GMCI

GLOBAL MANAGEMENT CONSULTANT INSTITUTE

GMCI CERTIFICATION PROGRAM

Certified Junior Consultant (GMCI-CJC)

Certification Program — Full Learning Journey and Detailed Curriculum Design. Ten modules covering the complete junior consulting lifecycle, from foundations and diagnostics to business cases, reporting, and recommendations.

PROGRAM	MODULES	LEARNING HOURS	DURATION
GMCI-CJC	10 Modules	100–140 hrs	3–6 Months

Contents

Program Overview & Learning Architecture

01

WHAT THIS PROGRAM BUILDS

The Level 1 Junior Consultant program is the entry point to the consulting profession. It develops the fundamental skills, knowledge, and professional behaviours required to contribute effectively in a consulting team from day one. The curriculum follows a logical consulting skill-build — from understanding what consulting is, through mastering personal and communication skills, to executing diagnostic work, building strategic frameworks, designing solutions, managing projects, writing proposals, and delivering compelling reports and presentations.

Every module is designed around real consulting practice. Participants do not sit and listen — they analyse, present, write, debate, and practise. The program uses GCC-contextualised case studies throughout to ensure maximum relevance for the target market.

PROGRAM FACTS

PROGRAM
GMCI-CJC Level 1 — Junior Consultant Certification

MODULES	TOTAL HOURS	DURATION	METHODOLOGY
10 modules covering the full junior consulting lifecycle	100–140 learning hours	3–6 months	25% theory · 40% case studies · 25% practical · 10% assessment

7 LIFECYCLE PHASES
Discovery · Diagnosis · Solution Design · Transformation Roadmap · Delivery & Execution · Measure & Evaluate · Closing

TARGET AUDIENCE
Entry-level consultants · Junior associates · Individuals transitioning to consulting

Program Architecture at a Glance

MODULE	TITLE	HOURS	CORE SKILL BUILT
01	Consulting Foundations & Professional Ethics	12 hrs	Consulting lifecycle, ethics, roles, competence, terminology and professional identity
02	Diagnostic, Research & Analytical Skills and Tools	14 hrs	Data collection methods, validation, survey design, interview design, and document analysis
03	Strategic Analysis & Planning Tools & Frameworks	18 hrs	Strategic planning process and core analytical frameworks — SWOT, PESTLE, TOWS, BCG, GE-McKinsey
04	Strategic Planning & Implementation Tools & Frameworks	14 hrs	Porter's Generic Strategies, Balanced Scorecard, KPI design, and framework application in depth
05	Marketing Analysis & Strategy	14 hrs	Marketing analysis, segmentation, market entry strategy, competitive positioning, value proposition, 4Ps, 7Cs, benchmarking
06	Organization Diagnosis & Culture	14 hrs	Basics of management, org structure, culture, maturity assessment, teamwork, delegation
07	Client & Stakeholder Skills	18 hrs	Communication, influence, meeting management, identifying stakeholders, negotiation, and conflict management
08	Managing the Consulting Project	14 hrs	Project lifecycle, PM tools, governance, and closure — Charter, WBS, Gantt, RACI, Change Log, Reviews
09	People & Practice Operations for Consultants	12 hrs	Talent and resource management, workforce planning, PA, recruitment, succession, development
10	Business Cases, Reporting & Recommendations	12 hrs	Case analysis, executive presentations, consulting report and building recommendations

Assessment Framework

COMPONENT	WEIGHT	DESCRIPTION
Knowledge Quizzes	**20%**	End-of-module MCQ and short-answer tests
Case Study Analysis	**25%**	Written case responses and group analysis exercises
Practical Assignments	**25%**	One deliverable per module, building the portfolio
Role-Play & Participation	**10%**	Active involvement in discussions, and group activities
Final Practical Exam	**15%**	Full case study with report and executive presentation
Portfolio Submission	**5%**	Completed consulting toolkit across all 10 modules

CUMULATIVE PORTFOLIO DELIVERABLES

Participants graduate with a 10-piece consulting portfolio — one professional deliverable per module — ready for immediate use in real engagements.

MODULE	PORTFOLIO DELIVERABLE
01	Consulting Lifecycle & Ethics Reflection + Competency Self-Assessment
02	Diagnostic Research Design + Interview Guide + Affinity Map
03	Strategic Analysis Report: PESTLE + SWOT + TOWS + Framework Selection
04	Balanced Scorecard + KPI Framework (12 KPIs, 2 levels of cascade)
05	Marketing analysis, market entry strategy, competitive positioning
06	Organisation Design Assessment + Maturity Diagnostic + Culture Map
07	Communication & Influence Skills Audit + BATNA + ZOPA
08	Full Consulting Project Plan: Charter + WBS + RACI + Risk Register
09	Manpower Plan + Skill Matrix + JD + CBI + PDP
10	Full Consulting Case Report + Executive Presentation Deck

MODULE 01 OF 10 · 12 HRS · 2 DAYS

Consulting Foundations & Professional Ethics

"Understand what consulting is, how it works, and what a great consultant looks like."

DURATION	LEARNING HOURS	LEVEL	MODULE
2 days	12 hrs	Level 1 — Junior Consultant	01 of 10

MODULE PURPOSE

Module 1 builds the foundation every junior consultant needs before entering any client environment. It answers the essential questions: What does a consultant actually do? How is a consulting engagement structured? What are the ethics and professional standards? And what does a consulting project lifecycle look like from contracting to closure? By the end of this module, participants will have a clear professional identity as a consultant and a mental model of the full engagement journey.

LEARNING OBJECTIVES

- Trace the origins of management consulting from Frederick Taylor through to the AI disruption era
- Map the competitive landscape: Big Three, Big Four, boutique firms — strategies, service lines, and positioning
- Define management consulting and articulate the unique value a consultant brings to a client
- Distinguish the roles of consultant, expert, and trainer in a client engagement context
- Map all stages of a consulting project lifecycle from contracting through to closure
- Describe the three phases of the client engagement journey: Gap Analysis, Solutions, and Implementation
- Apply the Iceberg Model to frame complex client problems beneath the surface
- Explain the consulting competence framework and self-assess current capability levels
- Identify the formal and informal roles consultants play and when each applies
- Apply the Code of Ethics for Consultants across pre-engagement, engagement, and post-engagement phases

Detailed Topics & Content

1.1 CONSULTING INDUSTRY HISTORY

- Origins: Frederick Taylor (scientific management), McKinsey founding (1926), BCG matrix era (1960s)
- The rise of the Big Three: McKinsey, BCG, Bain — strategy consulting heritage
- The Big Four entry: Deloitte, PwC, KPMG, EY — from audit to management consulting
- Boutique and specialist firms: where niche creates competitive advantage

1.2 THE CONSULTANT'S ROLE & PROFESSIONAL IDENTITY

- Management consulting defined: scope, value proposition, and the difference from employment
- Consultant vs. Expert vs. Trainer: the critical distinctions every junior consultant must master
- Problem framing — the Iceberg Model: visible symptoms vs. root causes
- The Consultant Divide: hands behind the work vs. brain behind the strategy
- Formal and informal consulting roles across the engagement lifecycle
- Qualities of an effective consultant: the 8 characteristics that distinguish excellent from adequate

1.3 CONSULTING JARGON & TERMINOLOGY

- Core consulting vocabulary: deliverable, engagement, scope, workstream, stakeholder, retainer
- The language of consulting reports: findings, insights, recommendations, actions
- Client-facing communication: what language builds credibility with executives
- GCC market-specific consulting terminology

1.4 STAGES OF THE CONSULTING PROJECT LIFECYCLE

- Stage 1: Contracting — scoping, proposal, and SOW sign-off
- Stage 2: Kick-off — team setup, client onboarding, and governance
- Stage 3: Diagnostic — data collection, analysis, and insight generation
- Stage 4: Solution Design — recommendations and roadmap development
- Stage 5: Implementation Support — delivery, change, and execution
- Stage 6: Closure — handover, lessons learned, and relationship management

1.5 THE ENGAGEMENT CLIENT JOURNEY — DETAILED VIEW

- Gap Analysis & AS-IS: problem framing, problem statement, hypothesis + MECE, data collection, data analysis & benchmarking, insights
- Solutions & TO-BE: tools & methodologies, root cause analysis, solutions & alternatives, quick wins identification
- Implementation & ROI: implementation plan, execution + action plan, stakeholder management + buy-in, deliverables & outcomes, ROI

1.6 THE CONSULTING COMPETENCE FRAMEWORK

- Professional behaviours: integrity, client-focus, intellectual curiosity, resilience
- Consulting competence: analytical thinking, structured communication, facilitation, project management
- Market capability and knowledge: industry expertise, functional knowledge, commercial awareness
- Junior consultant competency self-assessment: where to start, what to build
- Career stages: Analyst → Junior Consultant → Consultant → Senior Consultant → Partner

1.7 PROFESSIONAL CONSULTING ETHICS

- GMCI Code of Ethics for Consultants: the 5 core principles
- Professional standards and their application in the GCC and internationally
- Pre-engagement ethics: independence, conflict of interest, accurate capability representation
- Engagement phase ethics: confidentiality, data stewardship, objectivity under pressure
- Post-engagement ethics: client reference obligations, knowledge confidentiality, competitor intelligence
- Client trust pillars: competence, reliability, integrity, and intimacy

Tools, Case Studies & Assessment

TOOLS, TEMPLATES & FRAMEWORKS

- Consulting Lifecycle Diagram
- Consulting Jargon Glossary (200 terms)
- Iceberg Problem Framing Template
- Ethics Decision Framework
- Competency Self-Assessment Radar
- AS-IS / TO-BE Engagement Map
- Client Journey Map (AS-IS / Solutions / ROI)
- Trust Equation Tool

CASE STUDIES

CASE 1A

The Iceberg Problem — What Is the CEO Really Asking For?

