GMCI

GLOBAL MANAGEMENT CONSULTANT INSTITUTE

GMCI CERTIFICATION PROGRAM

Certified Professional Consultant (GMCI-CPC)

Certification Program — Full Learning Journey, Career Development Edition. Ten modules building on the Level 1 foundation, deepening analytical capability, strategic complexity, client leadership, and commercial acumen for the professional consultant.

PROGRAM	MODULES	LEARNING HOURS	DURATION
GMCI-CPC	10 Modules	100–150 hrs	3–6 Months

Contents

Program Overview & the Career Pathway

FROM JUNIOR TO PROFESSIONAL — THE DEVELOPMENT PHILOSOPHY

The GMCI-CJC Consulting Career Pathway is structured as a deliberate, staged capability build. Level 1 builds the foundation — the tools, language, professional behaviours, and entry-level competencies of consulting practice. builds on every module from Level 1, deepening technical capability, adding commercial and strategic complexity, and developing the professional judgment required to lead workstreams and manage client relationships independently.

Every module explicitly links to its Level 1 predecessor. Participants arriving at will recognise the territory — but will be taken deeper, challenged harder, and expected to operate with greater independence, ambiguity tolerance, and analytical sophistication.

PROGRAM FACTS

PROGRAM

GMCI-CPC — Professional Consultant Certification

MODULES	TOTAL HOURS	DURATION	METHODOLOGY
10 modules building on the Level 1 foundation	**100–150 learning hours**	**3–6 months, after completing Level 1**	**20% theory · 30% case studies · 40% practical · 10% assessment & coaching**

CAREER STAGE

Advancement from Level 1 Junior Consultant

ENTRY REQUIREMENT

GMCI-CJC Level 1 Certificate or equivalent consulting experience

The Two-Level Competency Architecture

DIMENSION	LEVEL 1 — JUNIOR CONSULTANT	PROFESSIONAL CONSULTANT
Analytical Depth	Applies frameworks as taught; structures analysis with facilitation	Adapts and combines frameworks; leads analysis independently
Problem Framing	Uses Iceberg Model and MECE with guidance	Develops custom diagnostic frameworks; challenges problem definition with clients
Client Interaction	Participates in meetings; supports senior consultants	Manages client relationships; leads discovery sessions and steering committee updates
Strategic Thinking	Applies BCG, SWOT, Porter with support	Builds integrated strategies; evaluates M&A options, Blue Ocean, VRIN framework
Commercial Awareness	Understands pricing models; contributes to proposals	Builds pricing models independently; leads proposal development; manages BD pipeline
Change Management	Understands change models; supports communication plans	Leads ADKAR and Kotter implementation; manages resistance; facilitates change workshops
Project Management	Executes tasks within a plan built by others	Builds and manages the full consulting project plan; governs delivery independently
Financial Acumen	Reads financial statements with guidance	Performs ratio analysis, builds business cases with NPV/IRR, interprets EBITDA
Communication	Structured written and verbal communication	Executive-level presentations; board-ready reports; influencing without authority
Crisis Management	Not covered at Level 1	Diagnoses and manages organisational crises using Coombs and Jaques models

Dual-Level Program Architecture

MODULE	LEVEL 1 FOUNDATION	ADVANCEMENT
01	**Consulting Foundations & Professional Ethics**	Advanced consulting landscape, business modelling, competitive dynamics
02	**Diagnostic, Research & Analytical Skills and Tools**	Design thinking, problem solving, hypothesis trees, statistical analysis, data visualisation
03	**Strategic Analysis & Planning Tools & Frameworks**	Advanced corporate and business strategies: McKinsey 7S Framework, Ansoff Matrix, Porter's Five Forces
04	**Strategic Planning & Implementation Tools & Frameworks**	Advanced strategies: M&A, Blue Ocean, Value Chain, Lean, OKR integration
05	**Marketing Analysis & Strategy**	Proposals development, pricing, SOW, and business development
06	**Organization Diagnosis & Culture**	Change management: ADKAR, Kotter, resistance, communication planning
07	**Client & Stakeholder Skills**	Advanced Consulting Leadership & Client Engagement, C-level client relationships, managing expectation, strategic communication, portfolio management
08	**Managing the Consulting Project**	Advanced solution design: MECE at scale, scenario analysis, Pre-Mortem, decision making
09	**People & Practice Operations for Consultants**	Crisis management: Coombs, Jaques, stakeholder management in crisis
10	**Business Cases, Reporting & Recommendations**	Financial acumen: P&L, ratios, EBITDA, business case modelling (NPV/IRR)

Career Stage Competency Map

The table below maps the GMCI-CJC levels to the consulting career ladder, showing which competencies are developed at each stage and what each level prepares participants for next.

CAREER STAGE	GMCI-CJC LEVEL	KEY COMPETENCIES	TYPICAL ROLE
Entry	Level 1 Junior Consultant	Consulting foundations, diagnostics, structured tools, communication, basic project support	Analyst / Junior Associate
Developing	Professional Consultant	Advanced analytics, market strategy, change management, financial acumen, client management, crisis handling	Consultant / Senior Associate
Advanced	Level 3 Senior Consultant (next)	Engagement leadership, practice leadership, thought leadership, P&L ownership, client development, sector specialisation, executive advisory	Senior Consultant / Manager

PROGRAM ASSESSMENT FRAMEWORK —

COMPONENT	WEIGHT	DESCRIPTION
Knowledge Quizzes	**20%**	End-of-module MCQ and short-answer tests — harder than Level 1
Case Study Analysis	**25%**	Written responses: more complex, multi-framework, ambiguous scenarios
Practical Assignments	**25%**	One deliverable per module; builds on the Level 1 portfolio entry
Presentations & Workshops	**10%**	Executive-level observed delivery; board simulation
Final Integrated Exam	**15%**	Cross-module case with financial, strategic, and organisational components
Professional Portfolio	**5%**	portfolio (10 deliverables) presented alongside Level 1 portfolio

Cumulative Portfolio

Participants who complete both Level 1 and graduate with a 20-piece consulting portfolio — the most comprehensive junior-to-professional consulting toolkit available in the GCC and international market.

