Certified Management Consultant®

CMC®

Information – Application

The certification is based on the CMC competence standard of

the International Council of Management Consulting Institutes ([www.icmci.org](http://www.icmci.org)) and

based on IMC USA’s Competency Framework – CMC® Certification Scheme of

June 18, 2010

Certified Management Consultant® (CMC®) represents evidence   
of the highest standards of consulting and  
 adherence to the ethical canons of the profession.

Please see videos on completing the CMC Application (step by step)

at http://www.imcusa.org/CERTAPP

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THE CERTIFIED MANAGEMENT CONSULTANT®

Certification

When you see the initials “CMC” following a consultant’s name, it means that he or she is a “Certified Management Consultant®” and has met the strict certification requirements of the Institute of Management Consultants USA, Inc. Candidates for Institute certification undergo a thorough investigation of their consulting experience. CMC® is a certification mark awarded by the Institute of Management Consultants USA and represents evidence of the highest standards of consulting and adherence to the ethical canons of the profession.

Code of Ethics

Certified Management Consultants® pledge in writing to abide by the Institute’s Code of Ethics. Their adherence to the Code signifies a voluntary commitment above and beyond the requirements of law. Key provisions of the Code require that Certified Management Consultants®:

* Safeguard confidential information.
* Render impartial, independent advice.
* Accept only those client engagements they are qualified to perform.
* Agree with the client in advance on the basis for professional charges.
* Develop realistic and practical solutions to client problems.

The Institute enforces the Code by receiving and investigating complaints of violations and by taking disciplinary action, including revocation of certification against any member found guilty of a Code violation.

Standards of COMPETENCE   
(REQUIREMEnTS)

Every step leading to the CMC® certification is designed to verify the candidate’s professional competence:

* A CMC® must have a minimum of three years of experience in the full-time practice of independent or internal management consulting within the last five years, with major responsibility for client projects during at least one of those years.
* A CMC® must have earned a Bachelor’s degree.
* A candidate without a Bachelor’s degree may apply for certification if they have a minimum of five years of full-time experience as an independent or internal management consultant, provided they can demonstrate an ongoing commitment to professional development in management, the consulting profession, and their area of specialty.
* The CMC® must provide multiple references, most of them officers or executives of client organizations served. These references are consulted to assure that the consulting relationship met the clients’ objectives.
* The CMC® must provide written summaries of client assignments linked to separate client evaluations requested.
* The CMC® must pass qualifying online ethics and consulting competency written exams.
* The CMC® must pass an oral examination by senior CMC®s, demonstrating professional competence and current knowledge in areas of specialization, application of experience, ethical behavior, and understanding of the management consulting process.

Mark of Excellence

The CMC® certification is a valuable tool to assist executives in the selection of a management consultant. It indicates that individuals meet profession’s standards of competence and ethics. Certification by the Institute of Management Consultants USA is the mark of excellence among management consulting professionals.

International recognition

As a management consultant, you demonstrate your commitment to provide the best services that clients demand by acquiring the Certified Management Consultant® (CMC®) certification through rigorous process, accredited by the International Council of Management Consulting Institutes. The CMC® certification, bestowed on individual management consultants after a rigorous process of examination, has come to be regarded as undoubted recognition of their competence and professionalism, as well as an acknowledged international benchmark.

STEPS IN THE CERTIFICATION PROCESS

To apply for the CMC® mark, you must:

1. Meet all of the Standards of Competence (Requirements) listed on page 2 above.
2. Select an entry stream for certification, listed on page 4.
3. Meet the point count requirements of this application for the entry stream you select, listed on pages 5 to 7.

The steps to earn the CMC® certificate are:

1. Submit Your Application – The candidate applies for a certification stream and submits the application in electronic format using this CMC® application form. He or she includes their calculation of point count requirements, at least three engagement summaries, and a list of clients asked to complete client evaluations with at least three of the evaluations associated with the engagement summaries. (See page xx for fees.)
2. The Certification Administrator Verifies the Qualifying Point Count – Once the application is received by the IMC USA, the Administrator verifies the candidate has sufficient points for CMC® certification stream (work experience, education, and professional activities) and then notifies the candidate the preliminary qualifying point count has been met.
3. Client Evaluations– IMC USA must receive at least five acceptable evaluations from the candidate’s clients. The Administrator forwards the evaluations requests, which are completed online, to the clients indicated in Part Five of the Application. Once at least five acceptable evaluations are received, the candidate is notified and the file is presented to the CMC® Certification Committee for an initial review and by majority vote, approval to proceed to the examinations. (The CMC® Certification Committee may waive the Consulting Competency online or the Consulting Competency section of the oral examinations for candidates in the Experienced Consultant and Management streams.)
4. Written Examinations – The Administrator sends the candidate a personal login and instructions to take the open book Ethics or Consulting Competency qualifying online exams. If a candidate does not pass the online exam or exams after four attempts, the CMC® Certification Committee may invite him or her to retake the appropriate online exam with a mutually agreed course of study or the Committee Chair may suspend their application with the right to appeal to the Board of Directors of IMC USA.
5. Oral Examination – After passing the qualifying online examinations, the candidate is scheduled for the oral examination in person with three CMC® examiners based on ***IMC USA’s Competency Framework – CMC® Certification Scheme***. If the candidate is not located near an IMC USA chapter or is in a situation where an in person examination is too difficult to convene, the Chapter Certification Chair (or the National CMC® Certification Committee Chair) may arrange the meeting using electronic means, preferably including live video of the candidate. If the candidate passes the oral examination, the results are sent to the IMC USA office and the candidate is notified of his or her application status. If a candidate does not pass a section or sections of the oral examination, the Chair of CMC® Certification Committee may request a second oral review committee. If that committee does not pass the candidate, the the candidate may go through the appeals process. Final CMC® Certification Committee Review – Upon completion of both the written and oral, the candidate’s application, supporting materials and examination results are presented to the Certification Committee for the final majority vote for approval and candidate notification of the award of the CMC® certificate. If not approved, a letter is sent to the candidate explaining the appeals process to the IMC USA Board of Directors.
6. IMC USA Board Approval – When a candidate is approved, the CMC® Certification Committee notifies the IMC USA Board of Directors and the local chapter of the candidate’s election.
7. Appeal Process – The Candidate makes a written request to the chair of the IMC USA Board of Directors for review. A CMC® Certification Committee decision may only be appealed once.

