



CMC GLOBAL

OFFICERS

Chairman
Sorin Caian CMC
Romania
sorin.caian@icmci.org

Treasurer
Dwight Mihalicz CMC
Canada
dwight.mihalicz@icmci.org

Secretary
Kim Karme CMC
Finland
kim.karme@icmci.org

Vice Chairs
Rob Bodenstein CMC
Austria
rob.bodenstein@icmci.org

Kyeong Seok HAN CMC
Korea
kyeong.seok.han@icmci.org

Elena Yuzkova CMC
Ukraine
elena.yuzkova@icmci.org

Oliver Matar CMC
USA
oliver.matar@icmci.org

Jeremy Webster CMC
United Kingdom
jeremy.webster@icmci.org

Immediate past Chair
Tim Millar CMC
Australia
tim.millar@icmci.org

Reema Nasser
Executive Director
Jordan
reema.nasser@icmci.org

COLLABORATIVE APPROACH MEETINGS

REPORT AND SUMMARY

OCTOBER 2016

TORONTO - CANADA

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Executive Summary

Increasing communication and enhancing the channels for communication was the main objective of the collaborative approach meeting, set for receiving feedback, sharing thoughts and ideas, with a clear plan on how to move forward.

Reactions from Member Leaders was positive and supportive of the initiative, which enhanced and enriched the conversations. Leaders were keen to receive the support from their international umbrella as they linked that with the support to their existence and presence internationally and nationally.

The findings are detailed later in this report, but we would like to highlight that all Members face similar challenges at a national level, and it could clearly be noticed that by only depending on reading emails or visiting the website, the information does not reach the receiver.

The expectations evolved around increased visibility of their operations to both their members and the international community to include all stakeholders, the profession and the expectations of the ISO20700 standard, the services and how they valued the co-sharing schemes, the increased communication between the Members was a specific request and summarizing the platforms to be announced on the website for such interaction was positively received by all. The key words evolved around communication, cooperation, sharing information, learning from each other, business opportunities, and increased visibility.

This prompted us to change the format of our Annual Assembly of Delegates agenda and include sessions for best practices and success stories, when in Toronto, you will feel the different approach to the annual meeting and how your feedback helped us meet some of your expectations.

Below is the detailed report to include the background, challenges, findings, and steps for moving forward.

Background

During the annual meeting in Noordwijk, it became apparent that enhancing communication is a must, and not just with the Members, but the members of our Members. In order to do that, the board launched the Collaborative Approach Meetings to be conducted with all the IMCs and the attendance of the Delegates, Chairs, Directors, and Executives of the IMCs.

The meetings focused on the following agenda, which by the end did not focus much on the previous annual meeting resolutions, but the topics that will be discussed in the upcoming meeting:

- Objective
- Expectations of IMCs for a proactive partnership
- Brief discussion on the CMC-Global Meeting and resolutions with feed-back
- How can CMC Global support you?
- Our products and how they can be implemented by the IMCs (CMC Firm, CSM, ISO, Constantinus Award)
- CMC Global Financing and Associated Financial Strategy
- Increasing involvement of IMCs in the different projects/committees
- IMCs perspective on moving forward
- Assigning contacts for direct contact between CMC Global ED and IMCs
- Summary and adjournment with clear steps forward

The objective was highlighted during all the calls that took place, and it focused on Improving communication to better understand the activities and needs of the IMCs and to establish a better way of working together, as well as enhancing links with chairs and boards of IMCs to get as close as possible to the needs and expectations of the CMCs and members of the IMCs. During which the board liaisons were also introduced, as they are the core for moving forward and implementing many of the thoughts and feedback received.

The agenda was provided to all prior to the meetings, and many came prepared with feedback from their members which enriched the conversation and provided lots of insight. Many of the Institutes had interesting suggestions and ideas of future initiatives and development. The Institutes were also willing to participate in further development of these initiatives. As this was a first expression of these initiatives we will continue to follow up and together evaluate them before adopting any and sharing updates with the Delegates.

This was covered in the expectations part of the discussion as well as the discussion covering how CMC-Global can support the operation of our Members, and the discussion covering how we can together move forward. The increased involvement of all, the increased number of volunteers in our network, the induction of the younger generation to the volunteering work and their involvement in the activities of the international platform. As a result of the discussion, direct contacts were assigned for all updates and involvement activities in the future.

A summary of our products was provided highlighting the benefits to the stakeholders and highlighting the benefits to the Members and their members. The knowledge of the products and how the Members can benefit from them provided us with an insight into the desirability of each. A summary of the interest is included later in this report.

The finances were discussed, and many of the shared ideas focused on the stability of both the CMC-Global and the Members, as Members can survive without the CMC-Global, but the CMC-Global cannot survive without the support and involvement of its Members.