A Saudi logistics CEO says: "We need to improve customer satisfaction." Participants use the Iceberg Model to discover that the real problem is a misaligned incentive structure that rewards speed over accuracy, leading to delivery errors.

REQUIRED TASKS

- Apply the Iceberg Model to separate visible symptoms from underlying causes
- Write a precise problem statement (3–4 sentences)
- Map the issue to the correct phase in the Engagement Client Journey
- Identify which consulting roles would be most critical for this engagement

CASE 1B

The Ethics Crossroads

A junior consultant discovers during an engagement that the client's financial projections in the board report are inflated. The engagement partner wants to proceed without correction to protect the relationship. Participants must navigate this ethical dilemma.

REQUIRED TASKS

- Identify all ethical principles at stake using the Code of Ethics framework
- Map this situation to the correct engagement phase (pre/during/post)
- Recommend a course of action with rationale
- Role-play a conversation with the engagement partner

ASSESSMENT

ASSESSMENT METHOD	FORMAT	WEIGHT
Knowledge Quiz	20 MCQ on consulting fundamentals and ethics	**30%**
Ethics Case Analysis	Written response to Case 1B, 500 words	**40%**
Competency Reflection Portfolio	Lifecycle map + self-assessment	**30%**

Exercises, Assignment & Deliverable

CLASSROOM EXERCISES & ROLE-PLAYS

Exercise: The Consultant Identity Exercise

Participants introduce themselves as a consultant to the group — not as their current job title, but as the consultant they want to become. Then the group maps which competence framework dimension each introduction demonstrated.

- 2-minute self-introduction as a consultant
- Group mapping of competencies demonstrated
- Facilitator feedback on credibility and positioning

Exercise: Lifecycle Sequencing Game

Cards with 24 consulting activities are distributed randomly. Participants race to sequence them correctly across the 6 lifecycle stages and defend their sequencing to the group.

PRACTICAL ASSIGNMENT

Consulting Lifecycle & Ethics Reflection. Participants map a real or observed business situation through the 6-stage consulting lifecycle and produce a written reflection on the ethical dimensions they would face as the consultant.

01 Select a real business problem (from your own organisation or a publicly known case)

02 Map how a consulting engagement for this problem would unfold across all 6 stages

03 Identify 3 ethical risks the consulting team would face and how to manage them

04 Complete the Competency Self-Assessment Radar for your current baseline

REQUIRED DELIVERABLE — CONSULTING LIFECYCLE MAP + ETHICS REFLECTION + COMPETENCY BASELINE

- 6-stage lifecycle map applied to a real business scenario
- 3 ethical risk scenarios with recommended actions
- Completed Competency Self-Assessment Radar (baseline score)
- 1-page personal development plan: 3 priority competencies to build during this program

MODULE 02 OF 10 · 14 HRS · 2 DAYS

Diagnostic, Research & Analytical Skills & Tools

"Collect the right data, in the right way, to build evidence-based consulting insights."

DURATION	LEARNING HOURS	LEVEL	MODULE
2 days	14 hrs	Level 1 — Junior Consultant	02 of 10

MODULE PURPOSE

Before any recommendation can be made, a consultant must understand the current state with rigor and evidence. Module 2 builds the diagnostic and research toolkit that every junior consultant needs: research design, data collection methods, interview skills, survey design, document analysis, and the data validation and cleaning disciplines that separate credible analysis from guesswork.

LEARNING OBJECTIVES

- Apply Kipling's 5W+H framework to structure a diagnostic investigation
- Distinguish between qualitative and quantitative research methods and select appropriately
- Design a primary data collection plan using surveys, interviews, and focus groups
- Source and evaluate secondary data from relevant business and industry databases
- Apply data validation criteria (completeness, accuracy, consistency, timeliness) to a real dataset
- Design a structured consulting interview guide using the funnel technique
- Apply document analysis methodology across all 6 methodological moves
- Identify and avoid the 7 most common diagnostic mistakes junior consultants make

Detailed Topics & Content

2.1 ROLE OF DIAGNOSTIC & RESEARCH TOOLS IN CONSULTING

- Kipling's 5W+H: What, Why, Who, Where, When, How — the consultant's diagnostic compass
- The consultant as problem solver & detective: why rigour in diagnosis prevents expensive mistakes
- Research design hierarchy: exploratory (what?), descriptive (how much?), explanatory (why?)
- Connecting research design to the engagement question: matching method to purpose

2.2 TYPES OF RESEARCH METHODS

- Qualitative methods: themes, patterns, meanings — when and how to use them
- Quantitative methods: numbers, frequencies, correlations — when and how to use them
- Mixed methods in consulting: using both for triangulation and richer insight
- Sampling strategies: purposive, snowball, and stratified — selecting for representativeness

2.3 DATA COLLECTION TOOLS

- Primary data: surveys, structured interviews, observation, focus groups, document analysis
- Secondary data: market reports, financial databases, regulatory filings, industry benchmarks
- Building a data collection plan: sources, methods, timeline, and responsibilities
- Ethical data collection: participant consent, anonymity, and data security

2.4 DATA VALIDATION & CLEANING

- Completeness: are all required fields populated across all records?
- Accuracy: is the data factually correct and sourced reliably?
- Consistency: does it match other sources and internal logic?
- Timeliness: is it current enough for the analytical purpose?
- Cleaning: missing values, outlier management, duplicate removal

2.5 SURVEY & QUESTIONNAIRE DESIGN

- Types of questions: closed, open, Likert scale, ranking, demographic
- Funnel technique: broad context questions first, specific detail questions last
- Survey design principles: length, language, skip logic, and pilot testing

2.6 INTERVIEW DESIGN & EXECUTION

- Types: structured, semi-structured, unstructured — when each is appropriate
- Characteristics of a good interviewer: curiosity, neutrality, active listening
- The interview guide: 10-question semi-structured guide design
- Before, during, and after the interview: the complete protocol
- Things interviewers must never do: leading questions, interrupting, telegraphing judgment

2.7 DOCUMENT ANALYSIS — 6 METHODOLOGICAL MOVES

- Document sites, tools, work, texts, issues, movements — the complete analytical approach
- Coding and annotating documents: building the analytical record
- What documents say vs. what they do not say: reading gaps and silences

2.8 STRUCTURING LOGICAL REASONING

- Draws logical preliminary conclusions from analysis and escalates them for senior review
- Applies basic issue-tree structuring to break a problem into component parts under guidance
- Applies basic scenario thinking to consider more than one plausible interpretation of ambiguous data
- Flags inconsistencies or gaps in decision logic for senior review

2.9 MISTAKES JUNIOR CONSULTANTS ALWAYS MAKE IN DIAGNOSTICS

- Starting with a solution before completing the diagnosis
- Interviewing only the top layer and missing operational insight
- Confusing data collection with insight generation
- Presenting data without the "so what" — analysis without insight is wasted effort
- Failing to triangulate: relying on a single source
- Confirmation bias: collecting only evidence that confirms the hypothesis

MODULE 02 · APPLIED PRACTICE

Tools, Case Studies & Assessment

TOOLS, TEMPLATES & FRAMEWORKS

- Kipling 5W+H Diagnostic Template
- Data Validation Checklist (4 dimensions)
- Research Design Selection Matrix
- Data Cleaning Log Template
- Data Collection Plan Template
- Document Analysis Coding Framework
- Semi-Structured Interview Guide Template
- Affinity Mapping Canvas (Miro)
- Survey Design Checklist
- Post-Interview Synthesis Template
- Questionnaire
- Diagnostic Mistakes Checklist
- Focus Group Facilitation Guide

CASE STUDIES

CASE 2A

Diagnosing a High-Turnover Crisis — International Manufacturer

An international industrial company is losing 35% of its production staff annually. HR says it is a pay issue. Operations says it is a management issue. The CEO wants the real answer in 3 weeks. Participants design the full diagnostic research plan.

REQUIRED TASKS

- Apply Kipling 5W+H to frame the diagnostic investigation
- Choose the right research methods for this situation (justify: qualitative, quantitative, or both)
- Design a data collection plan: 3 primary sources, 2 secondary sources
- Build a 10-question semi-structured interview guide for line managers
- Identify 5 potential mistakes to avoid in this diagnostic

CASE 2B

The Unreliable Data Set

Participants receive a 200-row operational performance dataset from a Saudi client. The data has missing values, duplicates, and several suspect outliers. They must clean, validate, and produce a summary of diagnostic-ready data.

REQUIRED TASKS

- Run a data validation check across all 4 dimensions
- Identify and handle missing values, duplicates, and outliers
- Document all decisions in a Data Quality Log
- Produce a 1-page data summary with 3 diagnostic observations

ASSESSMENT

ASSESSMENT METHOD	FORMAT	WEIGHT
Diagnostic Methods Quiz	20 MCQ	25%
Interview Role-Play	Observed 15-minute interview + synthesis	45%
Diagnostic Research Design	Full submission	30%

Exercises, Assignment & Deliverable

CLASSROOM EXERCISES & ROLE-PLAYS

Exercise: Live Interview Practice

Participants pair up. One plays a consultant, one plays an operations manager at a client company experiencing declining quality. The consultant must conduct a 15-minute semi-structured diagnostic interview using a guide they prepared in advance.