Thereafter:

Certification Re-Certification – Every CMC® is required to demonstrate commitment to the organization and the profession by renewing certification on June 30th of every third year after initial certification, the expiration date on their CMC® certificate. To be issued a new CMC® certificate, an individual must demonstrate continuing professional development, community outreach and professional conduct training, and remain in compliance with the organization’s Code of Ethics. The certification of any CMC® found not to be in compliance with these requirements will be revoked and the certificate returned.

Candidates who fail to complete their required activities (providing additional client references if requested, completing online examinations, delaying an oral examination, failing to acknowledge correspondence from the Certification Administrator, etc.) within one year of the initial receipt of their application may incur an additional $100 reactivation fee. CERTIFICATION STREAMS

In the interest of making certification more attractive and convenient to candidates 10 years or more of consulting experience or 20 years or more of senior management experience that includes three years of management consulting or consulting management, the IMC USA now offers three Steams of entry into the certification process. These paths or tracks include the Basic Certification Stream, the Experienced Consultant Stream, and the Senior Management Stream. The Basic Stream is for consultants with a minimum of 3 to 9 years of independent or internal consulting experience. Candidates in this track are subject to the most comprehensive testing of ethics, client engagement management and consulting competency of all candidates being certified. Candidates in the Experienced Consultant and Senior Management Tracks may have certain examinations or sections of an examination waived at the discretion of the CMC® Certification Committee based on their experience, personal and professional development, and education as supported by the information and supporting documents provided with their CMC® Application.

**Based on the requirements outlined below, on page 9 indicate the stream you intend to follow.**

**BASIC STREAM**

The Basic Certification Stream is intended for candidates who have been in the management consulting profession from 3 to 9 years as an independent or internal consultant. To be eligible to apply, a candidate must be currently active in consulting: able to demonstrate that in the last three years, management consulting has been a significant part of their activity. This can include consulting with clients; selling, managing and / or supporting consulting activity; preparing for and teaching consultancy; publishing and writing on consultancy.[[1]](#footnote-1) These candidates are subjected to the most rigorous testing of all candidates for the CMC®. In addition to completing the certification application, proving their competence through the receipt of satisfactory client evaluations, and submitting a minimum of three case studies describing client engagements (Note: At least three case studies must be tied to client evaluations to provide the IMC USA with a look at the engagements from both the client side and the consultant side.) The candidate must pass two online examinations and all four sections of the oral examination. The oral examination is conducted face to face (preferred) or by video conference where the examiners can observe the candidate.

**EXPERIENCED CONSULTANT STREAM**

The Experienced Consultant Stream is intended for candidates with 10 or more years’ experience as an independent or internal management consultant. These candidates must meet all or the requirements for the Basic Stream, complete the CMC® application, provide the required case studies, and receive satisfactory client evaluations. Out of respect for their experience, the consulting competency online examination and the core competency section of the oral examination may be waived at the discretion of the CMC® Certification Committee, where competency has been demonstrated at least twice by other means.

**MANAGEMENT STREAM**

The Management Stream is intended for candidates with 20 or more years’ experience in the high level management of non-consulting companies and with a significant role advising senior management on strategy or business processes. These candidates must meet all of the requirements for the Basic Stream with the exception of not having to be a full time internal or external consultant for at least three of the last five years. It is preferred that these candidates have been involved in 3 years of internal consulting for their employers or have been accountable for the successful completion of projects involving the use of consultants by their employers. He or she completes the CMC® application, provide the required case studies, and receive satisfactory client evaluations. Out of respect for their experience, the written core competency examination and the core competency section of the oral exams may be waived at the discretion of the CMC® Certification Committee if competency has been demonstrated at least twice by other means. The ethics online examination and the engagement presentation, practice management and ethics sections of the oral examination must be completed.

CERTIFICATION POINT SYSTEM

The application for the CMC® (Certified Management Consultant®) Certificate requires a candidate to demonstrate public engagement in management consulting for a fee and the devotion of a substantial majority of working time to management consulting. The first phase of the certification process is based in part on a qualifying point system, pages 6 to 8 for the appropriate stream. The first review by the CMC® Certification Committee will be of your record in the areas of education, work experience and professional activities. Minimum points required and maximum points allowed are shown in the worksheets. Candidates are required to present documentation to support the points counted in the educational and professional activities categories. The IMC USA reserves the right to adjust the number of points awarded if documentation provided does not sufficiently support the candidate’s point tally.

CMC® APPLICATION CHECKLIST

The Application is in a Word form format (1997 – 2003). Since it is an agreement between you and IMC USA, we cannot permit a candidate to modify language in the application by un-protecting the Word document. If you need to provide additional pages, please create a separate document file to include in your application. If your version of Word causes formatting issues, we take that into account on the application reviews without any penalty to you.

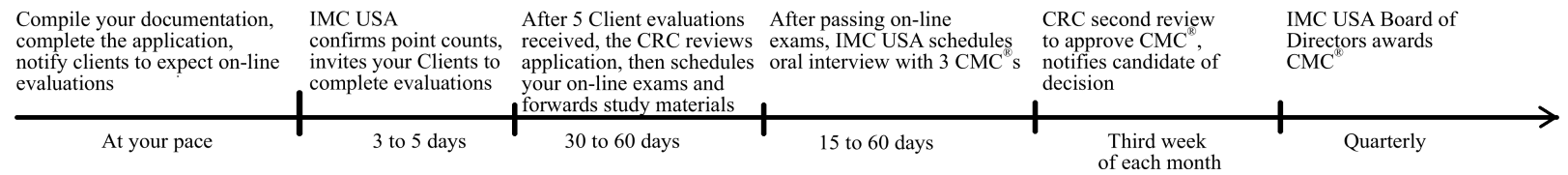
As you go through the application, each section describes the documentation needed and where to count the points earned.

