No. 1250 **2 November 2004**

SOUTH AFRICAN QUALIFICATIONS AUTHORITY (SAQA)

In accordance with regulation 24(c) of the National Standards Bodies Regulations of 28 March **1998,** the Standards Generating Body (SGB) for

HET Accountancy and Financial Management

Registered by NSB 03, Business, Commerce and Management Studies, publishes the following qualification and unit standards for public comment.

This notice contains the titles, fields, sub-fields, NQF levels, credits, and purpose of the qualification and unit standards. The qualification and unit standards can be accessed via the SAQA web-site at www.saqa.org.za. Copies may also be obtained from the Directorate of Standards Setting and Development at the SAQA offices, Hatfield Forum West, 1067 Arcadia Street, Hatfield, Pretoria.

Comment on the unit standards should reach SAQA at the address ***below and no later than 28*** November ***2004.*** All correspondence should **be** marked Standards Setting – SGB for HET Accountancy and Financial Management and addressed to

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SOUTH AFRICAN QUALIFICATIONS AUTHORITY

QUALIFICATION:

National Certificate: Management Consulting

SAQA QUAL ID	QUALIFICATION TITLE
49090	National Certificate: Management Consulting
SGB NAME	SGB HET Accountancy and Financial Management

NSB ACRONYM	PROVIDER NAME
NSB 03	

QUAL TYPE	FIELD	SUBFIELD
Honours Degree	Business, Commerce and Management Studies	Finance, Economics and Accounting

ABET BAND	MINIMUM CREDITS	NQF LEVEL	QUALIFICATION CLASS
Undefined	138	Level 7	Regular-ELOAC

PURPOSE OF THE QUALIFICATION

The primary purpose of the qualification is to advance the learner's competence in the process of management consulting, including:
> Change management;
> Promoting of management consulting services; and
> Project design, delivery and execution.

This qualification will allow management consulting learners to gain recognition and credibility as qualified professionals. As clients demand professional, qualified consultants, this qualification will allow the learner to become more marketable. This will ensure that the perception of the industry is that of a professional service sector committed to ethical service delivery to the highest standards.

This Qualification is offered as a development pathway to learners who have completed tertiary education, and as articulation pathways are developed it will become a pathway to post-graduate learning in the workplace. Learners who are found to be competent may advance to higher level qualifications in management consulting or other fields.

Learners need to be proficient in English language skills, including speaking, reading and writing skills, in order to access the learning material. Computer literacy is also important for practitioners and for self-learning opportunities.

Rationale of the Qualification

Management consultants can be defined as all individuals who offer/ provide independent advice and assistance regarding the process of management to clients with management responsibilities or management issues.

The typical learner identified to benefit from this outcomes-based management consulting qualification will be an individual who presently works within the field of management consulting. At present there is no such qualification in this field and no formal tertiary educational institution offers training towards the required competencies. This qualification will provide the basis for national recognition of the skills involved in management consulting. It is perceived that the qualification will improve the credibility and general public's awareness of practicing management consultants. International qualifications were studied during the research process undertaken to develop this qualification. As such, learners who obtain the qualification are expected to contribute to the sectors and industries and thus provide an impetus for improved global competitiveness.

The qualification supports the objectives and principles of the NQF in the following ways;

> Provides a structure onto which new qualifications can be added - Currently there are no specific management consulting qualifications available in South Africa. This certificate is therefore a new Qualification.

> Ensure that all existing and new national qualifications meet quality requirements- The management consulting certificate qualification was developed through consultation with key stakeholders and meets SAQA quality requirements.

> Ensure international education and business networks and opportunities can be developed now and in the future - management consulting learning outcomes, against which this outcomes-based certificate qualification was developed, were generated in consultation with the Institute of Management Consultants, an international organisation. As such, international standards were taken into account during development.

> A flexible outcomes-based approach - The management consulting certificate offers a flexible combination of outcomes in the field/specialist area of the learner. This means that the learners may be offering management consulting services in a wide range of disciplines, from Information Technology to Marketing to Human Resources to Finance to Medical consulting.

> Assessment based on clearly defined exit level outcomes - The management consulting certificate allows for assessment, including Recognition of Prior learning, based on SAQA principles of assessment, This shall include workplace and theoretical assessment methods. A portfolio of evidence may be submitted that provides evidence of the learner's:

- Area of speciality;
- Management competency; and
- Personal and interpersonal skills.

> Accessibility and inclusion - All learners who currently work in management consulting contexts or who would like to become management consultants shall have access to this certificate.

> Quality systems - To ensure quality the management consulting certificate shall involve:
- Training by accredited training providers;
- Assessment by registered assessors; and
- Quality management through moderation by internal systems and ETQA activities.

RECOGNIZE PREVIOUS LEARNING?

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LEARNING ASSUMED TO BE IN PLACE

This qualification is seen as a complementary addition to a prior degree. Therefore a recognised undergraduate degree or equivalent qualification at NQF level 6 is assumed to be in place.

Gaining experience as a consultant is a recommended learning route, as most learning towards management consulting competencies takes place in the workplace through learning and not theoretical methodology and principles. Learning can however take place through simulated workplace experience.

Recognition of prior learning

This qualification may be achieved in part or whole through the RPL process if the learner is able to demonstrate competence in the knowledge, skills, values and attitudes implicit in this qualification.

