



CERTIFIED  
MANAGEMENT CONSULTANT

# Consultants



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## Institute of Management Consultants Hong Kong (IMCHK) - Newsletter

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### About IMCHK

The Institute of Management Consultants Hong Kong (IMCHK) is the professional chapter and qualifying body for management consultants in Hong Kong. IMCHK was established in 2000, aiming at setting and maintaining high standards of quality, independence, objectivity, and integrity for Certified Management Consultants (CMC) originating in Hong Kong and Macau. IMCHK is representative of Hong Kong in the International Council of Management Consulting Institutes (ICMCI). ICMCI has over 60,000 CMC members worldwide.



### President's Message

Spring 2021 marks more than a year of business unusual in Hong Kong and around the world under the COVID-19 pandemic. At the time of writing, the 4<sup>th</sup> wave of pandemic in Hong Kong seems to be under control and together with the launch of community vaccination program, it is hoped that the local situation will gradually improve. But the battle is not over yet, we have to continue to be resilient and agile while facing the challenges brought about by the new “abnormal”; and at the same time to maintain the highest management consulting standard under the IMCHK Code of Professional Conduct.



As most of us are working from home or communicating remotely via Internet, Cybersecurity has become one of the imminent issues under the new abnormal. In this issue, we are happy to share some tips contributed from one of our CMCs and hope you will find them useful.

As always, stay connected with our IMCHK community!

Daniel Chan, CMC  
President, IMCHK



## ICMCI - Certified Management Consultant

The Certified Management Consultant designation is the preeminent professional designation for management consulting with a variety of sub-specialty areas. It is similar in scope and reliability to Chartered Professional Accountants, Professional Engineers, etc.

### Post-nominal initials

Consultants who have been awarded the CMC can put these initials after their name. In some countries, the CMC-Global member Institute may use the designations FIMC to signify a Fellow of that Institute of Management Consultants – someone who has made a significant contribution to the profession of management consulting. The initials FCMC therefore designate a Certified Management Consultant who is also a Fellow of his or her institute.



## IMCHK News

### The Certified Management Consultants (CMC) Mentorship Program for doctorate candidates or chartered / certified / management professionals was formally announced on 6 January 2021

The CMC Mentorship Program is a new extension of Mentoring Program in 2020 to promote IMCHK mentoring and CMC recruitment. Doctorate candidates or chartered / certified / management professionals are qualified to join the CMC Mentorship Program and earn their CMC qualification. They may develop a second profession in management consultancy to extend their career development path. The CMC candidates will be assigned a mentor (senior CMC) to guide their CMC competency development, which includes short training, case study, interview and ethical test within 6 to 12 months.



### The 1st Certified Management Consultants (CMC) Mentorship Program in 2021

IMCHK partnered with Happeace to promote CMC Mentorship Program and the 1st CMC Mentorship Program will be arranged on 15 and 16 May 2021 via Zoom. Day 1 - (6 hours) Training on management consulting, Day 2 - (3 hours) Case presentation and sharing.



## Worldwide Recognized CMC Qualification



**IMC Canada:** Anyone can claim to be a consultant, but only an individual with the highest level of competency can meet the standards required to become a Certified Management Consultant (CMC).

**IMC Canada:** All CMC candidates must have a university education, from a recognized program, or a professional license. In order to progress to the evaluation stage, CMC candidates must successfully complete a series of rigorous professional education programs.

**IMC Canada:** CMC candidates must pass a national assessment, tailored for them based on their experience. CMCs have proven they understand and demonstrate the nine core competencies as required by the National Certification Committee. Senior CMCs will review previous engagements, taking into account client feedback, and the deliverables produced by the candidate.

**IMC USA:** CMC candidates for certification must undergo a thorough investigation of their consulting experience, complete exhaustive written and oral examinations, and meet global standards in consulting competencies, professional behavior, client and project management, and personal conduct. Less than one percent (1%) of all consultants have achieved this level of excellence.

**IMC USA:** In over 50 countries around the world, these national member institutes of CMC-Global; enroll, oversee curriculum delivery, competency assessment and ultimately individual certification to strict common standards. National Institutes are regularly audited by CMC-Global to ensure each Institute upholds and advances the high standards of the designation.