Please review [www.imcusa.org/CERTAPP](http://www.imcusa.org/CERTAPP), a series of short webinars that take you through the application step by step.

Have you…

* Reviewed the requirements for application for the Basic, Experienced Consultant or Management streams? [FAQs](http://www.imcusa.org/?page=CERTFAQ#eligible)
* Completed the Certification Point System tally for the stream you are requesting to confirm eligibility? [FAQs](http://www.imcusa.org/?page=CERTFAQ#points)
* Completed your contact details.
* Included documentation to verify degrees earned (diploma, transcript or letter from institution scanned to PDF preferred) and other continuing professional development activities? If the documentation is not available, contact the Certification Administrator about alternatives.
* Answered all 15 questions in Part Three - Engagements? [FAQs](http://www.imcusa.org/?page=CERTFAQ#section3)
* Provided promotional materials, articles, a book’s title page and table of contents, your seminar outlines, etc.? (Scanned to PDF or JPG preferred of the first substantive page(s); we do not want every page.)
* Provided contact information for 5-6 Client Evaluators (with their permission, at least 3 associated with the Engagement Summaries)? [FAQs](http://www.imcusa.org/?page=CERTFAQ#eval)
* Carefully proof read your application. Does this represent your best work?
* Signed the Consent & Release? (Please print that page, sign the form and send a scanned copy.) [FAQs](http://www.imcusa.org/?page=CERTFAQ#2office)
* Submitted your application (PDF or MS Word format preferred), fees (on page 17 – online payment by credit card preferred) and supporting materials to the IMC USA office [FAQs](http://www.imcusa.org/?page=CERTFAQ#2office)

Timeline for application, client evaluations, written exams, oral exam, CMC® Certification Committee reviews



Submit your application by email to: [certification@imcusa.org](mailto:certification@imcusa.org)

or

On a CD mailed to:

IMC USA Attn: Certification Administrator

2598 E. Sunrise Boulevard, Suite 2104

Ft. Lauderdale, FL 33304

or

Mail your hard copy application (there is an additional $150 fee to convert the application to a PDF) to:

IMC USA Attn: Certification Administrator

2598 E. Sunrise Boulevard, Suite 2104

Ft. Lauderdale, FL 33304

Questions? Phone: (561) 472-0833 E-mail: certification@imcusa.org

Basic Certification Stream

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Category | | Minimum  Points  required | Maximum  Points  Allowed | Your  Point  Count |
| 1 | Education and Continuing Professional Development | |  |  |  |
| A | * Bachelor’s degree1, (see 1D for exceptions) | | 6 | 6 |  |
| B | Master’s degree1 | | 0 | 2 |  |
| C | Terminal degree1 (e.g., PhD, DSC) | | 0 | 2 |  |
| D | * Continuing Professional Development (CPD) – online or in person – offered by the IMC USA: IMC USA Academy courses (see Catalog for points per course), Chapter or National Presentations (1 point per presentation); or offered by other professional organizations (2 points per course, 1 point per presentation).   If no Bachelor’s degree, 12 CPD points are required. The Bachelor’s degree requirement 1A may be waived for candidates with five years of experience as an independent or internal management consultant, provided they demonstrate an ongoing commitment to and program of professional development in the management consulting profession and their area of specialty. Course work leading to a Bachelor’s degree will not count as CPD points. | | 6 | 12 |  |
| E | Active certification by another professional organization1 (2 points per certification) | | 0 | 6 |  |
| 2 | Work Experience | |  |  |  |
| A | Non-consulting business experience (1 point per year) | | 0 | 12 |  |
| B | * Independent or internal consulting experience (4 points per year, minimum of 3 years) | | 12 | 20 |  |
| C | * Submit Application for the CMC® with Engagement Summaries (2 points per Engagement Summary, 3 minimum to 5 maximum required) | | 6 | 10 |  |
| D | * Submit satisfactory Client Evaluations (2 points per evaluation, 5 minimum required). Assume these will be received when completing your point count. Points will be validated after receipt of evaluations. | | 10 | 12 |  |
| 3 | IMC USA or Other Professional Activities | |  |  |  |
| A | Attend the IMC USA National Conference, NOW, or other regional conferences including those of other professional or trade organizations (1 point per day of attendance) | | 0 | 3 |  |
| B | Taught a university or comparable course (1 point per 3 hours of instruction)1 | | 0 | 3 |  |
| C | Publish magazine articles or books nationally (1 point per book or article)1 Note: This includes electronic publication of article or books, and operation of a blog. | | 0 | 3 |  |
| D | Present at an IMC USA or other professional organization’s event or meeting (1 point per session) 1. Provide on line instruction via webinar or similar delivery method. (1 point per session). | | 0 | 3 |  |
|  | 40 Points Required to Qualify for the BASIC CERTIFICATION STREAM | | 40 | 94 |  |
| Notes | | * Minimum points required to qualify as a CMC® Candidate for Examination | | | |
|  | | 1. Attach supporting documents such as copy of diploma or transcript, curriculum, course description, presentation description, article, title page of book, etc. | | | |

Questions?