QUALIFICATION RULES

This certificate in management consulting is a **138** credit qualification at NQF level 7. The exit level outcomes for this certificate in management consulting describe the foundational, practical and reflexive competences, which, together, constitute the applied competence required of management consultants at this level.

The exit level outcomes have been grouped into fundamental, core and elective to allow for ease of articulation with qualifications in other fields.

Fundamental: 25 credits at NQF level 6

> Component **1:** Present a well-structured argument derived from qualitative and/or quantitative data to map new knowledge and generate a competitive advantage.
> Component 2: Demonstrate knowledge and understanding of e-business as a competitive tool.
> Component **3:** Apply the principles and ethics and professionalism to a business environment.

Core: **103** credits at NQF level 7

Competences relating to management consulting and including the following learning components:

> Component **4:** Develop management consulting products and services to establish company brand.
> Component 5: Build relationships and maintain key accounts in a professional management consulting environment.
> Component 6: Facilitate change management projects and interventions.
> Component 7: Promote management consultancy services.
> Component **8:** Manage change within a management consulting project.
> Component **9:** Produce management consulting project proposals.
> Component **10**: Conduct analysis for management consulting project proposal development.

Elective: Each component is worth **10** credits at either NQF Level 6 or 7. Choose at least one component.

Competences relating to the learning areas or subjects and content appropriate to the selected specialism:

> Component **11:** Manage and develop people in a professional services practice.
> Component **12:** Develop management consulting methodologies.
> Component **13:** Monitor and manage recovery and utilisation.
> Component **14:** Analyse and design business processes.

EXIT LEVEL OUTCOMES

On achieving this qualification, the learner will be able to:

1. Develop, implement and manage a project activity plan;
2. Manage customer requirements and needs and implement action plans;
3. Apply advanced business principles;
4. Identify innovation opportunities;
5. Manage change within a management consulting project;
6. Promote management consulting services;
7. Conduct analysis for management consulting project proposal development;
8. Produce management consulting project proposals;
9. Develop customer needs and relationships;
10. Develop and implement customer activity plans to reach agreement;
11. Integrate marketing plans with business processes; and
12. Analyse and interpret research in line with research requirements and communicate results.

Guidelines for assessing integrated and applied competence related to each exit level outcome are provided (refer also to the assessment criteria that deal with integrated assessment). For a definition of the content requirements for particular phase specializations, please refer to the requirements under levels, credits and learning components assigned to this qualification.

Fundamental Components.

Component 1: Present a well-structured argument derived from qualitative and/or quantitative data to map new knowledge and generate a competitive advantage.

The component is intended to meet the communication requirement for at NQF Level 6. It requires knowledge of current issues in a field or sub-field and ability to conduct independent research into such issues using qualitative and quantitative data to substantiate recommendations.

Exit level outcomes:
1. Demonstrate knowledge and understanding of key theories and principles appropriate to research.
2. Investigate a business issue
3. Analyse data to investigate a business issue
4. Present a well-structured argument on a business issue

Component 2: Demonstrate knowledge and understanding of e-business as a Competitive tool.

The component is intended for learners who are required to have a sound knowledge of the impact of e-business on a business sector and/or an individual business organisation in outside the financial services. It will be useful for all employees who communicate with internal and/or external clients and who use e-business as a tool in the business organisation.

Exit level outcomes:
1. Explain different types of e-business and their impact on a business environment
2. Investigate key aspects of a good e-business strategy
3. Explain the use of e-business as a means of communication
4. Explain the inter-relationship between e-business and globalisation
5. Apply the use of e-business as a competitive tool in a specific organisation
6. Investigate issues relating to trust, ground rules, enhancing infrastructure & maximising benefits

Component 3: Apply the principles and ethics and professionalism to a business environment.

This component is intended for learners in a business environment who are in a position to impact on an organisation's code of ethics and it implementation. It is designed to raise moral standards as a counter to potential or real corruption within a business environment. The focus is on ethics and corporate governance. It requires application of knowledge of legislation and codes that contain references to ethics for a selected business sector. It also requires analysis and interpretation of the implementation of a code of ethics within an organisation. It provides an opportunity for the learner to integrate theory and practice and to engage in thinking processes at a high level.

Exit level outcomes:
1. Demonstrate knowledge and understanding of key theories and principles appropriate to research
2. Investigate a business issue
3. Analyse data to investigate a business issue
4. Present a well-structured argument on a business issue

Core Components

Component 4: Develop management consulting products and services to establish company brand.

Learners credited with this Learning outcome are generally found within the management consulting field. On successful completion of the Learning outcome, Learners will be able to conduct consulting market and competitor analyses, identify market needs, ensure development of related products and establish brand and credibility.

Exit Level Outcomes:
1. Conduct industry market analyses
2. Conduct competitor analyses
3. Ensure development of products that meet market needs
4. Establish brand and credibility

Component 5: Build relationships and maintain key accounts in a professional management consulting environment.

Learners credited with this Learning outcome are generally found within a professional service environment and work within the auspices of a team. On successful completion of the Learning outcome, Learners will be able to build and maintain client relationships and key accounts in a professional consulting environment.