MODULE	PORTFOLIO DELIVERABLE	BUILDS ON LEVEL 1 DELIVERABLE
01	Industry Landscape Map + Business Model Stress Test + Ethics Case Analysis	L1 M1: Lifecycle Map + Ethics Reflection
02	Full Problem Decomposition Workbook: Trees + Root Cause + Data Visualisation	L1 M2: Diagnostic Research Design
03	Corporate Strategy Report: McKinsey 7S + Ansoff + GE-McKinsey	L1 M3: Strategic Analysis Report
04	Advanced Strategy Pack: M&A Rationale + Blue Ocean Canvas + OKR Framework	L1 M4: Balanced Scorecard + KPI Framework
05	Solution Design: Full Pre-Mortem + Sensitivity Analysis + Decision Matrix	L1 M2+M3+M4+M5+M6
06	Change Management Plan: ADKAR + Kotter + Communication + Resistance Strategy	L1 M5: OD Assessment + Culture Map
07	Crisis Management Playbook: Coombs + Jaques + Stakeholder Response Plan	Cross-cutting theme
08	Advanced Consulting Leadership & Client Engagement	L1 M7: Communication Skills Audit · L1 M8: Managing Consulting Projects
09	Proposals, pricing, SOW, and business development	L1 M7: Communication Skills Audit · L1 M5: Marketing analysis, competitive positioning
10	Financial Analysis Report: Ratios + EBITDA + NPV/IRR Business Case	L1 M10: Consulting Case Report

Program Overview — Architecture at a Glance

MOD	TITLE	HOURS	WHAT ADDS OVER LEVEL 1
01	Advanced Consulting Landscape & Business Modelling	12 hrs	Big 3/4, AI disruption, Business Model Canvas, ethics at depth
02	Problem Solving & Design Thinking	14 hrs	PRIAM model, 5 tree types, statistical analysis, dashboard design, brainstorming, lateral thinking
03	Advanced Strategic Analysis & Planning Tools & Frameworks — Part 1	18 hrs	7S, Ansoff, GE-McKinsey at depth; Porter generic strategies applied
04	Advanced Strategic Planning & Implementation Tools & Frameworks — Part 2	14 hrs	M&A, alliances, Five Forces depth, Blue Ocean, Lean, OKR
05	Design of Solutions & Decision Making	14 hrs	MECE at scale, Pre-Mortem mastery, sensitivity analysis, complex decision-making, cost-benefit analysis, impact assessment
06	Change Management	18 hrs	Full change lifecycle: 6 models, communication planning, resistance management
07	Crisis Management	14 hrs	NEW: Coombs, Jaques, SCCT, stakeholder management in crisis
08	Advanced Consulting Leadership & Client Engagement	14 hrs	Complex consulting programs and portfolios, consulting leadership, client engagement
09	Consulting Proposal Development & BD	14 hrs	Proposals, pricing, SOW, and business development
10	Financial Acumen for Consultants	14 hrs	NEW: Accounting foundations, P&L, ratios, EBITDA, NPV/IRR business cases

MODULE 01 OF 10 · 12 HRS · 2 DAYS

Advanced Consulting & Business Modelling

01

"Know the industry you operate in — its history, its players, and its future."

DURATION	LEARNING HOURS	LEVEL	MODULE
2 days	12 hrs	Professional Consultant	01 of 10

MODULE PURPOSE

Module 1 at repositions the participant from practitioner to industry insider. At Level 1, participants learned what consulting is and how a project runs. At , they learn the consulting industry itself: its origins and evolution, the competitive landscape, the economics of different firm models, and the disruption forces reshaping the profession. They also develop the ability to apply Business Model Canvas and Value Chain Analysis to real client situations — tools used in senior-level engagement diagnosis.

LEARNING OBJECTIVES

- Apply Business Model Canvas and Value Chain Analysis to diagnose a client's strategic position
- Compare consulting business models and evaluate their economics for a solo, boutique, or global firm
- Articulate the 5 growth drivers that cause organisations to hire management consultants
- Apply the ICMCI professional ethics code to complex multi-stakeholder engagement scenarios
- Self-assess career stage using the Analyst → Partner competency ladder

Detailed Topics & Content

1.1 CONSULTING INDUSTRY EVOLUTION

- Boutique and specialist firms: where niche creates competitive advantage
- The future of consulting: AI disruption, digital advisory, and the changing value of human judgment
- Global market size and growth trends: the $300B+ industry and where it is growing fastest
- Service lines in depth: strategy, operations, IT, HR, financial advisory, digital — what each involves

1.2 WHY FIRMS HIRE CONSULTANTS — THE 5 GROWTH DRIVERS

- Profitability: improving margins through cost reduction or revenue growth
- Costs: structural cost reduction, efficiency improvement, shared services
- Market Power: expansion, market entry, competitive repositioning
- Risk: navigating regulatory change, crisis, or strategic uncertainty
- Motivation: accessing external objectivity and intellectual challenge

1.3 BUSINESS MODEL UNDERSTANDING

- Business Model Canvas: the 9 building blocks applied to a real client diagnostic
- Value chain analysis: identifying where value is created and where it leaks across the operating model
- Revenue model mapping: how clients generate income and where the growth levers are
- Cost structure analysis: fixed vs. variable, direct vs. indirect from public data sources
- Identifying strategic leverage points before the engagement begins — the pre-diagnostic scan

1.4 CONSULTING BUSINESS MODELS & ECONOMICS

- Time & materials: the simplest model and its utilisation and pricing risks
- Fixed-fee: client predictability vs. consultant margin exposure
- Value-based pricing: aligning fees to the value delivered — the most advanced model
- Retainer models: advantages of recurring relationships for both sides
- Embedded consulting: the hybrid between consulting and employment
- Solo consultant economics: break-even, utilisation rates, and building a sustainable practice
- Boutique vs. global firm economics: overhead, leverage, and profit-per-partner

1.5 ADVANCED CONSULTING ETHICS & PROFESSIONAL STANDARDS AT DEPTH

- Global professional standards and their GCC application
- The ethical professional at : acting independently when the engagement partner applies pressure
- Ethical dilemmas in consulting: conflicts of interest, confidentiality, misrepresentation, commercial pressures
- Corporate governance & ethical compliance: the consultant's role in governance, compliance frameworks, ethical auditing
- Corporate Social Responsibility (CSR) & sustainability: integrating CSR into strategy, sustainability reporting, green consulting
- Cross-cultural ethics: cultural differences in ethical values, consulting in emerging markets
- Building a culture of integrity: leading by example, ethical training programs, whistleblowing mechanisms

1.6 CONSULTANT COMPETENCY FRAMEWORK — ADVANCED VIEW

- Technical competencies at : what you must now do independently
- Consulting competencies: client management, workstream leadership, quality review
- Leadership competencies: emerging at influence, coaching, and team direction
- Career stages mapped: Analyst → Consultant → Manager → Principal → Partner
- Competency radar chart: self-assessment against expectations

Tools, Templates & Frameworks

- Business Model Canvas Template
- Consulting Business Model Economics Calculator (Excel)
- Value Chain Analysis Template
- Competency Radar Chart ()
- Consulting Industry Landscape Map
- Ethics Dilemma Decision Tree
- Firm Comparison Matrix (Big 3 / Big 4 / Boutique)
- Growth Driver Diagnostic Template
- CSR & Sustainability Assessment Framework
- Cross-Cultural Consulting Guide

CASE STUDIES

CASE 01

Business Model Stress Test — Gulf FMCG Company

A Gulf FMCG company's business model is under threat from e-commerce disruption and private label competition. Participants apply Business Model Canvas and Value Chain Analysis to identify the structural vulnerabilities before any diagnostic work begins.

REQUIRED TASKS

- Map the full Business Model Canvas from secondary research
- Identify 4 structural vulnerabilities — rank by urgency
- Apply Value Chain to locate where value is being lost
- Recommend the top 3 strategic leverage points to investigate in the engagement

CASE 02

Ethics Under Commercial Pressure — The Partner Directive

You are a consultant on a senior engagement. The partner asks you to exclude a finding from the final report because it might upset the client's CFO and risk the renewal contract. The finding materially affects the recommendation.