Contact: Certification Administrator, IMC USA, 631 U.S. Highway One Suite 400 North Palm Beach, FL 33408

Phone: (561) 472-0833 E-mail: certification@imcusa.org

The Experienced COnsultant Stream

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Category | | Minimum  Points  required | Maximum  Points  Allowed | Your  Point  Count |
| 1 | Education and Continuing Professional Development | |  |  |  |
| A | * Bachelor’s degree1, (see 1D for exceptions) | | 6 | 6 |  |
| B | Master’s degree1 | | 0 | 2 |  |
| C | Terminal degree1 (e.g., PhD, DSC) | | 0 | 2 |  |
| D | * Continuing Professional Development (CPD) – online or in person – offered by the IMC USA: IMC USA Academy courses (see Catalog for points per course), Chapter or National Presentations (1 point per presentation); or offered by other professional organizations (2 points per course, 1 point per presentation).   If no Bachelor’s degree, 12 CPD points are required. The Bachelor’s degree requirement 1A may be waived for candidates with five years of experience as an independent or internal management consultant, provided they demonstrate an ongoing commitment to and program of professional development in the management consulting profession and their area of specialty. Course work leading to a Bachelor’s degree will not count as CPD points. | | 6 | 6 |  |
| E | Active certification by another professional organization1 (2 points per certification) | | 0 | 6 |  |
| 2 | Work Experience | |  |  |  |
| A | Non-consulting business experience (1 point per year) | | 0 | 12 |  |
| B | * Independent or internal consulting experience (4 points per year, minimum of 10 years) | | 40 | 54 |  |
| C | * Submit Application for the CMC® with Engagement Summaries (2 points per Engagement Summary, 3 minimum to 5 maximum required) | | 6 | 10 |  |
| D | * Submit satisfactory Client Evaluations (2 points per evaluation, 5 minimum required). Assume these will be received when completing your point count. Points will be validated after receipt of evaluations. | | 10 | 12 |  |
| 3 | IMC USA or Other Professional Activities | |  |  |  |
| A | Attend the IMC USA National Conference, NOW, or other regional conferences including those of other professional or trade organizations (1 point per day of attendance) | | 0 | 3 |  |
| B | Taught a university or comparable course (1 point per 3 hours of instruction)1 | | 0 | 3 |  |
| C | Publish magazine articles or books nationally (1 point per book or article)1 Note: This includes electronic publication of article or books, and operation of a blog. | | 0 | 3 |  |
| D | Present at an IMC USA or other professional organization’s event or meeting (1 point per session)1. Provide on line instruction via webinar or similar delivery method (1 point per session). | | 0 | 3 |  |
|  | 68 Points Required to Qualify as an EXPERIENCED CONSULTANT | | 68 | 122 |  |
| Notes | | * Minimum points required to qualify as a CMC® Candidate for Examination | | | |
|  | | * 1. Attach supporting documents such as copy of diploma or transcript, curriculum, course description, presentation description, article, title page of book, etc. | | | |

Questions?

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Phone: (561) 472-0833 E-mail: certification@imcusa.org

The Management Stream

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Category | | Minimum  Points  required | Maximum  Points  Allowed | Your  Point  Count |
| 1 | Education and Continuing Professional Development | |  |  |  |
| A | * Bachelor’s degree1, (see 1D for exceptions) | | 6 | 6 |  |
| B | Master’s degree1 | | 0 | 2 |  |
| C | Terminal degree1 (e.g., PhD, DSC) | | 0 | 2 |  |
| D | * Continuing Professional Development (CPD) – online or in person – offered by the IMC USA: IMC USA Academy courses (see Catalog for points per course), Chapter or National Presentations (1 point per presentation); or offered by other professional organizations (2 points per course, 1 point per presentation).   If no Bachelor’s degree, 12 CPD points are required. The Bachelor’s degree requirement 1A may be waived for candidates with five years of experience as an independent or internal management consultant, provided they demonstrate an ongoing commitment to and program of professional development in the management consulting profession and their area of specialty. Course work leading to a Bachelor’s degree will not count as CPD points. | | 6 | 6 |  |
| E | Active certification by another professional organization1 (2 points per certification) | | 0 | 6 |  |
| 2 | Work Experience | |  |  |  |
| A | Non-consulting business experience (1 point per year) | | 20 | 30 |  |
| B | * Independent or internal consulting experience (4 points per year, minimum of 3 years) | | 12 | 20 |  |
| C | * Submit Application for the CMC® with Engagement Summaries (2 points per Engagement Summary, 3 minimum to 5 maximum required) | | 6 | 10 |  |
| D | * Submit satisfactory Client Evaluations (2 points per evaluation, 5 minimum required). Assume these will be received when completing your point count. Points will be validated after receipt of evaluations. | | 10 | 12 |  |
| 3 | * IMC USA or Other Professional Activities | |  |  |  |
| A | Attend the IMC USA National Conference, NOW, or other regional conferences including those of other professional or trade organizations (1 point per day of attendance) | | 0 | 3 |  |
| B | Taught a university or comparable course (1 point per 3 hours of instruction)1 | | 0 | 3 |  |
| C | Publish magazine articles or books nationally (1 point per book or article)1 Note: This includes electronic publication of article or books, and operation of a blog. | | 0 | 3 |  |
| D | Present at an IMC USA or other professional organization’s event or meeting (1 point per session)1 Provide on line instruction via webinar or similar delivery method. (1 point per session) | | 0 | 3 |  |
|  | 60 Points Required to Qualify for MANAGEMENT STREAM | | 60 | 106 |  |
| Notes | Minimum point required to qualify as a CMC® Candidate for Examination | |  |  |  |
|  | | * 1. Attach supporting documents such as copy of diploma or transcript, curriculum, course description, presentation description, article, title page of book, etc. | | | |
|  | |  | | | |

Questions?

Contact: Certification Administrator,

IMC USA

**2598 E. Sunrise Boulevard, Suite 2104**

**Ft. Lauderdale, FL 33304**

Phone: (561) 472-0833 E-mail: certification@imcusa.org

APPLICATION FOR THE CMC®  
Certified Management Consultant®

Instructions: please submit this application form (MS word) and include all required supporting documents in a pdf or jpg file format. Please save a copy for your records and to prepare for your oral examination.