Exit Level Outcomes:
1. Identify, interpret and assess customer needs and expectations
2. Identify key role players and manage expectations
3. Develop and manage interactions with clients
4. Maintain business relationships. Range: Internal (subordinates, colleagues and management) and external (clients, sub-contractors, associates and suppliers) relationships.
5. Establish and maintain client/ consultant relationships

Component 6: Facilitate change management projects and interventions.

Learners credited with this Learning outcome may be found within a management consulting professional service environment, facilitate change management projects and work as part of a team. On successful completion of the Learning outcome, Learners will be able to plan and facilitate the implementation of successful change management processes, projects and interventions and evaluate the impact thereof.

Exit Level Outcomes:
1. Identify and plan to manage change within a particular context
2. Articulate and build a shared vision. Note: In this context, a shared vision has been defined as the management consulting methodology to be applied throughout the project in line with the ultimate goals and final impact of the project that has been agreed upon with the client and all its stakeholders - i.e. A common goal for the future.
3. Determine organisational transition requirements
4. Facilitate the implementation of change management processes

Component 7: Promote management consultancy services.

Learners credited with this Learning outcome are generally found within a management consulting professional service environment and work as part of a team. On successful completion of the Learning outcome, Learners will be able to conduct consulting market analyses, interact with clients and close service deals.

Exit level outcomes:
1. Conduct consulting market analyses
2, Interact with clients
3. Close the service deal

Component 8: Manage change within a management consulting project.

Learners credited with this Learning outcome are generally found within a management consulting professional service environment and work as part of a team. On successful completion of the Learning outcome, Learners will be able to manage ambiguity, establish project vision and manage overall change elements within management consulting projects.

Exit level outcomes:
1. Manage ambiguity throughout projects
2. Establish vision of project
3. Manage change within projects

Component 9: Produce management consulting project proposals.

Learners credited with this Learning outcome are generally found within a management consulting professional service environment and work as part of a team. On successful completion of the Learning outcome, Learners will be able to design and produce consulting proposals.

Exit Level Outcomes:
1. Consolidate information, define scope and determine approach
2. Develop pricing strategy for the proposal
3. Compile management consulting project proposal
4. Present proposal to client

Component 10: Conduct analysis for management consulting project proposal development.

Learners credited with this Learning outcome are generally found within a management consulting professional service environment and work as part of a team. On successful completion of the Learning outcome, Learners will be able to qualify consulting opportunities, assess and analyse information, estimate cost and effort, and conduct risk assessment.

Exit Level Outcomes
1. Qualify opportunities for projects
2. Assess and analyse information
3. Design proposal
4. Estimate effort and cost of the project
5. Conduct risk assessment

Elective Components

Learners should select a minimum of one of the following learning components

Component 11: Manage and develop people in a professional services practice.

Learners credited with this Learning outcome are generally found within a management consulting professional service environment and work independently. On successful completion of the Learning outcome, Learners will be able to appraise, motivate and develop professionals within the professional service environment.

Exit Level Outcomes:
1. Facilitate career planning of professional service staff
2. Develop professional teams
3. Ensure professional teams meet project requirements

Component 12: Develop management consulting methodologies.

Learners credited with this Learning outcome are generally found within a management consulting professional service environment and work independently. On successful completion of the Learning outcome, Learners will be able to develop, evaluate and present a framework and guidelines for management consulting methodologies.

Exit Level Outcomes:
1. Design a framework for a management consulting methodology
2. Develop guidelines for the management consulting methodology

3. Evaluate and present the management consulting methodology to users

Component 13 Monitor and manage recovery and utilisation.

Learners credited with this Learning outcome are generally found within the management consulting field. On successful completion of the Learning outcome, Learners will be able to assess timesheets and the impact of billing on clients, and manage resource and staff availability and utilisation.

Exit Level Outcomes:
1. Assess and interpret resource time allocation and utilisation in relation to the agreed project plan
2. Assess impact of calculated billing on client
3. Manage resource and staff availability and utilisation

Component 14: Analyse and design business processes.

Learners credited with this Learning outcome are generally found within a management consulting professional service environment and work as part of a team. On successful completion of the Learning outcome, Learners will be able to analyse and design high-level business processes, determine the impact of the redesign on the total organisation, and implement the new business processes.

Exit Level Outcomes:
1. Analyse, design and redesign high level business processes
2. Determine the impact of business process redesign on the total organisation
3. Facilitate the implementation of new business processes

Critical Cross Field Outcomes

The qualification addresses the critical cross-field outcomes through its Components and Exit Level Outcomes.

Monitor and manage recovery and utilisation
> Solve Problems/ Makes Decisions
> Information
> Related Systems

Develop management consulting products and services to establish company brand
> Teamwork
> Organisation
> Technology

Build relationships and maintain key accounts in a professional management consulting environment
> Teamwork
> Organisation
> Information
> Communicate
> Technology
> Related Systems
> Personal Development

Analyse and design business processes
> Teamwork
> Organisation
> Related Systems

Facilitate change management projects and interventions
> Solve Problems/ Makes Decisions
> Teamwork

> Organisation
> Information
> Communicate
> Technology
> Related Systems
> Personal Development

Develop management consulting methodologies
> Teamwork
> Organisation
> Technology

Manage and develop people in a professional services practice
> Teamwork
> Organisation
> Related Systems

Promote management consultancy services
> Teamwork
> Organisation
> Information
> Communicate
> Technology
> Related Systems
> Personal Development

Manage change within a management consulting project
> Solve Problems/ Makes Decisions
> Teamwork
> Organisation
> Information
> Communicate
> Technology
> Related Systems
> Personal Development

Produce management consulting project proposals
> Teamwork
> Organisation
> Information
> Communicate
> Technology
> Related Systems
> Personal Development

Conduct analysis for management consulting project proposal development
> Teamwork
> Organisation
> Information
> Technology

ASSOCIATED ASSESSMENT CRITERIA

Fundamental Components

Component 1

1.1 The difference between qualitative and quantitative research is explained and an indication is given **of** when each type of research is appropriate

1.2 The concept of sampling is explained and an indication is given of how a researcher could select a sample method
1.3 The role of a literature survey in researching a topic is explained with reference to gathering secondary data and understanding previous research experiences

2.1 An argument is formulated and the objectives are defined for a selected research topic
2.2 Appropriate data is sourced to support the topic under investigation
2.3 Sources data are checked of credibility and reliability for a specific industry

3.1 Data is compared and key assumptions are made about any anomalies in the data
3.2 Data is grouped into logical categories to aid interpretation and identify key insights
3.3 Key insights are summarised in relation to the objectives of the research
3.4 Conclusions and recommendations are formulated based on the findings of the research

4.1 Trends and implications are highlighted from data
4.2 Recommendations are presented in a well-structured report and substantiated by qualitative and quantitative data
4.3 New innovative knowledge from the research is mapped onto established practice and used to generate a competitive advantage

Component 2

1.1 Five forms of e-business and their impact on a business environment are explained.
1.2 The hardware, software and middleware needed **to** run five applications are identified and the relationship between the components of an e-business environment is illustrated graphically
1.3 The potential impact of e-business on a business environment is explained and an indication is given of the consequences of using or not using aspects of e-business

2.1 The key aspects of an e-business strategy are analysed in terms of focus, cost, research and development, balance between volume of information and accessibility, security, access and speed
2.2 The consequences of a poor e-business strategy are explained with reference to issues relating to business security, efficient use of resources and lost opportunities
2.3 A business proposal is analysed to ascertain the suitability of introducing e-business in a specific situation
2.4 **At** least five website are accessed and evaluated and an indication is given of the characteristics of a good website as a competitive tool

3.1 Reasons why organisations use e-business as a competitive tool are explained with reference to decision making and cost control
3.2 Three-business communications are analysed and an indication is given of the intended audience and purpose of each
3.3 Different ways of advertising a site are explored with reference to the use of search engines, high turnover sites, pop-ups and old economy communications

4.1 The inter-relationship between e-business and globalisation is analysed in terms of opportunities and threats to local business
4.2 The role of e-business in accelerating the rate of globalisation is explained with examples

5.1 Three possible applications of e-business in a specific industry are researched for a specific organisation
5.2 The pros and cons of three possible applications are analysed with reference to a specific organisation
5.3 The use of e-business in a specific industry is investigated and suggestions are made as to how a specific business could achieve a competitive advantage using e-business

6.1 The concepts of protection of users and privacy are explained and a comparison is drawn on the importance of privacy in e-business in South Africa and two other countries
6.2 Five tools relating to e-commerce are explained with examples of how each can be used in a business and the implications for the consumer

6.3 Encryption as a means of ensuring security, privacy and authenticity of information is investigated and an indication is given of how encryption may be used in an organisation to ensure the rights of the individual or organisation to privacy
6.4 Issues of intellectual property are investigated and the need for regulation is explained with reference to potential abuse if e-commerce is not regulated
6.5 The concepts of shrink-wrapping agreements are explained with reference to the requirements for a contract to be legally binding
6.6 The Electronic Commerce Act is analysed in terms of how it builds trust, establishes ground rules, enhances infrastructure and maximises benefits

Component **3**

1.1 The difference between qualitative and quantitative research is explained and an indication is given of when each type of research is appropriate
1.2 The concept of sampling is explained and an indication is given of how a researcher could select **a** sample method
1.3 The role of a literature survey in researching a topic is explained with reference to gathering secondary data and understanding previous research experiences

2.1 An argument is formulated and the objectives are defined for a selected research topic
2.2 Appropriate data is sourced to support the topic under investigation
2.3 Sources data are checked for of credibility and reliability for a specific industry

3.1 Data is compared and key assumptions are made about any anomalies in the data
3.2 Data is grouped into logical categories to aid interpretation and identify key insights
3.3 Key insights are summarised in relation to the objectives of the research
3.4 Conclusions and recommendations are formulated based on the findings of the research

4.1 Trends and implications are highlighted from data
4.2 Recommendations are presented in a well-structured report and substantiated by qualitative and quantitative data
4.3 New innovative knowledge from the research is mapped onto established practice and used to generate a competitive advantage

Core Components

Component **4**

1.1 Industry data is gathered in a professional and accurate way
1.2 Industry data is gathered that is relevant and necessary for market analysis
1.3 Market trends are identified, categorised and segmented in line with project and organisational methodology
1.4 Market trends are interpreted and assessed to determine market and industry needs

2.1 Competitors are identified who provide similar or like services for relevant market and industry
2.2 Competitor information is gathered in a professional and accurate manner
2.3 Competitor information is categorised and segmented to allow for effective interpretation
2.4 Competitor information is interpreted and assessed to determine impact on market needs
2.5 Competitor services are evaluated against organisational services to determine relationship and differences.
2.6 Recommendations are made for organisational service improvements or changes based on analysis of competitor services

3.1 Market needs are analysed to determine actual client or industry requirements
3.2 Recommendations are made for product development to meet market needs
3.3 Recommendations for product development are presented in a clear, accurate and meaningful way
3.4 Follow ups to product development are scheduled and implemented to ensure effective development

of market services that meet client or organisational needs

4.1 A business approach is established that is effective for the market place
4.2 The organisation's product and service mix is promoted using accepted marketing practice to current portfolio and potential customers
4.3 The capabilities of the organisation are matched to existing service and product mix to ensure customer satisfaction
4.4 Credibility is monitored and promoted in the market place through ongoing professional client service
4.5 The organisational brand is marketed through the use of various advertising means. Range: Advertising means refers to print media, mail shots, cold calling and maintenance of current client relationships
4.6 The organisation is promoted as one that creates value to customer operations
4.7 Organisational brand and credibility in the market place is evaluated on an ongoing basis

Component **5**

1.1 The client's situation and purpose of the project are reviewed to determine needs and expectations
1.2 Client data and information are gathered that is valid and reliable
1.3 Evaluation techniques are used for assessment purposes that are appropriate and relevant to the client's situation and complexity of the project
1.4 The client's situation is assessed against comparable others in a confidential manner
1.5 Aspects of the client's need which require specialist input are identified and sourced
1.6 Data and information is treated sensitively and within confidentiality constraints
1.7 A professional judgement is made of the client's need that takes into account the culture of the client organisation

2.1 Key role players and stakeholders are identified that may be affected by or affect the project
2.2 Rapport and mutual understanding is established with key stakeholders to ensure understanding and transparency of the project. Range: Understanding of the situation, project and potential changes to it
2.3 The position of the client is explained using professional expertise, experience and judgement to ensure understanding
2.4 An analysis of the needs and options of the client are presented accurately and in a manner that recognises constraints within the client organisation
2.5 The client is encouraged to agree to the needs assessment and options available to them
2.6 Agreement with the project status and changes to the project is obtained through ongoing communication and discussion with the client

3.1 The impact of the client organisation's culture is taken into account throughout all client interactions and project work. Range: Cultural influences may include individual personalities, perceptions and expectations
3.2 Interactions with clients are used to develop rapport and facilitate positive response to change
3.3 Project progress and situation are reviewed with the client on a regular basis **to** ensure understanding
3.4 Different roles within the project are identified and described in terms of appropriateness, achievement of agreed outcomes and meeting client needs
3.5 Constructive conflict management and problem solving techniques are utilised to maintain project focus and progress
3.6 Records of client interactions are kept in an effective way

4.1 Working relationships are maintained to ensure high levels of productivity
4.2 Improvements to business relationships are identified and implemented to ensure continuous positive relations
4.3 Information is provided to others continuously, that is accurate and relevant
4.4 Requests for information that cannot be handled are escalated to the appropriate, responsible person, and/ or appropriate alternatives are offered
4.5 Communication with others is planned and implemented as agreed Range: Communication may include meetings, telephonic discussions, electronic information sharing
4.6 Professionalism and credibility is maintained throughout all interactions with others
4.7 Advice is provided on request that falls within the learner's area of responsibility and meets any

regulatory requirements. Range: Regulatory requirements refers to all relevant legislation pertinent to the type of advice being provided

5.1 Rapport with the client is established in order to build trust and understanding
5.2 The values and culture of the client and client organisation are respected in order to maintain rapport and continued trust
5.3 The nature of the client/ consultant relationship is discussed and established **to** ensure mutual understanding of aims and expectations
5.4 The client's internal capacity is encouraged to enable clients to act on their own behalf and manage post project maintenance
5.5 A client/ consultant relationship is maintained that is transparent and of value **to** both parties
5.6 Team members are encouraged to be involved in interactions with the client as well as all aspects of projects

Component 6

1.1 Ambiguity within projects and organisations is identified and managed using effective, complex problem solving techniques Range: Ambiguity refers to all problems, barriers and misunderstanding found within projects or organisations
1.2 The drivers, barriers and enablers to change are analysed within an organisational context using methodology appropriate to the organisation
1.3 A plan to manage barriers and enablers **to** change within an organisational context is developed and implemented for effective change management processes
1.4 Stakeholders to the change management process are identified and consulted on projects, expectations and responsibilities
1.5 Personal resistance to the change management process is dealt with in a professional manner consistent with successful projects
1.6 The impact of change management processes on individuals and groups is understood in the context of operational realities
1.7 Individuals and groups are assisted throughout the change management process to ensure successful involvement and commitment from stakeholders

2.1 A shared vision is established and communicated through consultation with key stakeholders
2.2 Appropriate leadership behaviours, skills and competencies are enhanced to accommodate identified leadership challenges
2.3 Leadership challenges that inhibit change or development are analysed **to** identify training requirements
2.4 Front-line leadership are coached to ensure the development and demonstration of required leadership behaviours
2.5 A contribution to the design and development of activities that impact upon leadership behaviour is made, in relation to identified needs of individuals and the organisation.
2.6 Team development is facilitated, with regards to the change management process

3.1 All resources needed for the change process are identified through structured analysis within a team environment Range: Resources may refer to Learners, technology, materials, tools and interventions
3.2 The design/ re-design of jobs or job roles is facilitated in support **of** the change management process
3.3 **Job** impacts are identified and workforce transition requirements are determined to allow for practical recommendations for change to the client
3.4 Gaps in organisational infrastructure, processes and characteristics are identified to allow for practical change management recommendations to the client
3.5 The results of organisational and workforce gap analysis are taken into account during the change management design process

4.1 Change management processes are designed based on agreed upon methodology and organisational requirements
4.2 A plan for the implementation of change management is compiled after consultation with the client
4.3 The implementation of change management processes is facilitated in a professional manner consistent with the principles of project management

4.4 The impact of change management processes is monitored and evaluated to allow valuable feedback and reports to the client

Component 7

1.1 Market analyses are conducted that identify opportunities and competitors
1.2 Client needs are assessed to establish project proposal that meets client requirements in terms of deliverables, time and costs
1.3 Clients and projects are identified that present real marketing opportunities for the business
1.4 Client needs are identified through discussions with the client and articulated to ensure acceptance by the client

2.1 Initial contact ensures establishment of rapport and mutual understanding with the client
2.2 Client needs and position are interpreted and understood on an continual basis
2.3 Client signals are read, assessed and interpreted to ensure positive relations and focus
2.4 Client perceptions are interpreted accurately
2.5 Interactions with the client involve self marketing and internal networking in order to maximise marketing opportunities
2.6 Cross-selling opportunities are harnessed throughout the project process through structured identification and management of sales opportunities

3.1 The service marketing field is explained and differentiated from standard marketing practices in a meaningful way.
3.2 The relationship between service and price is described to show full understanding
3.3 Complex sales and buying roles are explained in a meaningful way
3.4 The benefits of utilising management consulting services are explained to the client
3.5 Proposals are presented to clients in a manner that facilitates understanding of the concept and acceptance of the project by the client
3.6 Proposals are revised and re-submitted to the client in order to meet client and project requirements

Component 8

1.1 The problem is identified and structured so that it captures ambiguity within the project
1.2 An analysis of the ambiguous situation is conducted that allows for identification of information necessary for solutions
1.3 Recommendations are developed that will address defined problems and provide viable alternative solutions
1.4 Performance measures are identified that are relevant to the chosen solution within the project
1.5 Implementation of solutions for ambiguity within the project is evaluated against pre-identified performance measures

2.1 Client needs are analysed and established at the start of a project
2.2 Management consulting methodologies are applied to address client needs
2.3 Vision of project is established and aligned to meet client requirements
2.4 Commitment and enrolment by stakeholders to the project vision is established to eliminate potential barriers to project implementation

3.1 Project activities and outcomes are measured against stated vision and environment of project to establish alignment levels on an ongoing basis
3.2 Project activities and outcomes are aligned and changed to meet client expectations and achieve client satisfaction
3.3 Project activities and outcomes are aligned to changing vision and environment on a continual basis and where necessary
3.4 The management of change within the project, relating to ambiguity, changing vision and changing environment is evaluated to establish effectiveness
3.5 The results and process of change management activities are included in the final project report to ensure clear communication to all stakeholders, in a clear and meaningful manner.

Component 9

1.1 All available data collected during proposal analysis is consolidated to allow for meaningful interpretation.
1.2 The scope of the intervention is defined in line with approach, detailed work programme, staffing resources and mix and use of sub-contractors.
1.3 All aspects of the project are taken into account when defining the scope of the project.
1.4 Account objectives, sales strategy and draft action plans are developed in line with project aims.
1.5 Potential differentiating factors are identified in line with project objectives and requirements.
1.6 A High level approach and project plan is developed within the identified conceptual framework.

2.1 A pricing strategy is developed in line with analysis results and based on project plan.
2.2 Initial fee estimates are included in the pricing strategy that allow for changes, methods of calculation and contingency billing.
2.3 A draft proposal is prepared and presented in rehearsal format in order to validate client buy in.

3.1 The production process for writing the proposal is organized in an effective manner to ensure deadlines and expectations are met.
3.2 All proposal structure issues are taken into account when writing the proposal.
3.3 The proposal includes all necessary components as per standard practice and client requirements.
3.4 The key objectives of the proposal are identified in order to write a clearly and professional document.
3.5 The reasons for using an engagement letter versus a proposal in client interventions are explained in relation to types of client and the competitive environment.
3.6 The contents of proposals and engagement letters are described in accordance with organisational and project specific requirements.

4.1 Planning for a proposal presentation includes rehearsal and organisation of logistical issues.
4.2 The proposal and implementation plan are presented using accepted presentation techniques and correct usage of required equipment.
4.3 The proposal and implementation plan are presented to the client on order to verify client's desired results.
4.4 All issues, concerns, questions and objectives are dealt with in a tactful manner consistent with applied facilitation techniques.
4.5 Decisions relating to reviews, steps and responsibilities are facilitated in line with draft project plan and client requirements.
4.6 A follow up to the presentation is made in order to build a relationship with the client and influence proposal decisions.

Component 10

1.1 The type of opportunity is identified and categorized as proactive or reactive.
1.2 The opportunity is assessed and qualified to ensure viability of the prospect.
1.3 The prospect is approached in a professional manner to schedule initial information gathering session.
1.4 Client requirements and key characteristics of the opportunity are assessed in order to make a decision to proceed with the proposal.

2.1 Information necessary for proposal development is identified based on the key characteristics of the client and the project.
2.2 The necessary data is collected through background research and meeting with the client.
2.3 The organisation's competitors are analysed to identify variables that may affect proposal design.

3.1 Level of investment and effort required in the project is evaluated in order to establish an estimate of costs and effort.
3.2 The level of effort required is estimated using standard estimating techniques.
3.3 An initial pricing strategy is determined in accordance with pricing policies.
3.4 The initial pricing strategy is developed in relation to competitor pricing.
3.5 The initial pricing strategy is designed according to methods of presentation.

4.1 The major risks associated with the project are identified through analysis against all variables.
4.2 The method for selling the project proposal is identified in terms of prospect buying behaviour, nature of personal relationships with the prospect and amount of positive influence of staff on prospect.

3.1 The prospect approach is determined in terms of method, style, involvement, steps and proposed solutions.
3.2 The prospect is re-assessed in order to finalise proposal methodology.
3.3 The opportunity is re-assessed for final decision making purposes.
3.4 The final decision of whether to propose or not is made based on all evidence gathered during analysis process
3.5 All variables are taken in to account when making the final decision to propose or not to propose.

Elective Components

Component 11

1.1 Formal appraisals of the individual's role are conducted at organisational and client level
1.2 Client feedback and perceptions of delivery are evaluated during the appraisal process
1.3 Project progress is monitored to determine achievement of individual and team objectives and deliverables
4.4 Individual career management planning is undertaken at both organisational and client project level
1.5 Quality assurance activities are undertaken for individual and team outputs and progress
1.6 Structured feedback is provided to individuals in relation to appraisal and monitoring results. Range: Structured feedback is specific, constructive and allows for open discussion

2.1 Training and development needs are determined from appraisal results and ongoing monitoring of team and individual projects
2.2 Client employees, seconded to consulting projects are managed through monitoring, feedback and training activities
2.3 Mentoring and guidance is provided to individuals and teams in line with identified needs
2.4 The behavioural traits of individuals within teams are taken into account when determining and planning development interventions
2.5 Individuals and teams are motivated utilising accepted motivational techniques

3.1 Knowledge of individual competencies and behavioural traits is demonstrated
3.2 Teams are matched according to experience, individual competencies and behavioural traits to meet project and client requirements
3.3 Project learner requirements are met to allow for an effective combination of diverse skills and individual traits
3.4 Employment equity learner requirements are met in order to meet client requests
3.5 Project team relationships are monitored and managed on an ongoing basis
3.6 Professional teams are supervised in accordance with current labour legislation

Component 12

1.1 The situation or problem in question is evaluated to gain and understanding of the relevant approach for methodology development
1.2 A literature review is conducted to identify existing theory and methodology
1.3 A framework for the methodology is developed that included a breakdown of major steps or phases
1.4 Alternate route maps for the methodology are designed to allow users various opportunities for working through the methodology and includes different starting points
1.5 The objectives of the methodology are determined through careful analysisRange: Objectives include purpose, deliverables, inputs, outputs, dependencies, interdependencies and definitions
1.6 The different levels of methodology are defined in relation to strategic and operational categories

2.1 The application of the methodology is defined and procedures are written for users
2.2 Quality assurance criteria are determined and include checkpoints during application. Range: Criteria

must refer to timeframes and details of quality assurance activities
2.3 The timeframes for the various phases of the methodology are assessed and defined realistically and with allowance for changes in the process
2.4 Documentation is compiled for all user levels in a format consistent with documentation control principles. Range: User levels may refer to trainers, learners, team leaders and consultants
2.5 All materials needed for working through the methodology are developed in a meaningful manner. Range: All materials may include templates, procedures and guidelines

3.1 The methodology is tested at a pilot site in a controlled and scientific manner
3.2 The results of methodology testing are evaluated to identify areas of re-design
3.3 Improvements to the methodology are made based on evaluation of test results and feedback from users, on a continuous basis
3.4 The methodology is presented to users in visual and documented format
3.5 A report is presented to the user that meets accepted structured reporting criteria

Component 13

1.1 Timesheets are assessed to enable accurate interpretation and reporting of resource utilisation
1.2 Timesheets are balanced as per project and organisational criteria
1.3 Calculations relating to timesheet balancing are conducted accurately and in line with accepted accounting/ financial management techniques
1.4 Timesheet reports are compiled and represented in a clear and accurate manner

2.1 Client billing is calculated accurately and in accordance with standard accounting practice
2.2 The impact on clients of calculated billing against budget is assessed to establish value added to the business
2.3 Engagement profitability is assessed and identified against organisational benchmarks
2.4 Records of billing and engagement profitability assessments are interpreted and included in financial reports

3.1 Resource and staff availability is assessed in line with standard operating procedures and project plans
3.2 Staff are assigned to projects in accordance with availability, competency levels, experience and recovery levels
3.3 Individual utilisation is analysed against recovery levels in line with organisational procedures
3.4 Staff utilisation and recovery levels meet organisational benchmarks
3.5 The impact of projects on staff is monitored and managed to ensure maximum recovery levels

Component 14

1.1 Cross-functional business processes are identified and analysed in the organisation for categorisation purposes
1.2 Duplicate business processes are identified from analysis and dealt with through appropriate elimination techniques
1.3 A high-level business process architecture is designed in line with agreed upon methodology and client requirements
1.4 Redesign of existing business process architecture is completed according to agreed upon methodology to meet client requirements
1.5 The designed business process is evaluated and meets the requirements for a logical and practical intervention that fits the organisation culture

2.1 Root causes of business process redesign are identified and clients are informed of findings in a professional manner
2.2 The business process re-design is contextualised within the organisation to meet client requirements
2.3 The impact of redesign on the organisation's structure is determined using standard analytical techniques
2.4 The impact of redesign on jobs and skills requirements is established once all stakeholders have been consulted and analysis has taken place
2.5 The impact of redesign on technology in the organisation is determined through analysis of current

versus required technology
2.6 A report on the findings of redesign impact analyses is produced in a professional format and includes recommendationsto the client

3.1 New business process designs are detailed and include documented procedures for implementation and future reference purposes
3.2 Resources are utilised in line with redesigned architecture to maximise effectiveness
3.3 Implementationof improvements in quality are facilitated according to redesign structure
3.4 New business processes, resource utilisation and quality improvements are evaluated to establish the extent of value added to the organisation
3.5 A report of the results of business process implementation is presented to the client in a professional manner, in order to ensure client understanding

Integrated Assessment

Evidence must be demonstrated through a variety of options: case studies, problem-solving assignments, management consulting practice in simulated and in-situ contexts, portfolios of learning materials, projects, written and oral examinations. Some of these options are more suited to the assessment of foundational competence, rather than practical and reflexive competence.

However, the final integrated assessment needs to have the following characteristics:
> It should assess the extent to which learners can operate competently and effectively in South African management consulting contexts;
> It should measure the extent to which learners have integrated the roles and the knowledge and skills delivered through the different courses/ modules that make up the management consulting programme;
> It should be designed in such a way that the roles are assessed through the specialism;
> It should measure applied competence. In other words, it should assess whether learners are able to integrate the ability to perform important management consulting actions competently (practical competence), understand the theoretical basis for these actions (foundational competence), and reflect on and make changes to management consulting (reflexive competence).

The assessment criteria and evidence requirements are as follows:
> Generate, explore and consider options for appropriate action;
> Identify the most appropriate course of action in relation to the particular context, topic, management consulting assignment and resources available;
> Explain the reasons for that particular selection as well as what was taken into account in making the selection;
> Perform the identified action, while continuously monitoring and adapting performance as required:
> Explain the reasons for the performance;
> Evaluate his/her performance and identify areas for improvement;
> Reflect on the learning and performance; and
> Develop a plan or strategy for future action, which reflects an integration of what has been learnt through reflection.

Because assessment practices must be open, transparent, fair, valid, and reliable and must ensure that no learner is disadvantaged in any way, an integrated assessment approach is incorporated into the qualification. It is an outcomes-based qualification and, therefore, both formative and summative assessment processes have been accounted for. Assessors are to design assessment tools and conduct assessment against the learning outcomes specified in the qualification. Any such assessment tools must take into account established assessment principles and makes use of a range of formative and summative assessment methods. It is recommended that the summative assessment involve both a portfolio of evidence and supplementary forms of assessment.

INTERNATIONAL COMPARABILITY

The exit level outcomes of this qualification have been aligned with management consulting unit standards that were developed, in consultation with industry stakeholders. Relevant international learning outcomes were reviewed and taken into account during this standards generation process. The review included taking into account the management consulting standards generated in the United Kingdom. ICMCI has a standing committee that is responsible for the production and alignment of standards across 35 member nations.

ARTICULATION OPTIONS

The qualification may be articulated in any field of specialisation, depending on the learner's selection of elective learning outcomes. As such, **it** is useful for all areas of business and management, where projects and change need to take place. Furthermore, articulation may be based on certain core learning outcomes relating to change management, marketing, customer service and business management. This means that learners may move into fields of change management, marketing, customer service or business management based on learning outcomes achieved through assessment. The NQF principles of portability of standards and alternative learning/career pathways are applied through this articulation possibility. It is envisaged that this qualification could grant access into further higher education qualifications such as a Master of Business Administration, other higher degrees (i.e. Master of Commerce, Master of Arts) or professional qualifications with professional institutes. As this is a new qualification these articulation routes are still to be implemented with the relevant institutions.

MODERATION OPTIONS

NIA

CRITERIA FOR THE REGISTRATION OF ASSESSORS

Criteria for registration of assessors

For an applicant to register as an assessor, it is recommended that the applicant should have:
1. A recognised national qualification at a NQF level higher than the qualification being assessed (i.e. Level **7).**
2. A minimum of 5 (five) years' practical, relevant occupational experience;
3. Declared competent in all the outcomes of the National Assessor Unit Standards as stipulated by SAQA:

NOTES

N/A

UNIT STANDARDS
(Note: A blank space after this line means that the qualification is not based on Unit Standards.)