- 10-minute guide preparation using the Interview Guide Template
- 15-minute observed interview role-play
- Post-interview synthesis: complete within 15 minutes
- Group debrief: what worked, what was missed, what was biased

Exercise: Document Analysis Sprint

Participants receive 3 documents from a fictional Saudi client (annual report, org chart, customer complaint log) and apply the 6 methodological moves to extract diagnostic insights.

PRACTICAL ASSIGNMENT

Diagnostic Research Design Project. Participants design a complete diagnostic research plan for a real or assigned organisational problem.

01 Define the diagnostic question using Kipling 5W+H

02 Choose research methods and justify the selection

03 Build the data collection plan: sources, methods, timeline, responsibilities

04 Design a 10-question semi-structured interview guide

05 Conduct 2 real or simulated interviews and complete post-interview synthesis

06 Produce an affinity map: cluster themes from both interviews

REQUIRED DELIVERABLE — DIAGNOSTIC RESEARCH DESIGN + INTERVIEW GUIDE + AFFINITY MAP

- Diagnostic question framed using Kipling 5W+H
- Research methods selection with justification
- Data collection plan (sources, methods, timeline)
- 10-question semi-structured interview guide
- Post-interview synthesis for 2 interviews
- Affinity map: 5–7 themes from combined interviews
- Data validation log (if dataset provided)

MODULE 03 OF 10 · 18 HRS · 3 DAYS

Strategic Analysis & Planning Tools & Frameworks — Part 1

03

"Build the strategic analysis toolkit that underpins every consulting engagement."

DURATION	LEARNING HOURS	LEVEL	MODULE
3 days	18 hrs	Level 1 — Junior Consultant	03 of 10

MODULE PURPOSE

Strategy is the lens through which consultants analyse client problems, evaluate options, and design recommendations. Module 3 builds the full strategic planning toolkit: the strategic planning process, environmental scanning (PESTLE and SWOT), and the major strategy frameworks across corporate, business, and functional levels. Participants learn not just how to use each framework, but when and why — and how to avoid the most common misapplication errors.

LEARNING OBJECTIVES

- Explain the 7-step strategic planning process and position each step correctly in a consulting engagement
- Formulate a client's vision, mission, and core values using structured facilitation techniques
- Conduct a PESTLE analysis and translate environmental factors into strategic implications
- Build a SWOT analysis and derive TOWS strategies from the intersecting quadrants
- Apply BCG Matrix, McKinsey 7S, Ansoff Matrix, and GE-McKinsey to corporate strategy decisions
- Apply Porter's Five Forces and Porter's Generic Strategies to business-level analysis
- Apply BSC, KPIs, Lean Six Sigma, and Marketing Mix to functional-level consulting
- Link all three levels of strategy (corporate, business, functional) in a coherent strategic architecture

Detailed Topics & Content

3.1 FOUNDATIONS OF STRATEGIC PLANNING

- Strategic planning: definition, purpose, and the consultant's role in the process
- The significance of strategic planning: why organisations without it fail
- Frameworks for strategic planning: formulation → implementation → evaluation and control
- Strategic planning in the GCC and internationally: cultural and market-specific considerations

3.2 THE 7-STEP STRATEGIC PLANNING PROCESS

- Step 1: Clarify values, purpose, and vision
- Step 2: Conduct environmental scan (external and internal)
- Step 3: Establish strategic priorities
- Step 4: Create metrics and goals
- Step 5: Create plan of actions
- Step 6: Draft and share the organisational strategic plan
- Step 7: Execute, track, and adjust

3.3 VISION, MISSION & CORE VALUES

- Vision: what the organisation aspires to become — the 10-year picture
- Mission: why the organisation exists — the daily compass for decisions
- Core values: the non-negotiable principles that guide behaviour and culture
- Facilitating a vision-mission-values workshop: a junior consultant's guide
- Common mistakes: vanity statements vs. actionable strategic intent

3.4 ENVIRONMENTAL SCANNING: PESTLE & SWOT

- PESTLE analysis: Political, Economic, Social, Technological, Legal, Environmental — depth analysis and strategic implication mapping
- SWOT analysis: internal strengths and weaknesses, external opportunities and threats
- TOWS matrix: converting SWOT into strategic options — SO, ST, WO, WT strategies
- Prioritising SWOT/TOWS findings: from brainstorm to ranked strategic insight

3.5 CORPORATE LEVEL STRATEGY FRAMEWORKS

- BCG Growth-Share Matrix: Stars, Cash Cows, Question Marks, Dogs — portfolio classification
- GE-McKinsey Matrix: 9-cell portfolio model for multi-business organisations
- McKinsey 7S: the 7 elements, their interdependencies, and alignment as a diagnostic
- Ansoff Growth Matrix: Market Penetration, Development, Product Development, Diversification

3.6 BUSINESS LEVEL STRATEGY FRAMEWORKS

- Porter's Five Forces: Supplier Power, Buyer Power, Competitive Rivalry, New Entrants, Substitutes
- Porter's Generic Strategies: Cost Leadership, Differentiation, Focus — applied to real clients
- The "stuck in the middle" trap and how to diagnose it in a client organisation
- Strategic group mapping: visualising competitive positioning within an industry

3.7 FUNCTIONAL LEVEL STRATEGY FRAMEWORKS

- Balanced Scorecard: the 4 perspectives (Financial, Customer, Internal Process, Learning & Growth)
- KPIs: design, SMART criteria, and cascading from corporate to functional level
- Lean Six Sigma: process improvement at the functional strategy level
- Marketing Mix (4Ps/7Ps): Product, Price, Place, Promotion (+ People, Process, Physical Evidence)

3.8 THE LINK BETWEEN 3 LEVELS OF STRATEGY

- How corporate strategy sets the context for business strategy
- How business strategy defines the requirements for functional strategy
- Strategy cascade: from 5-year corporate objectives to quarterly functional KPIs
- Common disconnects: what happens when the 3 levels are misaligned

Tools, Case Studies & Assessment

TOOLS, TEMPLATES & FRAMEWORKS

- PESTLE Analysis Template
- GE-McKinsey Matrix Template
- SWOT Analysis Template
- Porter's Five Forces Template
- TOWS Strategic Options Matrix
- Vision, Mission, Values Template
- BCG Growth-Share Matrix Builder
- Vision-Mission Workshop Facilitation Guide
- Ansoff Matrix Template
- KPI Design Worksheet
- McKinsey 7S Assessment Radar
- 3-Level Strategy Architecture Map

CASE STUDIES

CASE 3A

Strategic Analysis — Saudi FMCG Company

A Saudi FMCG company is experiencing market share decline in 2 of its 5 product categories, while 1 category is growing at 30% annually. Participants must conduct a full strategic analysis to recommend the corporate direction.

REQUIRED TASKS

- Complete a PESTLE analysis with 3 strategic implications per factor
- Build a SWOT and derive 4 TOWS strategies
- Apply the BCG Matrix to the 5-product portfolio
- Apply Porter's Five Forces to the FMCG sector
- Recommend a corporate strategy using the Ansoff Matrix

CASE 3B

McKinsey 7S Alignment Diagnostic

A regional bank in an international market has launched a new digital banking strategy but performance is lagging. The CEO suspects an internal alignment problem. Participants apply the McKinsey 7S to diagnose which elements are misaligned.

REQUIRED TASKS

- Complete the McKinsey 7S assessment across all 7 elements
- Identify the top 3 misalignments with evidence
- Map each misalignment to its functional-level strategy implication
- Recommend 3 specific alignment interventions

ASSESSMENT

ASSESSMENT METHOD	FORMAT	WEIGHT
Strategy Frameworks Quiz	30 MCQ on all frameworks	**30%**
Strategic Analysis Report	Full 12-page report	**55%**
SWOT-TOWS Group Presentation	15-minute group presentation	**15%**

Exercises, Assignment & Deliverable

CLASSROOM EXERCISES & ROLE-PLAYS

Exercise: SWOT to TOWS Strategy Derivation Workshop

Working in groups, participants conduct a SWOT analysis for a provided company scenario and must then systematically derive 8 TOWS strategies (2 per quadrant). Each group presents and defends their top 3 strategies.

Exercise: BCG Portfolio Sprint

Participants receive a holding company with 6 business units and 3 years of market share and growth data. They must classify all 6 units into the BCG matrix and make portfolio investment recommendations in 20 minutes.

PRACTICAL ASSIGNMENT

Full Strategic Analysis Report. Participants conduct a complete strategic analysis for a real or assigned organisation using the full Part 1 framework toolkit.

01 Select or receive a company for analysis

02 Conduct a full PESTLE analysis with strategic implications

03 Build SWOT + TOWS with 8 strategic options

04 Apply BCG or Ansoff to the portfolio/growth question

05 Apply Porter's Five Forces to the competitive context

06 Apply McKinsey 7S to assess internal alignment

07 Produce a 12-page strategic analysis report

REQUIRED DELIVERABLE — STRATEGIC ANALYSIS REPORT: PESTLE + SWOT + TOWS + FRAMEWORKS

- PESTLE analysis with strategic implications (2 per factor minimum)
- SWOT analysis with prioritised findings
- TOWS matrix with 8 strategic options
- BCG, Ansoff, or GE-McKinsey output (based on case)
- Porter's Five Forces assessment
- McKinsey 7S alignment diagnostic
- 12-page strategic analysis report with executive summary

Strategic Planning & Implementation Tools & Frameworks — Part 2

"Go deep on the Balanced Scorecard and KPI frameworks — the performance backbone of every strategic plan."

