



## Term of Reference

### Guidance for the use of ISO 20700:2017

#### Self-Declaration Checklist Training



CMC - GLOBAL

This Terms of Reference document is aimed at assisting accredited Trainers who attend the Guidance for the use of ISO 20700:2017 Self-Declaration Checklist Version 1.0 Training provided by ICMCI for the duration of four (4) training hours, and their IMCs, in highlighting benefits of attending the Self-Declaration Checklist Training to their different target groups.

The ICMCI training aims to ***accredit trainers who will deliver the training on behalf of their IMCs. ICMCI does not train CMCs or MCs who are not nominated by the IMC to train on their behalf.***

The ToR identifies ***benefits of attending the training IMCs will be delivering through their accredited trainers, objective of the training, pre-requisites for attendees, the different target groups, and provides the timeline for each target group*** training as follows:

#### a. Why attend the training:

1. To learn how and if the standard will have impact on how management consultants provide their consulting business.
2. Because ISO 20700 is valuable for consultants and their clients in terms of assigning a proper structure for implementing the project.
3. Clients might ask for the standard and they should be prepared.
4. Potential marketing tool for them by showing proof of.
5. To be able to inform the client of their expectations and responsibilities during the project cycle.
6. Empower the client to be a partner in the consulting process.
7. To stand out as a true management consultant and distinguish yourself and your deliverables from other providers.
8. To establish knowledge of the differences between the CMC designation and the ISO20700 Guidelines.

#### b. Training objectives:

1. Enhance understanding of policies vs. complexity of projects and the impact on each project and the conduct of business.
2. To know how to handle and adapt the check list for each project's specific needs – produce a declaration document
3. The use of the tools in the day to day practice – produce a term of reference
4. How to implement the declaration in proper contractual documentation.

#### c. Who to target for attending your training nationally with and customized time of delivery:

1. Experienced CMCs – 4 hours of training – they have proper knowledge and experience in managing a consulting project.



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2. MCs – full day training – they have the entry level knowledge and some experience in being part of a management consulting project.
3. New comers to the profession – training to be part of the intro to consulting training provided by the institute.
4. Clients – 2-4 hours of introduction to enhance knowledge of the management consulting cycle and project management.

Above summarized in below chart:

### “ISO20700 trained by ICMCI” scheme

	Embedded in CMC Trainings / Certification	For Consultants who are already CMC's	For everybody else	Clients
Requirements for participants	Same as for the CMC training	Experienced 	Consultant	n/a
Duration	No or very little additional time needed	Typically 4 hours (e.g. as part of annual meeting)	Typically 1 day	Typically 2 hours
Training blocks	Introductions of ISO 20700, Application of the checklist in case study	Introductions of ISO 20700, Application of the checklist in case study	Consultancy basics, Introductions of ISO 20700, Application of the checklist in case study	Introductions of ISO 20700
Award	 			

**Note: Pre-requisite: for management consultants attending the training:**

**To have read the ISO 20700 standard and have access to a licensed copy, this does not apply to clients**

#### d. Terms of use for the Train the Trainer Material, Self-Declaration Checklist, and the Related Logos:

Guidance on legalities that trained trainers of accredited IMCs and their target groups should abide with:

1. As an accredited Trainer you are allowed to use the training material prepared by ICMCI as long as it is used in its entirety. Noting that the checklist might be reduced but you are not allowed to change the checklist.



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2. The checklist is to be referenced as CMC-Global's when used (by the trainer or the trainee in implementation) in its current version and adapted to the extent of use, but not when changed. i.e. all clauses and items should stay as is.
3. Above guideline in item no. 2 is to be provided by the trainer of accredited IMCs to the trainees on how a consultant can adapt the checklist to the project type and complexity and the usage of reference thereof.
4. The trained consultant is allowed to use the brand in his presentation material (e.g. Website, Business Cards, e-mail signature, ...), but the delivery of an assignment according to ISO20700 has to be agreed individually for every project with the client.
5. The logo of the IMC might be added to the self-declaration checklist if the IMC agrees.
6. Logos usage guideline is an annex to this ToR.
7. The ***"Trained in the ISO 20700:2017 Guidelines for Management Consultancy Services by CMC-Global"*** sentence can be used in signature or a separate line by the trained consultant. This is similar to the fact that accredited trainers of Member IMCs can use the ***"CMC-Global ISO 20700:2017 Guidelines for Management Consultancy Services Accredited Trainer"***.
8. If an Accredited IMC translates the checklist they might add their copyright statement too (and keep that of ICMCI's).
9. Certificates of attendance to the Consultants trained by the accredited trainers of an IMC will receive a branded certificate by ICMCI. the Member IMC would need to:
  - a. Provide names of attendees
  - b. Advise if any are CMCs
  - c. Affirm that the attendees attended the training provided by the accredited trainerA certificate will be issued accordingly with a specific serial number.
10. An accredited IMC that would want to include its logo on the certificate handed out to its trainees, need to provide ICMCI secretariat with a high-resolution logo in .jpg or .jpeg.