PART ONE: Personal Data

PART TWO: Education and Professional Activities

PART THREE: Engagement Information

PART FOUR: Promotional materials

PART FIVE: Client Evaluations

PART SIX: Consent and Release

PART ONE: Personal Data (please type IN THE form FIELDs which expand)

|  |  |
| --- | --- |
| Name: | Position / Title: |
| Company Name: | Work Phone: |
| Office Address: | Work FAX: |
| Suite: | E-mail Address: |
| City / State: | Website: |
| Zip or Postal Code: | Mobile Phone: |
| Country USA | IM or VOIP ID:      through Enter IM or VOIP provider |
| Home Address: | Home Phone: |
| Home City / State or Region : |  |
| Zip or Postal Code : | Country of Residence: USA |

Certification StreamS

I am applying for (choose only one and complete only one point count table):

Basic Certification Stream,

Experienced Consultant Stream, or

Management Stream

Consulting Practice Description

Your primary areas of practice (specialties):

|  |
| --- |
| 1.      2.      3.      4.      5. |

The types of clients you serve:

|  |
| --- |
| 1.  2.  3.  4.  5. |

Higher Education (Supports items 1A, 1B, or 1C in the point count table for your certification stream)

Please submit scanned copies of your degree AND final transcript, OR official verification from your college or university to verify degree(s) earned.

|  |  |  |  |
| --- | --- | --- | --- |
| **College/University Information**  **(Name, City, State)** | **Years of Attendance From – To** | **Major Field of Study** | **Degree Awarded** |
| **Undergraduate** |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Graduate/Post Graduate** |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Other Professional Certifications (Supports item 1E in the point count table for your certification stream)

Are you certified by any other professional organizations? Please list the full names and phone numbers of all certifying bodies. Submit proof of your certification with this application. Acceptable documentation includes: a photocopy of your certificate or a letter from the certifying body indicating date certification was awarded.

|  |  |  |  |
| --- | --- | --- | --- |
| **Full Name of Organization** | **Phone Number** | **Full Name of Certification** | **Date Received** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Employment

For each section below, please list all of your employers chronologically, starting with the most recent position. If self-employed, so indicate. If the position was part time, please note approximate number of hours worked per week. Show each position held in each organization. The IMC USA will verify your employment history; therefore, provide in full the company name, address, phone and FAX numbers, and a contact person. Attach additional sheets if necessary at the end of this application.

Independent Consulting Experience (Supports item 2B the point count table for your certification stream)

List all management consulting organizations (including any companies you own or manage) by which you have been employed in public practice as a management consultant. For each position, show approximate percentage of total working time devoted to management consulting (including practice development and supervisory and administrative support), versus non-consulting activities, if any. To be eligible to apply in the Basic Stream for the CMC you must be currently active in consulting: able to demonstrate that in the last three years, management consulting has been a significant part of their activity. This can include consulting with clients; selling, managing and / or supporting consulting activity; preparing for and teaching consultancy; publishing and writing on consultancy.

|  |  |  |  |
| --- | --- | --- | --- |
| **Contact Name, Company Name, Address, Telephone, FAX** | **Position(s) Held** | **From To**  **Mo/Yr Mo/Yr** | **% Time Consulting** |
|  |  | to | % |
|  |  | to | % |
|  |  | to | % |
|  |  | to | % |
|  |  | to | % |

Internal Consulting Experience (Supports item 2B the point count table for your certification stream)

List all firms by which you have been employed as an internal management consultant and to apply in the Basic Stream, you are currently active in consulting: able to demonstrate that in the last three years, management consulting has been a significant part of their activity. This can include consulting with clients; selling, managing and / or supporting consulting activity; preparing for and teaching consultancy; publishing and writing on consultancy.

|  |  |  |  |
| --- | --- | --- | --- |
| **Contact Name, Company Name, Address, Telephone, FAX** | **Position(s) Held** | **From To**  **Mo/Yr Mo/Yr** | **% Time Consulting** |
|  |  | to | % |
|  |  | to | % |
|  |  | to | % |
|  |  | to | % |
|  |  | to | % |

Non-Consulting Experience (Supports item 2A in the point count table for your certification stream)

List all firms by which you have been employed in a non-consulting position.

|  |  |  |  |
| --- | --- | --- | --- |
| **Contact Name, Company Name, Address, Telephone, FAX** | **Position(s) Held** | **From To**  **Mo/Yr Mo/Yr** | **% Time Consulting** |
|  |  | to | % |
|  |  | to | % |
|  |  | to | % |
|  |  | to | % |
|  |  | to | % |

PART TWO: Professional Activities

Please review the IMC USA certification points awarded for various activities in **your certification stream first**, then document these activities below.

**Professional Education**

Have you attended any of the IMC USA’s Professional Development programs (online or in person)? Courses offered by IMC USA may be found at the IMC USA Web Site under “IMC USA Academy” under the “Professional Learning” menu. All courses listed under these menu items satisfy this requirement as do IMC USA Chapter presentations on professional development. (If you need more space, please add a page “More IMC USA Professional Development Activities”.)

**Please list which IMC USA courses, programs or presentations you attended: (Supports item 1D in the point count table)**

|  |  |  |
| --- | --- | --- |
| **Course or Program Attended** | **Month/Year Attended** | **Location or Website** |
|  |  |  |
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**Have you attended an IMC USA conference? (Support item 3A in the point count table)**

|  |  |  |
| --- | --- | --- |
| **National Conference/NOW Attended** | **Month/Year Attended** | **Location** |
|  |  |  |
|  |  |  |
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**Other professional conferences, workshops, or presentations directly related to improving your consulting competencies: (Supports item 1D for workshops/presentations hours completed and 3A for conference days attended)**

|  |  |  |  |
| --- | --- | --- | --- |
| **Conference, Workshop or Presentation Attended** | **Presented By (Organization Name)** | **Hours or Days Attended** | **Month/Year Attended** |
|  |  |  |  |
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Amplifying remarks:

**Conducted Professional Instruction (Supports items 3B taught a course, or 3D instructed at or presented to a professional conference)**

Have you instructed or presented at a professional organization, or taught a university or comparable course? You may list up to three courses / sessions. Please submit proof of your instruction / presentation with your application. Acceptable documentation includes: a letter from the professional organization, a course / presentation / event brochure bearing your name, or similar promotional information.

|  |  |  |  |
| --- | --- | --- | --- |
| **Conference, Workshop, or Course Presented** | **Organization Name** | **Course Hours** | **Month/Year Presented** |
|  |  |  |  |
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**Publications, Books, and Articles (Supports item 3C in the point count table for your certification stream)**

Have you been published in a nationally distributed book or journal? You may list up to three articles/books. Please submit a copy/reprint of the first page of each article with your application. For books, please submit a copy of the cover page.

|  |  |  |
| --- | --- | --- |
| **Book/Article Title** | **Publication Name or Book Publisher** | **Date** |
|  |  |  |
|  |  |  |
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PART THREE: Engagement Information

Part Three of the application consists of two parts: first 15 general information questions about your consulting and second, 3 to 5 Engagement Summary descriptions (the templates are located after Part Six – Consent and Release).