**IMC Australia:** The Certified Management Consultant (CMC) designation is the profession's only international certification mark, recognized in over 50 countries. It represents a commitment to the highest standards of consulting and adherence to the ethical canons of the profession.

**ICMCI:** The Certified Management Consultant (CMC) designation is the preeminent professional designation for management consulting with a variety of sub-specialty areas. It is similar in scope and reliability to Chartered Professional Accountants, Professional Engineers, etc.

**ICMCI:** Country Institutes of Management Consulting (IMC's), often through state or provincial institutes, work with government bodies to ensure that the CMC is a recognized professional designation with all the compliance, competency and ethical obligations and privileges that comes with being a top-tier individual professional.

**ICMCI:** CMC earned in one country can be recognized and trusted should the professional individual work in another jurisdiction. CMC is an international recognized qualification in management consulting. CMC designation is the consulting profession's preeminent certification, recognized internationally. It represents a commitment to the highest standards of consulting and adherence to the Profession's ethical guidelines.

### **CMC designation demonstrate professional areas of management consulting:**

Management Consultants in Education: Ed.M CMC, Ed.D CMC

Management Consultants in Business / Management: MBA CMC, DBA CMC, FCMI CMC, FInstLM CMC

Management Consultants in Information Technology: CITP CMC, MSc(IT) CMC, DIT CMC, PhD(IT) CMC

Management Consultants in Accounting / Finance: CPA CMC, CFP CMC, CFA CMC

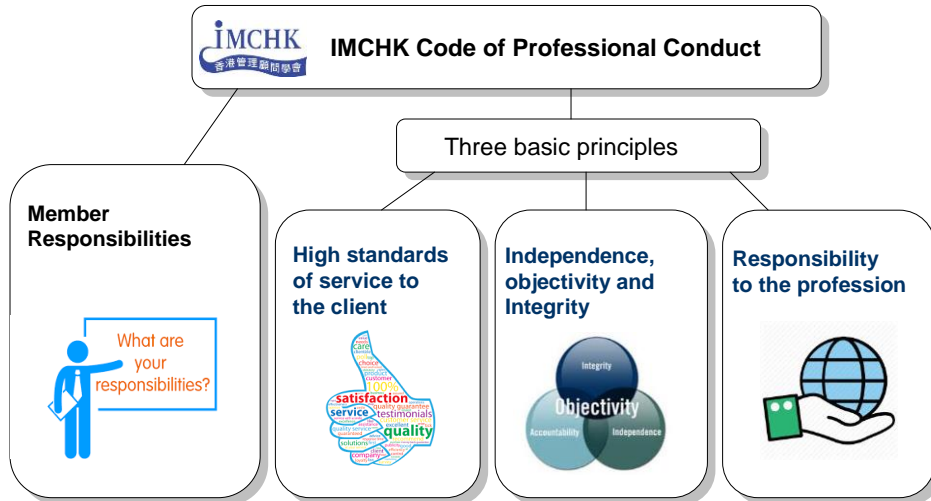
Management Consultants in Engineering: CEng CMC, BEng CMC, MSc(Eng) CMC



## IMCHK Code of Professional Conduct

IMCHK is the advancement of the profession of management consultancy under CMC-Global through the establishment and maintenance of the highest standards of performance and conduct by its members. (be responsible to professional)

### Outline of Code of Professional Conduct



**IMCHK Members have the basic responsibilities as management consultants to:**



- Exercise independence of thought and action  
Hold affairs of their clients in strict confidence
- Deal with management problems in perspective and give well-balanced advice
- Strive continuously to improve their professional skills and to maintain a high quality of advice
- Keep the professional standards of management consulting
- Maintain high standards of personal conduct requirements and interests as paramount at all times.

**Principle 1: High standards of service to the client**



- (1.1)** A member will only accept an engagement for which he is suitable and qualified.
- (1.2)** Before accepting an assignment a member shall clearly define the terms and conditions of the assignment, including the scope, nature and period of the service to be provided, the allocation of responsibilities, and the basis for remuneration.
- (1.3)** A member will highly regard his client's



**(1.4)** A member shall only subcontract work with the prior agreement of the client.

**(1.5)** A member will hold as strictly confidential all information concerning the affairs of clients unless the client has released such information for public use, or has given specific permission for its disclosure.

