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Chapter

1

About the Academy

The Academy is a training institute for professional management consultants and managerial problem solvers. The Academy also develops clinical tools and courses for internal and external consultants to management. Led by an international council of seasoned consultants and academics, the main aim of the Academy is to ensure that professional company doctors are provided with cutting edge clinical tools, methodologies, and solutions so that their clients can receive the best treatment possible.

The Academy scans the world for global practices and localizes them for the consultants, trains and certifies management trainers, develops and refines consulting tools, incorporates quality training methodologies into courses, trains consultants to international standards (e.g. CMC), and helps expand the acceptance of management to professional consultants. The Academy has over 50 professors, master trainers, and accredited trainers around the world and works closely with IMCs, universities, and global consulting practices. The Academy is a subsidiary of G. Li & Company (www.gliandcompany.com), a leading governance and strategy consultancy established in 1991 by several professors. For more information, please see www.academy-mc.org.

1. Whose problems are we trying to solve?

Giving problem solvers who are seeking methodologies and know-how to solve their own problems:

- Professional Management Consultants
- Internal Consultants from managers to directors

2. What solutions are we providing to them?

Teaching tools, clinical tools, training courses, references, applications, master and accredited trainers of the Academy, linkages to academia, training for certification, and interactive solution engine.

3. How will we deliver the solutions to those with the problems?

All our courses and programs can be structured to the need of trainees and this can be accomplished through our accredited trainers, program managers, franchisee, and local reseller.

Our Beliefs toward Learning

Broadening Mindsets and Enhancing Problem Solving Delivery

Broadening mindsets

'Whenever a problem cannot be solved, we need to approach it from another level of abstraction', said Albert Einstein. The Academy understands that problem solving cannot be a linear activity. There is often more than one way to solve a problem. But to develop this multiple perspective, one has to first broaden one's mindset. Understanding how to manage complexity and chaos, the latest scientific breakthroughs in research, underpins most of our core programs.

Speed

The ability to learn things quickly, adapt, and heal our clients is the trademark of successful consultants. To do this, consultants need tools that they can use, learn about, and apply them quickly, at all times understanding the limitations of all tools. It is with this belief that the Academy has focused on delivery learning and tools that matters, on designing **Management and Boardroom First-Aids™** to consultants, and on continuously findings ways to improve speed of diagnosis and prognosis.

Competency-based learning in management that matters

The Academy provides only the right skill sets and curriculum; and these educational programs are built on sound academic foundation. Learning is focussed on subjects that matters to the professionals, with high relevance to the ability to perform and to do. Extraneous academic subjects are kept to a minimum. To do this, we take on a competency approach in our programs, that is, the trainees must exhibit the minimum behaviours for a particular management competency, at the end of the training session. All courses have objectives that are competency based. Founders of the Academy are competency researchers and developers in management and management consultant. This sets us apart from all other 'trainers'.

Helping trainees to learn and own the learning

Learning should be a life long process, a skill that should be nurtured. Learning is more effective when the learners want to learn, being proactive rather than reactive to their own needs. In the increasingly competitive business world, managers are demanded for increased versatility in skills.

To do this, they must first realise their own limitations. Therefore, pre-assessment and sometimes with coaching is a basis of our approach and helps to distinguish how we work from other training institutes. Trainees are provided with exercises to make them think and stretch. **Self assessment is a critical and unique part of all our managerial programs.** By understanding their limitations, learning ownership is strengthened. Since there is never absolutely right or wrong with management decision making, we challenge our trainees to think out of the box. Hence, creative problem solving and helping them own the solution is a

belief that underpins all our programs. Since trainees learn best from experienced problem solvers, all accredited trainers must be a professional consultant first and foremost, and must be qualified to be a professional trainer.

To enhance learning, all participants must be actively involved. Training tools including role-plays, simulations, quizzes, sometimes field study, and case exercises covering the fundamental art of management consulting are used to enhance learning.

Learning is reinforced whenever possible. For example, students are expected to use the Internet for searches and downloading pre-course reading before attending the classes. There are in-class exercises, typically by teams; and short homework usually lasting no more than 30 minutes.

Clients prefer our programs because... 10 reasons

1. **Immediate Applications:** Participants like them more because they can be applied immediately at work. Cases are used throughout. All courses can be amended and adapted for the organization for a nominal fee.
2. **Future Applications:** all our key programs follow our proprietary problem solving methodology -- from symptoms, to causes, to prognosis, to courses of treatment; so that learners learn how to solve 'future' problems.
3. **Trainers who can train:** Each course is taught by an experienced professional certified in his/her profession and in management and consultancy; and must be trained and accredited by the Academy. Clients need not worry about the competency of the trainers. That worry is left to the AMC. They must be a professional certified in their technical field.
4. **Learning relevant best practices:** The contents are both academically respectable and functional at the same time (validated independently by an international team of training and educational experts). This ensures learners receive only the best and only relevant materials.
5. **Escalated learning possible:** Participants can learn to become trainers through accreditation (green belt to black belt). By teaching, the learner's ability is further enhanced.
6. **Relevant for your company:** Materials are in both English and in the local language. Management examples are amended to fit the local culture. In most cases, we would adapt the materials to the situation at our clients. We aim to provide 'just-for-you' solution based on a modular framework.
7. **Competency based:** Courses are competency based. Employers pay only for those that require immediate competency skills enhancement. Pre and post assessments are built in. Learners learn how to do and what to do, supported by background on management concepts on the why they have to do the practices.
8. **One point of contact:** You deal with one point of contact for your entire problem solving training needs. In addition, we can build learning management system and record database for your learners.
9. **Enhanced learning ownership:** Because learners want to learn and apply the learning, through various teaching methodologies, learners begin to own the thinking framework.

10. **Minimum worries:** Quality and value for money must apply to all our programs. Satisfaction guaranteed or a replacement course will be provided free in another subject or the same subject by another accredited trainer.

The Council of the Academy

The following individuals are members of the Council and the Advisory Board of the Academy.

Dr. Gregg Li	Chairman of the Council and Provost	<i>G. Li & Company Limited</i>
Mr. Simon Chan	Executive Director of IT	<i>G. Li & Company Limited</i>
Prof. Patrick Cheng	Advisor	<i>Retired. Former Vice Chancellor of the University of Hong Kong</i>
Dr. Yegin Chen	Advisor	<i>Chairman of private equity fund. Former professor at CUHK</i>
Mr. Charles Foley	Executive Director of Dev.	<i>G. Li & Company Limited</i>
Mr. Alfred Ho	Executive Director of Operations	<i>Former Senior Advisor of the Vocational Training Council.</i>
Prof. David Horner	Advisor	<i>US Fulbright Scholar</i>
Mr. Anthony Mak	Council Member	<i>Former a General Manager with American Express and MasterCard Int.</i>
Mr. Anthony Siu	Chief Financial Officer	<i>G. Li & Company Ltd.</i>
Mr. Don Sniegowski	Council Member	<i>Former Regional Sales Training Director of Nike</i>
Prof. Robert Tricker	Advisor	<i>Former Prof. of Corp. Governance: Oxford University, HKU, Harvard</i>
Mr. Alec Tsui	Chairman of the Advisory Board	<i>Chairman of WAG. Former CEO of the Hong Kong Stock Exchange Ltd.</i>
Mr. Gregg Trilling	Advisor	<i>Systems Manager, Systems Impact, USA</i>
Mr. K. M. Yim	Advisor	<i>CEO, Inno: Communications Ltd.</i>

Our Delivery Approach

Adding value throughout the learning process

Development Path / Competency Ladder

We offer a one-stop shop competency-based management development approach whereby we can support the career development of a manager or management consultant by identifying and fulfilling the training needs at each stage of the competency ladder.



- **Assessment of competency.**
- **Development of a personal development plan.**
- **10 Ways to close the gaps.**

Case-based & Action-oriented

Interactive learning is a hallmark of the Academy's programs, and syndication groups and team activities are very much an essential part of the learning experience. In our programs, we will, to the extent possible, adopt a "problem solving" approach whereby the participants will be asked to work together to solve a "real life problem" adapted from a current work situation.

Back-at-work Linkage

"Job Relevance" is another hallmark of the Academy's programs. We will consider our programs successful if the participants can take back with them to their workplaces some insights and actionable tools that they can apply to tackle a current issue.

We work with each client to see how learning can be reinforced and evaluated back at work.

Academic Recognition and Continuous Professional Units

Some of our selected programs will have an accreditation value in the following form:

- 1) For consideration of possible exemption in diploma and other certified courses from various universities such as Royal Roads University, University of Southern Australia, or the University of Hong Kong.
- 2) Recognised by some professional bodies, such as the Institute of Management Consultants, for fulfilment of their continuous professional development requirements.

Modular and Stand-alone Programs

The basic modular course is a how-to program. For a full list, please go to the appendix. Each modular course is 3.5 hours in length. By combining two courses, we have a day. Combining 10 and it is a week. Once combined, they form programs.

Language Medium

All course materials are in English unless stated otherwise. English is the primary language to be used in classes but can be supplemented by Chinese depending on the program leaders and the participants.

Four Levels of Trainers

Trainees can become trainers through our Green Belt Process. The Academy has four levels of trainers:

- **Professors (Gold Belt):** These are master trainers and fellows of the Institute of Management Consultants. To be a fellow, the consultant must have had at least 15 years in the industry, of which 10 has been to the service of the Institute. Typically, these are retired professors or a partner or and senior partner of a consulting firm.
- **Master Trainers (Red Belt):** These are very experienced consultants who have at least 20 years of experience, near retirement or at retirement, and have over the years refined their craft to master craftsmen level. Typically these are certified professionals, international experts, and senior members of a professional institute like IMC and who wants the world to know about their solutions. All of them are course providers and some are even course developers.
- **Accredited Trainers (Black Belt):** These are the core trainers of the Academy. Each trainer must have at least 10 years of managerial experience, certified to be eligible to teach the subject, and a fine management trainer. Typically, each would be a certified professional in consulting, accounting, finance, or a host of other commercially related fields.
- **International Student Trainees and Associates (Green Belt):** These are the basic trainers within the network of the Academy. Many of them are certified to teach other programs and are working consultants. They provide a surgical offering to very specific programs, thereby raising the value and contribution in basic management courses such as time management. University lecturers, managers, skills trainers are examples.

Upgradeability

Each student may want to become a black belt. We have a program to encourage students to be trainers. Please refer to our Green Belt to Accredited Trainer Competency Accreditation System below.

The Competency Accreditation System of the Academy of Management Consultancy is a progressive assessment framework. It provides a rigorous means for ascertaining the level of competency of participants having attended AMC courses and programmes and a career development ladder towards the training profession within the Academy.

Green Belt and Black Belt qualifications are Certificates of Competency for AMC Courses and Programs respectively. Management who sponsors staff to attend training will know that their employees not just managed to complete the attendance but are duly certified as having gained the knowledge, mastered the skills, and possessing the right attitudes for applying what they have learned in class to their work situations.

Participants of AMC Courses and Programs

- Each Course is typically 35 hours in duration focusing on developing one's competency ('how-to') in solving specific problem areas (except specified)
- Each Program is made up of a number of how-to courses, designed to stimulate and encourage the problem solver to think creatively and to derive solutions where others do not recognize.



To become a "GREEN BELT" problem solver

- Register with AMC for the "Green Belt" assessment within a week upon completion of an AMC Course.
- Pass a 20-question multiple choice assessment specifically designed for the course (70% as the passing mark).
- Write a simple 2-page paper on how to apply this for a client / at work
- Submit the appropriate administrative fees.



To become a "BLACK BELT" problem solver

- Register with AMC for the "Black Belt" assessment within a week upon completion of an AMC Program (which is comprised of a number of courses).
- Successfully satisfy the assessment for **all courses** in a program within a 24-month period.
- Complete and document a project based on a competency framework on the subject for a client, internal or external, within a 6-month period from registration.
- Attend a Panel Interview.
- Submit the appropriate administrative fees.

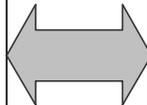


To become an International Certified Management Consultant (CMC)

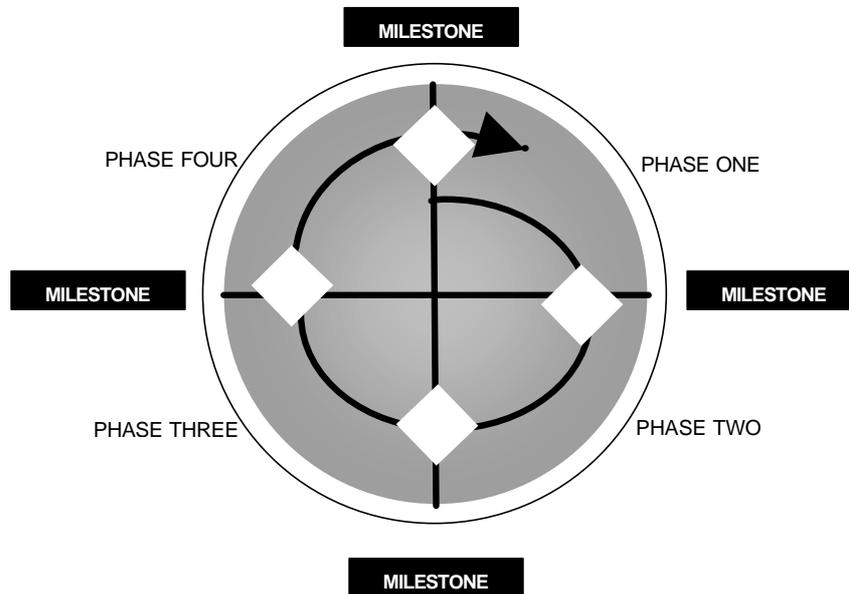
- Provide documented evidence of at least 3 years of hands-on consulting experience and submit to a local IMC for processing.
- Complete a bachelor degree from a recognized university.
- Attend AMC' s Professional Foundation in Management Consulting Program (PFMC).
- Strengthen the competency and knowledge base in several management areas by completing the relevant AMC programs and courses. Passing the AMC Accredited Trainer Certification process should adequately prepare the individual for the CMC tests (3 modules):
 1. The Professional Code of Conduct
 2. The Body of Knowledge
 3. The Panel Interview
- Pay the requisite admin and examination fee to IMC.

To become an Accredited Trainer of AMC

- Successfully completed the AMC "Train the Management Trainer" Programme.
- Receive mentoring from AMC Master Trainers.
- Teach a trial class, with Master Trainer standing by.
- Evaluated by a panel comprising of Master Trainer and AMC staff.
- Accept the professional conduct and quality control & assurance requirements of AMC (as detailed in the AMC Trainer Agreement).
- Submit the appropriate administrative, quality assurance, and training fees.



One can pave his/her way towards becoming a Certified Management Consultant (CMC) or an Accredited AMC Trainer through the AMC "Black Belt" qualification. The CMC is an internationally recognized qualification certifying the individual' s professionalism and competency in management consultancy.



Our entire development path undergoes a process flow that would allow your trainees to expand their mindset and perspectives. This is the self healing process that we aim to instil. It is a continual process to improve your consultant' s ability to deliver through a phase-by-phase approach.

Phase 1: Identifying where our intervention would add the most value by helping you focus and calibrating problem solving competency to your organization' s set

Phase 2: Setting measurable indicators to define progress

Phase 3: Formulating and structuring learning solutions to bring about the targets

Phase 4: Marshalling the trainers, materials, and structuring the learning environment

Phase 5: Assessing the learning and linking it back to the workplace, developing guidelines that would help you make the learning 'real'

Phase 6: Transferring and simplifying such guidelines which would form the basis of your policies, ideally flexible ones that would strengthen corporate governance and encourage decision making at the lowest levels

Phase 7: Measuring, calibrating, and aligning the learning to your mission, with the intent to help you develop your trainers to teach our subjects, thereby sealing in the self-healing process.

Our Management Trainees

Action learning for all levels of problem solving professionals

Our focus is providing relevant and impactful management development programs through proven learning methodologies. Action learning, projects, group exercises, games, e-learning, coaching, and various types of learning are employed, targeting at:

- 1) Internal Consultants and professional managers -- junior, middle and senior managers; and directors.
- 2) Professional consultants to management – management consultants, accountants, lawyers, surveyors, engineers, and other professionals.

The Internal Consultants and Professional Managers

Definitions of Junior, Middle and Senior Managers; and Directors

Junior managers are persons who:

- 1) Have at least two years of managerial experience
- 2) Manage a small team within a functional area
- 3) Need to upgrade skills for self-management as well as to manage others in preparation for greater managerial responsibilities.

Middle managers are persons who:

- 1) Have an average of six years' managerial experience
- 2) Are moving from a functional management or a professional/technical role to a more general management capacity for a bigger team
- 3) Would like to upgrade their managerial skills to prepare for greater and more sophisticated managerial responsibilities at more senior positions.

Senior managers are managers who:

- 1) Have an average of ten years' managerial experience
- 2) Are responsible for the management of a business and have to deal with both internal and external stakeholders of the business
- 3) Who are prepared for more senior corporate positions across the globe.

Directors and CEOs are:

- 1) Members of the Board who are responsible for the governance and strategy of the organisation.

Their needs

Our programs aim to broaden the general management knowledge and skill-sets of the middle and senior managers to prepare them for added responsibilities. Their needs will however be different.

Management development needs	Junior managers	Middle managers	Senior managers and Directors
Skills to manage greater responsibilities	<ul style="list-style-type: none"> ▪ General management skills at operational level 		<ul style="list-style-type: none"> ▪ General management skills at corporate level
Skills to manage strategy		<ul style="list-style-type: none"> ▪ Implementation of strategies 	<ul style="list-style-type: none"> ▪ Development of strategies and corporate governance
To be customer focused		Understanding and practising service quality and risks management	
Strengthening of functional skills to manage oneself & others	<ul style="list-style-type: none"> ▪ Soft (business) skills ▪ Hard (functional) skills 		<ul style="list-style-type: none"> ▪ Soft (business) skills
Manage in the Pacific Rim	<ul style="list-style-type: none"> ▪ Knowledge and skills to work and operate in the area 		<ul style="list-style-type: none"> ▪ Understanding of the situations in the area

Such needs would form the basis of our in-company programs.

The Professional Consultants to Management

Definition of Professionals to Management

Professionals are persons who:

- 1) Are qualified members of a profession such as engineers, surveyors, accountants, lawyers, and management consultants who are required to upgrade themselves as part of their continuous professional development; or
- 2) Are members of professions which do not at the moment offer an internationally recognised professional qualification but require continuous professional development anyhow (e.g. teachers, investigators, and technicians)

Our focus is on those professionals who have on average five years' experience and are beginning to take on more managerial responsibilities within their professions or need to understand and apply management practices in their solutions.

Their needs

Their management development needs comprise:

- General management skills to become a manager of professionals and projects (to manage a team / operations)
- Upgrade of functional skills in general consultancy required by a manager in a profession, such as writing proposals, managing project teams, and developing a course of remedial actions
- Advancement of technical skills in a business area such as reengineering, activity based costing, overhead value analysis, and risks management

Chapter

2

Our Professional Training Programs

Each program is comprised of a number of how-to courses, designed to stimulate and encourage the problem solver to think creatively and to see solutions where others do not see. Ability to perform the identified processes is the rule of thumb at the end of the workshop.

For Consultants to Management: Internal and External

Relevant Programs at the Academy	Days and Frequency of Offering	A	B	C	Pages
1. Professional Foundation in Management Consulting (PFMC). CMC Review.	5 days, Annually	✓	✓	✓	15-16
2. Personal Skills Refresher Program (PSRP)	5 days, Annually	✓	✓		17-18
3. Management Skills Refresher Program (MSRP)	5 days, Annually		✓	✓	19
4. Tools for Managing Change Program (TMCP)	5 days, Semi-Annually	✓	✓	✓	20-21
5. Strategy Formulation Design Program (SFDP)	2 days, Annually		✓	✓	22-23
6. Global Management Communications Program (GMCP)	12 days, Quarterly	✓	✓		24-25
7. Managing a Consulting Practice (MACP)	2 days, Annually		✓	✓	26
8. Company Turnaround Program (CTP)	5 days, Annually	✓	✓		27-28
9. Advanced Management Action Learning Program (AMAL)	10 -15 days, Annually			✓	29
10. Train the Management Trainer Program (TMTP)	5 days, Semi-annually		✓	✓	30-31
11. Making Governance Work Program (MGWP)	5 days, Semi-annually		✓	✓	32-33
12. Internal Consulting Preparatory Program (ICPP)	5 days over 3 months, Annually	✓	✓		34-35
13. Risks Management for Directors (RMDP)	0.5 day, Quarterly			✓	36
14. Risks Assessment and Management (RAMP)	2 days, Quarterly	✓	✓		37
15. Management Systems Diagnostic Program (MSDP)	15 days, Annually	✓	✓		38-39
16. Creative Problem Solving Program (CPSP)	2 days, Annually	✓	✓		40-41
17. Project Management (PM)	3 days, Half Annually		✓	✓	42-43
18. Board & Governance Advisory Program (BGAP)	4 days, Annually			✓	44-45

- Consultants/Analysts/Junior and Middle Managers B - Senior Consultants/Manager
C - Partners/Project Managers/Directors and CEOs

Our 1 and 2-day How-to Refresher Programs

Each refresher program is a topical program for all levels of managers and management consultants on how to improve their managerial effectiveness and their capacity to undertake and improve corporate governance at a working level. Each program can be further tailored with cases from the corporate environment. Each contains some type of self assessment, local cases, references, and guidelines.

For all levels of management and management consulting

Relevant 1-day How-to Programs	Frequency of Offer	Pages
19. How to Navigate through Complexity and Chaos	Once a month	46-47
20. How to Chair Meetings, Take Minutes, and Win Commitment	Once a quarter	48-49
21. How to Write a Proposal for that Million Dollar Contract	Once a quarter	50-51
22. How to Project a Professional Image	Once every 6 months	52-53
23. How to Manage Time Wisely	Once every 6 months	54-55
24. How to Manage the Chinese and English Media	Once every 6 months	56-57
25. How to Build the New Governance Structure for a Young SME	Once every 12 months	58-59
26. How to Enhance Internal Controls at the Managerial and Supervisory Levels	Once every quarter	60-61
27. How to Prevent and Detect Fraud and Enhance Compliance	Once every 6 months	62-64
28. How to Discipline Staff in China	Once every 6 months	65-66
29. How to Operationalize Corporate Governance through IT (OGIT)	Once every 12 months	67-68
30. How to Renew and Manage Business Processes Continually (2 days)	Once every 6 months	69-70
31. How to Manage the Client and Implementation	Once a year	71
32. How to Assess Organizational Culture and Climate (2 days)	Once a year	72-73
33. How to Enhance a Problem Solver's Interpersonal Skills (2 days)	Once a year	74-75

Program for New Consultants

To establish a strong foundation in management consulting with which to build upon

1. Professional Foundation in Management Consulting (PFMC). CMC Review Course.

Overview

Program Length

5 days spread over 2 weeks

Who should attend?

New consultants and young problem solvers

Comments

This is a foundation course for all consultants. A field project is involved. The program has been run for more than 6 times in Asia.

Relevant Trainers

- Professors
- Master Trainers
- Accredited Trainers

Today' s turbulent environment demands professionals who can solve problems creatively, persuade clients to undertake transformation, and do so in a professional manner. How would a manager and new consulting professional build on his/her competencies and become a professional consultant to management and an effective change agent? This is a 5-day course, spread over 2 weeks, designed for **new** consultants: auditors, accountants, trouble-shooters, internal consultants, contractors, managers and anyone with 5 to 10 years of managerial experiences looking to integrate their skills and structure them into a professional basis with which to begin their management consulting career. Those who needs to:

- *Sell their experience and know-how in a professional manner;*
- *Understand the nature and dynamics of consultancy and the consulting industry;*
- *Learn about the basic methodologies for effecting change in an organization;*
- *Manage the change process, the project, and the client;*
- *Learn some of the basic consulting methodologies and how to develop their own;*
- *Deliver on the intangibles within budget;*
- *Learn and be able to apply the International Code of Professional Conduct (ethics)*
- *Improve on the ability to satisfy clients' requests; and*
- Prepare for the certification of management consultant examination offered by the Institute of Management Consultants throughout the world.

How-to Courses:

Several courses are included in this program:

- Apply Consulting Approach, Tools, and Methodologies; Process Consulting, Do-Plan-Check-Act (2 days)
- An introduction to managing change (2 days)
- Apply professional ethics, (history of the consulting industry, and building the consulting mindset) (1/2 day)
- Manage Client' s Expectations (1/2 day)

Key Takeaways

At the end of the course and upon completion of the required field project, the participant should be more capable in:

- ❑ *Applying oneself more effectively as an internal or external change consultant;*
- ❑ *Managing better his/her consultancy projects, processes and roles;*
- ❑ *Preparing proposals, project plans, approaches, and manage expectations;*
- ❑ *Identifying areas where further development and learning in the becoming a competent consultant can take place; and*
- ❑ *Helping his/her clients deal with and overcome inertia for change.*

Program for New Managers and Consultants

Program for those seeking to gain higher EQ, to enhance their emotional quotient and their ability to work with others

2. People Skills Refresher Program (PSRP)

Overview

Program Length

5 days

Who should attend?

Those with low EQ and self confidence. Those with difficulties getting along with others.

Relevant Trainers

- Master Trainers
- Accredited Trainers

Other than being technically competent, a “competent” manager and consultant get things done through others. Having a strong EQ is vital in today’s multicultural and diversified world of commerce. The People Skills Refresher Program conducted in the form of highly interactive and action oriented workshops, aim to introduce and get participants to become more comfortable with who they are and how to interact with others.

Objectives

The participants should be able to recognize their competencies in these areas and be able to create and work on an action to strengthen the competencies which are relative weak. They will learn how to use the tools and ideas that participants can apply and take ownership as they deal with various people issues.

Course structure and Contents

The program comprises 12 modules, with courses on self-management and team management. Each module would typically consist of the following components:

- Self assessment such as using Ennegrams, DISC, and other instruments to identify interpersonal skill sets
- Introduction of the underlying theories and what considered to be good practices, through transactional analysis
- Understanding of common pitfalls
- Through experience sharing and workshops / role plays to reinforce behaviours

This is an expanded program on interpersonal skills and designed for the consultant. For example, It will focus on:

- *How others see the consultant as an individual – using for example, the Johari Window*
- *How to build the relationship with the client*
- *Building and running an effective consulting team – where there may be both consultants and client staff*

- *Persuading the client (including client staff) to accept the consultant's recommendations*
- One to one with the client
 - Personal style and impact on the client – others perceptions of you
 - Questioning and listening skills
- Working in teams
 - Group dynamics and group roles
 - Facilitation skills and team leadership
- Influencing and persuading
 - Body language and building rapport
 - Using personal skills

The following sessions in addition to the interpersonal skills above will be covered:

- 1) Solve non-technical problems
- 2) Manage time wisely
- 3) Handle difficult people
- 4) Strengthen one' s interpersonal skills
- 5) Lead (situational leadership) (2 days)
- 6) Manage a cross-cultural team
- 7) Manage stress and conflict at work
- 8) Get old dogs and young cats to work together
- 9) Dress professionally and project a professional image
- 10) Behave ethically and professionally
- 11) Be more assertive
- 12) Become more culturally aware and sensitive

Program for Senior Consultants and Managers

Program to rekindle the manager in us all, to set the foundation for managing others, particularly professionals

3. Management Skills Refresher Program (MSRP)

Overview

Program Length

5 days

Who should attend?

New PMs, new CEOs,
and team leaders

Relevant Trainers

- Master Trainers
- Accredited Trainers

A new manager of professionals must learn new management skills quickly, to lead those who are often smarter, more experienced, stronger, and more capable than oneself. As new leaders take on a more general management role and are required to manage more subordinates, they will need to acquire the right sets of management skills. This program aims to equip the new managers with these additional competencies.

Course structure

The program comprises seven modules, critical skills that a new manager needs to start acquiring for future advancement and the others for reinforcing skills to lead a team. Interactive workshops and experiential games that facilitate experience sharing and learning by doing will be the main delivery mode. Participants will be learned from good practices and gain insights from war stories from world class companies and management gurus. Outdoor activities may be involved.

Courses

- 1) What Management Is
- 2) Manage Other Professionals
- 3) Provide Constructive Feedback
- 4) Conduct Selection Interviewing
- 5) Appraise & Encourage Performance
- 6) Lead (Advanced Leadership) (2 days)
- 7) Build Teams (Advanced Team Building)
- 8) Coach Other Professionals

Key Takeaways

Learning the tools and skills to manage others who are smarter, better, wiser, and more professional than us.

Program for Change Agents

Programs for building change experts who are expected to provide the basic toolkit to manage change in turbulent organisations

4. Tools to Manage Change (TMCP)

Overview

Program Length

5 days (3 days then 2 days). Project teams should attend the modules together.

Organizations nowadays are undergoing constant changes, especially in times of economic turbulence, in order to stay competitive. All organizations are changing. They don't remain static. An effective change agent must first understand the transition processes any organization would go through and be able to facilitate effective transformation or hinder improper progress.

Relevant Trainers

- Master Trainers

Consultants are hired because they are change catalysts. Middle and senior managers are often appointed as change champions to lead the organisations to embrace the change process and realise the changes. This program introduces to the participants the tools and methodologies that they can apply.

Overall Objectives

At the end of the training, the trainees should acquire the know-how and the awareness to guide clients toward successful changes. They will gain:

- An understanding of the tools and methodologies in change management
- An aptitude and mindset to champion changes.

Course structure and Contents

The program contains widely used methodologies to redesign processes and effect changes in organisations to achieve efficiency improvement (e.g. Burke-Litwin Model, Freeze and Unfreeze). Generally, each tools will be framed in this format:

- The conceptual framework
- War stories on success cases and failures in using such tools
- Tips to avoid common pitfalls in applying the methodology
- Sharing of actual experience by participants.

The course is broken up into 2 modules. Module 1 covers the basic tool set; while Module 2 covers the strategic formulation process which is 2 days in length. With a strong foundation in organization analysis and change management, it is appropriate now for the change agent to learn how to use them effectively and this will be covered in Module 2. The following courses and contents will be covered:

- Causes of change
- Managing changes – why is it so difficult?
- Drivers and Resistors and other change processes
- The Seven C' s in Consulting
- Peter Block' s Flawless Consulting
- Communicating change and key successes
- Roles of an effective Change Agent
- Burke and Litwin Casual Model of Change
- Foley and Li' s 18 Stages of Change
- Parameters of Change
- **Plus** - The Strategy Formulation Program (2 days, see above).

Program for Directors, Principal Consultants, and Partners

Program for those who need to plan a course of strategy formulation for their clients

5. Strategy Formulation Design Program (SFDP)

Overview

Program Length

2 days

Desirable Entry Level

Senior Consultants and
above

Relevant Trainers

- Professors

Every year a company renews itself on a strategic level. Over the months, competitors have become stronger and the markets are no longer the green fields that they once were. New employees have come and gone. What everyone thought was the right things to do no longer are! Your clients and your people need to come together and work out a new set of strategy. How should such process be structured?

Strategy Formulation Design Program (SFDP) is a special workshop to help consultants design a series of learning processes so that the client's management team can think "out of the box" and enhance ownership. Strengthening ownership, team building, and understanding how to structure decision making would be the objectives for your client. The assumption behind this program is that oftentimes the clients know best about their industry and the consultant's role is to help them see and agree their own set of strategy.

The workshop should enable management to think what they have accomplished, what they have learned, and what they will need in order to succeed. The consultants will learn how to design a strategy formulation program to help his client's department work through a series of challenges, question their major assumptions and help them come together and accept the existing mission or agree a new mission. It is a facilitated process.

Overall Objectives

The participants should be able to design a learning environment for their clients and managers who must work together to create and implement a set of sensible strategies.

Course Structure and Contents

The program will cover these topics:

- How to design a strategy formulation process?
- How to use tools such as PEST (Politics, technology, environment, and society), SWOT (Strengths, weaknesses, threats, and opportunities) and Maxi-Maxi and Mini-Mini
- Gap analysis.
- The Balanced Scorecard and other high level executive information systems and tools,
- Scenario planning, Future-steps, and other processes to formulate strategy
- Structuring one's own processes to help clients recognize, build, and implement the derived strategies
- Chaos and complexity
- Ecosystem and competition
- Systems thinking

Program for high flyers and global managers

Program to upgrade and refine one's ability to command the use of English in a global managerial setting

6. Global Management Communications Program (GMCP)

Overview

Program Length

12 days; 3 days each
time

Desirable Entry Level

College degree and use
of English at work. Must
be fluent in the use of
English.

Relevant Trainers

- Master Trainers
- Accredited Trainers

In today's international world of business and management, a manager or a consultant to managers is expected to be an expert in the use of English in management. This is different from being conversant or having a strong command of business English because this ability assumes one has a strong foundation in management. This is a misplaced assumption and a core reason only a few managers actually get to the top.

Clarity of thought and the ability to convey one's thinking in a crisp and cogent manner represents one type of essence of quality in management. Central to the training is helping the students see things differently, at a managerial level that is, and building on that, to be able to communicate such thinking to others. All leaders are great communicators and this statement should indicate why being able to write well from a management perspective have often distinguished a typical manager from a company leader. A leader differs from a manager in knowing better what to say, how to say it, and how to package what he has written.

Nothing is more evident of a manager's clarity of thought and communication skills than what he has written and how he presents himself in English for an international company. What gets distributed to others are his written words, in the forms of emails, letters – complaint letters, recommendation letters, and service letters; minutes and memos, performance appraisals, reports and proposals. How others know of his existence and his leadership potential is conveyed through both his actions and his written words. Documents are solid testimonials to his ability to communicate and evidence of his leadership competency.

The pen has always been more powerful than a sword. Learn to use it effectively to become a global manager, from just being a local manager.

Overall Objectives

At the end of this program, participants should have gained the fundamental knowledge of and the application of English in a management setting. A manager's role is to manage and to lead. A

manager is involved in varied set of activities and typically is involved in chairing meetings, writing up minutes and reports, interviewing suppliers and customers, presenting proposals, and selling him or herself. At the end, the manager is equipped with the core materials to be a global player.

Course structure and contents

The course is divided into four 3-day programs. **Program A** looks at basic writing and management; **Program B** at selling through the written words; **Program C** looks at managerial presentation; and **Program D** at speaking and acting the part. Each program builds on the other. A total of 24 half day modules, each module providing a core set of skills that would enable a manager to become fundamentally a better global manager and be able to communicate effectively as a manager. The modules can be mixed and matched depending on the needs of the individual students.

Program A: Global Management Culture and Writing:

- Basic English grammar review
- How to write in simple English
- How to lead in a global management culture
- How to document your objective assessment of an individual
- How to communicate using emails
- How to avoid lawsuits through one' s writing

Program B: Mastering Management Writing

- How to write business reports (2 days)
- How to sell yourself and your department on paper
- How to write that powerful functional resume

Program C: Selling through Management Presentation

- How to put together a million dollar proposal (1 day)
- How to display and illustrate vividly with diagrams and pie chart
- How to dress professionally and project a professional corporate image in the West
- How to speak clearly in English
- How to facilitate in English

Program D: Speaking, Acting, and Managing Expectations

- How to interview English speaking managers
- How to set questions and conduct a simple survey
- How to behave ethically and professionally
- How to manage the English media (1 day)
- How to be more assertive in a multinational setting

Program for Practising Managers of Professionals

To begin changing the **service** organisation into a quality conscious, customer orientated, and service marketing professional firm

7. Managing a Consulting Practice (MACP)

Overview

Program Length

2 days

Who should attend?

Chief Executive,
department heads, section
chiefs of consulting units

Relevant Trainers

- Professors
- Master Trainers

The management of professional staff is different in many ways to the management of less highly educated and independent people. They are the consulting firm's most important assets. The writer of the module should take care to identify the key issues in managing these people equipping the participants with skills to get the best out of such people.

Objectives

At the end of the training, the participants should be able to create a system of management that would reflect their own working style. The system should have a process to manage staff, information, client, and knowledge.

Course structure

The module is highly participative and includes a session on managing and implementing with the clients. The focus will also be on the collection, dissemination and utilisation of data in a consulting practice. The module should also focus on how the consultant should act to build and maintain an effective working relationship with the client over the length of the assignment and into the future. The module contains examples of the use of data in the consulting industry and the manner in which it is used.

- Management style
- Motivating professionals
- Building and maintaining the client relationship
- Dealing with difficult clients
- Implementation with the client
- Managing an assignment

Program for Consultants and CEOs

A 5-day introductory clinical programme on how to cure ailing companies

8. Company Turnaround Program (CTP)

Overview

Program Length

5 days

Who should attend?

Consultants who lead or wish to lead such rescues, those who are in a position to identify trouble-shooters, and those who have invested in companies that need such type of rescue would benefit from attending this program.

This course aims to provide practitioners with an overview and systematic set of tools so that they may conduct clinical review of ailing companies and begin to put in place remedial actions. This course is about company rescue and immediate actions that can be put in place that would lead to turnaround. Trouble-shooting business systems will be the emphasis and it is assumed that these business systems can be isolated and repaired.

This course is about setting and fine-tuning the right parameters that would ideally turnaround the company from an ailing status to a healthy status. Given the length of this program, which is only five days, the program will focus less on refining or redesigning business systems that are the scope of other more advanced courses developed by the Academy.

Language

English or Chinese

Overall Objectives

- to introduce participants to the basics of how organisations operate and the key areas on which the consultant should focus when seeking to turnaround an ailing company
- to provide the basic technical concepts and tools to be used in troubleshooting business systems

At the end of the program, participants will be able to:

- Describe the open systems nature of organisations and the key sub-systems within a healthy organisation.
- Understand how organisational goals, policies, strategies and procedures come together to provide the 'software' for the organisation and when these are not working properly.
- Outline the main principles that are used in the analysis and design of an effective organisation structure – the 'hardware' of the organisation.
- Set out the key management control systems for an organisation and how these are used in monitoring and managing performance.

- Understand how to employ the basic and cascading set of analytical tools a consultant needs to identify where an organisation has problems and determine the appropriate action to take, moving from strategy to more operational matters.
- Describe the most frequently used strategies for turning around a 'sick' organisation.
- Understand how to plan the rescue stages.
- Outline the key principles and concepts to be employed by a consultant when helping a client organisation to achieve effective change.
- Describe the key actions to be taken in bringing about effective long-term change in an organisation.

Course Structure and Contents:

The course will aim to teach participants the **basic** practices and indicators of business systems diagnostics in these areas:-

1. Turnaround Management
2. Symptoms and Causes of Decline
3. Characteristics of Crisis Situations
4. Inventory and Supply Chain
5. Systems Thinking
6. Crisis Stabilization
7. Leadership and Succession
8. Operationalizing Governance
9. Strategic Planning and Focus
10. Business Models and Venturing
11. Organizational Change
12. Critical Process Improvements
13. Information Management and Control
14. Financial Restructuring
15. Business Closure and Exit
16. Sales Order Processing
17. Control, Command, and Communication
18. Fraud, Security, and Risks

Program for General Managers, Directors, and Partners

To expand their strategic perspectives and groom their leadership skills

9. Advanced Management Action Learning Program (AMAL)

Overview

Program Length

One to three days for each topic, spread over 3 months

Who should attend?

Senior managers who have been in a managerial position for a minimum of 15 years

Relevant Trainers

- Professors
- Master Trainers

Courses

1. Risks Management
2. Leadership and motivation
3. Effective corporate governance
4. Building and leading teams
5. Organizational Revival

The Advanced Management Action Learning Program is designed specifically for general managers of organisations in Asia to upgrade them with current management thinking and skills to deal with current business issues and challenges. It can be run as an in-company program specifically for senior executives within an organisation or in a consortia mode whereby executives from a few companies will get together. The style of learning is team-based, interactive, and action learning whereby the participants are asked to solve a strategic problem currently faced by his company.

Objectives

The objectives of these integrated short courses are to:

- Bring best practices in management from abroad and “localise” them in local context
- Strengthen the executives to attain the necessary strategic skills and exposure in handling management issues that they are concerned with in their own organisations.

Course structure

The program consists of 5 modular courses focusing on topical but strategic issues. They emphasize on sharing of experience and actionable ideas, plus a project at the end. The courses will be delivered by means of highly interactive workshops and seminars by business leaders and leading academics. Individual coaching accounts for half of the involvement.

Required reading: ‘ From Good to Great’

Program for Senior Consultants who need to train adults

To upgrade the knowledge and skills of new trainers to train managers more efficiently

10. Train the Management Trainer (TMTP)

Overview

Program Length

5 days (three parts)

Training managers to operate and thereby own the solutions as recommended by the consultant is a vital skill set that all effective consultants must possess. Training adults require a different set of skills and such skills are vastly different from simply lecturing to a university class or attempting to sell a product. Adults have different style of learning and incline to look for practical applications and prescriptive solutions.

Prerequisite

Consultants who have a need to train managers on a managerial topic

Objectives

Language

English or Chinese

This program will provide the fundamental knowledge and skills for consultants to be able:

Relevant Trainers

- Professors
- Master Trainers
- Accredited Trainers

- To control the training environment for a short knowledge input session for 20 managers (**Part A**);
- To design simple learning sessions using multiple tools from videos, to cases, to quizzes, to elearning, to games (**Part B**);
- To facilitate high level discussions where the syllabus and topic is vague and unstructured (**Part C**)

Part A is for those who have not trained before. Part B builds on Part A and extends the skills whereby the trainer is able to develop his/her training program. Part C is the highest form of training which calls for facilitation.

Course structure

This program is in three parts and participants are encouraged to take these courses in sequence. **Part A** is a half day and provides the trainer with a core set of useable skills and a tool bag for immediate application. **Part B** is 3 days whereby the participants will have an opportunity to design his/her own session. **Part C** is one day in length and provides the tools for the trainer to be a facilitator, not just a management trainer.

Part A:

- Symptoms of bad training
- The company doctor methodology: symptoms, prognosis, causes, and course of treatment

- Instant reminders, tips, and practices for the trainer who must train the next day
- How to build anchors, establish credibility, and set the stage.

Part B:

- How to design an instrument to assess what your clients really need to learn – the training needs analysis instrument
- The Kolb' s Learning Cycle and other adult learning models
- Instructional designs
- How to use training tools to enhance learning: videos, CBT, games, exercise, etc.
- E-learning, blended mode, and other ways to reduce learning time and increase absorption
- How to structure and design a learning module for adults on a management topic?
- How to design, write, and facilitate a case study?

Part C:

- How to get others to present their thinking?
- How to facilitate a high level management discussion?
- How to conduct a question and answering session effectively?

Deliverables

At the end of the program, participants should be able to:

- *Train other managers and be effective in getting across to the trainees what they must learn*
- *Design a simple training programs for adults*
- *Understand how to apply and use different training tools to raise training effectiveness*
- *Understand how to design a training needs analysis*
- *Achieve a higher level of trainee satisfaction*
- *Be much more flexible and versatile in his ability to train managers and be able to improvise as the learning context changes*

Program for Senior Consultants and Senior Managers

To help consultants understand how best to enhance their client's corporate governance and managerial effectiveness at the same time

11. Making Governance Work (MGWP)

Overview

Program Length

5 days

Desirable Entry Level

All directors (Chairperson included)

Language

English or Chinese, depending on the participants

Topics

- **Part A:**
 - The Cadbury Report and others
 - Working style of the board
 - The learning board
 - Issues of effective checks and balances
 - Performance versus conformance
 - The roles of the directors
 - Transparency and accountability
 - Training needs of the directors
- **Part B:**
 - IT Governance
 - GOVIS
- **Part C:**
 - Business Process Management

Real corporate governance goes beyond simple cosmetics, such as being in compliance with OECD Codes or ensuring reports are filed on time every quarter. Real corporate governance is a combination of 'layering' responsibilities whereby the management team play a crucial role and these everyday practices are the bedrocks of operational governance. Complementing the work of the board, the working level either can strengthen or weaken 'real' working governance. What does corporate governance really means in terms of operating practices for your firm? What firms really do everyday such that over the course such practices would somehow ensure that the firm continue to excel, from one generation to the next? These are relevant and questions that need to be addressed by every board.

This workshop will explore the elements which could weaken or strengthen working governance. We will look at operational risks and how they are managed. We will look at IT Governance and Business Process Renewal.

Information Technology has always assisted management to manage complexity. Again, IT will be used here. In the realm of IT, how does IT play a part? What is a governance information system (GOVIS)? How does it link to an enterprises information system and enterprise risks management system? What firms really do everyday such that over the course such practices would somehow ensure that the firm continue to excel, from one generation to the next? And how does IT play a role? These are relevant and questions that need to be addressed by every board and will be addressed at this workshop.

Objectives

To understand how corporate governance can and has affected the role as a manager at the working level, for example,

1. To understand how the everyday practices can affect corporate governance
2. To recognise how policies, which are the software of corporate governance, can be formed to enhance employee participation and buy-in to strengthening corporate governance.

Relevant Trainers

- Professors
- Master Trainers

3. To understand how governance can be weakened through the lack of enforcement of operational policies such as those for fraud, conflict of interests, money laundering, branding and ethics to name a few
4. To learn about the vulnerabilities of one's managerial position by conducting a corporate governance operational audit of the various management systems and their linkages to good governance.
5. To understand how corporate governance can be strengthened or weakened with information technology and note how the efforts and the role of a manager are being affected at the working level.

Course Structure

The program is comprised of 3 parts. **Part A** is an introduction to corporate governance with linkages to Enterprise Risks Management (ERM) and compliance. **Part B** deals with operationalizing CG through the aid of information technology and **Part C** deals with the refinement of business processes that would create the flow for continual renewal and control at the operational levels. Topics for the first 2 days include:

- What is 'True' corporate governance? The Zen of corporate governance
 - Robert Tricker's Corporate Governance framework
 - Layering in corporate governance control
 - Simons' four levels of control – boundary, diagnostics, interactive, and belief system
 - Basel II and operational risks assessment
- What does this have to do with the Corporate Governance Code?
 - Linkages among corporate governance, enterprise risks management, and compliance
- How is corporate governance operationalised? Can it be operationalised?
 - Key managerial operational risks such as fraud, money laundering, ethics, compliance, branding, policy development and enforcement, and business process reengineering
 - Development, monitoring, and assessing management policies
 - Risks management and the identifications of key risks for my department
 - Business Continuity Planning or Business Contingency Planning
- How to Operationalize CG with IT? (1 day)
 - COBIT and IT Governance
- How to renew and manage your business processes continually? (2 days)

Program for Internal Change Agents, Internal Consultants and New Trainers

To understand how to marshal and facilitate change, work with external consultants, and move beyond simple training solutions

12. Internal Consultant Preparatory Program (ICPP)

<p>Program Length</p> <p>5 days, spread over 3 months</p> <p>Prerequisite</p> <p>None</p> <p>Language</p> <p>English or Chinese, depending on the participants</p> <p>Relevant Trainers</p> <ul style="list-style-type: none"> ▪ Professors ▪ Master Trainers ▪ Accredited Trainers 	<p>Overview</p> <p>Major companies and governments have utilized successfully internal consultants to solve a host of problems that are cross-departmental, dynamic, fast changing, and difficult to define. These investigators, properly trained, often become the leaders of tomorrow because solving business problems, however complex and intertwined, belongs to the realm of senior management. Internal consultants differ from external consultants in that the former have a much broader and deeper understanding of the organization. They however, lack the depth of skills in applying tools and processes that are employed elsewhere.</p> <p>The Academy has been offering this program to a number of large organizations that have “internal” consultancy departments of their own. Numbering in the hundreds of employees, these departments, sometimes called Management Services or Internal Consulting Units, typically would have their own training programs. Smaller ones, those with 10 to 50 employees, may not be able to afford a systematic process of development. This program has been designed purposely to fill this gap.</p> <p>Objectives</p> <p>On completion of this program, managers and trainers should be able to:</p> <ul style="list-style-type: none"> • Know oneself and applying oneself more effectively as an in-house consultant; • Manage the consulting process; • Create partnership with business managers and be able to prepare proposals for solving business problems; and • Help individuals and departments deal with change. <p>Course Contents</p> <p>The program is spread over 3 months and a project is required from each student. The project is a business problem at work that must be solved by the company. The evaluation panel will include senior management of the company. As a result and by going through the systematic training program, the individual becomes a more mature and resourceful internal problem solver. The tailored training and development program should allow the candidates to:</p>
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- Be more responsive to the business needs of the clients
- Put together a proposal with a clear scope
- Able to structure a methodology in resolving business problems
- Complete a training needs assessment
- Conduct and manage a project from beginning to end
- Able to analyze pertinent facts
- Derive options for the clients to consider
- Transformed the chosen option into recommendations for implementation
- Close the project properly.

Day 1: Overview

- Understanding self, consulting skills profile
- Understanding business partners: exploring needs
- Introduction to the consulting process
- Getting the work from your internal clients
- Writing the proposal
- Collecting the information
- Conducting a training needs analysis
- Project planning and managing your team of analysts and trainers

Day 2: Systems thinking and analysis

- Mapping components to solutions
- Sorting and analyzing data
- Problem clarification
- Understanding paradigm shifts and changing mindset
- Forming methodologies
- Contracting and action planning
- Processing consultation and formulating a solution

Day 3: Quality and Processing Tools

- Organization and methods
- Business process and reengineering
- Balanced scorecard
- Fishbone diagram, 6 Sigma, others
- Organizational restructuring

Day 4: Facilitation and Intervention (2nd month)

- Presentation skills
- Presenting one's findings and recommendations
- Managing change
- Dealing with difficult people and resistance
- Professional ethics

Day 5: Designing a solution-based training program for adult learners (3rd month)

- Training needs analysis and learning paradigms
- Putting together a 45-minute learning session for adults
- The adult learner, team learning
- Integrating learning with consulting

Program for Directors and Partners

To understand what is risks management in the context of corporate governance

13. Risks Management for Directors (RMDP)

Overview

Program Length

0.5 day

Prerequisite

None

Language

English or Chinese, depending on the participants

Relevant Trainers

- Professors

Topics

- Working style of the board
- The learning board
- Issues of effective checks and balances
- Performance versus conformance
- The roles of the directors
- Training needs of the directors
- Performance evaluation of the board

A very high level workshop for directors, this workshop is about creating business value and minimising risks. Corporate governance is a set of operating good practices and involves building and maintaining management systems that would strengthen the mandate and viability of the board and the enterprise. These systems are primarily based on information. We can see that the world of information technology is intricately linked to the viability of a corporate governance system. This is the world of the governance information system.

The workshop will touch on the essence of corporate governance and how risks management plays a crucial part. The workshop works on identifying some of the key risks, including operational risks, from the perspective of the boardroom and identifying ways to control or mitigate such risks. Software that can help will be introduced. Management of risks is taken to mean the identification, assessment, monitoring, and control/mitigation of such risks. Operational risk is defined as the potential in which the key drivers of the business deviate from their strategic course.

Objectives

To understand and assess the organization' s risks at a strategic level.

Course Contents

- Risks Management
- Risks Governance
- Business Continuity Planning or Business Contingency Planning

Program for Consultants and Managers

To understand how to assess and manage risks

14. Risks Assessment and Management (RAMP)

Overview

Program Length

2 days

Prerequisite

None

Language

English or Cantonese,
depending on the
participants

This is a workshop for those who are interested in becoming novice risks assessors. The workshop will touch on a number of risk assessments, with the intent of helping the participants learn how to conduct an effective risk management audit. The workshop first works on identifying some of the key risks, including operational risks, from the perspective of management. Software that can help will be introduced. Management of risks is taken to mean the identification, assessment, monitoring, and control/mitigation of such risks and these other components will be covered as well.

Objectives

To become competent in assessing key risks.

Relevant Trainers

- Master Trainers
- Accredited Trainers

Course Contents

- Risks Management and Risks Governance
- Introduction to Threat Risk Assessment (TRA)
- What are the Critical Components of a Risk Assessment?
- Assessment Types such as Compliance, Insurance, Physical Risk/Security, IT, and Disaster Planning and Business Continuity
- Methodologies such as ASIS International, NIST, and Octave
- Tools and spreadsheets such as computer based programs, Acertus, and others
- After the TRA
- The Ongoing Process
- Business Continuity Planning or Business Contingency Planning

Program for Consultants and Managers

To have the basic tools to conduct a management systems health-check

15. Management Systems Diagnostic Program (MSDP)

Overview

<p>Program Length</p> <p>15 days (three parts)</p>	<p>Probably the most important part of consulting is defining the problem. Unless a problem can be properly defined, no amount of solution is appropriate. The better is the problem definition; logically the more appropriate would then be the solution. Consultants should not take for granted by the CEO on what were the problems that got them hired in the first place; although the inexperienced Consultant would usually fall into this trap. Consultants work around identifying problems by establishing a process of inquiry, known as an approach, to substantiate the problem and the causal loops that are bringing about the intensity of the problem.</p>
<p>Prerequisite</p> <p>None</p>	<p>Consultants would begin with a system check, sometimes known as a system audit or a health check. The health check can be a complex and sophisticated process or it can be a cursory observation. In this chapter, we will explain a well-tested and fairly robust system called a management systems diagnosis.</p>
<p>Language</p> <p>English or Chinese, depending on the participants</p>	<p>In order to perform a health-check, the Consultant would need to undertake a management audit. There are many management audit systems, but the one that we have found to be particularly useful for working in PRC is a Management System Diagnostics (MSD).</p>
<p>Relevant Trainers</p> <ul style="list-style-type: none"> ▪ Master Trainers ▪ Accredited Trainers 	<p>The MSD is a generic framework with a set of tools for assessing the maturity and quality of an organisation's governance and its management systems. Governance is introduced here as well because governance means the systems of direction and control at the highest level. All organisations need to be properly governed and managed. Governance work is often done by the Board of Directors, but not usually. Sometimes management also take on some of these delegated roles and therefore it is important that management and the board understand how the work of each would dovetail into one another. The MSD is particularly useful and applicable in a growing enterprise operating in a complex and turbulent environment and where the system of governance and management in that enterprise may be particularly weak. This is why the MSD is particularly appealing for PRC and Asia in general.</p>

Objectives

The participants will learn about the systems of diagnostics, apply the tools, and general be able to identify a course of action that would begin the healing process.

Course structure

Since the main aim of the system is to assist the Board of Directors and senior management to identify the type, extent, and complexity of the management systems that would be needed and improve upon, fifteen systems are covered. Each part covers 5 systems. All parts are a day in length.

Part A: Basic Management Systems I (5 days)

- Strategy formulation
- Policy structure
- Financial management
- General staff supervision
- Operations management

Part B: Basic Management Systems II (5 days)

- Service quality management system
- Monitoring and management information reporting system
- Change management or cultural alignment system
- Performance management and measurement
- Succession planning

Part C: Basic Management Systems III (5 days)

- Nurturing innovation
- Managing knowledge
- Managing supply chain
- Marketing
- Risks management

Deliverables

At the end of the program, participants should be able to:

- Make governance practicable and integrate it into management;
- Enable comparisons to be made to an 'ideal' model;
- Clarify roles and responsibility for the work of management;
- Provide a fair and comparable basis of evaluating and assessing the quality of management and management decisions; and
- Begin the improvement process through a series of guided steps.

Program for Consultants and Managers

To raise a consultant's understanding and perspective in how he sees the world

16. Creative Problem Solving Program (CPSP)

Overview

Program Length

2 days

Language

English or Chinese

Relevant Trainers

- Master Trainers
- Accredited Trainers

Many people find that a more creative, less rigid approach to solving problems often yields the highest quality solutions; but first, one needs to understand *what factors* make creative thinking work best. The purpose of this training course is to help you identify what factors are necessary for a productive creative problem-solving session and to provide a process for thinking creatively. Under the guidance of the tutor, the participants will have opportunities to practice some well-proven creative thinking skills individually and as members of a team, emulating situations that you often encounter in work and in everyday life.

The participants will also learn about systems thinking and how by understanding complexity and chaos the problems can be framed differently. Oftentimes the best solutions of yesterday often led to the problems we see today. This is because many problem solvers failed to see the interconnectedness of their solutions. On the other hand, complex problems also create opportunities and these problems are the source of many new innovations, which leads to more challenges that consultants would have to solve. How can businesses adapt and prosper in the new connected economy? How can organisations prepare for uncertainties and chaos? And how can consultants design in simple solution that may work in other situations, while at the same time, looking out for opportunities that may arise?

Objectives

Its main aim is to raise a consultant's understanding and perspective in how he sees the world. The session is both highly theoretical in discussion and fun, and aims to open one's mindset. It contains self-administered questionnaires and cases for analysis to build self-understanding and help participants to apply what they have learned back in the workplace.

- Develop clarity to challenges, opportunities and issues
- Find new, varied and unusual ideas to solve a problem that you have already defined, to meet a challenge or overcome a concern
- Translate interesting and promising ideas into useful, acceptable and implementable actions
- Withhold judgment while generating ideas and use affirmative judgment during focusing
- Apply idea generating tools and focusing tools during the problem solving process

Course structure and contents

This program combines two award winning courses, one based on the de Bono creative thinking process and the other on the Santa Fe Institute's complexity and chaos. *It is important for consultants to understand how sometimes the best solution in vacuum may not work in a connected world and that the second best solution is sometimes better as it evolves with the environment. A basic background in systems thinking, feedback loops, and consulting methodologies is assumed.* The contents will cover:

- Introduction to the creative problem solving process
- Creativity, your personal creativity style and attitude
- Thinking style and its effect on problem solving
- Problem definition and focusing on the issue
- Idea/alternative generation and the tools – brainstorming; logical approaches; lateral thinking tools
- Reviewing and assessing alternative solutions
- Pareto Optimality and the 80/20 solution; Process over Form
- Business and company evolution
- The complexity of innovation
- Self-organizing systems
- Analysis versus synthesis
- Managing complexity
- Network and coordination over control
- Managing in a world of chaos

Program for New Project Managers

To develop the managerial skills in managing projects that may involve the deliverables of IT solutions.

17. Project Management (PM)

Overview

Program Length

3 days

Language

English or Chinese

Relevant Trainers

- Master Trainers
- Accredited Trainers

This course focuses on training the new project manager to manage resources, budget, information technology, quality, and people. Hardly any projects today do not include the management of software and this course differs from other project management courses in its specific addition in this area. Fundamental skills to be a successful project manager will be introduced and exercised. The aim of this program is to cover essential elements in project management, with context from emerging technologies and methodologies that pertain to project management. Trainees will learn how to perform risk assessment of the project and run post-mortem meetings. Project status, tracking, performance reporting and evaluation, and the integration of sub-projects are introduced to the audience.

They will learn how to schedule project with Critical Path Methodology (CPM), apply Capacity Maturity Model (CMM) to Software Project Management, deploy Enterprise Project Management (EPM), and Project Portfolio Management (PPM) for enterprise.

Course structure

The course will involve asking the student to work on one of their current projects so that the learning can be used immediately back at work. Two days followed by a 3 day training a week after is the standard structure.

Deliverables

At the end of the program, participants will be able to:

- Understand what is project management and the roles know how to apply the skills necessary to becoming a successful project manager
- Recognize how to define a project, form a project team and take steps to successful project management
- mitigate project risk by performing project risk assessment

- Apply different compiling methods to measure project performance
- Leverage Project Constraints and Risks – perform risk management and leverage budget, resource and time to finish the project within limitations
- Manage Management Expectation – Apply different computation and chart to measure project performance
- Ensure Quality of Project Delivery – apply CMM to manage software development project. This repeatable pattern ensures quality of the project deliverables. Learn to run post mortem meeting for continuous project improvement
- Assess how to integrate disparate projects
- Recognize the benefits and drawbacks of EPM and PPM
- Obtain a collection of templates and charts to help in the collection and presentation of report.

Program for Senior Consultants, Directors, and Partners

To develop the consultancy skills in managing governance projects

18. Board & Governance Advisory Program (BGAP)

Program Length

4 days

Language

English or Chinese

Relevant Trainers

- Professors

Courses

1. Intro to CG and Self-governance audit for enterprises
2. Handling systematic growing pains in a complex and chaotic environment (1 day)
3. Operationalizing CG
4. Operationalizing CG through IT
5. Strategic human resources planning at the board level
6. Risk management for the board
7. Formulating strategic performance indicators for the board

Overview

This program aims to develop the competencies of management consultants for advising chairmen, board members and CEOs to tackle common issues facing boards and top management, particularly emerging enterprises.

Courses within this program zoom in on the importance of installing proper corporate governance systems to ensure the enterprise can continuously excel. The basic of development is systems thinking under a chaotic and complex environment and this philosophy frames the direction of the program. That is, an organisation is living entity and needs a governance structure that is both fluid and functional. There should be a respect for the need of control to assure accountability and decentralization; but there is also a need to allow for growth and matching core competencies with the changing ecosystem.

As a result, the courses will concentrate on handling the various stages of governance change as the enterprise continues to grow from one phase to the next. Topical coverage include the effectively leveraging on strategic information and IT in exercising governance; establishing decision making systems and structure, setting in place performance management systems for the board and senior managers; identifying and assessing risks and performance for the organization; and formulating strategic performance indicators using the balanced scorecard approach for the board as a whole.

Course structure

The program consists of four half-day workshops each facilitated by a professor of the Academy. Through assessment questionnaires, checklists and other tailored instruments participants learn how to carry out simple diagnosis for client boards and quickly break the ice and win the trust of boards and top management.

Deliverables

At the end of the program, participants will be better able to:

- Understand what is systems thinking, complexity, and chaos and more importantly, how to manage them
- Advise board chairmen, members and CEOs on how to evaluate the overall performance of the board under a chaotic and complex ecosystem
- Coach boards on balancing control with performance
- Inspire and prepare directors for taking on the changing roles as the enterprise grows
- Identify the board members' coaching and development needs for those performance that is best resolved through individual initiatives
- Provide guides for boards to understand the strategic value of information systems and office automation, MIS, EIS and the proper adoption of systems development methodologies
- Help boards build a simple decision making structure that would link their authority to those of the top management level of the enterprise, through the establishment of policies.
- Help boards set up a simple governance architecture for decision making, linking committees with the authority of senior management
- Support boards to formulate strategies and policies for developing executives and board members
- Show and guide board members to identify key categories of risks and apply risk management philosophies to assess and mitigate key risks
- Advising boards on how to use balanced scorecard and other approaches for monitoring overall performance of the firm

General 1-day skills refresher programs for 'soft' thinkers

To develop an understanding of complexity theory and its impact on organizational design

19. How to Navigate through Complexity and Chaos

Overview

Program Length

1 day

Language

English

Relevant Trainers

- Master Trainers

Developer

IMCHK, Dr. Gregg Li

Probably the only thing that is consistent in the world of business is the impact of change. Nothing remains static in the world of business. And because businesses face uncertainty everyday, changes are inevitable. As we move forward, we are also noting that businesses are more interconnected than ever before. A virus in Southeast Asia can have destructive impact in Vancouver within hours. The 'Butterfly Effect' is alive and well.

Often times the best solutions of yesterday often lead to the problems we see today. This is because many problem solvers fail to see the interconnectedness of their solutions. On the other hand, complex problems also create opportunities and these problems are the source of many new innovations, which leads to more challenges that consultants would have to solve. Navigating Complexity and Chaos in Management is one of the latest additions to the Academy's portfolio. The course brings the latest thinking in complexity and chaos into the realm of management; and integrates soft systems thinking with synthesis, and even Zen. This course is not for the faint hearted or those who have problems thinking in abstract terms.

For management, the course helps them understand how they can adapt and prosper in the new connected economy. They are provided with some of the methodologies used in designing flexible organisations. Managers and consultants would find the course useful in helping them understand the why's and how's in designing simple guides for complex needs.

Course structure

The module is highly participative. The session is highly theoretical in discussion, and aims to open one's mindset. It is important for consultants to understand how sometimes the best solution in vacuum may not work in a connected world and that the second best solution is sometimes better as it evolves with the environment.

A basic background in systems thinking, feedback loops, and consulting methodologies is assumed. Senior Consultants are preferred.

Deliverables

The main aim of this course is to raise a consultant's understanding and perspective in how he sees the world, and how he can possibly develop a process methodology that would be applicable under complexity for his client who operates in a dynamic world.

At the end of the program, participants will have been exposed to the following topics:

- Self-organizing systems
- Analysis versus synthesis
- The art of Zen in synthesis and management
- Managing complexity
- Network and coordination over control
- Organizations as living systems
- Managing at the edge of chaos
- The language of chaos – emergence, autopsies, attractors, etc.
- Complex adaptive systems
- The Santa Fe Institute
- Systems that can be controlled: feedback and controllable systems. Soft systems thinking.
- Systems that cannot be controlled: Pattern management and not control
- Chaotic architecture and systems control
- Examples of using complexity thinking to solve real problems
- Criticism of Chaos Theory
- The meaning of alignment, balance, and at the edge of chaos

General 1-day skills refresher program for leaders

To develop company directors, advisors, and potential advisors to SME board of directors such as company secretaries, consultants, and risks assessors.

20. How to Chair Meetings, Take Minutes, and Win Commitment

Overview

Program Length

1 day

Language

English & Chinese

Relevant Trainers

- Master Trainers
- Accredited Trainers

Developer

Charles Foley

To many managers and executives chairing a meeting is almost a weekly routine. Nonetheless, many of us do not know how to make best use of meetings to share knowledge, to enhance the quality of problem analysis and decision making through collective wisdom, and to gauge and secure commitment. A capable boss is able to make use of meetings to keep staff members updated, solicit ideas, set out 'balloons' to 'test the waters', explore optimum solutions to tough problems, promote trust, establish reciprocity, and win commitment.

Course structure

Highly interactive and exercise driven, the course has been designed to offer each participant an opportunity to run a sample meeting, get constructive feedback from observers and other participants, and identify ways for remedial improvements. Cases, role-plays, and examples will be employed.

Deliverables

At the end of the workshop participants should be able to:

- Enhance one's ability to chair and run meetings
- Prepare better for meetings: setting meeting agenda, assigning specific roles in meetings for optimum process and results, and providing needed information in good time for people to get prepared
- Help others increase their commitment to the problems at hand.

At the end of the program, participants will have been exposed to and participated in these action areas:

- Chairing meetings
- Keeping meetings under control and yet promoting an open atmosphere that induces people to participate

- Stimulating input and feedbacks from all relevant parties in meetings, ensuring that everyone has the opportunity, and yet maintaining a proper balance over the process
- Handling conflicting situations in a positive way and finding a way forward
- Taking stock of discussions; summarizing at proper intervals
- Seeking clear decisions at appropriate points
- Keeping good time control
- Taking precise key notes at meetings and writing up proper minutes with clear action assignment
- Skillfully using meetings as occasions for cultivating team spirit and building teams
- Selling resolutions to staff to gain understanding, acceptance, assume ownership and enhance their sense of commitment

General 1-day skills refresher program for salespersons

To be able to develop a winning strategy in asking people for money

21. How to Write a Proposal for that Million Dollar Contract

Overview

Program Length

1 day

Language

English & Chinese

Relevant Trainers

- Master Trainers
- Accredited Trainers

Developer

Dr. Gregg Li

Persuading clients and your superiors to accept the merits of one's idea is an important competency for all successful marketers. One cannot be successful if one cannot put across a decent and convincing proposal. Whether your role is to get that project, secure an assignment, support a department, or convince a certain bureaucracy, the ability to influence through a written proposal is paramount to success. The buyer may not see or know who is the proposer, but he will come to recognize his professionalism through his writing. Writing a winning proposal is often the first step towards forming a positive impression.

Course structure

Participants will have ample opportunities to critique the work of others and be given an opportunity to develop one's own. Short lectures, real examples, cases, exercises, and a series of supporting documents will help the writer put together a winning strategy and a proposal.

Deliverables

Having attended this 1-day session, the participant will have acquired a useful set of first references in developing their winning proposals. The session will cover these topics:

- How to make a proposal look more professional?
- How to get on a client's radar screen?
- How to manage a client's expectations?
- How to write to express, not to impress? Using the right words.
- How to structure a proposal, in a logical and coherent manner?
- How not to write a proposal?

At the end of the program, participants will have been exposed to and participated in these action areas:

- How to get on a client' s RFP list?
- How to distinguish the hidden from the obvious agenda?
- How to structuring the proposal – key elements of this selling document?
- How to write to express and to impress – English diction, style, and grammar?
- How to move clients from buying to advocacy?
- 10 ways to destroy trusts

General 1-day skills refresher program for professionals

To look apart and build a professional level of confidence

22. How to Project a Professional Image

Overview

Program Length

1 day

As human beings we quickly form first impressions of the person we see, hear, touch, and smell. There is no second chance to make a first impression. As a potential candidate is short-listed from hundreds of CVs, s/he is asked to visit the office or to join the team in an informal get together where these first impressions are made.

Language

English & Chinese

Knowing how to project a professional image is important for many reasons. Besides tangibles, professionals often sell intangibles. They sell promises of the products to come. It is these intangibles (e.g. trust that one generates in clients, self-image of knowing what one's doing, etc.) that distinguish a professional from an amateur. All clients, whether they are external or in-house, have immense difficulties in understanding these intangibles and often do not see the value in paying for such intangibles. Unless as professionals we can project that value of the intangibles individually and collectively, we will not be able to secure employment and contribute to our employer by being a professional. Clients do pay for the services of professionals, and professionals only. Therefore, a positive professional image adds that much value for our clients and for our potential employers. All employers look for this intangible quality.

Relevant Trainers

- Master Trainers
- Accredited Trainers

Developer

Dr. Henry Au

A professional image is established over time, through diction, our discourse, our presentation, or looks, our perspectives, our qualification, our competencies, and our beliefs of being a professional. Every moment creates an opportunity where that image can be strengthened or weakened. Professionals who work with and for management are continually being assessed by our clients on the manner with which we conduct ourselves. How we project ourselves in an interview, in small groups and discussions, and how we value other people's professional opinions say a lot about our professional image.

Course structure

Participants will have ample opportunities to critique self and the appearance of others. Highly interactive and fun, participants will have ample opportunities to take pictures and share. Bring your own digital camera. Short lectures, real examples, exercises, pictures, and a series of reference guide will help the professional put together a winning portfolio.

Deliverables

At the end of the program, participants will be able to acquire useful examples leading to further practices in these action areas:

- Understanding one' s projected image, what part of it is desirable and what is not;
- Knowing and recognizing what is indeed a professional;
- Knowing how to observe things more closely (be more aware of a professional surrounding);
- Learning how to dress professionally;
- Building and maintaining a strong sense of self-esteem;
- Behaving ethically and proper;
- Learning the importance of managing time wisely;
- Being more assertive;
- Learning how to manage stress at work and maintain a balance of life style;
- Being able to project a positive professional image; and
- Looking smart and appropriate for the job you are vying for and for various work situations you encounter .

General 1-day skills refresher program for professionals

To manage oneself against the limitation and the perception of limited time

23. How to Manage Time Wisely

Overview

Program Length

1 day

Language

English & Chinese

Relevant Trainers

- Accredited Trainers

Developer

Charles Foley

Managers nowadays find themselves working harder and harder daily but still do not have enough time to finish their own tasks. When things like that happen, it may sometimes seriously damage the reputation of the companies and the managers themselves, not to mention the monetary impacts. Good time management can help managers utilize their time more effectively, prioritise and plan ahead their schedule and thus block out sufficient time to accomplish their tasks. The need is more obvious for project/production managers who normally have very tight schedules and lots of unexpected interruptions.

For a consultant, whether s/he charges by time spent on the client's assignment or by the achievement of specified deliverables, their only assets are expertise and time. Expertise can be enhanced but time is finite. Both for their clients' sakes and for their own consultants have to learn how to make the best possible use of the time available to them.

The program covers the principal techniques of time management and organization for the professional manager and consultant with simple yet practical ways to squeeze more out of the day. **The program is designed for all those who want to get more out of their days and work more effectively under less pressure.**

Course structure

Participants will have ample opportunities to critique self and the time keeping of others. In-tray exercises will be used to illustrate the importance and practices of prioritization. The program requires some pre-work plus self-assessment and exercises on the program itself:

- The principal time wasters and how to manage them
- Simple scheduling techniques and self-management
- Urgent vs. important and dealing with paperwork

Deliverables

At the end of the programme participants will understand how to :

- Identify and deal with the main consumers of time
- Organize time of oneself and of others efficiently
- Prioritize and delegate

The following topics will be covered:

- Time log
- Task prioritising
- Controllable/uncontrollable time
- Rules of delegation
- Avoiding/controlling interruptions
- Self organisation
- Chargeable hours
- Activity based costing
- Keeping a diary

General 1-day skills refresher program for managers

To be able to work with, cooperate, and gain the trust of the media

24. How to Manage the Chinese and English Media

Overview

Program Length

1 day

Language

English & Chinese

Relevant Trainers

- Master Trainers
- Accredited Trainers

As the world becomes more global and transparent, managers are increasingly being asked to manage a media-oriented business world. Frequently they are asked to face the press, talk with the reporters, and tell the company's side of the story. It's not easy...and preparation is always too late somehow.

To resolve this issue, AMC has invited leading media experts to introduce a newly developed program on managing the media for managers. This program uses TV crew to simulate a live environment. This program promises to be highly interactive and revealing! Press in general, radio, television, and other media will be explored and participants will do role-plays.

Developer

Nina Hansen

Course structure

Participants will have ample opportunities to critique self and the performance of known celebrities. Highly interactive and fun, participants will have ample opportunities to take pictures and share. Bring your own digital camera. Short lectures, real examples, exercises, pictures, and a series of reference guide will help the professional put together a wiring portfolio.

This is fundamentally an introduction course for managers who will have to come in contact with the media. Young executives, managers, and senior managers needing a refresher or those who will become the spokesperson for their company.

Deliverables

At the end of the program, participants will be able to acquire useful examples leading to further practices in these action areas:

- Understanding one's projected image, what part of it is desirable and what is not;
- Knowing and recognizing what is indeed a professional;

- Knowing how to observe things more closely (be more aware of a professional surrounding);
- Learning how to dress professionally;
- Building and maintaining a strong sense of self-esteem;
- Behaving ethically and proper;
- Learning the importance of managing time wisely;
- Being more assertive;
- Learning how to manage stress at work and maintain a balance of life style;
- Being able to project a positive professional image; and
- Looking smart and appropriate for the job you are vying for and for various work situations you encounter .

General 1-day skills refresher program for SMEs

To be able to design a simple governance architecture to institutionalize growth and control

25. How to Build the New Governance Structure for a Young Small and Medium Enterprise

Overview

Program Length

1 day

Language

English & Chinese

Relevant Trainers

- Master Trainers
- Accredited Trainers

Developer

Gregg Li and Robert Tricker

Corporate governance for small and medium enterprises often means a totally different thing. What are considered important attributes such as transparency, independence, and accountability for large multinationals can become the trigger that will start the SME's demise. Ask any banker how relevant is corporate governance in a realistic lending decision to an SME and the probable answer is 'not very'.

But building and institutionalizing the company systems and structure that would be both adaptive and workable is a challenge for the consultant, the venture capitalist, and the SME owners.

Good corporate governance is about finding and practicing a balance between conformance and performance and real corporate governance is about sustainability, sustaining the SME from one generation to the next. One definitely does not want a restrictive system that would prevent further growth of the company. The key is how corporate governance should be operationalized at working level such that the SME can move from this generation to the next? Good corporate governance is initiated by the right kind of leadership that can balance risks with entrepreneurship, set in place with the right set of culture. Good corporate governance is a way of life, not a set of codes framed onto the wall of our corporate office. Such ways of life in many ways encapsulate the ways of life of our young corporate leaders.

Course structure

Participants will have ample opportunities to critique self and the governance of others. Highly interactive and practical, participants will have ample opportunities to share and work on one's own set of problems. The introductory workshop will have exercises, short cases, and participants will work through self-analysis instruments. Sharing and discussion of experience is mandatory.

Deliverables

At the end of the workshop participants should be able to:

- Understand how young SME boards should balance control with nurturing entrepreneurship;
- Balance the contribution of independent and non-independent directors during the formative years and understand the conflicting roles they should play; and
- Lead with integrity and nurture the culture through setting working examples at the early stages.

At the end of the program, participants will have acquired useful examples leading to further practices and understanding in these action areas:

- What is the definition of corporate governance for SMEs? Operationalizing it on a day-to-day basis.
- Why for many small firms director independence is not very relevant?
- How to structure the company with governance, and thereby raising the ability for fund raising?
- UCLA Professor Flamholtz's seven layers of organizational development.
- Designing a minimum set of architecture.

General 1-day skills refresher program for managers

To begin identifying how to establish stronger internal control measures

26. How to Enhance Internal Controls at the Managerial and Supervisory Levels

Overview

Program Length

1 day

Language

English & Chinese

Relevant Trainers

- Master Trainers
- Accredited Trainers

Developer

Gregg Li, Certified Financial Consultant and CISA; and C. K. Cho, Certified Fraud Examiner and Barrister-at-Law

Internal control is a process, initiated by an entity's board of directors, management and other personnel. It is designed to provide reasonable assurance regarding the achievement of objectives in running an effective and efficient operation, reporting financial information reliably, and in compliance with certain laws and regulations.

At the managerial and supervisor levels, as the board cascades it internal control through a network of counter-checking mechanisms including through the internal auditor, audit committee, and the external audit, there are certain facets which primarily place the onus on management. These may include:

- the propriety of transaction,
- reliability of management information,
- compliance with company policies relating to risk management,
- the safeguarding of core assets, and generally
- prevention and detection of fraud
- how their audit function can be run with more economy and efficiency.

Course structure

The introductory workshop will have exercises, self assessment evaluation tools, short cases, and participants will work through the tools to gain a much better understanding of internal control and their roles in it. This course should be followed-up with a course on risks management and another on fraud prevention and detection.

Deliverables

At the end of the course, have a better understanding of the most common types of fraud offences and the respective powers and procedures and how an internal control officer can operate effectively within the constraint of the relevant legislation including the Hong Kong Bill of Rights Ordinance and the Personal Data Privacy

Ordinance, the respective Code of Practices and evidential procedures. Participants should be able to:

- conduct a simple evaluation of their work environment;
- design simple process to achieve and measure quality which would lead to better control;
- establish a foundation for further learning into risks management, fraud detection and prevention, corporate governance, and other areas of control; and
- understand the manager' s and supervisor' s role in making up the framework of internal control that was cascaded from the Board to the front line.

Topics covered would include:

- Control environment, morale and its impact on self control, ethical values and integrity, and value statement
- The Audit Committee
- Simple risk assessment
- Control activities such as policies and procedures
- Various levers of internal control and their responsibilities – reporting, monitoring, and communication
- SOX 404, Basel II, and the Committee on Sponsoring Organization of the Treadway Commission (COSO) internal control framework.
- US Foreign Corrupt Practice Act and implications on dealing with multinationals
- Information, feedback, and monitoring
- Employee surveillance
- Limitations of internal control
- Operational fraud
- Segregation of Duties
- New control models under reengineering, TQM, and self directed work teams (the "Coactive' model).

General 1-day skills refresher program for managers

To become much more sensitive and aware of potential fraud activities

27. How to Prevent and Detect Fraud and Enhance Compliance

Overview

Program Length

1 day

Language

English & Chinese

Relevant Trainers

- Master Trainers
- Accredited Trainers

Developer

C. K. Cho, Certified Fraud Examiner and Barrister-at-Law

The key to effective corporate governance is having a robust system of fraud detection and prevention so as to protect the company's assets and to prevent loss. As with any crime prevention strategy, in turn, the key to minimising the risk of fraud lies in understanding why it occurs, identifying business areas that are at risk and implementing procedures to address vulnerable areas. According to a fraud expert, *"Fraud generally occurs when someone has identified an opportunity, a weakness in the company's systems, and believes that the potential rewards will outweigh the risk should he be caught."*

The first step towards combating fraud is to recognise the many different forms that it can take. Although the facts are never quite the same in any two cases, there are always certain features in common. The aim of this training program is to help raise the awareness and sensitivity of managers towards fraud so as to enhance compliance. For instance, typical frauds involve an intentional and unlawful misrepresentation that is to the detriment of the business. There are several categories: **theft** (the removal or misappropriation of cash or assets to which he is not entitled); **false accounting** (falsifying the results of the operations with the aim of presenting it in a better light); and **intent to defraud** (sending computer viruses including Trojan Horses using stolen email IDs).

To minimize fraud, companies need to do three things: firstly, that the opportunities do not arise; secondly, that the person committing potential fraud believes that he will be caught; and thirdly, that the consequences of being caught are severe. How these can be set in place and maintained will be explored in this program. Furthermore, identifying the key controls over the company's assets is best achieved by understanding the business processes, how different types of fraud could be perpetrated and by whom. Then management must examine the key controls that prevent fraud from occurring in each of the business areas and how effective those controls are. The program aims to cover these areas.

Course structure

Participants will have ample opportunities to critique their own system and those of others. Highly interactive and practical, participants will have ample opportunities to learn through real cases.

Deliverables

At the end of the program, participants will be able to acquire useful examples leading to further practices and understanding in these action areas:

- Common Features of control system, including
 - Why control system does not work?
 - Internal fraud
 - Segregation of duties
 - Rotation of posts
 - Recruitment - proper selection and vetting - financial background checks
- The Role of the Fraud Detection Team: core competencies of internal control professionals
- How to execute an anti-fraud strategy and related procedures
- How to manage the legal and human resource issues resulting from the discipline and/or prosecution of an offending employee or third party and any subsequent criminal or disciplinary proceedings such as the recovery of stolen assets
- Elements of the most common types of fraud offences including those relating to the unlawful use of computer and internet
- Powers and investigative procedures
 - Rules on debriefing of suspects
 - Interview techniques: The Prisoner's Dilemma
- Ethical education and communication at all levels
- Monitoring of Employee action and successful prosecution
 - ICAC Powers of Investigation Prevention of Bribery Ordinance (POBO)
 - Police Powers under the Organized and Serious Crimes Ordinance
 - Rules and Directions for the Question of Suspects and the Taking of Statements
 - Admissibility of Evidence including Confession and Documentary evidence

- The legal considerations
 - The statutory offence of Conspiracy S159A Crimes Ordinance
 - Common Law Conspiracy to Defraud
 - Special Rules of Evidence relating to Conspiracy
 - False Accounting S.19 Theft Ordinance
 - Fraud-S16A Theft Ordinance
 - Forgery S.71 Crimes Ordinance
 - S.9 Prevention of Bribery Ordinance Accepting/Offering an Advantage
 - Offence of Deceiving his principal by false receipt, account or other document S.9(3) POBO

(Note: Additional Offences such as Money Laundering; certain offences under the Securities and Futures Ordinance, Banking Ordinance or Company Ordinance may be included to meet the needs of the course members.)

General 1-day skills refresher program for managers

To be able to turn disciplinary opportunities into development opportunities

28. How to Discipline Staff in China

Overview

Program Length

1 day

Language

English & Chinese

Relevant Trainers

- Master Trainers
- Accredited Trainers

Developer

Gregg Li and Charles Foley

Effective corporate governance includes setting in place a fair and sufficiently transparent system of reward and punishment. Both must be in balance for the overall system to work. However, in a minority of cases the punishment aspect has not been thoroughly thought through, resulting in a good deal of misunderstanding, and sometimes leading to embarrassing PR events that could have been prevented. Such activities would undermine the value of the brand and the shares.

This program deals with various ways and means a manager can use to discipline the staff, with the intent of saving the individual from making further problems for him and for the organization. The infamous case of a Nike factory in China whereby factory managers forced their employees to physical punishment, eventually leading to stronger calling to GMP compliance, dismissal of corporate leaders, and even tarnishing the good brand name of Nike.

The aim of discipline is not to punish, but to take an advantage of an opportunity to turn the employee to become a more productive employee. There is no one set of best practices because of the regional differences among the Chinese culture, but there are 'accepted' local and global practices. This program will explore these and provide some suggestions for the manager.

Course structure

Highly interactive and practical, participants will have ample opportunities to share and work on one's own set of challenges. This functional workshop will have exercises, short cases, and participants will work through a self-analysis instrument and personality tests. Sharing and discussion of experience is mandatory.

Deliverables

At the end of the workshop and with sufficient practices, participants should have more confidence in:

- Disciplining employees;
- Turning problematic employees into strong performers;

- Being in alignment with the legal requirements and best practices; and
- Creating a culture that has strict but fair disciplinary actions.

At the end of the program, participants will have acquired useful examples leading to further practices and understanding in these action areas:

- The meaning of being Chinese
 - Face issue
 - Regional differences on corporal punishment
 - Culture and language
- Corporate governance, corporate social responsibility, human rights, and codes of business conduct
- Global Manufacturing Principles (GMP)
 - Code Implementation
 - Monitoring and Audit
- International labor standards and child labor laws
- Hong Kong and Chinese labor law and applications
- Situational discipline -- sweatshops, factories, and other establishment where discipline can be predominant; and where it is not the norm
- Powers and investigative procedures
 - Rules on debriefing of suspects
 - Punishment norms and no-no's
- Ethical education and communication at all levels
- Monitoring of employee action and successful prosecution
 - ICAC Powers of Investigation Prevention of Bribery Ordinance
 - Police Powers under the Organized and Serious Crimes Ordinance
 - Rules and Directions on question of suspects
 - Admissibility of Evidence
- The manager's personal liability
 - Slander and libel

General 1-day course for Senior Consultants & Managers

To understand how corporate governance can be strengthened or weakened with information technology and note how the efforts and the role of a manager are being affected at the working level

29. How to Operationalize Corporate Governance through IT (OGIT)

Overview

Program Length

1 day

Corporate governance is about creating business value and minimising risks. Corporate governance is a set of operating good practices and involves building and maintaining management systems that would strengthen the mandate and viability of the board and the enterprise. These systems are primarily based on information. We can see that the world of information technology is intricately linked to the viability of a corporate governance system. This is the world of the governance information system.

Prerequisite

Risks Management,
Corporate Governance

Language

English or Chinese,
depending on the
participants

But a typical board is often very busy; much of governance work and processes is actually performed everyday by the management team. This is called Operationalizing corporate governance. True CG can and do create value...if the systems work; while cosmetic CG is just that. Fraud, conflicts of interests, money laundering, branding, IT Security, compliance, business process reengineering are all examples of key operational risks. Operational risks should be defined as the potential in which the key drivers of the business deviate from their strategic course. Management of such key risks is taken to mean the identification, assessment, monitoring, and control/mitigation of such risks.

Relevant Trainers

- Professors
- Master Trainers

Information Technology has always assisted management to manage complexity. Again, IT will be used here. In the realm of IT, how does IT play a part? What is a governance information system (GOVIS)? How does it link to an enterprises information system and enterprise risks management system? What firms really do everyday such that over the course such practices would somehow ensure that the firm continue to excel, from one generation to the next? And how does IT play a role? These are relevant and questions that need to be addressed by every board and will be addressed at this workshop.

Objectives

To understand how corporate governance can be strengthened or weakened with information technology and note how the efforts and the role of a manager are being affected at the working level, for example,

1. To understand how the everyday IT practices can affect corporate governance
2. To recognize how IT policies and systems can be formed to enhance employee participation and buy-in to strengthening corporate governance.
3. To understand how governance can be weakened through the lack of enforcement of operational IT policies such as those for fraud, conflict of interests, money laundering, branding and IT Security to name a few
4. To learn about the vulnerabilities of one's managerial position by conducting a corporate governance IT operational audit of the various management systems and their linkages to good governance.
5. To review how various Quality Control Methodologies which contribute to efficiency and quality data through process re-engineering.

Course Content

- Governance Information System or GOVIS
 - IT governance
 - COBIT
 - IT security
 - Data security, integrity, and fraud
 - Business Nodes Grid
- IT principles, architecture, infrastructure, business applications
- How is corporate governance operationalized? Can it be operationalized?
- Business Continuity Planning or Business Contingency Planning

Special 2-day new skills program for managers

To be able to identify, streamline, and integrate business processes

30. How to Renew & Manage Business Processes Continually

Overview

Program Length

2 days

Language

English & Chinese

Relevant Trainers

- Professors
- Master Trainers
- Accredited Trainers

Developer

Gregg Li and Simon Chan

Strong companies are able to refine their business processes on a continual basis. Lesser companies are able to do so through a business process re-engineering effort, which is typically offered as a one time shock treatment to the establishment. The first thing two companies going through a merger must do is to integrate and align their core business processes, because failure here would mean the failure of the merger. In fact, a reason why the majority of mergers do fail is that this step was not managed well, and more importantly, not managed on a continuous basis.

This course is not about re-engineering, but focuses on understanding the fundamental element of the latest Business Process Integration Management (BPIM) tool set and identifies the characteristics of the new BPIM that make it unique and stand out from other related technologies.

About four years old, the BPIM system is the latest process technology from California. Consultants would be learning the principles and concepts behind BPM and would be able to deploy BPIM as an enterprise survival kit, with the aim of improving the flexibility and adaptability of the company. By deploying BPIM, consultants will be able to identify and configure business processes to align with company' s mission and overcome the current crisis.

Course structure

Highly interactive and practical, participants will have ample opportunities to share and work on one' s own set of challenges. This functional workshop will have exercises, short cases, and participants will work through an exercise. Sharing and discussion of experience is mandatory. A step-by-step approach to demonstrate Business Process Integration Management as a vital process to a troubled company in today' s dynamic market will be illustrated in the workshop.

Deliverables

At the end of the course, participants could discover the true business value of BPIM. Participants should be able to identify processes for BPIM analyses which would integrate resources, technology and processes. Participants should be able to:

- Understand different technologies that are available for enhancing the business processes and automating business practices;
- Recognize the process improvement methodologies;
- Understand the purpose and pillars of Business Process Management System;
- Realize different BPIMS deploy strategy leveraging with existing IT investment;
- Identify the key concepts and ingredients to be deployed for business process improvement;
- Outline the main principles that are used for modeling, designing, analyzing, and reporting the business process;
- Understand the benefit of BPIM and how to create the value out of BPIM with BPIMS for organization;
- Assess and evaluate existing enterprise situation for applying proper BPIM deployment strategy for the enterprise; and
- Receive a collection of templates which should help the consultant to collect information regarding business processes for improvement.

General 1-day skills refresher program for new PMs

To be able to turn clients into advocates and problems into opportunities

31. How to Manage the Client and Implementation

Overview

Program Length

1 day

Language

English & Chinese

Relevant Trainers

- Master Trainers
- Accredited Trainers

Developer

Charles Foley

Managing the expectations of the client and working with his team to install a system are probably the two most difficult tasks for a junior project manager. The process begins and ends with a client and managing this relationship is vital to having a successful project. Before one can start to understand the client's problem, it is imperative one understands and appreciates how they see their world.

The process of client management runs the gamut from orientation to closure. In this one day workshop, the participants will focus on how the consultant should need to build the bridges and communications channel with the client's team over the length of the assignment.

Course structure

Highly interactive and practical, participants will have ample opportunities to share and work on one's own set of past challenges. Short cases and role plays will be used, and participants will work through a self-analysis instrument and possibly personality tests. Sharing and discussion of experience is mandatory.

Deliverables

At the end of the workshop and with sufficient practices, participants should have more confidence in:

- Building and maintaining the client relationship
 - The first meeting – establishing client needs
 - Keeping the client informed – the no surprise policy
- Dealing with difficult clients
 - The demanding client and the low skilled client
- Implementation
 - Sharing the responsibilities, gaining support and commitment
 - Setting up the project team.

General 2-day refresher program for problem solvers looking to enhance their sensitivity and awareness of culture and organizational politics

To be able to understand and measure culture and climate more objectively

32. How to Assess Organizational Culture and Climate

	Overview
Program Length	<p>The culture and climate of an organization can be significant obstacles to a consultant and problem solver. Culture and politics often sets the style within an organization. Politics, although discouraged, is real and can often undermine any process of change. Unless a problem solver can become more attuned to politics, without getting involved himself, he/she will not be able to effect changes as effectively. Should the problem solver have limited understanding of the concepts or lack the ability to determine the climate or culture this is likely to make his/her work much more difficult.</p> <p>Every one of us spend more than a third of our waking hours at work. Research has shown that enjoying one' s work do contribute to higher levels of productivity; but more importantly, higher sense of achievement and job satisfaction. In highly stressful environments, achieving a favorable work climate is a tougher challenge because the workers are constantly being bombarded with conflicting objectives and tight deadlines. How to create a favorable work climate is aimed to help problem solvers particularly managers understand the levers that they can use to improve a work climate.</p>
2 day	
Language	
English & Chinese	
Relevant Trainers	
<ul style="list-style-type: none"> • Master Trainers • Accredited Trainers 	
Developer	
Charles Foley, Henry Au, Gregg Li	

Course structure

With this in mind the developer has produce a learning event that is largely experiential utilizing role plays, simulations, and case studies. Highly interactive and practical, participants will have ample opportunities to share and work on one' s own set of challenges.

This how-to session has three modules: A, B, and C.

- **Module A** will deal with diagnostics, or learning how to identify favorable and unfavorable work climates and culture particular for an organization.
- **Module B** deals with understanding the causes of the factors contributing to work climates and culture; and
- **Module C** deals with laying down a course of treatment that would move the unit from an unfavorable one slowly

to a favorable one, that is, learning how to build an environment that would encourage and sustain a favorable work climate and culture.

- Politics and the recognition of politics will be addressed and put into perspective during each module.

At the end of the three sessions, the participants should be able to be much more cognizant of the factors that are contributing and weakening a favorable work climate and culture. They will have some of the tools to help them set the climate back in the right directions should they choose.

Deliverables

At the end of the workshop and with sufficient practices, participants should have more confidence in understanding and determining the levels of:

- Organizational culture and climate
 - The impact of organizational culture for the consultant
 - Assessing culture and climate, and possibly politics
 - Understanding what is politics and the reasons why they exist
 - How to align the politics so they all point to a favorable direction
 - Main types of culture and how to deal with them
- National culture, management consulting, and problem solving
 - Models of culture for use by the consultant
 - Authors: Geert Hofstede, Charles Handy, Gordon Redding, John Child, Michael Bond, and other writers of Chinese culture
 - The impact of culture on management and organization
 - Consulting in Asia, particularly China and Hong Kong

General 2-day skills refresher program for those who must deal with other people on a working basis

To be able to turn engagement into joint problem solving opportunities

33. How to Enhance a Problem Solver's Interpersonal Skills

Overview

Program Length

2 days

Language

English & Chinese

Relevant Trainers

- Master Trainers
- Accredited Trainers

Developer

Charles Foley for IMCHK

Possessing a strong set of interpersonal skills is a requirement of all effective consultants. This skill set however is particularly alien to the analytical, quiet, and systematic type of individuals. Because management problems are always situational and contextual, how the client sees the problem has an immediate and relevant impact on the solution and how the solution would be implemented.

This module is a basic program in interpersonal skills but is designed for the consultant. It focuses on:

- How others see the consultant as an individual – using for example the Johari Window
- How to build the relationship with the client
- Building and running an effective consulting team – where there may be both consultants and client staff
- Persuading the client (including client staff) to accept the consultant's recommendations.

Course structure

The module would be mainly experiential with only short inputs from the tutor. Learning will be assisted by exercises and questionnaires to provide personal reflection, feedback, role plays, and exercises to build skills.

Deliverables

At the end of the workshop and with sufficient practices, participants should have more confidence in:

- Sharing one's idea in a positive way, without being seen egoistical or dogmatic;
- Turning problematic employees into strong performers;

- Appreciating the point of view of others, with an intention of listening and understanding the other person's point of view before imposing on them our own point of view; and
- Building the confidence needed to influence and persuade.

The contents would include:

- One to one with the client
 - Personal style and impact on the client – others perceptions of you
 - Questioning and listening skills
- Working in teams
 - Group dynamics and group roles
 - Facilitation skills and team leadership
- Influencing and persuading
 - Body language and building rapport
 - Using personal skills

Program Leaders

Brief bio of program leaders

Program Leaders	Qualifications & Career History	Core Expertise	Historical Company Association
Sample Professors :			
Chen, Yegin	Ph.D MIT		
Foley, Charles, CMC	BA <i>Liverpool</i> , MBA <i>Liverpool</i> Institute of Personnel & Development	Managerial Competency; Change Management; Strategic Formulation, Practice Management	KPMG, Price Waterhouse (UK), G. Li & Company, Birmingham University, University of Hong Kong
Gable, Guy	BSc <i>Alberta</i> , MBA <i>Ontario</i> Ph.D. <i>Bradford</i>	Consultancy, IT Strategy, Systems Development	Queensland University of Technology, Visiting Professor, HKU, Price Waterhouse Management Consultants (Australia), Woods Gordon Management Consultants (Canada), Northern Transportation Co Limited (Canada)
Gaeta, Gordian, CMC	Ph.D, <i>Vienna</i> , MSc <i>Salzburg</i> . FIMC	Strategy, Mathematics, and General Management	Booz Allen & Hamilton, Standard Chartered Bank, Spicer and Oppenheim, Yenji
Goodstadt, Leo JP, CBE	Adjunct professor in the School of Business Studies, Trinity College, University of Dublin, and HKU.	Policy and Public Sector, Strategy, and Banking	Hang Seng Bank, Standard Chartered Bank and N. M. Rothschild, NatWest, HKSAR Government Efficiency Unit, PCCW, Deputy Editor of Far Eastern Economic Review.
Ho, Alfred, CMC	BSocSc, GDMS, MBA <i>HK</i> , MScIS <i>HK PolyU</i> FIIM, FITP, FIMC, NVQ Development Advisor, Assessor & Internal Verifier, <i>Oxford</i>	Management Development, Managerial Competency; Trainer's development, creative problem solving	Hay Group, G. Li & Company, Vocational Training Council, PKKI, HKU, HK PolyU, Hutchison-Whampoa
Horner, David	Ph.D., Fulbright Scholar	Education, Management English	Michigan State University, Hong Kong American Center, CUHK
Hough, Mike	BA, <i>Macquarie</i> ; B. Eng, <i>USW</i> ; MA, <i>New England</i> , Ph.D. <i>Georgia</i> USA. FACE, FAIM, FACEL and Past National President of Australian Council for Educational Administration (ACEA)	Applying Quality Management Techniques to the Professional Services Sector. Human Resource Management, with a particular emphasis on Staff Development, Career Stages, Job Satisfaction, and Performance Indicators.	Michael retired from Full Time employment at the University of Wollongong in 2002 and has worked as a Professorial Fellow in the Business School and the Faculty of Education 2002-2005. Michael is a Professorial Fellow of the Educational Leadership Institute of the University of Lincoln, appointed in 2002. He is a Professorial Fellow of the IC2 Institute of the University of Texas at Austin Texas, appointed in 2001.
Li, Gregg, CMC	BA <i>Washington in St. Louis</i> , MA <i>UH</i> , MBA <i>UCLA</i> ; Eng. D, <i>Warwick</i> FIIM, FIOD, FIMC	Organization Development; Corporate Governance; Strategy	American Express, Citibank, Coopers and Lybrand, University of Hong Kong, US Government, G. Li & Company.
Redding, Gordon	MA <i>Cantab</i> , PhD <i>Manc</i>	Change management, culture.	INSEAD; Honorary Professor, HKU

Tricker, Robert	MA <i>Oxon</i> , DLitt <i>CNA</i> FCA, FCMA, FHKSA, FIMC	Corporate Governance; Finance and Accounting	Oxford, Harvard, HKU. Honorary Professor, HKU, Warwick U & Exeter
Tsui, Alec	BS, MS, <i>Tennessee</i> . Cert. <i>Harvard</i> .	General Management, Strategy, and New Venture	Hong Kong Stock Exchange, Securities and Futures Commission, Anderson Consulting, WAG
Vieira, Walter CMC	FIMC. Northwestern University Visiting Professor	Marketing Strategy, consultancy, and Branding	Marketing Advisory Services (India). Boots Pharmaceuticals, Glaxo, Warner Lambert, Worldwide fund for Nature. Former Chair of ICMCI.
Wallin, Ted	BA, MA, MBA, Ph.D., <i>Cornell</i>	Supply Chain, ERP, Quality	Syracuse University, USA; HKUST, HKU.
Master Trainers and Accredited Trainers (Partial List)			
Au, Henry	BA MBA, Ph.D. <i>UH</i>	Strategy, political science, risks management	the State of Hawaii Government (US), the Hawaii Department of Business, First Hawaiian Bank (US), the State of Hawaii Office (Hong Kong), New World Group, China Development Corporation, Television Broadcasts Limited
Barr, Jeremy, CMC	MSc <i>London</i> , DMCC, <i>HKU</i> . FCA, CPA, FHKSA	Strategy, Accounting, Finance	Inchape, Lecturer at the University of Hong Kong; Consultant at Baker Tilly; Director at Stratcon International. Partner at BKR Lew & Barr.
Chan, Michael	PhD. <i>Poly</i> .	Systems Engineering, Systems Thinking, ERP	Polytechnics University
Chan, Simon	BS <i>UCLA</i>	IT corporate governance, internet strategy, project management	Strategy and management system designed at Symantec (Norton), Mitsubishi Electronic, Tornado Development, US Interactive, Choice Point, and Luckman Interactive (US)
Chan, Tony	BBA <i>UH</i> , MBA <i>Houston</i>	Business development, venture capitalist, corporate turnaround	Lecturer, HKPC, Employee Retraining Board, Harriott-Watt University (England), American Business Institute (Houston); Opening University (HK), Open Learning Institute
Cheung, D S	LLB, LLM <i>London</i> Practicing law in Singapore, Australia, England and Wales, and Hong Kong	Corporate Finance, Finance, China Investments	Senior Partner, D S Cheung & Co; Lovell White, Barclays Merchant Bank.
Cheng, George	MSc (Eng), RPE (Civil), PEng, CPEng, RSO, FASCE, FInst. CES., MHKIE, FIE Aust., MRICS	Project Management	Maeda Corporation Hong Kong, Battersby Kingsfield Ltd., Bechtel China Inc., Lump Sum Turnkey Projects group of Bechtel Asia Pacific Civil RIU office and International Bechtel Inc, Bechtel Canada Inc.
Cheung, G.	M.Phil. in Mgmt <i>CUHK</i> , BBA <i>Hawaii</i>	Quality, customer service, change management	The Hong Kong and Shanghai Hotels Limited, Hyatt International Corporation (Guam, Hawaii, San Francisco, Hong Kong, Macau, Shanghai), Dragon Hotel, Hangzhou (China)
Cho, C K	LLB, Barrister at Law , <i>London</i> , MCMi, DMS, CFE	Corporate Governance, Risks management, fraud.	Barrister, London Asia Capital (Hong Kong) Limited, Qleap Accelerators Limited (HK), Eden Group Plc (London)
Choy-Hsu Leslie	BA <i>Smith College</i> , MA <i>Columbia</i>	Public Sector Management, Corporate Governance	G. Li & Company.

Chu, Peggy	BA <i>Baptist. University</i>	Communications and PR	Academy of Management Consultancy
Graham, Peter	Royal Military Academy, Sand Hurst. UK.	Anti-corruption, corporate governance, and fraud	British Army, ICAC, de Speville & Associates,
Hansen, Nina	BA <i>London</i>	Crisis Management Corporate Communication	Henley Management College, Director, Hansen Network
Ip, H Y	BS, MS <i>Houston</i> . Ph.D <i>Polytechnics</i> . FIE	IT Governance and IT Strategy	Northrop Grumman, US Dept. of Defence, IBM USA, Vocational Training Council
Kan, Patrick	BBA <i>UH</i> , MBA <i>Golden Gate</i>	Financial management, business turnaround	Kingston Holdings Ltd. Hong Kong, Equitable Trust Toronto, Century Bank of San Francisco, CA, Imperial Savings, San Francisco, CA
Lai, Lucius CMC	BBA <i>Singapore</i> , MBA <i>AIM Manila</i>	Supervisory management, general management	Management Development Centre of Hong Kong, VTC, Asco General Supplies (Far East) Ltd., Centurion Facility Co., Ltd., Hong Kong Security Ltd., DHL International Ltd., Sui Tai Garment Factory Ltd., Jade Travel Ltd.
Lam, Symond CMC	BSc <i>Canada</i> , MBA <i>UK</i> , PDMkt <i>UK</i> , CMC	Business turnaround, IT strategy, sales	Broad United Consultants Limited, PA Consulting Group
Lee, Paul	BA, <i>Poly</i> , MA, <i>Chinese University</i> in Politics.	Time management, leadership, and culture	Academy of Management Consultancy.
Leung, Tommy K. C. , CPA	BA, MBA, MPA, FCCA, FAIA, FHKSA, MCSA, ATIHK, CPA	Cost reduction and accounting strategy.	KCG & Company Ltd. University of Macau.
Nixon, Peter, CA	BBA <i>Bishop U</i> , CA <i>McGill</i> , MSc <i>Leicester</i>	Negotiation, Licenses Consultant, Effective Negotiation Services	Coopers and Lybrand
Ng, Mike	Dip in Art and Design, <i>London</i> . UK.	Branding, Corporate Communications	Hill & Knowlton, Chase Compton, Polygraphia, G. Li & Company.
Poon, Lily Fong Fong	BBA, Communications, <i>UH</i> .	Communications	Television hosts and commentator, TVB Hong Kong and TVB International.
Sarwarte, Dilip CMC	BE (Electrical) <i>Mumbai</i> ; MBA <i>Atlanta</i> ; Ph.D <i>Pune</i> , <i>India</i>	Marketing Management, Competitive Intelligence, Knowledge Management	Humphreys & Glasgow Overseas Consultants; Southern State Inc (USA), Kirkoskar Consultants
Seligman, Matthew	LLB. <i>Cambridge</i> , LL.M. <i>Westminster</i> , <i>Inns Court</i> .	Global Management Communication	UK Courts.
Siu, Anthony, CMC	BEng <i>McMaster</i> , MBA <i>UCLA</i>	Process Improvement, Change Management, Venture Capital	G. Li & Company. Indosuez Capital.
Shanker, G. CMC	BSc, <i>Bombay</i> , Post Grad Dip, <i>Indian Inst. Of Mgmt</i>	Strategy, Market Study, Planning, and Training	Institute of Management of Consultants of India (IMCI), Consultancy Development Center, New Delhi. Market Research Society of India, Mumbai Member of All India Management Association, New Delhi
Sniegowski, Don	BSc, BA <i>Brigham Young U</i> , MBA <i>USC</i>	Training, selling, and general management	Sales Training Director, Nike Inc; General Manager, Franklin Quest; Marketing Director in China, The ASM Group; AlphaGraphics, and Fluor.

So, Jill	BSc, University of Virginia, MBA <i>HKUST</i> , AIMC	Corporate governance, risks management, change management	G. Li & Compenny Limited, J.P. Morgan Securities Inc. (New York), Morgan Stanley Dean Witter (McLean),
Tang, Thomas CMC	PhD. <i>City U London</i> MIMCHK, MBA <i>Henley</i> , MRSC (CChem) <i>CityU</i> <i>London</i>	Strategy, consultancy, and change management	GML Consulting Limited, PA Consulting Group, HK, Environmental Resources Management
Waddington, Stuart	BBA, <i>Qld U of Tech</i> MBA, <i>U</i> <i>of Qld</i> , Grad Dip Applied Finance and Investment, Grad Australian Institute of Company Directors	Strategic & Operational Planning, Change Management	Founding Director of Management Effect Pty Ltd, Business Consultants and Change Managers. Past-lecturer of Knowledge Management, Qld Institute of Technology MBA Program.
Yau, Diana	BA, BSC; Certified Lead Assessor, ISO; FLMI	Management Training, Customer Services	Trainer, CSTDI, HK Govt & Kowloon Canton Railway Corporation.
Yeung, Anthony, CFA	BBA, MSBA <i>Texas Tech</i> CFA	Finance and Investment, Due Diligence	Lecturer, Tsinghua U; Advisor to the Chinese Securities Regulatory Commission
Yim, K M	BA, <i>Chinese University</i>	Marketing and Branding	Direct Force, Partners Advertising and Marketing, Thompson Solutions (a JV with J Walter Thompson), Direct Response (Thailand), P.O.D. Design
Ying, Sam	BA, <i>HKU</i> , MBA, <i>CUHK</i>	Organizational Development	New World, Shaw Brothers, Lingnan U, Vocational Training Council

A. Competencies for Management Consultants

The University of Hong Kong's Poon Kam Kai Institute, Tsinghua University, IMCHK, and G. Li & Company conducted a six month research to identify the competency set for management consultants. This is the competencies identified for effective management consultants working in Hong Kong and China in general. For more information, please go to www.imchk.com.hk

Reference Competency Set for Management Consultants in General

Competencies listed below are in descending order of priority as suggested by respondents in the study, so are the behaviors expected to be exhibited under each competency.

Technical/Job Competencies

1. *Analyzing the Problem Situation*

- Identify the root causes of a management problem; separating symptoms from the roots.
- Obtain information and critical data from clients and others from face to face discussions and conversation without offending, using robust information gathering tools.
- Help the clients recognize the problems.
- Analyze a situation or problem by breaking down into its constituent parts and reassembling them to achieve improved performance.
- Structure the major tasks to be undertaken to deal with the management problems.
- Formulate and find pattern.
- Use the right diagnostic tools to determine the current position of your client, linking improvement interventions to client's problems.
- Be familiar with the industry and speaks the language of the industry.

2. *Presenting the Case*

- Present proposals or project results that sell the recommendation or get management buy-in in front of senior management.
- Handle questions diplomatically during the presentation.

- Communicate the findings and the recommendations to the clients for approval.
- Write professional reports.
- Exercise effective interpersonal influence with clients, enabling the clients and the various stakeholders to share their perception of the situation.
- Understand when to lead a meeting or make contribution to a meeting when it is the more appropriate role to adopt.
- Assure the client of his integrity and competence as a consultant and inform the client which area is outside his/her expertise.
- Create a win-win situation with the clients on new territories - budget, methods of inquiry, and deliverables and record details of the agreement.
- Agree contractual arrangement and fee basis with the client without any problem.
- Make effective and appropriate contributions to meetings.

3. Planning the Approach/Methodology

- Build and maintain cohesive team spirit (even with subcontractors) for achieving team results throughout the project.
- Put together persuasive proposals and project reports to clients, in logical sequence, with no grammatical mistakes.
- Scope out the problems and formulate realistic courses of action with tools and models to solve problems, with principles defined.
- Get the clients' buy-in for any change in the work plan.
- Provide critical evaluation of members without undermining team spirit.
- Set realistic plan with agreed timeliness and consideration for reaction
- Use established and new methodology in conducting one's project

4. Implementation with the Client

- Lead and motivate members of the consulting team
- Make timely and sound decisions in the face of constraints.
- Close the projects and transfer ownership to the clients.
- Manage the change intervention process for the clients and prepare contingency plans in case of need.
- Produce implementation or action plans that are acceptable to the clients.
- Enable clients to take ownership of the development which he/she has introduced in the course of the intervention.
- Convince the client where to draw the line between implementation and advisory.
- Have strong foundation and knowledge of change models.
- Develop options with recommendations for clients on taking on any one option.
- Get the project delivered on time and within budget.

5. *Managing the Project*

- Identify key individuals and organizations likely to be useful for establishing a relationship whilst remaining sensitive to the power pyramid and network.
- Manage clients' expectations according to the agreed intervention plans.
- Keep the project to its time schedule.
- Understand the requirements of ethical consulting and abide by the Codes of Professional Conduct.
- Identify and manage risks over the course of the project.
- Successfully manage project withdrawal with the client.
- Explain, establish and monitor the systems, processes and methods necessary for completion of the intervention.
- Ensure all the assignments' objectives have been met in full.
- Assess own performance continuously during the assignment.
- Market and sell consultancy service through contractual arrangement, approach new clients and develop mutual understanding with a potential client, and work out an appropriate level of intervention.

6. *Being Cultural Aware and Sensitive*

- Build high levels of trust between self and the client.
- Identify and is sensitive to interpersonal politics in the organization.
- Demonstrate awareness of 'face' issues.
- Coach local staff during any assignment.
- Is 'street-wise' in dealing with the day-to-day issues arising in the assignment?
- Show understanding of the socio-political situation in the environment that he/she is working in (Mainland China, HK, etc).
- Provide significant amounts of detail and reassurance to client and client's staff to deal with risk aversion in Mainland Chinese organizations.

7. *Possessing Relevant Interpersonal Skills*

- Handle conflict situations in a positive way and sustain a good relationship with people.
- Build on the initial rapport created with the client to produce a professional working relationship throughout the term of the assignment.
- Do not panic under prolonged pressure.
- Be critical but non-judgmental.
- Show patience when dealing with the client and client's staff.
- Build a network of connections and relationships outside of the consulting firm.
- Get message across to clients with the effective use of body language.
- Get message across to clients clearly and concisely in the local language.

8. *Working with Information*

- Find useful and reliable information.
- Make a clear and appropriate analysis of information which is used in the recommendation and write-up process.
- Have never disclosed clients' information without their consent.
- Understand the source material in its original language.
- Observe individuals and groups for their interaction and provide consultation with professional competencies.
- Carefully check and verify the information given by the clients. Never assume they are correct.
- Demonstrate the techniques and information needed for solving the problems.
- Select and put into place systems for recording, storage and retrieval of information.
- Take advantage of computer software (e.g. Excel) to analyze and compile useful information.

9. *Planning and Deploying Resources*

- Put together a convincing proposal.
- Convert a proposal into a project.
- Ensure sufficient client/staff resources with appropriate skills to meet the objectives of the assignment.
- Make sufficient and appropriate consultancy hours available to fulfill the requirements of the intervention.
- Find contractor for the project team (resourcefulness).
- Plan the use of physical resources with the client to meet the objectives of the assignment.
- Meet out-of-pocket requirements on projects.
- Use appropriate techniques to manage consultancy budgets.
- Put together a winning proposal within 3 hours.

General Competencies

General competencies are those applicable to all consultants. That is, behaviors or competencies that should be demonstrated by all consultants whether operating in Mainland China or not. In descending order of priority, they are:

- Demonstrate trust in people and the democratic process in economic activities.
- Exhibit a high level of accountability in getting the job done.
- Take a broad view of the organization and its place in its competitive environment.
- Encourage personal and professional growth among the members of the project team.
- Demonstrate belief in the importance of individual.
- Demonstrate self-confidence and the ability to cope with hostility.
- Demonstrate belief in technology and efficiently as means and not ends.



Personal Competencies

Knowledge and Experience

- Learn fast, adapting to a new environment quickly.
- Develop an objective and constructive analysis of the problem situation.
- Have solid knowledge in a specific field and act to continually expand own knowledge and experience.
- Develop new methodologies to problems.
- Understand the political and business environment in China.
- Summarize own experience and improves own effectiveness.
- Learn from others' studies or experience quickly.
- Know client's enterprise well, and shows client with successful past cases and methodologies.
- Have political, economic, technical, and social knowledge and experience.
- Have rich management consultancy experience.
- Have working experience in enterprises, entrepreneurs, or government agencies.
- Have doctoral, master, or MBA degree.

Professional Ethics

- Maintain confidentiality between clients.
- Gain acceptance from clients for the recommendations put forward.
- Take great care at all stages of the assignment.
- Abide by the Law.
- Reject all bribes and other inducements.
- Be responsible for the client's developments and tells the truth.
- Do not use client's information for others' benefits.
- Devote all resources and time needed to complete the project.
- Remain highly responsible even for subcontracted projects.
- Promote own service objectively, without undermining competitors.
- Refuse to be involved in any activity that will destroy the objectivity view.
- Refuse any relationship with client that will destroy the justification of solutions.
- Refuse projects that he/she has no confidence in, and avoid client's losses.

Source: *IMC Hong Kong, 2004. Competency Research with Tsinghua University*

B. Job Roles for Different Levels of Consultants

Management Consultants come in many grades. In general, the grades range from an Analyst to a Partner or Director level individual. In this chapter, we will look at some possible grades, using an international consulting firm as a reference. This guide should be used for reference only. The titles may not exactly match the reader's particular situation as each consulting firm in the local consulting market has its own title structure.

For this chapter, we will discuss the following positions:

- Director or Partner
- Principal Consultant or Engagement Manager
- Senior Consultant
- Consultant
- Assistant Consultant/Business Analyst

It is important readers do not confuse these positional titles with functional titles. These position descriptions assume a team structure, where typically all projects are led by a Project Director, which is a functional title. The Project Director can, for example, be a Senior Consultant, but is typically the Partner-in-charge. It depends upon the size of the project. In a consulting team of ten persons, typically there is one Project Director, one Project Manager who handles the day-to-day liaison with the client, and a mix of Senior Consultants, Consultants, and one to two Analysts.

We begin with the position description of a Director or Partner.

Director/Partner

The Director is the leader of the team. He or she finds the project and manages budget, time and quality. And most importantly, issues the invoice and makes sure the clients pay and the consulting teams are paid. A Director typically has over 10 years plus experience and must be able to bring sufficient revenue to cover the costs of the team. Usually the director or partner is given a quota that would be sufficient to cover the costs of his/her team and then profit for the firm. A simple guide would be for the firm to tax revenue at 35% to 65% of the billable hours undertaken by his/her team. Firms with lower administrative and support costs, also known as overheads, would charge at the lower end of the spectrum.

A Director's responsibilities are:

1. Client relationships, marketing and selling, invoicing

- To build the business and the team;
- To identify business prospects, nurture relationships and secure new business;
- To make sure everything seen by the client is top quality and representative of the professional work delivered by the company, also known as quality assurance;

- To develop an understanding of assigned market or functional sectors and maintain a network of clients and other external contacts, networking with clients from time to time (meaning dining with the clients to collect market intelligence and to gauge potential demand);
- To scope and conceptualize client proposals, delegating proposal tasks to appropriate staff;
- To formulate the methodology by which the problems can be solved, in consideration of budget, personnel available and shared resources (typically with the project manager if the project is sufficiently large);
- To lead the presentation proposals to clients (literally be the rainmaker);
- To protect the firm' s image and reputation;
- To nurture new associates and seek new Consultants;
- To get on the media so that he/she can be seen to be a guiding light in his/her industry;
- To publish and seek recognition by the professional body such as IMC for this team;
- To collect the fees from the clients and ensure items borrowed are returned to the client for disposal; and
- To build long-term relationship with senior personnel of his/her clients, ensuring he is always aware of the needs and problems faced by his/her clients.

2. Assignment delivery

- To direct the assignments, ensuring that high quality work is delivered to clients in a profitable and timely manner;
- To build and staff the team, and administer the roles to everyone;
- To initiate the project and making sure everyone knows his/her roles, time commitment and deliverable requirements; and
- To be the quality checker, the last reviewer, of all materials that are sent to the client.

3. Technical Competence

- To build thought leadership in his or her area of expertise;
- To maintain technical competence and business awareness in his or her own field or industry;
- To identify areas where technical development of new products or services or methodologies can be made or is needed;
- To ensure his/her team is competent in the application of consulting methodologies and to the work being performed;
- To facilitate client' s senior management team in problem solving and be able to act as coaches and teachers to the clients;
- To qualify as a FIMC in addition to being a CMC;
- To develop his or her team in terms of competence and efficiency and seek help from others when such development is unavailable.

4. Business management and administration

- To ensure clients pay as agreed and on time as per contract;
- To develop and lead a business area, achieving fee targets as agreed by the Board of Directors of the consulting firm;
- To participate in the development of the business plan for the firm and to develop such a plan for his/her practice;
- To perform assigned functional responsibilities;
- To lead and conduct closure report, highlighting where improvements and learning can be made;
- To complete Staff Assignment reports and Staff Appraisal reports as appropriate once every 6 months;
- To undertake the appraisals and counseling for members of his/her team;
- To recruit, retain and motivate quality staff for assigned practice areas;
- To decide the allocation of staff to chargeable and non-chargeable work; and
- To complete and submit his/her own timesheets and ensures his/her subordinates do the same.

Principal Consultant/Engagement Manager

A Principal Consultant (PC) is a subject matter expert, and often knows more about a particular subject, industry or methodology than the Director. This is expected. A PC is well respected in the community and industry and is looked upon in the industry as a subject matter leader. The client's senior managers should respect a PC based on the PC's expertise. The PC will normally have at least 8 years experience and would become a Partner or Director except for an inability to bring in the work. Alternatively, they may find doing the work much more appealing than selling to clients.

The Director looks for and after the business and the client. A director brings in business; the PC looks after the quality and excellence particularly during the delivery stage. He or she is the colonel on the SWAT team. They deliver and are often on site. They are the best trained specialists on the team and are often doubled as the Project Managers, handling up to four projects at any one time.

A Principal Consultant's responsibilities are:

1. Assignment delivery

- To manage the client on-site and act as the main point of contact with the client's team on a regular if not daily basis (the PM should be on the phone or be seeing the client at least once a week);
- To manage the assignments delegating appropriate tasks to the consulting staff, whilst ensuring quality outputs and completion within budget and to timetable;
- To write the first draft of the final and other reports (to be submitted to the Project Director for revision and submission to clients);
- To act as the job controller managing costs, billing and margins (approving taxi, out-of-pocket expenses per contract, and other additional overheads);
- To identify all reports and records needed from the clients and ensure that such items are properly returned or destroyed after the project; and

- To be responsible for the final presentation, to a high standard requiring minimal revision by Directors.

2. Technical Competence

- To assist the Director and the company in the development and delivery of the consulting processes or products;
- To refine the proposed methodologies and structure in the appropriate timeline and billable hours to be used;
- To refine the working templates if any and teach this template to everyone on the team;
- To be responsible for developing his/her own technical knowledge and skills and those of the staff;
- To train and develop client' s managers, acting as a facilitator; and
- To be qualified as a CMC and be an operational expert in his/her areas of strengths.

3. Client relations, marketing and selling

- To assist the Director in developing a significant level of business generating fees that would be at least 3 to 4 times his/her own compensation;
- To identify new business opportunities and play a leading role in converting these into sales as he/she will be with the client on a much closer basis than the Partner. (He/she can see new problems arising, as he/she will be on-site); and
- To scope, conceptualize, write and present proposals as directed by the Director. Typically, the Director would provide the direction, framework and structure an approach. The PC would fill the structure with details and linkages and would work with the Director in consummating the deal.

4. Business management and administration

- To manage a staff group, motivating, developing and appraising staff, identifying development gaps for everyone on the team (meaning submitting a project evaluation to the Director for each individual on the team);
- To make sure the team is professionally dressed and presented;
- To advise the weekly project management meeting on the allocation of staff to chargeable and non-chargeable work and monitor and control utilization;
- To work closely with the client, making sure there are no surprises for the client;
- To assist in managing the client' s expectations at all times;
- To conduct first-level recruitment interviews as instructed by the Director;
- To complete and submit on time accurate timesheets and forward commitment forms;
- To complete his/her own team' s Staff Appraisal Reports at the end of each assignment, within guidelines provided by the Directors;
- To manage his/her own utilization;
- To discipline the consulting team and propose to the Director the dismissal of anyone on the team who is not doing his/her function; and
- To minimize waste and find ways to handle multiple projects at the same time in order to leverage resources more efficiently.

Senior Consultant

A Senior Consultant is a seasoned Management Consultant whose subject matter is on a par with those who have worked in a particular industry for over 5 years. They are comfortable speaking with department heads and are not afraid to disagree with the client, assuming their arguments are sound. They are confident and never overly zealous. For small projects, the SC often plays the role of a Project Manager. They are the captains while the PCs are the colonels of highly trained and skilled elite forces. They are technically competent in one or several subject areas and can, for example, stand their ground talking about HR strategy with the HR Director. Typically, a person with a graduate degree with five years of experience would be operating as a Senior Consultant.

A Senior Consultant's responsibilities are:

1. *Assignment delivery*

- To undertake quality work, normally unsupervised, within budget and to timetable as agreed in the scope;
- To manage his/her team of Consultants and Analysts;
- To double check all research and evidence from the team. (They are the first-level gate-keepers).
- To draft reports to an agreed structure for review by the Project Manager;
- To develop leadership skills through managing small assignment teams;
- To review all interview notes and advising junior staff how to write unbiased minutes and to conduct triangulation;
- As instructed, to act as job controller for the assignment, managing costs, billing and margins; and
- To manage all information gathering work as delegated by the PM.

2. *Technical Competence*

- To assist the company in technical product development and delivery;
- To be responsible for developing his/her own technical knowledge and skill and those of the staff;
- To be responsible for producing a section of the report, ensuring 'all' facts are correct and validated as needed;
- To develop more than one area of personal expertise and widen his/her industry exposure by attending conferences and workshop as needed;
- To compose the first draft for the Principal Consultant's or the PM's review;
- To confirm evidence and assess opinions, research methodology, and use of triangulation in research;
- To be able to train and develop managers, acting as a teacher as needed; and
- To be qualified as a CMC.

3. *Business management and administration*

- Within guidelines provided by the Director, to be responsible for managing his/her own utilization;
- To complete and submit on time accurate timesheets and forward commitment forms;

- To complete a Staff Assignment Report at the end of an assignment; where instructed to complete Staff Appraisal Reports for consulting staff;
- To document learning and knowledge from the last assignment;
- To manage all out-of-pocket expenses and confirm their use; and
- To conduct administrative matters promptly and efficiently.

4. Clients relationships, marketing and selling

- To identify opportunities for new business – particularly selling on to existing clients – and assist in converting these into sales, informing the PD as needed;
- To play a significant role in the scoping, drafting and presenting of proposals and assist with their production;
- To undertake research into new clients/markets/industries and prepare working papers and reports at a high level of quality (few revisions are expected);
- To ensure the team handles the client's team professionally and with minimal conflict; and
- To make sure everything to be seen by the client is without error and professionally handled.

Consultant

The Consultant is a Management Consultant, possessing both technical expertise in a subject area and a working knowledge of business and management. This position is the core of all the other positions. They must have sufficient expertise and personal skills to deal with clients on their own. The Consultant is an operating-level professional and is equivalent to a practicing lawyer or doctor after his/her internship.

The usual entry level for a professional Management Consultant is an MBA, with a minimum of 2 years' working experience. The Consultant will first need to go through a series of foundation-level training programmes, joins the Institute of Management Consultants in his/her respective country and abides by the Institute's Code of Professional Conduct. They should be members of the local IMC and preferably have passed the certification examination for Management Consultants, the CMC exam. Alternatively, they may possess a Bachelor degree with at least 5 years' management and management consulting experience. Ideally, they would have finished a rigorous internship at a consulting firm.

A Consultant's responsibilities are:

1. Assignment delivery

- To identify the problem and present options which would resolve these problems within the framework laid down by the PM;
- To undertake quality work, with minimal supervision, working within budget and to timetable;
- To conduct interviews, focus groups, desk research and field work;
- To compose minutes of the meeting;
- To draft sections of assignment reports to an agreed structure for review by the PM;
- To overlap assignments where possible, starting a new assignment while completing a previous one; and
- To assist in the preparation of reports and presentations.

2. Technical Competence

- To be competent in at least one management area – strategy, process, marketing, finance, etc.;
- To have managed a project or a student team in the past and understands how to work in a team;
- To be able to analyze and synthesize complex business reports quickly and with minimal errors;
- To put together an appropriate solution to the problem;
- To be able to present his/her findings in a succinct and clear manner;
- To be able to construct a training session, helping managers to learn;
- To write reports with minimal errors, be as precise as required;
- To assist with the firm' s technical product development;
- To be responsible for developing his/her own technical knowledge and skills and those of the staff reporting to him/her;
- To exhibit the highest level of professionalism as per the IMC' s Code of Professional Conduct; and
- To be qualified as a CMC.

3. Business management and administration

- Within guidelines provided by the Director, to be responsible for managing his/her own utilization;
- To complete and submit on time accurate timesheets and forward commitment forms;
- To complete a Staff Assignment Report at the end of an assignment;
- To conduct administrative matters promptly and efficiently; and
- To help the senior members of the team sell new services to the clients.

Assistant Consultant/Business Analyst

The Assistant Consultant or Business Analyst is usually a university graduate with a major in a business area, economics, or the humanities. The main role of the Analyst is to gather needed data and information, look for patterns, confirm and validate the facts and prepare the pertinent information that would be built into the report.

Analyst positions are rare and highly competitive. Good Analysts are offered an opportunity to earn their MBAs, often sponsored by the consulting firm.

An Assistant Consultant' s/Analyst' s responsibilities are:

1. Assignment delivery

- To undertake, under supervision, a range of professional work, often working on one or two assignments at a time;
- To draft working papers and notes of meetings;
- To communicate pro-actively with the assignment manager to clarify requirements, discuss problems and agree solutions; and
- To assist in the preparation of reports and presentations.

2. Technical Competence

- To develop his/her own technical knowledge and skills;
- To know how to write succinctly, cogently, and with no grammatical mistakes;
- To be critical with the source and veracity of the report;
- To question all assumptions;
- To know where to seek and substantiate information;
- To be able to solicit information from those who are liberal with the truth;
- To know how to use the basic word processing software, spreadsheets, presentation, and flowcharting software; and
- To be a member and abide by the Code of Professional Conduct (or on the way to becoming a member of IMC).

3. Business management and administration

- Within guidelines provided by his/her Director, to be responsible for managing his/her own utilization;
- To complete a Staff Assignment report at the end of an assignment;
- To complete and submit on time accurate timesheets and forward commitment forms; and
- To conduct administrative matters promptly and efficiently.

Source: *“From Elephant to Jaguar”*, Edited by Gregg Li, Charles Foley, and Alfred Ho, 2004. MCCM

Global Clients

Our clients typically remain with us for the long haul. Our client attrition ratio is one of the lowest in the industry. They have continued to remain on top form within their industry and have continued to partner with the Academy and its associates. Below is a sample of our clients and research associates located around the world:

- Asian Medical Clinic in Fremont California
- Aviva
- Contempo
- Hong Kong and Shanghai Banking Corporation
- IBM, China and Hong Kong
- Institute of Management Consultants
- International Institute of Management, Sri Lanka
- Li and Fung
- Macau Institute of Management, Macau SAR
- MTR Corporation
- Pan Asian Mortgage
- Poon Kam Kai Institute of Management, University of Hong Kong
- Securac, Calgary, Canada
- Specialized Technology Resources, Shenzhen
- Tung Wah Group of Hospitals