Each Engagement Summary is worth 2 points.

For each of Engagement Summary descriptions you will describe:

* Your level of responsibility
* Number of people engaged in the assignment
* Duration of the engagement
* Problem(s) presented to you
* Steps in solving the problem(s)
* Results achieved

All answers should be brief and concise.

Each engagement summary should not exceed one page. To preserve client confidentiality, do not disclose your client’s name unless you have their permission.

The 15 general questions are similar to those you will be asked on the Oral Examination.

The Fifteen General Questions

1. Please check up to three of the following management consulting specialties in which you are qualified on a professional level.

Strategy/Organizational development Operations/Production/Distribution

Human Resources /Compensation Information Technology/Systems/EDP

Marketing

Other (please explain):

2. How do you consult to management? Describe your typical consulting engagement. Please describe services, client type, client size, annual sales, duration of projects, and the number of professionals on your engagements.

|  |
| --- |
|  |

3. What is the average number of client engagements you work on per year?

4. Are you involved in the implementation of your recommendations? If, so how?

|  |
| --- |
|  |

5**.** Please indicate your level of experience managing consulting engagements for these activities. Select only one response for each activity.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Activity** | **Not Applicable in My Work** | **Participated In or Supported Engagements** | **Led\* Small Engagements** | **Led\* Large Engagements** |
| Marketing and client acquisition |  |  |  |  |
| Conduct due diligence on client (e.g., PESTLE, SWOT, etc.) |  |  |  |  |
| First meeting with client |  |  |  |  |
| Prepare proposal |  |  |  |  |
| Complete written engagement agreement |  |  |  |  |
| Gather data/fact finding |  |  |  |  |
| Identify change obstacles |  |  |  |  |
| Make recommendations |  |  |  |  |
| Implement or observe/assess client implementation |  |  |  |  |
| Make written reports to client |  |  |  |  |
| Resolve disputes with a client |  |  |  |  |
| Conduct disengagement with client |  |  |  |  |
| Make the final report |  |  |  |  |
| Continue client relationship after engagement |  |  |  |  |

6. What would you consider an ideal consulting engagement? Why?

|  |
| --- |
|  |

7. How do you achieve the agreed results between yourself and the client on time and within budget?

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| --- |
|  |

8a. Describe your most successful consulting engagement.

|  |
| --- |
|  |

8b. Why do you consider that engagement to be the most successful?

|  |
| --- |
|  |

9a. Describe your least successful consulting engagement (do not disclose client name).

|  |
| --- |
|  |

9b. Why do you consider that engagement to be the least successful?

|  |
| --- |
|  |

10a. Without disclosing confidential information, give an example of an uncomfortable (e.g., ethical, client confidentiality) situation that developed with a client.

|  |
| --- |
|  |

10b. How did you handle the situation?

|  |
| --- |
|  |

11. If a client is not pleased with your work, how do you respond?

|  |
| --- |
|  |

12. What are you doing to stay current with advancements in your field of practice?

|  |
| --- |
|  |

13. Why do you believe the CMC® mark is important?

|  |
| --- |
|  |

14a. Describe the business development and promotional practices of your firm. (Please submit as attachments to this application soft-copy or scanned samples of promotional materials you use to market your consulting practice.).

|  |
| --- |
|  |

14b. What is your role in your firm’s business development promotional practices?

|  |
| --- |
|  |

15a. What do you like about the management consulting profession?

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| --- |
|  |

15b. What drawbacks or concerns do you have about the management consulting profession?

|  |
| --- |
|  |

Part Four: Promotional Materials

Please submit as attachments to this application electronic file or scanned samples promotional materials (the first substantive page(s)) used to market your consulting practice.

Part Five: Client Evaluation For A Professional Credential

Please provide a list of at least five but no more than six clients from the last five years that you would like the IMC USA to contact to complete the online Client Evaluation. Each client will be contacted via e-mail and directed to a website to complete the online Client Evaluation for a Professional Credential. (A sample of the online form included below). If the reference does not respond, they will be contact by phone, fax or certified mail to provide the evaluation form. All evaluations will remain confidential.

We recommend that you contact each client listed to inform him or her of the pending request (a copy of the client evaluation is included for your information). To avoid our evaluation invitation/line ending up in a spam folder, advise your references early to accept e-mails from certification@imcusa.org. The e-mail requests will be made within five business days of the approval of your application and you will be notified by the Certification Administrator they have been sent.

|  |
| --- |
| **DO NOT FORWARD THE SAMPLE FORM TO YOUR REFERENCES. THE COMMITTEE CONTACTS THEM INDEPENDENTLY.** |

If you are able and fully respecting any non-disclosure agreement you have with your clients, please include three of the five client references from your engagement summaries, if they give their permission. Otherwise, disguise the name of the firm in the engagement summaries. The CMC® will keep all these details confidential.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Name, Title** | **Company** | **Telephone** | **E-mail Address** |
| 1 |  |  |  |  |
| 2 |  |  |  |  |
| 3 |  |  |  |  |
| 4 |  |  |  |  |
| 5 |  |  |  |  |
| 6 |  |  |  |  |