**(1.6)** A member will prevent from inviting any employee of a client advised by the member to consider alternative employment (an advertisement in the press is not considered to be an invitation to any particular person).

**(1.7)** A member will develop recommendations specifically for the solution of each client's problems; such solutions shall be realistic and practicable and clearly understandable and accepted by the client.

**(1.8)** To ensure efficient performance of each assignment, a member will exercise good management through careful planning, frequent progress reviews and effective controls.

## **Principle 2: Independence, objectivity, integrity**



**(2.1)** A member will maintain a fully independent position with the client at all times, making certain that advice and recommendations are based on Facts, findings and professional analysis.

**(2.2)** A member will not introduce any earliest opportunity, any special relationships, or business interests which might influence or affect the judgment or objectivity on a particular assignment.

**(2.3)** A member shall not serve a client under terms or conditions which might affect his independence, objectivity, or integrity; he will reserve the right to withdraw if conditions beyond his control develop to interfere with the successful conduct of the assignment. He will not practise during a period when his judgment is or might be impaired through any cause.

**(2.4)** A member shall not take discounts, commissions or gifts as an inducement to show favour to any person or body.

**(2.5)** A member will not accept an engagement in which he cannot serve the client effectively.

**(2.6)** A member should clearly indicate any potential benefits relevant to the assignment and advise the client of the implications.

**(2.7)** A member should discuss and agree with the client any significant changes in the objectives, scope, approach, anticipated benefits, or other aspects of the engagement which might arise during the course of carrying it out.

### Principle 3: Responsibility to the profession



**(3.1)** A member recognises that he has a responsibility to the profession as well as to himself and his clients, to ensure that his knowledge and skills are kept up to date and will take appropriate action to this end.

**(3.2)** A member will not knowingly, without permission, use copyright material, or a client's data, or materials or techniques that others have developed but have not released for public use.

**(3.3)** A member shall have proper regard for the professional obligations and qualifications of those from whom he receives or to whom he gives authority, responsibility or employment, or with whom he is professionally associated at all time.

**(3.4)** A member shall only initiate or accept a joint assignment with a member of another professional body if he is satisfied (and can satisfy the client and if required the Institute) that such an assignment would be conducted to the standards of IMCHK Code of Professional Conduct.

**(3.5)** A member referring a client to another management consultant will not misrepresent the qualifications of the other management consultant, nor will he make any commitments for the other management consultant.

**(3.6)** A member will not accept an assignment for a client knowing that another management consultant is serving the client in a similar capacity unless he is assured, and can satisfy himself, that any potential conflict between the two assignments is recognized by, and has the consent of, the client.

**(3.7)** When asked by a client to review the work of another professional, a member will exercise the objectivity, integrity and sensitivity required in all technical and advisory conclusions and should agreed details with the client.

**(3.8)** A member will negotiate agreements and charges for professional services should under the ethical and professional requirement of IMCHK.

**(3.9)** A member shall not attempt to obtain work by giving financial inducements to clients or client staff.

**(3.10)** A member, in publicising his work or making representations to a client, shall ensure that the information given

- is factual and relevant
- is neither misleading nor unfair to others
- is not otherwise discreditable to the professional

**(3.11)** A member shall be a fit and proper person to carry on the profession of management consultancy.

**(3.12)** A member shall not give the false, inaccurate, misleading, incomplete information under management consulting services.



# Cybersecurity Recommendations

## Recommendations of email security from CMC member, Andy Kwong

### Preventive

- Inform staffs, members directly (e.g., disseminate information through monthly statements, leaflets, publications, or websites) about the preventive measures that IMCHK organization has implemented, e.g., IMCHK will not send emails with embedded hyperlinks to websites to its users; and will not ask for users' personal information or account information such as user identity or passwords via email.
- Consider to register official email domain @imchk.com.hk that is similar to the one that is currently used by the organization  
<https://workspace.google.com.hk/intl/zh-HK/products/gmail/>
- Educate staff and members about the best practices they should follow and observe when using email communication.  
<https://www.cybersecurity.hk/en/learning-scam.php>

### Detective

- Monitor the Internet for phishing emails related to your organization by the outsourcing service provider  
<https://www.fireeye.com/content/dam/fireeye-www/products/pdfs/pf/email/sb-email-security-for-advanced-threat-protection.pdf>
- Identify and notify management of any reports of suspicious activities on websites or phishing emails and make announcements to members.