REQUIRED TASKS

- Apply the ICMCI ethics framework to assess the situation
- Identify the professional obligations at stake
- Prepare a structured, respectful response to the partner
- Draft the finding for inclusion using diplomatically sound language

Exercises, Assignment & Assessment

CLASSROOM EXERCISES & WORKSHOPS

Exercise — Consulting Firm Positioning Game

Each participant is assigned a consulting firm (McKinsey, BCG, Deloitte, EY, a regional boutique). They have 15 minutes to map the firm's service lines, key clients, competitive positioning, and pricing model, then pitch the firm to the group as if recruiting a client.

Exercise — Business Model Canvas Live Build

Working in pairs, participants receive a 2-page company profile and 15 minutes to complete a full Business Model Canvas. Pairs compare canvases, debate differences, and identify the most critical leverage point for a consulting engagement.

PRACTICAL ASSIGNMENT — INDUSTRY LANDSCAPE MAP + BUSINESS MODEL STRESS TEST

Participants build a consulting industry landscape map for their target market AND apply the Business Model Canvas + Value Chain Analysis to a real client scenario.

01 Map the consulting industry in your target market (international/GCC): top 15 firms, service lines, competitive positioning

02 Build the Business Model Canvas for a real or assigned company

03 Apply Value Chain Analysis: identify where value leaks

04 Complete the Competency Radar self-assessment

05 Write a 1-page ethics position paper on a provided dilemma

REQUIRED DELIVERABLE — INDUSTRY LANDSCAPE MAP + BUSINESS MODEL STRESS TEST + ETHICS ANALYSIS

- Consulting industry map: 15 firms, service lines, positioning (visual)
- Business Model Canvas (complete, from secondary research)
- Value Chain analysis: 3 value leak points with evidence
- 3 strategic leverage points for a potential consulting engagement
- 1-page ethics position paper (dilemma analysis using ICMCI code)
- Updated competency radar

ASSESSMENT METHOD	FORMAT	WEIGHT
Industry & Business Model Quiz	25 MCQ	**25%**
Business Model Stress Test	Full submission	**50%**
Ethics Position Paper	Written, 400 words	**25%**

Problem Solving & Design Thinking

"Move from using frameworks to mastering analytical rigour — the hallmark of the professional consultant."

DURATION	LEARNING HOURS	LEVEL	MODULE
2 days	14 hrs	Professional Consultant	02 of 10

MODULE PURPOSE

The transition from Level 1 to in analytical capability is the transition from data collector to insight generator. Module 2 builds the advanced analytical toolkit: hypothesis-driven problem solving, MECE logic trees across 5 types, the PRIAM diagnostic model, statistical analysis, and professional data visualisation. By the end, participants can lead the analytical workstream of a consulting engagement.

LEARNING OBJECTIVES

- Apply the pyramid principle to structure consulting recommendations answer-first
- Build and test hypotheses using inductive and deductive reasoning discipline
- Construct all 5 types of consulting logic trees: problem, hypothesis, issue, objective, and decision
- Apply the PRIAM model to diagnose complex business problems systematically
- Use 5 Whys, Fishbone, Fault Tree, and Gap Analysis to identify root causes
- Apply descriptive statistics, correlation, Pareto, and trend analysis to business data
- Design an executive analytics dashboard using Power BI or Excel with clear visual hierarchy

Detailed Topics & Content

2.1 HYPOTHESIS-BASED PROBLEM SOLVING

- The pyramid principle: answer first, evidence second — structuring consulting communication
- From data to insight to recommendation: the 3-step discipline that separates junior from professional
- Hypothesis generation: building the first 5 hypotheses from discovery and context
- Hypothesis testing methodology: designing data collection to confirm or refute each hypothesis
- Inductive reasoning: building from specific observations to a general conclusion
- Deductive reasoning: starting from a general principle and testing its application
- The hypothesis log: tracking status (confirmed, refuted, pending) across the engagement

2.2 MECE FRAMEWORK & CONSULTING LOGIC TREES

- MECE definition and the McKinsey standard: mutually exclusive, collectively exhaustive
- Tree Type 1 — Problem Tree: decomposing a problem into its component causes
- Tree Type 2 — Hypothesis Tree: structuring competing explanations for testing
- Tree Type 3 — Issue Tree: mapping all questions that must be answered to solve the problem
- Tree Type 4 — Objectives Tree: cascading strategic goals into measurable actions
- Tree Type 5 — Decision Tree: mapping options and their consequences with probabilities
- Profitability, revenue, and cost tree archetypes: the three most common in consulting
- Issue tree decomposition workshop: applying all 5 types to 5 real business problems

2.3 ROOT CAUSE ANALYSIS & PROBLEM-SOLVING TOOLS

- PRIAM — Problem Identification and Analysis Model: the 5-phase structured diagnostic
- 5 Whys: facilitation guide, documentation protocol, and common misuse errors
- Fishbone (Ishikawa) Diagram: 6M construction for manufacturing and service problems
- Fault Tree Analysis: for complex multi-causal systems problems
- Prioritising root causes: impact vs. actionability 2×2 matrix
- Process Mapping: documenting how work actually flows (vs. how it is supposed to flow)
- Flowcharts: standardised notation and when to use them in a consulting context
- Value Chain Analysis: mapping where value is created and destroyed in the operating model
- Gap Analysis: current state vs. desired state — the simplest and most powerful diagnostic tool

2.4 CRITICAL THINKING & DECISION MAKING

- Cognitive biases in consulting: anchoring, confirmation bias, availability heuristic
- Design Thinking phases, idea generation techniques, open innovation
- Brainstorming techniques, lateral thinking, design thinking basics
- Structured decision frameworks: pros/cons, weighted criteria, multi-attribute analysis
- Scenario analysis: best-case, base-case, worst-case — structuring uncertainty for clients
- The "so what" discipline: turning every analytical finding into an actionable insight

2.5 STATISTICAL ANALYSIS FOR CONSULTANTS

- Descriptive statistics: mean, median, mode, standard deviation — business interpretation
- Correlation analysis: identifying relationships in business data and avoiding spurious correlations
- Trend analysis and time series: spotting patterns across time in operational and financial data
- Benchmarking and percentile analysis: positioning client performance against industry norms
- Pareto analysis: the 80/20 rule applied to cost, revenue, customers, and defects
- Data triangulation: using multiple sources to validate a finding

2.6 DATA VISUALISATION & DASHBOARD DESIGN

- Visualisation principles: the right chart for each data type — bar, line, scatter, waterfall, heatmap
- Dashboard design: KPI selection, layout hierarchy, and data storytelling
- Common visualisation mistakes: chart junk, misleading axes, wrong chart types
- Executive dashboard vs. operational dashboard vs. analytical dashboard: design differences
- Power BI essentials: data model, relationships, DAX measures, and visual formatting
- Colour, contrast, and annotation: the design principles that make dashboards credible

Tools, Templates & Frameworks

- Hypothesis Tracking Log
- Gap Analysis Template
- 5-Type Logic Tree Builder Template
- Statistical Analysis Template (Excel)
- PRIAM Diagnostic Model Guide
- Pareto Analysis Tool
- 5 Whys Facilitation Guide
- Power BI Dashboard Template
- Fishbone Diagram Template
- Data Visualisation Decision Tree
- Process Mapping Tool (Visio/Lucidchart)
- Correlation Analysis Worksheet

CASE STUDIES

CASE 01

Revenue Collapse — Applying All 5 Tree Types

A Gulf retail chain has lost 18% of revenue over 24 months. No clear single cause has been identified. Participants apply all 5 logic tree types to build a complete analytical picture from multiple angles.