DURATION	LEARNING HOURS	LEVEL	MODULE
2 days	14 hrs	Level 1 — Junior Consultant	04 of 10

MODULE PURPOSE

Part 2 extends the strategic framework toolkit with deep application of the Balanced Scorecard and KPI frameworks. While Part 1 introduced these, Part 2 builds the ability to actually design, cascade, and operationalise them in a client context. Participants will leave able to build a functional BSC from scratch, cascade KPIs from corporate to individual level, and apply the BCG, PESTLE, and SWOT frameworks with greater depth.

LEARNING OBJECTIVES

- Design a Balanced Scorecard at corporate, business, and functional levels
- Build a strategy map linking objectives across all 4 BSC perspectives
- Design and cascade KPIs from corporate strategic objectives down to individual performance targets
- Apply the BSC to a real client scenario to translate strategy into measurable performance
- Distinguish the BCG Matrix applications at corporate vs. business level
- Use PESTLE, SWOT, and TOWS with greater depth and analytical precision than Part 1

Detailed Topics & Content

4.1 CORPORATE LEVEL — BCG MATRIX DEEP DIVE

- BCG Matrix revisited: detailed analysis methodology beyond simple classification
- Using the BCG Matrix at corporate level: portfolio management and resource allocation
- Growth-share thresholds: how to determine the cut-off points for each quadrant
- Dynamic BCG: how businesses move between quadrants over time
- BCG limitations and how experienced consultants compensate for them

4.2 BUSINESS LEVEL — PESTLE, SWOT & TOWS (DEEP APPLICATION)

- PESTLE at the business unit level: market-specific environmental scanning
- Weighting PESTLE factors: impact vs. probability scoring matrix
- SWOT at the business level: competitive strengths vs. market opportunities
- TOWS advanced: linking strategic options to resource requirements and timelines
- Using SWOT/TOWS to build the business unit strategic plan

4.3 BALANCED SCORECARD — CORPORATE LEVEL

- BSC at the corporate level: translating the group strategy into 4-perspective objectives
- Corporate strategy map: cause-and-effect logic linking all strategic objectives
- Selecting corporate-level KPIs: the 3 criteria for a good corporate measure
- Corporate BSC target setting: how to set ambitious but credible 3-year targets
- BSC reporting at corporate level: the executive scorecard format

4.4 BALANCED SCORECARD — BUSINESS LEVEL

- BSC at the business unit level: adapting the corporate BSC for each division
- Business-level strategy maps: customising cause-and-effect for the business unit context
- Aligning business unit BSC to corporate priorities: the cascade logic
- Business unit KPI selection: balancing standardisation with business relevance

4.5 BALANCED SCORECARD — FUNCTIONAL LEVEL

- BSC at the functional level: translating strategy into departmental priorities
- Function-specific BSC: HR, Finance, Operations, Sales, IT examples
- Functional KPI design: 6–8 measurable indicators per function
- Linking functional targets to individual performance agreements
- Common BSC implementation mistakes at the functional level

4.6 KPI FRAMEWORK DESIGN

- Department KPIs: designing the KPI set for Finance, HR, Operations, and Commercial functions
- Individual KPIs: translating departmental KPIs into personal performance targets
- SMART KPI design: Specific, Measurable, Achievable, Relevant, Time-bound
- Leading vs. lagging indicators: why junior consultants must use both
- KPI ownership: assigning accountability, data source, and reporting frequency
- KPI library: 120 ready-to-use KPIs across 8 business functions

Tools, Case Studies & Assessment

TOOLS, TEMPLATES & FRAMEWORKS

- BSC Builder Template (Corporate)
- SMART KPI Design Worksheet
- BSC Builder Template (Business Unit)
- SWOT, PESTLE Weighting Matrix
- BSC Builder Template (Functional)
- TOWS Matrix
- Strategy Map Builder (Excel)
- BCG Dynamic Analysis Template
- KPI Library (120+ KPIs by function)
- BSC Executive Scorecard Template

CASE STUDIES

CASE 4A

Building a 3-Level BSC for a Saudi Industrial Group

A Saudi industrial group has just completed its 5-year strategic plan. Now it needs a Balanced Scorecard at corporate, business, and functional levels. Participants design all 3 tiers.

REQUIRED TASKS

- Build the corporate-level BSC with 16 KPIs across 4 perspectives
- Build a business unit BSC for the manufacturing division (12 KPIs)
- Build a functional BSC for the HR department (8 KPIs)
- Create a strategy map showing the cause-and-effect logic across all 4 perspectives

CASE 4B

KPI Design & Cascade — From Strategy to Individual Targets

An international logistics company has 3 corporate KPIs and needs to cascade them down to 4 departments and then to 8 individual roles. Participants design the full cascade.

REQUIRED TASKS

- Take 3 corporate KPIs and cascade to department level (4 departments, 3 KPIs each)
- Cascade department KPIs to 2 individual roles per department
- Apply SMART criteria to validate all KPIs at all levels
- Identify 3 leading indicators for each corporate KPI

ASSESSMENT

ASSESSMENT METHOD	FORMAT	WEIGHT
BSC & KPI Knowledge Quiz	25 MCQ	**25%**
BSC Design Submission	Full 3-level BSC package	**60%**
KPI Design Group Exercise	Observed workshop output	**15%**

Exercises, Assignment & Deliverable

CLASSROOM EXERCISES & ROLE-PLAYS

Exercise: Strategy Map Speed Build

Working in pairs, participants receive 12 strategic objectives and must arrange them into a coherent strategy map — placing each objective in the right BSC perspective and drawing the cause-and-effect arrows. Pairs compare and debate their maps.

Exercise: KPI Design Workshop

Participants receive 6 vague "performance goals" from a fictional CEO (e.g., "improve customer satisfaction", "be more efficient") and must convert each into 2 SMART KPIs with data sources and targets.

PRACTICAL ASSIGNMENT

Balanced Scorecard + KPI Framework for a Real Organisation. Participants build a complete 2-level BSC (corporate + one functional area) and a full KPI cascade for a real or assigned organisation.

01 Select or receive an organisation with a stated strategic objective

02 Build the corporate BSC with 12–16 KPIs across all 4 perspectives

03 Build the strategy map (cause-and-effect visual)

04 Design the functional BSC for one chosen function (HR, Finance, or Operations)

05 Cascade 3 corporate KPIs down to individual level (2 roles)

REQUIRED DELIVERABLE — BALANCED SCORECARD + KPI FRAMEWORK (3-LEVEL CASCADE)

- Corporate BSC (12–16 KPIs, 4 perspectives, with targets)
- Strategy map (cause-and-effect visual, all 4 perspectives)
- Functional BSC for one function (8 KPIs)
- KPI cascade: 3 corporate KPIs → department → 2 individual roles
- SMART validation: all KPIs validated against SMART criteria

Marketing Analysis & Strategy

"Think like a commercial strategist — understand markets, customers, and competitive dynamics."

DURATION	LEARNING HOURS	LEVEL	MODULE
2 days	14 hrs	Level 1 — Junior Consultant	05 of 10

MODULE PURPOSE

Participants begin operating in the commercial and strategic layer of consulting. Module 5 builds the marketing and market analysis capabilities required when a client asks: "Should we enter this market?" or "Why are we losing market share?" Participants develop the full toolkit: marketing principles, value proposition design, market entry strategy, competitive analysis, customer segmentation, benchmarking, and commercial financial modelling.

LEARNING OBJECTIVES

- Apply the 4Ps and 7Cs marketing frameworks to a client's go-to-market strategy
- Design and evaluate a market entry strategy including entry mode and financial modelling
- Apply Porter's Five Forces and the VRIN framework to assess competitive sustainability
- Build a TAM/SAM/SOM market sizing model for a client's target opportunity
- Segment a customer base using demographic, psychographic, and behavioural criteria
- Execute a structured benchmarking study using recognised industry data sources
- Map the 5-stage customer buying decision process to improve client sales strategy

Detailed Topics & Content

5.1 MARKETING PRINCIPLES & VALUE PROPOSITION

- Definition of marketing: from product-push to customer-value orientation
- Customer value: the difference between features and the value customers actually buy
- What is marketed: products, services, experiences, ideas, people, places
- Who markets: internal teams, consultants, agencies — and how consulting uses marketing thinking
- Markets: market structure, market boundaries, and how consultants define the market
- B2B vs. B2C: how the buying process, decision criteria, and relationships differ fundamentally
- Value proposition design: articulating what makes an offering worth buying at a premium

5.2 MARKETING MIX: 4PS VS. 7CS

- Product: design, features, quality, branding, lifecycle
- Price: pricing strategy, psychology, and competitive positioning
- Place: distribution channels, digital vs. physical, channel economics
- Promotions: communications strategy, digital marketing, content and conversion
- 4Ps to 7Cs: Customer Solution, Cost, Convenience, Communication, plus People, Process, Physical Evidence
- Applying the marketing mix in a consulting context: diagnosing client go-to-market weaknesses

5.3 MARKET ENTRY & EXPANSION STRATEGY

- Market attractiveness assessment: size, growth rate, competitive intensity, regulatory environment
- Market entry modes: organic growth, partnership, acquisition, franchise, joint venture
- Geopolitical and regulatory considerations for GCC market entry
- Go-to-market strategy design: target segment, channel model, pricing, launch plan
- Go-to-market models: direct sales, channel/partner, digital/e-commerce
- Market entry financial modelling: break-even analysis and payback period calculation