CMC® Certificate Charges

Your certification fee is determined by your IMC USA member status. IMC USA awards the CMC® to members and non-members. There is no requirement for membership in any professional association or to attend any specific course to apply for the CMC®. IMC USA member rates will apply only if you are in good standing at the time you submit payment. If you join IMC USA after being awarded the CMC certificate mark, member rates will be applicable in the next calendar year.

|  |  |  |
| --- | --- | --- |
|  | **IMC USA MEMBER STATUS** | |
|  | **Member** | **Non-Member** |
| Initial Certification Application and Assessment  (non-refundable) | $350.00 | $550.00 |
| Convert a hard copy application to electronic files (non-refundable) | $150.00 | $150.00 |
| Revive a dormant application caused by the candidate after one year from receipt of the CMC® Application | $100.00 | $100.00 |
| Annual CMC® charge (prorated first year – due January 1st) | $395.00 | $550.00 |
| Tri-Annual Certification Renewal – issue new CMC® Certificate (an assessment of your continuing professional development – due June 30th every third years) | $150.00 | $250.00 |

PART SIX: Consent TO TERMS and Release

All information contained in this application for certification by the Institute of Management Consultants USA, Inc. is true and accurate to the best of my knowledge. The Institute of Management Consultants USA, Inc., its officers, directors, committee members, employees, agents, and divisions (“IMC USA”) may review my application, and I will cooperate promptly and fully in such review. I will submit to the IMC USA such documents and information as deemed necessary to confirm their accuracy.

All documents submitted to the IMC USA are the property of the IMC USA and will not be returned to me. The IMC USA may communicate any and all information relating to my certification application and certification status pursuant to the rules and policies of the IMC USA, which are available to the public at <http://www.imcusa.org/?page=CERTSTANDARDS> and in this application. I waive all claims relating to or arising out of the review by the IMC USA of this application and/or my certification, if granted, and I release, discharge, and exonerate the IMC USA for any action taken relating to such review, including denial of my application, revocation, suspension, or other sanction. I agree to indemnify and hold harmless the IMC USA for any action taken pursuant to the rules and standards of the IMC USA with regard to this application, and/or my certification, if granted.

By signing below, I fully understand that the submission of this application is for enrollment purposes only in order to complete registration as a candidate. I will execute the necessary documents, submit to written and oral examinations, and supply further information as determined by the Institute’s CMC® Certification Committee.

I further understand and, by my signature, subscribe to the IMC USA Code of Ethics with the knowledge that any false statement or misrepresentation that I may make in the course of these proceedings may result in the revocation of this application and the issuance of a complaint of violation of said Code of Ethics.

By signing, I acknowledge that I have read and understand this information and the IMC USA Code of Ethics, and agree to abide by these terms and rules. If I am judged by the IMC USA Ethics Committee to be in violation of the IMC USA Code of Ethics, IMC USA may revoke the CMC® Certificate.

By signing below and if awarded the CMC®, I understand that I can use the CMC® logo in my practice as long as I successfully complete the triennial renewal assessment and pay the CMC® Annual Charge for each calendar year.

If my CMC® Certificate is revoked by IMC USA, I will return my certificate, pin and no longer use the mark.

Please fill in Your Name and Date then print, sign and forward to IMC USA.

Include a scanned copy of this page with your signature as part of your electronic file application or mail this page to our National Office attention Certification Administrator.

Full Name:

Signature: ­­­­­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date:

CMC® Certification Fee Total:         
(See fee schedule on page 17)

To pay online (preferred) use this link <https://imcu.memberclicks.net/cmc-application-fee>

then pay under ***Certification Fees and CMC Related Products****,* or to pay with this form attach a check payable to “IMC USA” or enter a credit card authorization (MasterCard, VISA, or American Express) below.

|  |  |
| --- | --- |
| Card Number: | Exp Date: |

Name on Card:

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date:

\*Payments to the IMC USA are not deductible as charitable contributions for federal income tax purposes; however, dues payments and other fees may be deductible as ordinary and necessary business expenses.

Engagement Summary ONE (Complete a Minimum of 3)

Project Name:

|  |
| --- |
|  |

Client’s Name

Candidate’s Role in Project:

|  |
| --- |
|  |

Project Description/Duration:

|  |
| --- |
|  |

Outcome of Engagement (General Description of Value to Client and Consultant)

|  |
| --- |
|  |

Steps taken to complete:

|  |
| --- |
|  |

Issues and obstacles encountered and how resolved:

|  |
| --- |
|  |

Results achieved: (Specific Results Achieved – e.g. 15% improvement in productivity)

|  |
| --- |
|  |

Please note, fields above and the page will expand to meet your needs for text.

Engagement Summary TWO (Complete a Minimum of 3)

Project Name:

|  |
| --- |
|  |

Client’s Name

Candidate’s Role in Project:

|  |
| --- |
|  |

Project Description/Duration:

|  |
| --- |
|  |

Outcome of Engagement (General Description of Value to Client and Consultant)

|  |
| --- |
|  |

Steps taken to complete:

|  |
| --- |
|  |

Issues and obstacles encountered and how resolved:

|  |
| --- |
|  |

Results achieved: (Specific Results Achieved – e.g. 15% improvement in productivity)

|  |
| --- |
|  |

Please note, fields above and the page will expand to meet your needs for text.

Engagement Summary THREE (Complete a Minimum of 3)

Project Name:

|  |
| --- |
|  |

Client’s Name

Candidate’s Role in Project:

|  |
| --- |
|  |

Project Description/Duration:

|  |
| --- |
|  |

Outcome of Engagement (General Description of Value to Client and Consultant)

|  |
| --- |
|  |

Steps taken to complete:

|  |
| --- |
|  |

Issues and obstacles encountered and how resolved:

|  |
| --- |
|  |

Results achieved: (Specific Results Achieved – e.g. 15% improvement in productivity)

|  |
| --- |
|  |

Please note, fields above and the page will expand to meet your needs for text.

Client Evaluation Form FOR A PROFESSIONAL CREDENTIAL

(Same as online survey)

**Candidate's Name:**

1. Has this candidate provided management consulting services to you within the last 5 years? **YES NO**
2. Name of Project \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. Please briefly describe the nature of the consulting engagement(s) conducted by this candidate:
4. How long did the project take (project hours)? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**We would appreciate your rating the candidate's performance on the engagement(s):**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Strongly**  **Disagree** | **Disagree** | **Somewhat**  **Agree** | **Agree** | **Strongly  Agree** |
| The candidate had the expertise required for this engagement | **1** | **2** | **3** | **4** | **5** |
| Services were delivered on time. | **1** | **2** | **3** | **4** | **5** |
| Services were delivered within budget. | **1** | **2** | **3** | **4** | **5** |
| Consulting work met the stated purpose of the assignments. | **1** | **2** | **3** | **4** | **5** |
| Consulting work was performed in accordance with professional standards of competence, independence and integrity. | **1** | **2** | **3** | **4** | **5** |
| If similar consulting services were required in the future, this candidate would be considered, for the engagement. | **1** | **2** | **3** | **4** | **5** |
| Overall, I was satisfied with the candidate's performance on this engagement. | **1** | **2** | **3** | **4** | **5** |

***We would appreciate any additional comments that you may have about the candidate.***

***Please sign, date, and attach your business card, or complete the information requested below.***

Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Signature \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Company \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone Number \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ City/State/Zip \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

IMC USA CODE OF ETHICS

Approved by the IMC USA Board of Directors February 3, 2005

All IMC USA members pledge in writing to abide by the Institute’s Code of Ethics. Their adherence to the Code signifies voluntary assumption of self-discipline.

As the professional association and certifying body for management consultants in the United States, the IMC USA requires adherence to this Code of Ethics as a condition of membership or certification. The standards of conduct set forth in this Code provide basic principles in the ethical practice of management consulting. The purpose of this Code is to help IMC USA members maintain their professionalism and adhere to high ethical standards in the conduct of providing services to clients and in their dealings with their colleagues and the public. The individual judgment of members is required to apply these principles. Members or non-member CMC®s are liable to disciplinary action under the IMC USA Rules of Procedure for Enforcement of this Code if their conduct is found by the IMC USA Ethics Committee to be in violation of the Code or to bring discredit to the profession or to IMC USA.

*My Commitment to My Clients*

* 1. I will serve my clients with integrity, competence, independence, objectivity, and professionalism.
  2. I will mutually establish with my client’s realistic expectations of the benefits and results of my services.
  3. I will only accept assignments for which I possess the requisite experience and competence to perform and will only assign staff or engage colleagues with the knowledge and expertise needed to serve my clients effectively.
  4. Before accepting any engagement, I will ensure that I have worked with my clients to establish a mutual understanding of the objectives, scope, work plan, and fee arrangements.
  5. I will treat appropriately all confidential client information that is not public knowledge, take reasonable steps to prevent it from access by unauthorized people, and will not take advantage of proprietary or privileged information, either for use by myself, the client’s firm, or another client, without the client’s permission.
  6. I will avoid conflicts of interest or the appearance of such and will immediately disclose to the client circumstances or interests that I believe may influence my judgment or objectivity.
  7. I will offer to withdraw from a consulting assignment when I believe my objectivity or integrity may be impaired.
  8. I will refrain from inviting an employee of an active or inactive client to consider alternative employment without prior discussion with the client.

*My Commitment to Fiscal Integrity*

* 1. I will agree in advance with a client on the basis for fees and expenses and will charge fees that are reasonable and commensurate with the services delivered and the responsibility accepted.
  2. I will not accept commissions, remuneration, or other benefits from a third party in connection with the recommendations to a client without that client’s prior knowledge and consent, and I will disclose in advance any financial interests in goods or services that form part of such recommendations.

*My Commitment to the Public and the Profession*

* 1. If within the scope of my engagement, I will report to appropriate authorities within or external to the client organization any occurrences of malfeasance, dangerous behavior, or illegal activities.
  2. I will respect the rights of consulting colleagues and consulting firms and will not use their proprietary information or methodologies without permission.
  3. I will represent the profession with integrity and professionalism in my relations with my clients, colleagues, and the general public.
  4. I will not advertise my services in a deceptive manner nor misrepresent or denigrate individual consulting practitioners, consulting firms, or the consulting profession.
  5. If I perceive a violation of the Code, I will report it to the Institute of Management Consultants USA and will promote adherence to the Code by other member consultants working on my behalf

# About the IMC USA

The Institute of Management Consultants USA, Inc. (IMC USA) is a nonprofit, national professional association founded in 1968 to set standards of professionalism and ethics for the management consulting profession.

Headquartered in North Palm Beach, FL, the IMC USA sponsors national and regional workshops, seminars, and conferences.

The IMC USA’s Find-A-Consultant search engine, located at www.imcusa.org, is a free online directory of IMC USA members and CMC®s.

IMC USA members include individual independent consultants operating their own businesses and internal consultants working for consulting firms and other businesses with offices in the United States.

IMC USA is a founding member of the International Council of Management Consulting Institutes (ICMCI). Collectively ICMCI members represent more than 20,000 consultants worldwide.

For more information about the IMC USA, please visit our web site at www.imcusa.org.

PROMOTING EXCELLENCE AND ETHICS IN MANAGEMENT CONSULTING

THROUGH CERTIFICATION, EDUCATION, AND PROFESSIONAL RESOURCES.

INSTITUTE OF MANAGEMENT CONSULTANTS USA, INC.

2598 E. Sunrise boulevard, suite 2104

Ft. Lauderdale, fl 33304

(561) 472-0833

E-MAIL: OFFICE@IMCUSA.ORG

WEBSITE: WWW.IMCUSA.ORG

1. Definition of consulting experience, ICMCI CMC Certification Scheme Manual, Appendix 5, Certified Management Consultant (CMC) Additional Pre-requisites (CMC005), paragraph 5. [↑](#footnote-ref-1)