The steps forward highlighted what needs to be done, who should be involved, and actions towards each Member suggestions and contributions, it was especially rewarding to hear the willingness of increased interaction of the CMC-Global.

This way, the board would have paved the way for this practice to continue through its liaisons for the benefit of our network of professional and competent management consultants.

Statistics

We were able to conduct 40 meetings with 5 provisional members and 35 full members. Meetings took place over 11 months using Webex, Skype, Face to Face, and email for translation purposes. The calls involved the total of 104 participants from the different IMCs. On the ICMCI part the calls involved the Chair, Treasurer, Secretary, Liaison, and ED.

Findings

During the calls, IMCs were asked to advise their expectations, many concerns/challenges were shared by the IMCs as well as expectations, which brought lots of understanding and ideas to the table, and provided CMC-Global/ICMCI with better understanding to build its strategy in order to try its best to meet expectations and address concerns and challenges.

Summary of Expectations:

- Reactions were wide, but all supportive of the initiative and a number of similar needs (increase recognition of CMC brand, increase visibility, increase international cooperation/ connections).
- No refusals to discuss, postponements due to local events and elections, or requests for face to face at IMC events. However, there were issues of communications due to the lack of the English language knowledge at the level of leaders at some IMCs.
- Leaders were keen to get support from CMC-Global to increase their visibility in front of their members and in the market they are operating in.
- International umbrella to assist their presence.
- More developed were keen on the ISO and having a strong standard to be able to promote it as a valuable asset to the profession and increase its receptiveness within the market.
- All services were of interest and each found some services to focus on.
- Discussed aspects depending on how the IMC is addressing certain issues like financing, membership, relation with other institutes, increasing the visibility of the profession, how we are supporting the improvement of the quality of certification...etc.
- Sharing information and achievements between institutes.
- Matching business opportunities for the members of the IMCs and sharing of business directories.
- Similar challenges among many of the IMCs.
- CMC-Global/ICMCI is the most important organization for many of the IMCs as they are aware of the strength the international connection provides for them.
- ICMCI to look into ways to address the English language obstacle between consultants.

Summary of Challenges:

- Economic and financial challenges - currency depreciation.
- Political challenges.
- Sustainability.
- Declining number of “young” members.
- Slow growth in numbers of CMCs.
- Promoting the importance of the CMC designation.
- Attracting big firms to membership.
- Attracting funders and donors.
- High dependency on volunteer work.
- Providing benefit to the members of the IMCs.
- Communication challenges with ICMCI related to frequent change of volunteer officials at the IMCs.
- Communication challenges (also amongst CMCs worldwide) due to the language barrier, this also reflects on readiness of CMCs to volunteer with ICMCI.
- Isolation of the members of the members from the international community.
- Inability to always participate in the international events of ICMCI – budget restraints.
- motivating the members of the Members to participate in the Constantinus award.