5.4 COMPETITIVE STRATEGY & POSITION

- Porter's Five Forces: detailed application to industry attractiveness assessment
- Blue Ocean Strategy: value innovation and creating uncontested market space
- VRIN framework: Valuable, Rare, Inimitable, Non-substitutable — testing competitive advantage
- Competitive advantage sustainability: when does an advantage erode and why
- Strategic group mapping: visualising competitive positioning in a target market
- Competitive positioning models: frameworks for assessing a client's position relative to competitors and the broader market
- Competitor analysis: mapping competitor positions, strengths, weaknesses, and strategic intent

5.5 CUSTOMER ANALYSIS & SEGMENTATION

- The buying decision process: the 5-stage model (need recognition → information search → evaluation → purchase → post-purchase)
- Level of segmentation: mass, segment, niche, and micro-marketing
- Niche marketing: finding the profitable sub-segment competitors are ignoring
- Customer segmentation: demographic, psychographic, behavioural, and needs-based
- Customer classification: A/B/C customer value analysis for resource allocation

5.6 MARKET SIZING & BENCHMARKING

- TAM (Total Addressable Market): the full market if you captured 100% of demand
- SAM (Serviceable Addressable Market): the segment your model can realistically serve
- SOM (Serviceable Obtainable Market): the realistic share you can win in 3 years
- Market sizing from first principles: top-down vs. bottom-up methodology
- Benchmarking types: internal, competitive, functional, and best-in-class
- Building a benchmarking framework for a client's specific industry and geography
- Sourcing benchmark data: Gartner, McKinsey, Hackett Group, industry associations
- Pricing strategy analysis: cost-plus, value-based, and competitive pricing models

Tools, Case Studies & Assessment

TOOLS, TEMPLATES & FRAMEWORKS

- Market Attractiveness Assessment Matrix
- Benchmarking Data Collection Template
- Market Entry Mode Evaluation Matrix
- Competitive Intelligence Map
- TAM/SAM/SOM Market Sizing Model (Excel)
- Value Proposition Canvas
- Break-Even & Payback Financial Model
- Porter's Five Forces Template (Advanced)
- VRIN Competitive Advantage Assessment
- 5-Stage Buying Process Analysis Tool
- Customer Segmentation Framework
- 4Ps/7Cs Marketing Mix Audit

CASE STUDIES

CASE 5A

Market Entry Decision — Saudi FMCG International Expansion

A Saudi FMCG manufacturer is evaluating entry into an international market. Budget: SAR 15M. Participants must produce the full market entry strategy including market attractiveness, entry mode, TAM/SAM/SOM, go-to-market design, and financial model.

REQUIRED TASKS

- Conduct a market attractiveness assessment (5 criteria, weighted scoring)
- Build the TAM/SAM/SOM model for the target category
- Evaluate 3 entry modes and recommend with rationale
- Build the go-to-market strategy: target segment, channel, pricing
- Produce the market entry financial model: break-even and 3-year payback

CASE 5B

Competitive Advantage Audit — Is This Sustainable?

A Gulf logistics company claims its competitive advantage is "our technology and our relationships." Participants apply the VRIN framework and Porter's Five Forces to assess whether this advantage is truly sustainable.

REQUIRED TASKS

- Apply Porter's Five Forces to the Gulf logistics sector
- Apply the VRIN framework to each claimed competitive advantage
- Classify each advantage: sustainable, temporary, or illusory
- Recommend 3 actions to strengthen competitive position

ASSESSMENT

ASSESSMENT METHOD	FORMAT	WEIGHT
Marketing & Market Analysis Quiz	25 MCQ	**20%**
Market Entry Strategy Report	Full written report	**60%**
Market Sizing Presentation	10-minute group presentation	**20%**

Exercises, Assignment & Deliverable

CLASSROOM EXERCISES & WORKSHOPS

Exercise: Market Sizing Speed Build

Pairs receive a market opportunity (e.g., "the Saudi premium food delivery market") and have 20 minutes to build a TAM/SAM/SOM model using first-principles estimation. Groups compare outputs and debate the key assumptions.

Exercise: Segmentation Workshop

Participants receive a customer database extract (200 simulated customers) and must apply demographic, psychographic, and behavioural segmentation to identify 4 distinct customer segments. They then design a targeted value proposition for each.

PRACTICAL ASSIGNMENT

Market Entry Strategy Report + Competitive Analysis. Participants produce a full market entry strategy report for a real or assigned opportunity.

01 Conduct a market attractiveness assessment (5 criteria)

02 Build the TAM/SAM/SOM model from first principles

03 Evaluate 3 entry modes and select the recommended approach

04 Apply Five Forces and VRIN to the competitive landscape

05 Design the go-to-market strategy

06 Build the financial model: break-even and 3-year payback

07 Produce a 14-page market entry strategy report

REQUIRED DELIVERABLE — MARKET ENTRY STRATEGY REPORT + COMPETITIVE ANALYSIS + TAM/SAM/SOM MODEL

- Market attractiveness assessment (5 criteria, weighted)
- TAM/SAM/SOM model (Excel, with methodology notes)
- Entry mode evaluation matrix (3 modes)
- Five Forces assessment with industry attractiveness score
- VRIN competitive advantage analysis
- Go-to-market strategy (target segment, channel, pricing)
- Market entry financial model (break-even + 3-year payback)
- 14-page market entry strategy report

MODULE 06 OF 10 · 14 HRS · 2 DAYS

Organization Diagnosis & Culture

06

"Understand how organisations are built, broken, and redesigned — and your role in that process."

DURATION	LEARNING HOURS	LEVEL	MODULE
2 days	14 hrs	Level 1 — Junior Consultant	06 of 10

MODULE PURPOSE

Organisation design is one of the most common consulting engagement types, yet junior consultants are often underprepared for the complexity of how organisations actually work. Module 6 builds the knowledge base: management fundamentals, organisation design principles, culture diagnostics, maturity assessments, and team dynamics. Participants will leave able to contribute meaningfully to OD assignments and conduct a structured organisational diagnostic.

LEARNING OBJECTIVES

- Define management and describe the skills required at each management level
- Apply organisation design principles (span of control, accountability, centralisation, agility) to a real scenario
- Evaluate the advantages and limitations of functional, divisional, matrix, and network structures
- Apply culture diagnostic tools (OCI, Denison) to identify culture gaps
- Design and score a custom maturity assessment questionnaire
- Apply RACI and RAPID frameworks to clarify roles and decision rights
- Facilitate a team chartering session using the team building phases framework

Detailed Topics & Content

6.1 BASICS OF MANAGEMENT

- What is management: planning, organising, leading, controlling
- What do managers do: the 10 managerial roles (Mintzberg)
- Management levels: operational, middle, and senior management — what each level needs
- Efficiency vs. effectiveness: the consultant's lens on management quality
- Skills needed at different levels: technical → human → conceptual

6.2 ORGANISATION DESIGN

- What is an organisation: definition, purpose, and the relationship between structure and strategy
- Organisation's functions: how the parts work together (and why they often don't)
- Organisational structures: functional, divisional, matrix, network, hybrid
- Organisation design principles: span of control, layers, accountability, centralisation, decentralisation
- Job architecture: job families, grades, and levelling — how organisations rank and reward roles
- Role clarity tools: RACI (who does what), RAPID (who decides what)
- Org design for agility: tribes, squads, and chapters — the modern agile model

6.3 CULTURE TRANSFORMATION

- Organisational culture: Schein's Iceberg — visible and invisible cultural dimensions
- Culture diagnostic tools: OCI (Organisational Culture Inventory), Denison Culture Model
- Culture change mechanisms: leadership modelling, system redesign, symbols and stories
- High-performance culture: the 5 characteristics that consulting teams target
- Culture measurement and embedding roadmap: sustaining change after the report

6.4 MATURITY ASSESSMENTS

- Maturity models: CMM, OPM3, and custom frameworks
- Designing a maturity assessment questionnaire: 5-level scale, dimension selection, question design
- Scoring, weighting, and visualising maturity results: radar charts and heat maps
- Translating maturity scores into a development roadmap: the 3-horizon improvement plan

6.5 TEAMWORK & DELEGATION

- Team characteristics: the difference between a team and a group
- Team building phases: Tuckman's forming, storming, norming, performing, adjourning
- Team roles: Belbin's 9 team roles and how to build a balanced consulting team
- Delegation: the art of delegating effectively — what junior consultants must learn as they grow
- Consulting team dynamics: what makes a consulting team high-performing vs. dysfunctional

Tools, Case Studies & Assessment

TOOLS, TEMPLATES & FRAMEWORKS

- Organisation Design Assessment Template
- Maturity Radar Chart Template
- RACI Matrix Template
- Job Architecture Framework Template
- RAPID Decision Rights Template
- Team Charter Template
- Culture Diagnostic Survey (OCI-based)
- Tuckman Phase Diagnostic Tool
- Denison Culture Model Assessment
- Span of Control Calculator
- Maturity Assessment Questionnaire Builder
- Agile Org Design Canvas (Tribes/Squads/Chapters)

CASE STUDIES

CASE 6A

Redesigning an Underperforming Organisation — Saudi Holding

A Saudi holding company with 5 subsidiaries is suffering from unclear accountability, overlapping roles, and slow decision-making. The CEO has asked consultants to redesign the top structure and clarify the governance model.