### Responsive

- Issue promptly alerts to the staff, members, and related parties or even the public through press releases, website, or postal emails about the fraudulent website and warn them not to respond to the suspicious or phishing email
- Report to the police and relevant organizations such as Hong Kong Police about the suspicious website.  
[https://www.police.gov.hk/ppp\\_en/04\\_crime\\_matters/tcd/types\\_12.html](https://www.police.gov.hk/ppp_en/04_crime_matters/tcd/types_12.html)
- Issue alerts to staff, administrators, or members of the organization's website to strengthen security measures and watch out suspicious activities.
- Stop further using the hyperlink that contains secret code or device immediately when a loss, theft, or possible compromise of a secret code or a device, is reported.

### Administrative and daily operation

- Promote using corporate mail address  
[http://www.imchk.com.hk/imchk/imc\\_member\\_list.htm](http://www.imchk.com.hk/imchk/imc_member_list.htm)
- Mail disclaimer  
<https://www.mail-signatures.com/articles/email-disclaimer-examples/>

### Andy Kwong CMC

MBA, MSc, CISSP, CISA, CISM, CEH, CHFI, ECSA, PMP, ITIL  
*Principal Consultant*  
*Security Practices Unit*  
*Global Technology Integrator Ltd.*



**IMCHK Council Members (2021 ~ 2022)**

**President:**  
Mr. Daniel Chan

**Vice President:**  
Mr. Philip Wai

**Honorary Secretary:**  
Dr. Samson Ma

**Honorary Treasurer:**  
Ms. Ridy Suen

**Council Members:**  
Mr. Alvin Wong  
Mr. Antony Yip,  
Mr. Share Tai Ki  
Mr. Barkis Ip  
Mr. John Lai  
Ms. Ada Wong

## Professional Training

### **ISO 20700:2017 Guidelines for Management Consultancy Services Training for IMCHK CMC Members** 24 April 2021 Saturday 9:00am – 1:00pm via ZOOM

**This half-day training on ISO 20700:2017 Guidelines for Management Consultancy Services is specially organized by IMCHK for Certified Management Consultants (CMC).**

The ISO 20700:2017 Guidelines for Management Consultancy Services was developed by CMC-Global (International Council of Management Consulting Institutes, ICMCI) with International Organization for Standardization (ISO). It aims to improve the transparency and understanding of consultancy assignments between management consultants and their clients.

#### **ISO 20700 CERTIFICATION**

In order to provide practical and hands on support for management consultants in demonstrating their work according to the ISO 20700, CMC-Global has developed a self-declaration checklist to the ISO 20700 Guidelines for management consultancy services. This list, as well as the extent and the content of the list, are agreed individually by client and provider for project and service delivery.

#### **YOU WILL GET**

- A certificate issued by IMCHK and ICMCI
- 4 CPD units awarded by IMCHK
- A complete set of ISO 20700 checklist
- Listing of Certified ISO Members on websites of ICMCI and IMCHK
- Usage of ISO Logo on name card and business communication

#### **WHO MUST ATTEND**

IMCHK CMC members (This half-day intensive course is only applicable for current CMC members. Lapsed CMC members are encouraged to renew their membership soon if they want to join this course.)

#### **METHODOLOGY**

Workshop, Case Study and Practices

#### **PROGRAMME OUTLINE**

- Introduction to Self-Declaration Checklist
- Application of the Self-Declaration Check List
- Practices in Contracting
- Practices in Execution
- Practices in Closure
- Practices in Policies
- Pre-class case study

#### **TRAINER**

Mr. Daniel Chan, President of IMCHK, and IMCHK Team of ICMCI-Accredited ISO 20700 Trainers

#### **LANGUAGE**

English / Cantonese

#### **FEE**

HK\$1,800 (inclusive of the Certification fees)

#### **REGISTRATION**

Email to [adminsec@imchk.com.hk](mailto:adminsec@imchk.com.hk) with your name and mobile number, by 10 April 2021. Successful registrants will receive a confirmation email with payment details.

#### **ENQUIRY**

[adminsec@imchk.com.hk](mailto:adminsec@imchk.com.hk) +852 2865 2108



**Institute of Management Consultants Hong Kong**

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