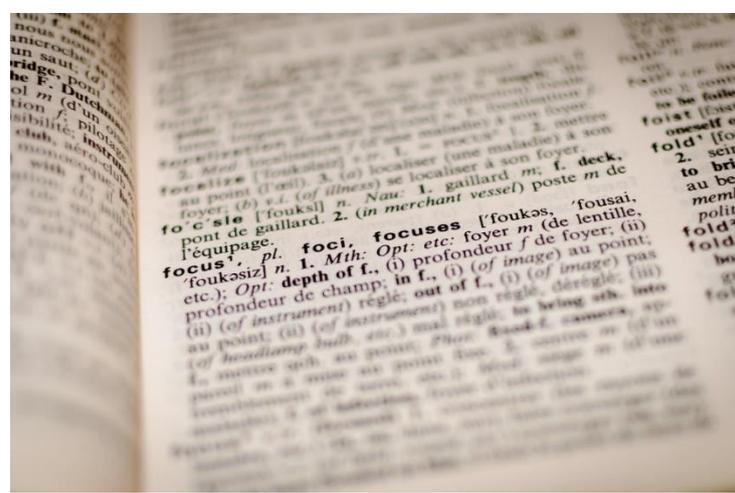
Statistics of Interest in Products

Product	Type	Involvement of IMCs	Interest and Commitment
UN Status	Service	<ul style="list-style-type: none"> Promoting to members and clients 	Interested and Committed: All as this should be a common interest
CMC-Firm	Product (co-sharing scheme)	<ul style="list-style-type: none"> Promoting to members and MC Firms Securing applications Encouraging CMCs to become appraisers 	Interested: 20 Committed: 8
Academic Fellow	Service	<ul style="list-style-type: none"> Promoting to members and Academia Sending Nominations Assuring involvement of named AFs in the community 	Interested: All Committed: 20
ISO 20700	Product	<ul style="list-style-type: none"> Promoting to members and clients Supporting the ICMCI in developing the implementation at the level of IMCs Marketing ICMCI as the standard pioneer and the IMCs as its implanting arm 	Interested: All as this should be a common interest Committed: 18
AMCC	Product (co-sharing scheme)	<ul style="list-style-type: none"> Promoting to members and clients Securing applications Getting their courses accredited 	Interested: 22 Committed: 9
Conference and Hubs	Service	<ul style="list-style-type: none"> Attending Participating in success stories Hosting 	Interested and Committed: All as this should be a common interest Interest and Commitment to hosting is in accordance with the annual RFP
Constantinus Award	Product	<ul style="list-style-type: none"> Promoting to members and clients Sending nominations Nominating assessors to the panel 	Interested: 16 Committed: 8
Website	Service	<ul style="list-style-type: none"> In the IMC Exchange and Blog by promoting it to the executives and the CMCs for continued discussions and contributions 	Interested and Committed: All as this should be a common interest
	Service	<ul style="list-style-type: none"> Newsletter by promoting it to the executives and the CMCs 	Interested and Committed: All as this should be a common interest

Product	Type	Involvement of IMCs	Interest and Commitment
		for continued discussions and contributions	
	Service	• Micro Website	Interested: 8 Committed: 3
	Service	• Common Calendar by providing continuous updates of events and programmes at the IMCs level	Interested and Committed: All as this should be a common interest
Statistics and Surveys	Service	<ul style="list-style-type: none"> • Filling out the surveys and request for data/info in a timely manner • Providing input for future surveys • Promoting reports to members and clients 	All However, Committed: 9
Corporate Sustaining Member (CSM)	Service	• Promoting to members and clients	Not much interest, however, we encourage IMCs to benefit from the sponsors package and build on it for their events.

Conclusion and Next steps

- This is a first among many other meetings to keep the communication continuous and on-going.
- The interaction with the IMCs is continuous and not a onetime thing, process will continue and will enhance based on the received input and suggestions.
- The relationship has to be both ways and communication has to also be direct and dynamic. This type of communication will energize the officials at the IMCs to deliver more and be more active.
- Many of the advised expectations would need the cooperation and collaboration of IMCs for input, especially those related to the newsletter, the website, the statistics, and the reports.
- The Liaison Board Members will start taking over the initiative. The ToRs for Liaisons is supportive of that.
- Our main issue will remain our focus: How to deliver value to the members of our Members!



APPENDIX 1: Categorized Expectations

A summary of the expectations - categorized to meet our objectives - *as included in the minutes of the meetings* are as follows (repetitions of the same in different wording may be found):

Communication and Cooperation (IMCs):

1. More cooperation of synergies not only on the CMC designation, but to share the experiences among ICMCI members – which would take more work and involvement of IMCs with ICMCI. Other words used during the meeting that falls under this item is collaboration and exchange of experience.
2. Forums to include officers and executives and not just CMCs, however, CMCs need to also contribute with solid research and training. In other words, global community increased interaction.
3. Better connection to the global membership (countries, members...etc.) to create better communication for cooperation and collaboration.
4. Forum for CMCs, or a directory / database of CMCs to allow visibility and interaction.
5. Better support from CMC-Global as an international platform, as well as support in increasing linkages between professionals for opportunities.
6. Strengthening the MC community all over the world and encouraging International communication.
7. CMC-Global/ICMCI to produce a periodical newsletter in the form of international press review with the involvement of colleagues from various IMC countries.
8. Setting a theme for the annual “international consultants day” to be included with the message from the chair.
9. Regional conferences.
10. Attendance of CMC-Global/ICMCI officials at national member events for increased ICMCI visibility and to give the national events the international twist.
11. Increase cooperation with business schools through the academic fellow programme.
12. CMC-Global/ICMCI should focus on the fact that the IMC is an institute for management consultants and not just CMCs.
13. More regular basis of communication is appreciated as this will assist IMCs in their growth.
14. Producing a presentation or video to assist promote ICMCI and the global linkage around the world
15. Use our professionals and Gurus in our ICMCI network as speakers at national events/ conferences. International speakers to national events on the various subjects and experiences to add to know-how.
16. Requests to enhance regional cooperation and exchange of success stories.
17. Create a mechanism for more mature IMCs to share with smaller IMCs in order to increase their learning curve mainly in attracting large practices for membership.
18. Small practitioners and individuals have different requirements than the large ones, this is an important discussion for CMC-Global.
19. Support from CMC-Global on broadening the international network for the members to enhance exchanging ideas, information, and opportunities.
20. Support Increasing number of events and conferences at national level.
21. The CMC-Today is very positive, still has some way to go but it is a great tool that keeps members up to date and gives power to the global entity.
22. A major opportunity to use the international linkages to the various national institutes at the centre to brokerage cooperation between members and practices internationally, this in order to leverage the CMC-Global international dimension to create partnerships and opportunities.
23. CMC-Global/ICMCI to organize web seminars for potential CMCs.
24. IMCs Need to think global and act local.