REQUIRED TASKS

- Diagnose the current structure: identify the 3 main design failures
- Apply design principles (span of control, accountability, centralisation) to assess the current state
- Design 2 alternative structures and evaluate using a weighted scoring matrix
- Build the RACI matrix for the 10 most important corporate decisions

CASE 6B

Culture Diagnostic — Family Business Professionalisation

A family business operating in an international market is bringing in professional management. The founder's culture (hierarchical, relationship-based, risk-averse) must shift to a performance-oriented, accountable culture. Participants design the culture diagnostic.

REQUIRED TASKS

- Design a 20-item culture diagnostic survey based on the Denison model
- Score and visualise the current culture profile
- Identify the 3 biggest culture gaps against the target culture
- Recommend 3 culture change mechanisms with rationale

ASSESSMENT

ASSESSMENT METHOD	FORMAT	WEIGHT
OD & Culture Knowledge Quiz	25 MCQ	25%
Organisation Design Assessment	Full submission	55%
Maturity Assessment Design	Observed workshop sprint	20%

Exercises, Assignment & Deliverable

CLASSROOM EXERCISES & ROLE-PLAYS

Exercise: Maturity Assessment Design Sprint

Participants design a 15-item, 5-level maturity assessment for the HR function of a fictional client organisation. They must select 3 assessment dimensions, write 5 level descriptors per dimension, and score a given scenario.

Exercise: Tuckman Team Diagnosis

Participants receive 6 short descriptions of consulting team behaviours and must correctly identify which Tuckman stage each team is in, then recommend the right leadership intervention.

PRACTICAL ASSIGNMENT

Organisation Design Assessment + Maturity Diagnostic. Participants conduct a structured organisational assessment for a real or assigned organisation.

01 Map the current organisational structure and identify design principles being violated

02 Complete an OD assessment across 5 dimensions (structure, roles, accountability, culture, agility)

03 Build a custom maturity assessment (3 dimensions, 5 levels each)

04 Score the organisation and produce a maturity radar chart

05 Develop a 3-priority development roadmap

REQUIRED DELIVERABLE — ORGANISATION DESIGN ASSESSMENT + MATURITY DIAGNOSTIC + CULTURE MAP

- Current organisational structure analysis (3 design principle violations identified)
- OD assessment across 5 dimensions with evidence
- Custom maturity assessment questionnaire (3 dimensions, 5 levels)
- Maturity radar chart with current scores and gap analysis
- Culture map: current vs. target culture (Denison or custom)
- 3-priority development roadmap (12-month)

MODULE 07 OF 10 · 18 HRS · 3 DAYS

Client & Stakeholder Skills

"Master the human skills that separate good analysts from great consultants."

DURATION	LEARNING HOURS	LEVEL	MODULE
3 days	18 hrs	Level 1 — Junior Consultant	07 of 10

MODULE PURPOSE

Technical knowledge without personal effectiveness is not consulting — it is analysis that never lands. Module 7 develops the interpersonal and professional skills that are the hardest to learn and the most valuable to have: communication across all modes, influencing without authority, navigating conflict, and negotiating outcomes. These skills apply on day one of every engagement.

LEARNING OBJECTIVES

- Apply the communication process model to improve clarity and reduce misunderstanding in client interactions
- Select the right communication method (verbal, written, visual, non-verbal) for each consulting context
- Demonstrate professional email etiquette and meeting management in client-facing situations
- Apply Cialdini's 6 principles of influence to consultative persuasion scenarios
- Navigate the Thomas-Kilmann conflict styles and select the right approach for each consulting situation
- Apply BATNA and ZOPA frameworks to consulting negotiation scenarios
- Deliver a structured refusal or boundary-setting communication without damaging client relationships

Detailed Topics & Content

7.1 COMMUNICATION IN CONSULTING

- The communication model: sender, message, channel, receiver, feedback, and noise
- Communication breakdown in consulting: the 6 most common failure points
- The consulting communication hierarchy: clarity over sophistication

7.2 COMMUNICATION METHODS FOR CONSULTANTS

- Verbal communication: structured speaking, active listening, and consultative questioning
- Written communication: emails, reports, memos, and instant messages — each has different rules
- Visual communication: charts, frameworks, slides, and how visuals create or destroy credibility
- Non-verbal communication: body language, presence, micro-expressions in client settings
- Listening actively to understand client needs

7.3 COMMUNICATION TONES, STYLES & MEETING MANAGEMENT

- Formal vs. informal communication: when each is appropriate and how to switch
- Communication styles: assertive, aggressive, passive, passive-aggressive — reading each in clients
- MBTI, DISC, Social Style Matrix
- Key communication skills: precision, economy, empathy, and confidence
- Meeting management: preparation, agenda design, facilitation, minutes of meeting, and follow-up
- Email etiquette: the 10 rules that every junior consultant must follow

7.4 INFLUENCING SKILLS

- The 6 principles of influence (Cialdini): reciprocity, commitment, social proof, authority, liking, scarcity
- Consultative persuasion: building the logic-emotion-authority triangle
- Handling resistance: the Feel-Felt-Found technique in client conversations
- Saying no professionally: declining requests without damaging the relationship

7.5 CONFLICT MANAGEMENT

- Conflict as a consulting reality: task conflict vs. relationship conflict
- Causes of conflict in consulting: roles, data, expectations, and resources
- Thomas-Kilmann five styles: competing, collaborating, compromising, avoiding, accommodating
- Consultant's application: selecting the right style per situation
- Conflict prevention and de-escalation techniques

7.6 NEGOTIATION SKILLS

- Negotiation concepts: positions vs. interests, value creation vs. value claiming
- BATNA: Best Alternative to a Negotiated Agreement — your power in every negotiation
- ZOPA: Zone of Possible Agreement — finding the space where deals are made
- Win-win negotiation: collaborative negotiation in long-term client relationships
- 5-step negotiation process: prepare, open, explore, bargain, close
- Qualities of an effective negotiator: the 7 characteristics that junior consultants must develop
- Negotiation strategies & tactics: anchoring, bracketing, good cop/bad cop, and how to recognise them
- Negotiation traps: the 6 cognitive biases that derail consulting negotiations

7.7 IDENTIFYING & MAPPING STAKEHOLDERS

- What is stakeholder mapping?
- The Power/Interest Grid
- The Stakeholder Register
- Identifying informal influencers

Tools, Case Studies & Assessment

TOOLS, TEMPLATES & FRAMEWORKS

- Communication Styles Self-Assessment
- Thomas-Kilmann Conflict Mode Instrument (TKI)
- Email Etiquette Checklist (10 Rules)
- BATNA Preparation Worksheet
- MBTI Self-Assessment
- ZOPA Mapping Template
- DISC Self-Assessment
- 5-Step Negotiation Preparation Guide
- Meeting Agenda Template
- Feel-Felt-Found Script Builder
- Influencing Strategy Planner
- Active Listening Observation Rubric
- The Stakeholder Register
- The Power/Interest Grid

CASE STUDIES

CASE 7A

The Unresponsive Director — Influencing Without Authority

A junior consultant needs critical data from a senior director who is not responding to emails or meeting requests. The engagement timeline is at risk. Participants must design an influence strategy to unlock the relationship.

REQUIRED TASKS

- Identify which of Cialdini's 6 principles apply to this situation
- Design a 3-step influence strategy using different communication channels
- Draft the email and one verbal message that will most likely get a response
- Prepare for a possible conflict: which Thomas-Kilmann style will you use?

CASE 7B

The Scope Negotiation — Client Wants More, Budget Says No

The client has requested 3 additional deliverables beyond the agreed scope. They are a key relationship account and the partner wants to keep them happy. The consultant must negotiate scope without losing the relationship.

REQUIRED TASKS

- Identify the BATNA for both the consultant and the client
- Map the ZOPA for this negotiation
- Prepare for a 10-minute negotiation role-play using the 5-step process
- Draft the formal scope change communication that follows the negotiation

ASSESSMENT

ASSESSMENT METHOD	FORMAT	WEIGHT
Communication & Influence Quiz	25 MCQ on all topics in this module	**25%**
Negotiation Role-Play	Observed 15-minute live negotiation	**40%**
Skills Audit & Development Plan	Written submission	**35%**

Exercises, Assignment & Deliverable

CLASSROOM EXERCISES & ROLE-PLAYS

Exercise: Communication Style Speed Round

Participants receive 5 consulting situations and must select the right communication method (verbal, written, visual, non-verbal) and tone (formal/informal) for each. They must defend their choices.

Exercise: Live Negotiation Role-Play

Participants pair up. One plays a junior consultant, one plays a demanding client. They negotiate a timeline extension for a delayed deliverable using the 5-step process. Observers use the BATNA/ZOPA worksheet to analyse the negotiation.

- 10-minute preparation using the BATNA worksheet
- 15-minute live negotiation role-play
- 10-minute debrief: what worked, what was the ZOPA, what tactics were used

PRACTICAL ASSIGNMENT

Communication & Influence Skills Audit. Participants conduct a personal skills audit across all communication and influence dimensions and produce a development plan with 3 priority areas.