REQUIRED TASKS

- Build a Problem Tree: decompose "revenue decline" into component causes
- Build a Hypothesis Tree: generate and structure 6 competing explanations
- Build an Issue Tree: what questions must be answered to solve this?
- Apply PRIAM to the diagnostic phase
- Use Pareto analysis on transaction data to identify the 20% driving 80% of the loss

CASE 02

Dashboard Build — Executive Analytics

Participants receive a 500-row operational dataset from a Saudi manufacturing client. They must clean, analyse, and build an executive Power BI dashboard that tells the diagnostic story in visual form.

REQUIRED TASKS

- Clean and validate the dataset (4-dimension validation)
- Calculate 6 KPIs: productivity, quality, cost per unit, OEE, downtime, yield
- Build a Power BI dashboard with 3 pages: overview, trend, and root cause
- Write a 1-page analytical narrative: 5 findings with implications

Exercises, Assignment & Assessment

CLASSROOM EXERCISES & WORKSHOPS

Exercise — 5-Tree Sprint

Participants receive a single business problem (e.g., "declining employee retention"). In 30 minutes, they must build all 5 logic tree types for the same problem. Facilitator challenges MECE compliance and tree quality.

Exercise — Statistical Insight Race

Teams receive a 3-year financial dataset. They must apply Pareto, correlation, and trend analysis in 25 minutes and present 3 business insights — not data descriptions, but "so what" conclusions — to the group.

PRACTICAL ASSIGNMENT — FULL PROBLEM DECOMPOSITION WORKBOOK + ANALYTICS DASHBOARD

Participants apply the complete analytical toolkit to a complex business problem.

01 Build all 5 logic tree types for the assigned problem

02 Apply PRIAM to structure the diagnostic approach

03 Conduct statistical analysis: Pareto, correlation, and trend

04 Build a Power BI or Excel executive dashboard (6 KPIs)

05 Write a 2-page analytical narrative with the pyramid principle

REQUIRED DELIVERABLE — FULL PROBLEM DECOMPOSITION WORKBOOK: TREES + ROOT CAUSE + DATA VISUALISATION

- All 5 logic tree types (visual, for the same business problem)
- PRIAM diagnostic model output
- Root cause analysis outputs: 5 Whys + Fishbone
- Statistical analysis: Pareto, correlation, trend (Excel)
- Executive Power BI or Excel dashboard (6 KPIs, 3 pages)
- 2-page analytical narrative using pyramid principle

ASSESSMENT METHOD	FORMAT	WEIGHT
Structured Thinking Exam	90-minute case — all 5 tree types and PRIAM	**35%**
Full Analytical Workbook	Full submission	**45%**
Dashboard Peer Review	Structured critique by 2 peers	**20%**

MODULE 03 OF 10 · 18 HRS · 3 DAYS

Advanced Strategic Analysis & Planning Tools & Frameworks — Part 1

"Apply corporate and business strategy frameworks with the depth expected of a professional consultant."

DURATION	LEARNING HOURS	LEVEL	MODULE
3 days	18 hrs	Professional Consultant	03 of 10

MODULE PURPOSE

Module 3 at takes the strategy frameworks introduced at Level 1 and builds professional-grade depth. The transition is from "I know what this framework is" to "I can lead a client workshop using this framework and defend the outputs under senior scrutiny." Participants work at the corporate and business strategy levels, combining frameworks to build a coherent strategic argument.

LEARNING OBJECTIVES

- Apply McKinsey 7S as a diagnostic tool: identify misalignments and trace their performance impact
- Use the Ansoff Matrix to evaluate growth vectors with associated risk and investment profiles
- Apply the GE-McKinsey Matrix to make portfolio investment recommendations for a multi-business organisation
- Articulate Porter's Generic Strategies and position a client on the strategic landscape
- Combine corporate and business-level frameworks into an integrated strategic recommendation

Detailed Topics & Content

3.1 MCKINSEY 7S MODEL — DEEP APPLICATION

- 7S Model revisited: the 7 elements and their interdependencies
- Using 7S as an alignment diagnostic: how misalignment explains underperformance
- Conducting a 7S assessment: data sources, weighting, and visualisation
- The "hard" and "soft" S distinction: why structure and strategy are easier to change than culture
- Case application: post-merger 7S realignment in a GCC industrial company
- From 7S diagnosis to 7S-informed transformation plan

3.2 ANSOFF GROWTH MATRIX — ADVANCED APPLICATION

- Ansoff revisited: Market Penetration, Market Development, Product Development, Diversification
- Risk profiling each vector: the investment and failure probability profile of each quadrant
- Combining Ansoff with financial modelling: quantifying the investment required and expected return
- Using Ansoff to challenge an over-conservative or over-aggressive growth strategy
- Sequencing Ansoff vectors: building the 3-year growth roadmap
- Holding company Ansoff: portfolio-level growth strategy using the matrix

3.3 GE-MCKINSEY MATRIX — PORTFOLIO STRATEGY

- GE-McKinsey revisited: the 9-cell investment attractiveness vs. competitive strength matrix
- Scoring methodology: industry attractiveness criteria and competitive strength criteria
- Portfolio classification: invest and grow (green), selectivity (yellow), harvest/divest (red)
- Capital allocation recommendations: how the matrix drives investment decisions
- Combining GE-McKinsey with BCG: when to use each and how the outputs complement
- Presenting portfolio strategy to a holding company board

3.4 PORTER'S GENERIC STRATEGIES — APPLIED

- Generic strategies revisited: Cost Leadership, Differentiation, Focus (cost and differentiation)
- The "stuck in the middle" trap: what happens when a company tries to do both
- Applying generic strategies to a real company: evidence-based positioning
- Competitive moves: how a company strengthens its chosen generic position
- Generic strategy sustainability: when does a cost leadership or differentiation position erode?
- Porter's Generic Strategies in the GCC context: market-specific considerations

3.5 ANALYZING THE BUSINESS ENVIRONMENT — ADVANCED

- Applies advanced frameworks (Porter's Five Forces, VRIO) independently to assess market dynamics and internal capability
- Validates environmental analysis with subject-matter experts and client stakeholders prior to presentation
- Integrates ESG materiality factors into environmental scans where relevant to client strategy

Tools, Templates & Frameworks

- McKinsey 7S Assessment Radar (Advanced)
- Portfolio Capital Allocation Template
- Ansoff Matrix with Risk Profiling (Excel)
- 7S Transformation Plan Template
- GE-McKinsey 9-Cell Matrix Builder
- Growth Vector Financial Model (Excel)
- Porter Generic Strategies Positioning Map
- Integrated Strategy Architecture Canvas

CASE STUDIES

CASE 01

7S Post-Merger Alignment

A Saudi industrial company has acquired a smaller competitor. 6 months in, performance is below plan. The CEO suspects an internal alignment problem. Participants apply McKinsey 7S to diagnose the specific misalignments causing underperformance.