25. Better support with knowledge and tool kits on the products. As well as support in marketing to include participation and attendance to national events when needed.
26. Support in the packaging of the services of ICMCI.
27. Increased communications from ICMCI that could be shared with the members.
28. Networking globally: common interests to leverage the work of all.
29. Support from CMC-Global on how to become more of an international platform (broaden the international network) for the members for exchanging ideas and information.
30. Consultant meet Consultant and Consultant meet client initiatives at an international level.
31. Support regional service initiatives (training, e-learning...etc.).
32. A promotional video on the Constantinus Award to help consultants and clients know more about what it is about.
33. Using technology to connect people to opportunities
34. Increasing the no. of volunteers from all the IMCs in the working committees of the ICMCI.
35. Design a refurbished plan during Toronto on how to increase the no. of Academic Fellows in the IMC countries to be a more interactive community.
36. Encouraging all IMCs to send their yearly activities/events to be posted in the ICMCI common calendar to let all website visitors know how IMCs are active and have global profession interactions
37. Standard publications of the best practices of our profession that serves the diversity of industries.
38. Promoting the IMCs activities globally.
39. Articles that CMC-Global can provide to be added to the IMCs newsletters (articles and more thought leadership research that can drive the process which will be supported by their national events, to include content related to why consultants would want to become CMCs, testimonials by CMCs, clients of CMCs, hirers of CMCs, as well as how CMCs are providing value against non-CMCs).
40. Online transmission of the ICMCI annual meetings of delegates.
41. Sharing of business directories.

Membership:

42. Attracting the younger generation and students and meeting their expectations.
43. Cooperation with international vendors for the benefit of the member consultants. For example, CMC-Global to look into signing an agreement with air alliances in order to support travel to conferences and assemblies (One world and Star alliance for example).
44. Online conferences with top speakers and educational programmes
45. The core of the effort to increase revenues we need is to assist IMCs to increase their membership and through that we have a bigger market to sell the products and services to.
46. Enhanced discipline by IMCs towards the assessments.
47. Success of IMCs depends on the effort of the IMC and the support of CMC-Global.

Finances

48. Diversifying revenue streams to lessen dependency on membership fees.
49. Enhance benefits to international consultants.
50. Online conferences with top speakers and educational programmes for income generation.
51. CMC-Global / ICMCI should work for the wealth of the whole system as our profession impacts the economies in general.

Advocacy, Marketing and PR, Profession Representation

52. Interest in increasing level of advocacy, and the UN status could be one of the main means. Visits and physical presence is important.
53. UN NGO status of ICMCI to be used as a promotional tool along with the work on the ISO and the pioneering in that field.
54. Outreach to international organizations on the value of the CMC and its benefit to increase the value of CMCs locally and regionally.
55. ICMCI / CMC-Global could help national IMCs represent the interests of their members as well as improve the standing of the management consultancy profession as a whole by enhancing international relations.
56. Strengthening the MC community all over the world and encouraging International communication.
57. CMC Brand should be more well-known, efforts towards achieving that could include an international directory, enhanced visibility by capitalizing on the Constantinus award, advocacy to stress the benefits of hiring a CMC. Stronger promotion and reporting from ICMCI.
58. CMC-Global/ICMCI surveys to produce statistics, best practices, and fee based reports. The Consulting report for CMC-Global will stress ICMCI as the leader of the profession.
59. Implementation and extension of relations between ICMCI and the larger multinational Consulting Corporations, taking part in their survey, analyzes, insights, and sharing the results.
60. Qualitative economy indicators through polls with members on economy in various countries, or management consultancy in countries of major innovation...etc.
61. Capitalize on the ISO 20700 standard for the benefit of the profession and the professionals as that holds a great benefit to IMCs as ambassadors and this will increase national recognition and enable the customers to have a better service.
62. Membership of the IMCs is not mandatory like it is in other professions, and one of the more powerful things that could be generated is to push for enabling legislation of our profession.
63. Cooperation with EBRD and approach them to join efforts to create one standard based on the CMC standard to recognize consultants.
64. Increase visibility and strengthen the brand both at the ICMCI and IMCs levels.
65. Properly market the ISO 20700 worldwide

- THE END -