01 Complete the Communication Styles Self-Assessment tool

02 Score yourself on all 5 modules of this unit: communication, influence, conflict, negotiation

03 Write a 500-word self-reflection: where are you strong, where are the gaps?

04 Design a personal development plan: 3 priority skills, 3 practice actions, 3-month timeline

REQUIRED DELIVERABLE — COMMUNICATION & INFLUENCE SKILLS AUDIT + PERSONAL DEVELOPMENT PLAN

- Communication styles self-assessment results
- TKI conflict style profile and reflection
- BATNA exercise: applied to a real or simulated negotiation scenario
- 500-word self-reflection on communication and influence strengths and gaps
- Personal development plan: 3 skills × 3 actions × 3-month timeline

MODULE 08 OF 10 · 14 HRS · 2 DAYS

Managing the Consulting Project

"Plan it, execute it, close it — professional project management for consulting engagements."

DURATION	LEARNING HOURS	LEVEL	MODULE
2 days	14 hrs	Level 1 — Junior Consultant	08 of 10

MODULE PURPOSE

Consulting is delivered through projects. Without strong project management discipline, even the best diagnostic and solution work falls apart in execution. Module 8 builds the full consulting project management toolkit: from initiation through planning, execution, monitoring, and formal closure. Participants will leave with every template and tool needed to manage their first consulting project from kickoff to sign-off.

LEARNING OBJECTIVES

- Map all five phases of a consulting project lifecycle and explain what must happen in each
- Build a Project Charter, WBS, Gantt Chart, and RACI Matrix for a consulting engagement
- Apply risk management to a consulting project: identify, score, and plan responses for 10 risks
- Design a client communication plan and issue escalation protocol
- Facilitate a project closure session and produce a lessons-learned log
- Distinguish between limited-scale and full-scale consulting projects and plan accordingly

Detailed Topics & Content

8.1 CONSULTING PROJECTS — PURPOSE & LIFECYCLE

- Why consulting is project-based: scope, deliverables, timelines, and client relationships
- The 5 purposes of consulting projects: diagnosis, solution design, capacity building, change facilitation, performance improvement
- Significance of consulting projects: why they must be managed, not just executed
- Applying PM principles to consultancy: what transfers from traditional PM and what is unique
- Limited vs. full-scale projects: which tools apply when

8.2 CONSULTING PROJECT LIFECYCLE

- Initiation phase: scoping, project charter, client alignment, team setup
- Planning phase: WBS, Gantt, resource planning, RACI, risk register
- Implementation phase: execution, data collection, analysis, delivery
- Monitoring phase: progress tracking, RAG reporting, issue management, client communication
- Project closure: final report, client sign-off, knowledge transfer, team debrief

8.3 PLANNING TOOLS & TECHNIQUES

- From contract signature to kick-off: the 10-item initiation checklist
- Project Charter / Terms of Reference (ToR): structure, content, and client sign-off
- Resource planning: staffing the consulting team — roles, hours, and responsibilities
- Work Breakdown Structure (WBS): 3-level decomposition of all project work
- Gantt chart: sequencing deliverables, milestones, and dependencies
- Stakeholder Analysis Matrix: power, interest, and engagement strategy
- RACI matrix: who is Responsible, Accountable, Consulted, and Informed for each activity
- Risk Register (simplified): identify, score, and plan responses for the top 10 risks
- Escalation plan: who decides what when things go wrong

8.4 EXECUTION TOOLS & TECHNIQUES

- Data dashboards: tracking progress against the workplan in real time
- Issue log: capturing, assigning, and resolving problems as they arise
- Client communication plan: cadence, format, audience, and message
- Quality checklist: ensuring deliverables meet the agreed standard before submission
- Quality reviews of team deliverables; managing engagement-level risk registers
- Change log: formally tracking all scope or timeline changes with client sign-off
- Milestone reviews: structured check-ins at each project phase gate

8.5 CLOSURE TOOLS & TECHNIQUES

- Client feedback: structured end-of-engagement satisfaction survey
- Lessons log: what worked, what to improve, what to never do again
- Official Project Closure Report: the formal document that closes the engagement
- Knowledge transfer plan: handing over to the client so they can sustain results
- Post-engagement relationship management: the professional follow-up that builds repeat business

Tools, Case Studies & Assessment

TOOLS, TEMPLATES & FRAMEWORKS

- Project Charter Template
- Issue Log Template
- WBS Builder (3-Level)
- Quality Checklist Template
- Gantt Chart Template (Excel)
- Change Log Template
- RACI Matrix Template
- Lessons Log Template
- Risk Register Template (Simplified)
- Project Closure Report Template
- Escalation Plan Template
- Stakeholder Analysis Matrix
- Client Communication Plan Template
- Knowledge Transfer Plan Template

CASE STUDIES

CASE 8A

Planning a 10-Week HR Strategy Engagement

Participants have just signed a 10-week HR strategy engagement for a Saudi manufacturing company with 1,200 employees. They must build the full project plan from kick-off to final report.

REQUIRED TASKS

- Build the project charter with scope, objectives, deliverables, and assumptions
- Develop the WBS (3 levels) and Gantt chart for the 10-week engagement
- Complete the RACI matrix for the 8 major project activities
- Identify and score the top 10 project risks
- Design the client communication plan: 5 touchpoints across the engagement

CASE 8B

Mid-Project Crisis — Issue Escalation & Recovery

Four weeks into a retail strategy engagement in an international market, two key data sources have refused to cooperate, one team member is sick, and the client is asking for an output two weeks early. Participants must recover the plan.

REQUIRED TASKS

- Update the issue log with all 3 problems and ownership assignments
- Apply the escalation plan: which issues go to the engagement partner, which to the client?
- Rebuild the Gantt to accommodate the revised timeline
- Update the risk register with the new risks created by this situation

ASSESSMENT

ASSESSMENT METHOD	FORMAT	WEIGHT
Project Management Quiz	25 MCQ on all lifecycle phases and tools	**25%**
Full Project Plan Submission	Complete package graded by rubric	**60%**
Crisis Recovery Exercise	Written response to Case 8B scenario	**15%**

Exercises, Assignment & Deliverable

CLASSROOM EXERCISES & ROLE-PLAYS

Exercise: Project Charter Speed Build

Participants receive a 1-page client brief and have 20 minutes to produce a complete Project Charter, then defend its scope choices and assumptions to the group.

Exercise: Risk Register Workshop

Working in groups, participants receive a project scenario and must identify 12 risks in 15 minutes, score each on a probability × impact matrix, and develop response plans for the top 5.

PRACTICAL ASSIGNMENT

Full Consulting Project Plan. Participants build a complete project plan package for a real or assigned consulting engagement.

- 01 Write the Project Charter for the engagement
- 02 Build the WBS (3 levels) for all project deliverables
- 03 Create the Gantt chart: sequence deliverables and milestones
- 04 Complete the RACI matrix for all major activities
- 05 Build the Risk Register with 10 risks and response plans
- 06 Design the Client Communication Plan
- 07 Produce an Escalation Plan for the engagement

REQUIRED DELIVERABLE — FULL CONSULTING PROJECT PLAN: CHARTER + WBS + RACI + RISK REGISTER

- Project Charter (scope, objectives, deliverables, assumptions, exclusions)
- Work Breakdown Structure (3 levels, all work packages)
- Gantt Chart (sequenced, with dependencies and milestones)
- RACI Matrix (all major activities)
- Risk Register (10 risks, probability × impact scored, with response plans)
- Client Communication Plan (5 touchpoints, format, audience, message)
- Escalation Plan

MODULE 09 OF 10 · 12 HRS · 2 DAYS

People & Practice Operations for Consultants

"Understanding how a consulting practice runs — the operational backbone of professional delivery."

DURATION	LEARNING HOURS	LEVEL	MODULE
2 days	12 hrs	Level 1 — Junior Consultant	09 of 10

MODULE PURPOSE

Module 9 builds the capabilities and real-world experience of the junior consultant across the operational backbone of a consulting practice: allocating and managing resources across workstreams, participating in recruitment and onboarding, championing technology adoption within engagement teams, and ensuring engagement-level regulatory compliance.

LEARNING OBJECTIVES

- Allocate consulting resources across a multi-workstream engagement using a utilization model
- Participate meaningfully in recruitment interviews using competency-based assessment
- Champion adoption of a new technology tool within an engagement team
- Identify and escalate engagement-level regulatory compliance triggers
- Manage a workstream budget and produce a basic utilization and margin report

Detailed Topics & Content

9.1 TALENT & RESOURCE MANAGEMENT: FROM SELF TO WORKSTREAM

- Consulting team roles, accountabilities, and responsibilities
- Staffing and workforce models: planning pyramid staffing model; flat-team model; expert/boutique model
- Managing your own time and workload against engagement plans
- Utilization management: a weekly utilization tracker for a consultant
- Recruitment & selection: job ad, sourcing, testing & assessment, offering
- Outsourcing
- Competency-Based Interview (CBI)
- The onboarding process
- Tracking time and expenses accurately against engagement budgets

9.2 SUCCESSION & TALENT DEVELOPMENT

- Performance & competency gap
- Why professional development is a consulting competency
- The 70-20-10 model applied to consulting
- Applied learning: converting knowledge to practice
- Capability gap assessment for a consulting team
- The Personal Development Plan (PDP)
- Succession planning
- Training feedback

9.3 LEADING & COACHING TEAMS

- Leadership
- Building and developing high-performing, accountable consulting teams
- Coaching & mentoring
- Situational leadership for consulting workstreams
- The weekly workstream check-in
- Giving SBI feedback
- Driving accountability without escalation
- The underperformance conversation
- Building consensus among cross-functional stakeholder groups

Case Study, Deliverable & Assessment

CASE STUDY

CASE 9A

The New Tool Nobody Used

A consulting firm has invested in a project collaboration platform to reduce email volume and improve document version control on complex engagements. The CPC consultant on a large transformation engagement sets it up at kickoff, explains it briefly in a five-minute meeting segment, and then uses email for everything. Three months in, the platform has had six logins from the eight-person engagement team. The engagement partner asks the CPC consultant to explain why the platform was not adopted.