REQUIRED TASKS

- Complete the 7S assessment for both the acquirer and the acquired entity
- Identify the top 4 misalignments with supporting evidence
- Map each misalignment to its performance impact
- Build the 7S realignment plan: what changes in what sequence?

CASE 02

GE-McKinsey Portfolio Rationalisation

A GCC holding company has 8 business units across 4 sectors. 3 are loss-making; 2 are high-growth stars. The board wants a portfolio rationalisation with capital allocation recommendations.

REQUIRED TASKS

- Score all 8 units on industry attractiveness (5 criteria) and competitive strength (5 criteria)
- Build the GE-McKinsey 9-cell matrix
- Classify each unit: invest, hold, harvest, or divest
- Build the capital reallocation recommendation with financial rationale

Exercises, Assignment & Assessment

CLASSROOM EXERCISES & WORKSHOPS

Exercise — 7S Realignment Design Sprint

Participants receive a post-merger scenario and 20 minutes to identify the top 3 7S misalignments and design a 90-day realignment plan. Groups compare and debate their choices.

Exercise — Ansoff Risk Quantification

Each participant takes one Ansoff growth vector and builds the financial model: investment required, probability of success, expected return, and risk mitigation actions. All 4 vectors are covered across the group.

PRACTICAL ASSIGNMENT — CORPORATE STRATEGY REPORT: MCKINSEY 7S + ANSOFF + GE-MCKINSEY

Participants produce an integrated corporate strategy report using all 3 corporate-level frameworks.

01 Apply McKinsey 7S to diagnose alignment in a real or assigned organisation

02 Apply Ansoff Matrix with risk profiling and basic financial modelling

03 Apply GE-McKinsey to the organisation's portfolio (or a simulated one)

04 Combine all 3 outputs into a unified corporate strategy recommendation

05 Produce a 14-page corporate strategy report

REQUIRED DELIVERABLE — CORPORATE STRATEGY REPORT: MCKINSEY 7S + ANSOFF + GE-MCKINSEY

- 7S alignment assessment (radar + narrative)
- Ansoff Matrix with risk profiles and financial estimates
- GE-McKinsey matrix with portfolio classification and capital allocation recommendation
- Porter's Generic Strategy positioning with evidence
- Integrated corporate strategy recommendation (3 strategic priorities)
- 14-page strategy report with executive summary

ASSESSMENT METHOD	FORMAT	WEIGHT
Strategy Frameworks Exam	30 MCQ + 1 case application	**35%**
Corporate Strategy Report	Full submission	**55%**
Portfolio Presentation	10-minute board simulation	**10%**

MODULE 04 OF 10 · 14 HRS · 2 DAYS

Advanced Strategic Planning & Implementation Tools & Frameworks — Part 2

"Master the advanced strategies that senior consultants use: M&A, Blue Ocean, Value Chain, and OKR."

DURATION	LEARNING HOURS	LEVEL	MODULE
2 days	14 hrs	Professional Consultant	04 of 10

MODULE PURPOSE

Module 4 at develops the advanced strategic toolkit that takes a consultant beyond the standard frameworks taught at Level 1. M&A and strategic alliances, Blue Ocean Strategy, deep Value Chain Analysis, and the integration of OKR with KPI frameworks are the tools that senior-level consulting work requires. Participants will leave able to advise clients on growth-by-acquisition decisions and help create genuinely new competitive positions.

LEARNING OBJECTIVES

- Evaluate a proposed merger, acquisition, or strategic alliance using a structured rationale framework
- Apply Blue Ocean Strategy to identify value innovation opportunities for a client
- Conduct a Porter's Five Forces analysis with strategic depth and commercial implications
- Build a Value Chain Analysis that identifies where competitive advantage is created and sustained
- Design an OKR framework and show how it integrates with and extends the Balanced Scorecard
- Apply Lean Six Sigma and Marketing Mix in a functional strategy advisory context

Detailed Topics & Content

4.1 CORPORATE LEVEL: M&A AND STRATEGIC ALLIANCES

- Why companies acquire: synergy types — revenue, cost, financial, and strategic
- M&A process: strategic rationale, target screening, due diligence, integration planning
- Integration risk: why 50–70% of M&A deals fail to create value
- Post-merger integration (PMI): the 100-day plan and workstream architecture
- Strategic alliances and joint ventures: when collaboration beats ownership
- Holding company strategy: managing a portfolio for total shareholder return
- Subsidiary strategy alignment: the cascade from group strategy to subsidiary operating plans

4.2 BUSINESS LEVEL: FIVE FORCES & VALUE CHAIN AT DEPTH

- Porter's Five Forces revisited: industry profit pool analysis and competitive pressure mapping
- Force interaction effects: how a change in one force reshapes the industry
- Value Chain Analysis: primary and support activities — where competitive advantage lives
- Value chain linkages: the connections between activities that create inimitable advantage
- Using Value Chain to diagnose operational cost disadvantage
- Combining Five Forces + Value Chain: the integrated competitive position analysis

4.3 FUNCTIONAL LEVEL: LEAN, OKR & MARKETING MIX AT DEPTH

- Lean Six Sigma at the functional level: DMAIC applied to a specific consulting scenario
- KPI and OKR: how they differ, and how to design a framework that uses both
- OKR design: ambitious objectives, measurable key results, check-in rhythm
- Integrating OKR with BSC: the dual-framework performance management model
- Marketing Mix (4Ps/7Ps) in a consulting advisory context: diagnosing go-to-market failures
- Blue Ocean Strategy at functional level: applying the Eliminate-Reduce-Raise-Create grid

4.4 BLUE OCEAN STRATEGY IN DEPTH

- Blue Ocean vs. Red Ocean: competing in existing markets vs. creating new ones
- Value innovation: the cornerstone of Blue Ocean — simultaneously pursuing differentiation and low cost
- The 4 Actions Framework: Eliminate, Reduce, Raise, Create
- The Blue Ocean Strategy canvas: mapping the current industry and designing the new value curve
- Blue Ocean in GCC and international markets: where untapped demand exists
- Case: Blue Ocean applied to an international logistics company entering a fragmented market

MODULE 04 · TOOLKIT

Tools, Templates & Frameworks

- M&A Strategic Rationale Template
- Five Forces Interaction Map
- PMI 100-Day Plan Template
- OKR Design Template
- Blue Ocean Strategy Canvas
- OKR + BSC Integration Framework
- Eliminate-Reduce-Raise-Create Grid
- DMAIC Project Charter (Advanced)
- Value Chain Analysis Template (Advanced)
- Strategic Alliance Evaluation Matrix

CASE STUDIES

CASE 01

M&A Rationale — Should the Saudi Holding Acquire?

A Saudi holding company is evaluating the acquisition of a smaller international competitor. Synergy claims have been made by the investment bank. Participants must independently assess the strategic rationale.

REQUIRED TASKS

- Classify the claimed synergies: revenue, cost, financial, or strategic
- Apply the Value Chain to both companies to identify where synergies actually exist
- Identify 3 integration risks and their probability
- Recommend: acquire, partner, or walk away — with rationale

CASE 02

Blue Ocean Strategy — Creating New Market Space

An international logistics company is trapped in a commoditised market competing on price. Revenue is flat, margins are declining. Participants apply Blue Ocean Strategy to find a new competitive position.

REQUIRED TASKS

- Draw the current industry strategy canvas for international logistics
- Apply the 4 Actions Framework to identify what to eliminate, reduce, raise, and create
- Design the new value curve
- Build the go-to-market plan for the Blue Ocean position

Exercises, Assignment & Assessment

CLASSROOM EXERCISES & WORKSHOPS

Exercise — M&A Due Diligence Sprint

Participants receive a 2-page target company profile and 20 minutes to assess the M&A rationale: identify synergies, flag integration risks, and make a go/no-go recommendation.

Exercise — OKR-BSC Integration Workshop

Working in pairs, participants design an OKR framework for a given strategic priority and then map how each key result connects to a BSC KPI. The dual-framework design is presented and peer-reviewed.

PRACTICAL ASSIGNMENT — ADVANCED STRATEGY PACK: M&A RATIONALE + BLUE OCEAN CANVAS + OKR FRAMEWORK

Participants produce three connected strategy outputs for a real or assigned organisation.

01 Evaluate an M&A or alliance scenario: classify synergies, identify risks, make recommendation

02 Apply Blue Ocean Strategy Canvas to the same organisation

03 Design an OKR framework (3 objectives, 3 key results each)

04 Show how the OKR integrates with the existing or proposed BSC

05 Produce a 12-page advanced strategy pack

REQUIRED DELIVERABLE — ADVANCED STRATEGY PACK: M&A RATIONALE + BLUE OCEAN CANVAS + OKR FRAMEWORK

- M&A strategic rationale assessment with synergy classification
- Integration risk analysis (top 5 risks with mitigation)
- Blue Ocean Strategy Canvas (current vs. proposed value curve)
- Eliminate-Reduce-Raise-Create grid
- OKR framework (3 objectives, 3 key results each)
- OKR-BSC integration map
- 12-page advanced strategy pack

ASSESSMENT METHOD	FORMAT	WEIGHT
Advanced Strategy Quiz	25 MCQ — M&A, Blue Ocean, OKR	**25%**
Advanced Strategy Pack	Full submission	**60%**
Blue Ocean Group Workshop	Observed strategy canvas build	**15%**

Design of Solutions & Decision-Making

05

"Go beyond generating options — master the discipline of structured recommendation under uncertainty."

DURATION	LEARNING HOURS	LEVEL	MODULE
2 days	14 hrs	Professional Consultant	05 of 10

MODULE PURPOSE

At , solution design is not just about using the tools — it is about operating under the pressure of client ambiguity, competing stakeholder objectives, and imperfect data. Module 5 reinforces every tool from Level 1 and adds complexity: larger option sets, deeper risk analysis, sensitivity analysis across multiple variables, and the management of group decision-making dynamics in contentious client situations.

LEARNING OBJECTIVES

- Generate 6+ MECE alternatives for a complex business problem and map them across the Solution Matrix
- Build a Weighted Scoring Model with 7 client-defined criteria and defend the weighting decisions
- Conduct a full Pre-Mortem for 3 alternatives: identify Killer Assumptions and build a Risk Heat Map
- Run a sensitivity analysis across 4 external variables using "What If" T-charts
- Facilitate a group decision-making session with a divided client team
- Handle the curveball: when the client favours the rejected option

Detailed Topics & Content

5.1 DESIGN SOLUTIONS & GENERATING ALTERNATIVES

- From Diagnostician to Designer: the mindset shift — moving beyond the problem into prescription
- Avoiding Premature Optimisation: the most dangerous trap in solution design for experienced consultants
- The Problem-Solution Paradox: why going deeper into the problem always yields better solutions
- MECE Alternative Generation at scale: applying MECE logic to 6+ alternatives without repetition or gaps
- Solution Matrix: mapping all options on Strategic vs. Tactical and Low Risk vs. High Risk axes
- Zero Option: always include the cost of doing nothing — quantified
- Benchmarking as a solution generation tool: how best practice comparison generates options
- Root-Cause Reversal: systematically converting each identified root cause into a targeted solution

5.2 EVALUATING ALTERNATIVES & COMPARING OPTIONS

- Deconstructing Client Objectives: moving from vague goals to precise, weighted evaluation criteria
- Building the Success Scorecard: the 7-criteria Weighted Scoring Model for complex decisions
- Pre-Mortem Technique: imagining project failure and working backwards to the cause
- Killer Assumptions: the assumptions that, if wrong, make an alternative unviable
- Risk Heat Map: Likelihood × Severity matrix for all alternatives side-by-side
- Scenario Analysis at depth: testing each option under 3 external futures
- "What If" T-Charts: sensitivity analysis across 4 variables (raw material costs, regulation, FX, demand)
- Impact vs. Effort Matrix: the decision tool when resources are constrained
- Trade-off Analysis: making explicit what the client gives up with each choice

5.3 DECISION-MAKING

- Structured decision frameworks: pros/cons, weighted criteria, multi-attribute decision analysis
- Decision Trees: multi-stage decisions with probabilities and expected monetary values
- Four Steps to Effective Decisions: frame, generate, evaluate, decide — and the mistakes at each step
- Managing Group Decision-Making: techniques for reaching consensus with a divided client team
- Using Data to Guide Decisions: building the evidence trail that makes the recommendation defensible
- Overcoming Decision-Making Traps: anchoring, groupthink, overconfidence, and status quo bias
- Facilitating Client Decision-Making: the consultant's role as neutral guide vs. advocate
- Handling the Curveball: why clients choose the rejected option, and how to respond professionally
- Decision Matrix: the structured final selection tool with full client involvement

5.4 DRIVING A CULTURE OF INNOVATION

- The "Why" of Innovation
- Frameworks for Innovation
- Introduces new problem-solving tools or techniques into engagement teams
- Contributes case studies of innovative solutions to organizational knowledge repositories

Tools, Templates & Frameworks

- MECE Solution Matrix (6+ alternatives)
- Scenario Analysis Template (3 futures)
- Weighted Scoring Model (7 criteria, Excel)
- Impact vs. Effort Matrix
- Pre-Mortem Workshop Template
- Decision Tree Builder (multi-stage)
- Killer Assumptions Tracker
- Trade-off Analysis Template
- Risk Heat Map (Likelihood × Severity)
- Group Decision Facilitation Guide
- Sensitivity Analysis "What If" T-Chart
- Decision Matrix Template

CASE STUDIES

CASE 01

Six Alternatives, One Decision — Strategic Options for a Gulf Manufacturer

A Gulf industrial manufacturer has 6 potential strategic responses to a competitor entering its core market. Each has a different risk profile, timeline, and investment requirement. Participants must evaluate all 6 and recommend.

REQUIRED TASKS

- Map all 6 options on the Solution Matrix: classify by strategic/tactical and risk level
- Build a 7-criteria Weighted Scoring Model (criteria derived from the client brief)
- Conduct Pre-Mortem for the top 3 options: identify Killer Assumptions
- Run sensitivity analysis: how does the recommendation change if energy costs rise 30%?
- Facilitate a simulated 20-minute group decision session with a divided client team

CASE 02

The Curveball at Board Level

After a 3-week engagement, the consulting team recommends Option C. At the board presentation, the Chairman is clearly favouring Option A — the option scored lowest on risk. The CEO is deferring to the Chairman. The team has 5 minutes before the vote.

REQUIRED TASKS

- Review the risk analysis for Option A: is there anything legitimate the team underweighted?
- Prepare the 3-minute response that respectfully and evidentially defends Option C
- Design 3 risk mitigation measures that would improve Option A if the board proceeds
- Role-play the conversation with the Chairman

Exercises, Assignment & Assessment

CLASSROOM EXERCISES & WORKSHOPS

Exercise — Full Sensitivity Analysis Build

Participants receive a preferred option and 4 external variables (raw material cost, regulatory change, FX rate, and demand drop). They must build the full "What If" T-chart and determine at what threshold the preferred option is no longer recommended.

Exercise — Group Decision Facilitation Simulation

A group of 6 participants plays a divided client team. One facilitator must guide them to a decision using only the structured decision tools (no personal advocacy). The group debrief focuses on facilitation technique and handling dominant personalities.

PRACTICAL ASSIGNMENT — ADVANCED SOLUTION DESIGN: FULL PRE-MORTEM + SENSITIVITY ANALYSIS + DECISION MATRIX

Participants produce a complete solution design output for a complex business scenario.

01 Generate 6 MECE alternatives and map on the Solution Matrix

02 Build the 7-criteria Weighted Scoring Model

03 Conduct Pre-Mortem for top 3 options: Killer Assumptions + Risk Heat Map

04 Run full sensitivity analysis across 4 variables using "What If" T-charts

05 Build a Decision Tree for the top 2 options

06 Produce the written recommendation (4 pages, pyramid principle)

REQUIRED DELIVERABLE — ADVANCED SOLUTION DESIGN: FULL PRE-MORTEM + SENSITIVITY ANALYSIS + DECISION MATRIX

- MECE solution matrix (6 alternatives, classified)
- 7-criteria Weighted Scoring Model with justification
- Pre-Mortem for top 3 options: Killer Assumptions + Risk Heat Map
- "What If" T-Chart sensitivity analysis (4 variables)
- Decision Tree (multi-stage, with probabilities)
- Decision Matrix (client involvement, final selection)
- 4-page written recommendation using pyramid principle

ASSESSMENT METHOD	FORMAT	WEIGHT
Solution Design & Decision Quiz	25 MCQ	**20%**
Advanced Solution Design Package	Full submission	**60%**
Curveball Role-Play	Observed 10-minute board conversation	**20%**

Change Management

"Lead organisations through transformation — not just advise them on it."

DURATION	LEARNING HOURS	LEVEL	MODULE
3 days	18 hrs	Professional Consultant	06 of 10

MODULE PURPOSE

Change management is the capability that separates consultants who write reports from consultants who drive transformation. Module 6 builds the complete change management toolkit: understanding change fundamentals, 6 change management models, communication planning, and resistance management. Every tool in this module is used in real transformation engagements.

LEARNING OBJECTIVES

- Explain the concept of change and the 5W+H of organisational change
- Apply ADKAR, Kotter, Lewin, Fisher, Force Field Analysis, and Appreciative Inquiry to change scenarios
- Conduct a change impact assessment across people, process, and technology dimensions
- Design a change communication plan for a multi-audience transformation program
- Diagnose and intervene on all 4 types of change resistance
- Facilitate a change readiness assessment and build a stakeholder change journey map

Detailed Topics & Content

6.1 BASICS OF CHANGE

- The Concept of Change: what organisational change is and is not
- Why Change Matters: the competitive and strategic imperative for transformation
- 5W+H applied to change: What is changing? Why? Who is affected? Where? When? How?
- Change as a Transition State: the gap between current and desired state
- Change Drivers: external (market, regulation, technology) and internal (strategy, leadership, performance)

6.2 CHANGE MANAGEMENT FUNDAMENTALS

- Advantages of structured change management vs. unmanaged change
- Types of Change: adaptive, transformational, revolutionary, and remedial
- Critical Success Factors: the 8 things that determine whether change sticks
- Roles & Responsibilities: sponsors, change managers, change champions, and HR
- Change Requirements: capability, willingness, and structural enablement
- Change Management Phases: preparing, managing, and sustaining change
- Emotional Process of Change: the individual transition curve and how consultants respond to it

6.3 SIX CHANGE MANAGEMENT MODELS

- Fisher's Transition Model: stages of personal transition from anxiety through acceptance
- ADKAR Model: Awareness, Desire, Knowledge, Ability, Reinforcement — application in consulting
- Lewin's 3-Step Model: Unfreeze, Change, Refreeze — when simplicity is an advantage
- Kotter's 8-Step Model: creating urgency → forming a coalition → communicating the vision → enabling action → quick wins → consolidating → embedding
- Force Field Analysis: mapping driving vs. restraining forces for a change initiative
- Appreciative Inquiry: the strength-based alternative to deficit-focused change management
- Selecting the right model: when each framework works best in consulting engagements
- Change impact assessment: evaluating the people, process, and technology dimensions
- Change readiness assessment: are the conditions for successful change in place?
- Stakeholder change journey mapping: where each key stakeholder is on the change curve

6.4 CHANGE COMMUNICATION PLANNING

- Communication planning: defining channels, key messages, timing, and frequency
- Audience segmentation for change communication: different messages for different groups
- The 3-phase communication campaign: launch (build awareness), sustain (build desire), reinforce (maintain commitment)
- Crisis communication in change: when the transformation hits an unexpected setback
- Digital communication tools: intranet, town halls, pulse surveys, Teams/Slack, video messages

6.5 RESISTANCE MANAGEMENT

- Types of resistance: behavioural (action), emotional (feeling), political (power), structural (system)
- Diagnosing root cause of resistance: the resistance diagnostic interview
- Intervention strategies by resistance type: education, participation, facilitation, negotiation, coercion (last resort)
- The resistant manager: coaching intervention vs. sponsor escalation decision
- When resistance is valid: incorporating legitimate stakeholder feedback into the solution design
- Building a resistance management plan as part of every transformation engagement

MODULE 06 · TOOLKIT

Tools, Templates & Frameworks

- ADKAR Assessment Tool
- Change Communication Plan Template
- Kotter's 8-Step Action Planner
- Resistance Diagnosis Interview Guide
- Force Field Analysis Template
- Resistance Management Plan Template
- Change Impact Assessment Matrix (People/Process/Technology)
- Fisher Transition Curve Tool
- Change Readiness Survey Template
- Appreciative Inquiry Protocol
- Stakeholder Change Journey Map
- Change Pulse Survey (10 items)

CASE STUDIES

CASE 01

Transformation Stalled — Diagnosing the Failure

A Saudi industrial company launched a major operational transformation 6 months ago. Energy has stalled, managers are reverting to old behaviours, and 3 senior leaders are openly hostile. The CEO asks the consulting team to diagnose and rescue the transformation.

REQUIRED TASKS

- Apply ADKAR measurement to determine where the breakdown occurred
- Apply Kotter's 8 steps to identify which steps were skipped or rushed
- Conduct a Force Field Analysis for the current state
- Design the recovery plan: 90 days to rebuild momentum
- Design the resistance intervention for each of the 3 hostile senior leaders

CASE 02

Leading Change Communication for a Restructuring

A GCC holding company is restructuring, affecting 200 roles. Some roles will be eliminated; others will be significantly changed. Participants design the full change communication plan.

REQUIRED TASKS

- Segment the audience: identify 4 distinct groups with different communication needs
- Design the 3-phase communication campaign (launch, sustain, reinforce)
- Write the CEO announcement message for each audience segment
- Design the town hall format and Q&A preparation guide
- Build the 30-60-90 day communication calendar

Exercises, Assignment & Assessment

CLASSROOM EXERCISES & WORKSHOPS

Exercise — ADKAR Diagnosis Role-Play

Participant A plays a change manager. Participant B plays a resistant middle manager. Participant A must use an ADKAR diagnostic conversation to identify at which stage (A, D, K, A, or R) the resistance is occurring, then design the appropriate intervention. Observers assess using the ADKAR scoring rubric.

Exercise — Force Field Analysis Workshop

Groups receive a change scenario and 20 minutes to build a Force Field Analysis: identify all driving and restraining forces, score their strength, and design 3 interventions to shift the balance toward change.

PRACTICAL ASSIGNMENT — CHANGE MANAGEMENT PLAN: ADKAR + KOTTER + COMMUNICATION + RESISTANCE

Participants produce a complete change management plan for a real or assigned transformation program.

01 Apply all 6 change models to diagnose the readiness and risks of the change

02 Conduct a change impact assessment (people, process, technology)

03 Complete a change readiness assessment

04 Design the stakeholder change journey map (top 8 stakeholders)

05 Build the 3-phase change communication plan

06 Build the resistance management plan (4 types)

REQUIRED DELIVERABLE — CHANGE MANAGEMENT PLAN: ADKAR + KOTTER + COMMUNICATION + RESISTANCE STRATEGY

- Change impact assessment (people, process, technology)
- Change readiness assessment results
- Stakeholder change journey map (top 8 stakeholders)
- ADKAR gap analysis and intervention plan
- Kotter 8-step implementation guide (customised)
- 3-phase change communication plan with calendar
- Resistance management plan: 4 types × intervention strategy

ASSESSMENT METHOD	FORMAT	WEIGHT
Change Management Exam	35 MCQ + scenario analysis	**30%**
Change Management Plan	Full submission	**55%**
ADKAR Role-Play	Observed 20-minute diagnostic conversation	**15%**

Crisis Management

"Master the most high-stakes consulting scenario — when a client's organisation is in crisis."

DURATION	LEARNING HOURS	LEVEL	MODULE
2 days	14 hrs	Professional Consultant	07 of 10

MODULE PURPOSE

Crisis management is a specialist consulting capability that appears later in a consultant's career — at , participants are introduced to it in a structured way. Whether advising a client on reputation management, operational failure, or regulatory crisis, the ability to think clearly, act decisively, and communicate with precision under pressure is a high-value differentiating skill.

LEARNING OBJECTIVES

- Distinguish between a problem, a crisis, and a disaster using structured definitional criteria
- Classify organisational crises by type and understand the different response requirements
- Apply Coombs' SCCT model to select the appropriate crisis response strategy
- Apply Jaques' 4-phase model to design a crisis management framework for a client
- Map stakeholders during a crisis and design communications for each group
- Apply the Power-Interest Matrix to prioritise crisis communication audiences

Detailed Topics & Content

7.1 INTRODUCTION TO CRISIS

- Problem vs. Crisis vs. Disaster: the definitional distinctions that determine the response level
- Definition of Crisis: sudden, unexpected, high-threat events that require immediate decision-making
- Types of Crisis: operational (failure, accident), reputational (scandal, social media), financial (liquidity, fraud), natural (disaster, pandemic), regulatory (investigation, fine)
- Research design in crisis diagnosis: exploratory, descriptive, and explanatory approaches to rapid assessment

7.2 COOMBS CRISIS MANAGEMENT MODEL

- Pre-Crisis Phase: scanning, preparation, and prevention activities
- Crisis Response Phase: the first 24 hours, the first 72 hours, and the first week protocols
- Post-Crisis Phase: learning, reputation rebuilding, and system strengthening
- Coombs' Situational Crisis Communication Theory (SCCT): matching response strategy to crisis type
- SCCT crisis clusters: victim (low blame), accidental (moderate blame), preventable (high blame)
- Response strategies per cluster: instructing, adjusting, rebuilding, and bolstering

7.3 JAQUES CRISIS MANAGEMENT MODEL

- Preparedness Phase: crisis plans, protocols, team training, scenario planning
- Prevention Phase: early warning systems, risk monitoring, and trigger identification
- Crisis Response Phase: crisis team activation, escalation, stakeholder notification, media management
- Post-Crisis Phase: review, learning, compensation, and relationship repair
- Comparing Coombs and Jaques: when to use each framework in a consulting context

7.4 ROLES, RESPONSIBILITIES & STAKEHOLDER MANAGEMENT

- Crisis management team structure: the crisis commander, communications lead, operations lead, legal/regulatory
- Roles & Responsibilities: who decides what, who communicates what, who reports to whom
- Stakeholder identification in a crisis: primary (directly affected), secondary (influencers), tertiary (observers)
- Power-Interest Matrix applied to crisis: who has the power to make this worse, and who has the highest interest in resolution?
- Communication in crisis: speed, accuracy, empathy, and authority
- Social media in crisis: monitoring, response protocols, and the 1-hour rule

Tools, Templates & Frameworks

Crisis Type Classification Framework	Stakeholder Communication Plan (Crisis)
SCCT Response Strategy Matrix	Crisis Scenario Planning Guide
Jaques 4-Phase Crisis Plan Template	First 24 Hours Checklist
Crisis Communication Protocol	Crisis Post-Mortem Template
Crisis Team RACI Template	Social Media Crisis Response Protocol
Power-Interest Matrix (Crisis Version)	Crisis Preparedness Audit

CASE STUDIES

CASE 01

Operational Crisis — Factory Accident

An international manufacturing plant has suffered a serious equipment failure injuring 3 workers. Media have arrived. The regulator is calling. Employees are gathering. The CEO is on a flight. Participants manage the first 72 hours.

REQUIRED TASKS

- Classify the crisis type using SCCT and select the response strategy cluster
- Activate the crisis team and assign all roles using the Crisis RACI
- Draft the first communication to employees, media, and the regulator
- Apply Jaques' Response Phase: what happens in the first 24 hours, 48 hours, and 72 hours?
- