

**ENGAGE  
AND  
PROMOTE**  
CMC-CANADA'S  
STRATEGIC PLAN  
2013-2016





**To my fellow members:**

One of the most important achievements for the past year is the development and finalization of our new strategic plan.

We had made significant progress from the last strategic plan, approved in 2007— updating and adding new pieces of infrastructure, but with the harsh economic environment we all faced, compounded by strong demographic changes, a refresh / rethink was required.

What was the result?

The Board has approved a new 3-year strategy. The four strategic pillars from 2007 were retained, but rearranged to significantly change our approach to building a stronger association.



Where our goal before was to ‘grow’ so we have the budget to deliver the programs our existing members demand, now we will ‘engage’ those members and ‘promote’ the designation so consultants will want to be members in our Association.

This new Engage and Promote strategy will force CMC-Canada to think, manage, and operate in a different manner. These ‘strategic shifts’ include:

→ **Diversifying our revenue base:**

Reducing the share of revenue derived from member dues.

→ **Leveraging our assets:**

Expanding the audience who benefit from our proven, established pre-certified professional development programs.

→ **Helping our CMC members continue in their development:**

Building our roster of post-certified professional development programs.

→ **Promoting the awareness of our designation:**

Our building awareness initiative launched in early 2014 and we will be in Charter Accountants’ CA magazine beginning with the January 2014 issue.

We are now in the process of implementing this plan. Our fiscal 2014 business plan and budget are built around these priorities. The National Board continues to work on new transformational concepts that will help accelerate progress and achieve our vision.

We went through a challenging period, and I am pleased that we have CMC-Canada headed in the right direction. I now pass the torch to Mark Brown FCMC, who has been a tremendous partner and team player over the past two years.

Regards,

Lynn Bennett FCMC

## Context and Purpose

The CMC-Canada strategic plan outlines the vision, direction, and priorities of the association for the next 3-4 year period.

The National Board reflected on our guiding principles, analyzed the environment within which we operate, compared our association against other similar professional bodies, considered what our stakeholders have asked for, combined this information to develop a vision for our association's future, and identified a few strategic priorities to ensure that CMC-Canada delivers value to our stakeholders.

The strategic plan is an important direction-setting document, communicating priority areas that are significant to the National Board, staff, and stakeholders. Through collaboration and clear communication, these priorities will cascade into plans for the Institutes, Chapters, Committees and Task Forces, and staff, complete with accountability and measurement.

## Process

The National Board began the process of reviewing and developing this new strategic plan in 2012, as there had been sufficient change in the environment that the 2007 plan needed to be revisited. As part of the process, Institutes were consulted, member feedback was sought, and staff and Board Directors provided input, so the full breadth of needs and wants were considered.

The guiding principles (mission, vision, and values) were updated. Whenever strategic options were compared, these guiding principles helped to ensure focus was maintained.

The National Board approved this plan, and the priorities within it, in spring 2013.

But the work didn't stop there. Knowing that this new plan presented challenges and changes in an order of magnitude that we have not seen before, the Board continues to explore the strategic shifts in thinking required to facilitate achievement of this plan, as paradigms must be broken and new ways of operating considered. The Board knows the strategic imperatives contained in this plan are directionally correct, but we must find the balance between what is realistic and what moves the association signifi-

cantly towards its objectives when setting the metrics that will serve as a beacon for success.

Three themes pervaded the strategic planning process:

→ **Must deliver value for money:**

We are not alone. The majority of associations are facing membership challenges. Professional development, knowledge, awareness, and communities of interest are key to delivering value.

→ **Must leverage our investments:**

Foundational pieces are in place and we are poised to leverage past investments, like our pre-certification professional development.

→ **Must reinvent our membership:**

We must attract and retain the next generation of members.

## Integration and alignment with business planning

Our first application of the plan was the fiscal 2014 business planning and budget for the July 1 to June 30 fiscal year. The identified priorities helped select the strategic initiatives where we would allocate our scarce resources.

CMC-Canada's Board and staff annually develop a business plan, which manifests itself in the budget. The budget covers three years, with precision on the first year, while the second and the third years provide a preview on opportunities and challenges on the horizon.

## Our Stakeholders

CMC-Canada's roots came from the establishment of the Canadian Association of Management Consultants in 1963. The original objectives remain as true today as 50 years ago:

→ To foster among management consultants the **highest standards of quality and competency** in their services to their clients.

→ To establish, maintain and enforce upon all **members strict rules of professional conduct and ethical practice** in their relations with clients, other members, and the public generally.

→ To undertake development, research, and **training programs** which will advance and disseminate among members the **common body**

- of knowledge of professional management.
- To disseminate, to the business community and the public, **information regarding the services offered by the management consulting profession** in Canada.
- To represent fairly, and **act as authoritative spokesman** for, the management consulting profession in all parts of Canada.
- To provide, in due course, a **set of standards** to be met by individuals desiring to be recognized as **Professional Management Consultants**.

These original goals have largely guided the activities of the association and the Institutes that were created from the rib of CMC-Canada.

CMC-Canada not only represents the profession, but strives to represent individual professionals, firms, and the industry. Partnerships with government departments, like Industry Canada, the National Research Council, Statistics Canada, and Public Works and Government Services Canada, indicate an important coordinating need fulfilled by CMC-Canada. The public (and ensuring its protection) is a key stakeholder whose interests must be considered.

Today, CMC-Canada fosters excellence and integrity in the management consulting profession as a whole. CMC-Canada administers, and its regional Institutes confer, the Certified Management Consultant (CMC) designation in Canada. The Association and its members advocate for the CMC designation and are dedicated to advancing the profession and delivering the benefits of those efforts to the client community. CMC-Canada is a founding member of the *International Council of Management Consulting Institutes* (ICMCI).

### Our mission

To strengthen the practice and profile of the management consulting profession in Canada through education and certification of members of the profession, promotion of ethical standards and professional competency, and communications and advocacy to advance the interests and capabilities of the members of the profession to a wide range of public, business, and government audiences.

### Our vision

CMC-Canada and its member institutes and affiliate associations strive to be widely recognized as the voice of the management consulting profession in Canada and to demonstrate the management leadership and professional excellence of its membership.

### Our strategic priorities

CMC-Canada will strive to offer professional development programming, networking, connections, awareness, and related activities that generate revenues, and are inherently attractive to attract new and different individuals to the organization and that membership growth will be an outcome, as opposed to growth being the first priority.

CMC-Canada must reduce its dependence on member dues-based revenues. We will accomplish this by delivering value throughout the lifetime of a member. Key themes:

- **Becoming a sought-after provider of professional development on management consulting skills and knowledge:**  
CMC-Canada has traditionally focused on pre-certification professional development, but—must develop a reputation and expertise in post-certification professional development.
- **Increasing our brand awareness:**  
By ensuring the CMC is a ‘known’ designation, we inherently increase the value of membership and certification.
- **Leveraging our assets:**  
By delivering proven assets (PD) to different audiences, who value knowledge and skills of the consulting process, but who may not necessarily be focused on becoming full-time, career management consultants.

To achieve the above, four strategic pillars were identified, in order of priority:





## Engage

**Outcome Statement:** CMC-Canada will engage with current and prospective members, with consumers of consulting services, and with the wider business and professional community to demonstrate through PD programming, thought leadership and related communications, and other activities and events that individuals holding the CMC designation possess superior leadership, analytical, problem-solving, and solution development skills they apply with independent judgement in a variety of organisational roles and environments to influence decision outcomes.

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Strategic Priority #1

## **Provision of the highest value professional development for our profession**

### **Goals**

Increase the quality and effectiveness of professional development activities delivered by and/or sponsored by our association, so CMC-Canada will:

- Enhance the professional capabilities of current and prospective members.
- Attract in-class and online participants.
- Generate revenues from sales and licencing to other organizations.
- Attract, recruit and retain high-calibre members.

### **Initiatives**

In 2013, CMC-Canada struck a Continuing Professional Development committee, tasked to conduct a member needs analysis, to prioritize development needs for post-certified professionals, and to seek providers to satisfy this need.

With the guidance of this committee, CMC-Canada will launch, nationally, a series of CPD programs that will complement, and not compete with, programming of the regional Institutes and Chapters.

### **Metrics**

- Numbers of participants who partake in these post-certified professional development programs.
- Revenue generated by these post-certified professional development programs.



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Strategic Priority #2

## **Optimal promotion of value-creating business relationships for our profession**

### **Goals**

Increase the quality and effectiveness of networking, mentoring, and social-media-based communities-of-interest to help build business, professional and collegial relationships that in turn create value for members of our profession.

### **Initiatives**

CMC-Canada will support the development of national special interest groups, beyond those current domiciled within the GTA Chapter.

### **Metrics**

Number of participants who are registered as part of the national special interest groups.



## Promote

**Outcome Statement:** CMC-Canada will promote the CMC brand and designation to prospective members, to consumers of consulting services, and to the wider business, professional and academic communities as representing superior business, professional, and leadership capabilities that will be valued in almost all organisational settings.

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Strategic Priority #3

## Optimal promotion of the CMC designation and brand

### Goals

Increase the advocacy and promotion of the CMC designation and brand, as well as the high-performance capabilities of members holding the CMC designation, in order to:

- Build and optimize awareness of the CMC designation and its value.
- Increase the attractiveness of a relationship with CMC-Canada for other professional associations and buyers of management consulting and advisory services (e.g.: IRAP).
- Demonstrate both the advanced skills possessed and the high-performance capabilities of professionals holding the CMC designation to other professional associations, to buyers of management consulting and advisory services, as well as potential new members.
- Position CMC-Canada members and specifically those having earned the CMC designation as thought leaders who demonstrate superior advisory skills, inform best practice development, and who are sought after by clients, their organizations, and consultancies in all sectors.

### Metrics

Annual surveys of our target audience will show increases in:

- Awareness of the CMC designation.
- Importance of the CMC designation as a key criteria in the selection of management consultants.



## Strengthen and Sustain

**Outcome Statement:** CMC-Canada will be an effective developer and provider of high quality, high performance management consulting-focused professional development programming, activities, networking, and community-building activities that will in turn sustain the profession and be attractive to leaders and management professionals in a wide variety of organisations and roles.

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Strategic Priority #4

## Optimal financial performance of CMC-Canada

### Goals

Enhance the financial performance and sustainability of our association, in order to:

- Sustain a positive financial position.
- Diversify revenue sources and reduce reliance on existing sources, thus establishing a more balanced financial risk profile for the association.
- Enable desired investments in value-add initiatives for members.
- Enable desired investments in association personnel.
- Protect and continue to invest in the association's contingency fund.

### Initiatives

CMC-Canada will explore new audiences and partnerships where its existing intellectual capital in pre-certification professional development would be valued. These new audiences will view 'consulting skills' as critical skills in the development of their future professionals and leaders, who may not be career consultants.

CMC-Canada's Board is currently exploring new revenue generating initiatives that can develop into major sources of revenue.

### Metrics

The non-dues portion of CMC-Canada's revenue will increase to x%, by June 30, 2016.



## Attract

**Outcome Statement:** CMC-Canada will attract to our membership by 2016, as a result of our activities, more than 1,000 new members, for a net membership base 3,500, of whom at least half will have embarked on pursuit of the CMC designation by June 30, 2016.

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Strategic Priority #5

## **Optimal attraction, recruitment, and retention of members committed to our profession**

### **Goals**

Increase the frequency and the effectiveness of membership recruitment and retention activities, and optimize and integrate attraction, recruitment, and retention activities with professional-development, learning, and networking activities and events, so CMC-Canada will:

- Attract, engage and retain individuals, firms, and like-associations committed to management consulting.
- Actively promote the pursuit of the CMC designation as demonstration of the highest possible level of commitment to our profession.

### **Initiatives**

- CMC-Canada will ensure a regular schedule of member recruitment activities across the country.
- CMC-Canada will continue to dedicate human resources to managing the member recruitment activity, supporting and complementing the volunteer efforts at the Institute and Chapter levels.
- CMC-Canada will launch a 'young professionals' program in early calendar 2014 to attract the under 40 professionals to our association.

### **Metrics**

CMC-Canada's membership will grow to 3,500 by June 30, 2016.





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