REQUIRED TASKS

- Design a two-week technology adoption plan for the remaining engagement period
- Identify the three adoption barriers most likely to have caused the failure and design a specific intervention for each
- Produce the Workstream Financial Tracker for the past four weeks using data provided in the case brief
- Draft the competency-based interview question (STAR format) the CPC consultant would use to assess "Managing Client Expectations" in a CJC recruitment interview

REQUIRED DELIVERABLE — PRACTICE OPERATIONS PORTFOLIO

- Workstream staffing plan for a three-phase engagement (provided brief)
- Utilization and margin tracker for a four-week period (Excel-based, provided template)
- Two competency-based interview questions (STAR format) with model answers and CJC proficiency-level calibration notes
- Technology adoption plan for one tool (30-day adoption arc)
- Compliance trigger register for a provided engagement scenario: three triggers identified, escalation path for each

ASSESSMENT

ASSESSMENT METHOD	FORMAT	WEIGHT
Practice Operations Quiz	25 MCQ on resource management, compliance, financial literacy	**35%**
Practice Operations Portfolio	Full submission, graded by rubric	**50%**
Case Debrief	15-minute discussion of the case study: adoption failure diagnosis and recovery plan	**15%**

MODULE 10 OF 10 · 12 HRS · 2 DAYS

Business Cases, Report & Recommendations

10

"Build the final capability: analyse cases, write reports, and present like a consultant."

DURATION	LEARNING HOURS	LEVEL	MODULE
2 days	12 hrs	Level 1 — Junior Consultant	10 of 10

MODULE PURPOSE

Module 10 builds the three closing capabilities of the junior consultant: case analysis (how to read and solve business cases under pressure), recommendations development (how to translate analysis into actionable, client-accepted advice), and executive presentation and reporting (how to communicate findings with clarity, persuasion, and professional impact). These are the skills that clients and partners evaluate most directly.

LEARNING OBJECTIVES

- Apply a structured 5-step case analysis methodology to solve a business case in a time-pressured environment
- Use the 6C Framework to develop compelling, client-ready consulting recommendations
- Apply the pyramid principle to design a headline-driven, answer-first presentation structure
- Construct a professional consulting report using the MCPC report structure and writing principles
- Deliver a 10-minute executive presentation with Q&A to a panel audience
- Identify and correct the most common mistakes in consulting reports and presentations

Detailed Topics & Content

10.1 THE BUSINESS CASE

- Business case definition: what it is and is not in a consulting context
- Types: diagnostic, evaluative, comparative, and instructional cases
- Kipling's 6 Questions applied to case analysis: What, Why, Who, Where, When, How
- 5-step case analysis: (1) understand context, (2) define problem, (3) gather evidence, (4) generate options, (5) recommend and justify
- Selecting the right frameworks for the case type

10.2 DEVELOPING RECOMMENDATIONS

- Basics of recommendations: what makes a recommendation actionable, not just insightful
- The 6C Framework: Clear, Concise, Credible, Consistent, Client-focused, Compelling
- Recommendation approaches: assertive (we recommend), conditional (if X then Y), provisional (subject to further data)
- Reference points: how to ground recommendations in data, benchmarks, and precedent
- The client's eye: how does this recommendation look from the client's perspective?
- Developing & implementing recommendations: the gap between "writing the recommendation" and "making it happen"
- Translating recommendations into actions: from recommendation to action item to accountable owner

10.3 EXECUTIVE PRESENTATION MASTERY

- Pyramid principle in slide design: answer first, then support
- The McKinsey slide anatomy: title (the "so what"), body (the evidence), kicker (the implication)
- Charts that communicate: the visualisation decision tree for consultants
- Slide deck architecture: Executive Summary → Body → Appendix
- Elements of effective oral presentations to a panel: the 5 skills that determine how you are perceived
- Executive persuasion techniques: framing, contrast, and anchoring in presentations
- Speaking with confidence in C-suite environments: the preparation routine that eliminates nerves
- Managing first impressions: the consultant credibility moment in the first 90 seconds
- Dealing with difficult participants: dominators, naysayers, and the silent majority
- Delivery techniques: rehearsal, Q&A management, handling the unexpected question

10.4 CONSULTING REPORT WRITING

- Overview of consulting reports: types (diagnostic, recommendation, progress, final), audiences, and purposes
- Difference between reporting, advising, and persuading: the three modes and when to use each
- Reporting pyramid: document hierarchy from raw data to executive summary
- Principles of good report writing: clarity, brevity, evidence, objectivity, action-orientation
- Common mistakes in consulting reports: the 10 errors that undermine consultant credibility

10.5 SOLUTION GENERATION TECHNIQUES

- Why solution generation is a distinct skill
- The Solution Options Log
- Technique 1: Comparable Solutions Research
- Technique 2: The 4-Perspective Stimulus
- Technique 3: The Analogical Leap
- From options to recommendations

10.6 PROFESSIONAL CONSULTING REPORT STRUCTURE

- Executive Summary: 1 page, 3 key messages, action-oriented
- Context and Background: why this engagement was initiated
- Methodology: how the work was conducted (research methods, data sources)
- Findings: what the evidence shows (structured, evidence-backed, objective)
- Analysis: what the findings mean (frameworks applied, patterns identified)
- Recommendations: what to do (6C compliant, prioritised, actionable)
- Implementation Roadmap: when and how to act (phased, resourced, governed)
- Appendix: supporting data, interview notes, and detailed analysis

Tools, Case Studies & Assessment

TOOLS, TEMPLATES & FRAMEWORKS

- Consulting Report Template (Full Structure)
- Q&A Preparation Framework
- 6C Recommendation Checker
- Case Analysis 5-Step Guide
- Pyramid Principle Slide Storyboard
- Kipling Case Analysis Template
- Executive Presentation Template (PPT)
- Report Writing Quality Checklist
- McKinsey Slide Anatomy Guide
- Executive Summary Template (1-Page)
- Visualisation Decision Tree
- Common Report Mistakes Checklist (10 Items)

CASE STUDIES

CASE 10A

Full Case Analysis Under Time Pressure

Participants receive a 4-page business case about a Saudi retail company facing declining margins, rising competition, and internal organisational tension. They have 45 minutes to analyse the case and produce a structured recommendation.

REQUIRED TASKS

- Apply Kipling's 6 Questions to define the core problem
- Apply 2 appropriate frameworks from the program toolkit
- Develop 3 recommendations using the 6C Framework
- Structure the recommendation into a 5-slide pyramid-principle deck
- Present to the group in 8 minutes and handle 5 minutes of Q&A

CASE 10B

Report Quality Audit

Participants receive a poorly written consulting report (intentionally filled with the 10 most common mistakes). They must identify every mistake, explain why it damages credibility, and rewrite the Executive Summary correctly.

REQUIRED TASKS

- Identify all instances of the 10 common report mistakes
- Classify each mistake: clarity, evidence, structure, tone, or action-orientation
- Rewrite the 1-page Executive Summary using correct principles
- Rewrite one slide from the body using the McKinsey slide anatomy

ASSESSMENT

ASSESSMENT METHOD	FORMAT	WEIGHT
Case Analysis Exam	Timed 45-minute case analysis	**30%**
Consulting Report Submission	Full written report graded by rubric	**40%**
Executive Presentation	Live 10-minute delivery + Q&A panel	**30%**

Exercises, Assignment & Deliverable

CLASSROOM EXERCISES & ROLE-PLAYS

Exercise: McKinsey Slide Build Sprint

Participants receive 5 bullet-point "data dumps" and must convert each into a McKinsey-style slide with a "so what" title, clean body, and a kicker message. All 5 slides built in 30 minutes. Peer review and facilitator debrief.

Exercise: Final Presentation Rehearsal

Each participant delivers a 6-minute presentation on a consulting topic of their choice (from any module in the program). Peers provide structured feedback using the 5-dimension observation rubric. Every participant presents.

PRACTICAL ASSIGNMENT

Final Consulting Case Report + Executive Presentation. The final assignment combines all 10 modules. Participants receive a full business case and must produce a complete consulting report and executive presentation — the program's final examination.

01 Read and analyse the case (apply Kipling, MECE, and at least 3 strategic frameworks)

02 Develop 4 recommendations using the 6C Framework

03 Write the full consulting report (8–10 pages, all sections)

04 Build a 15-slide executive presentation using the pyramid principle

05 Deliver the presentation to the facilitator panel (10 minutes + 5-minute Q&A)

REQUIRED DELIVERABLE — FULL CONSULTING CASE REPORT + EXECUTIVE PRESENTATION DECK

- Full consulting report (8–10 pages, all 8 structural sections)
- Executive summary (1 page, 3 key messages)
- 15-slide executive presentation (pyramid structure, McKinsey slide anatomy)
- 4 recommendations validated against the 6C Framework
- Delivery video or in-person presentation (10 minutes)
- 6C self-assessment of your own recommendations

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PROGRAM	MODULES	PORTFOLIO	OUTCOME
GMCI-CJC	10 Modules	10 Deliverables	Junior Consultant Certification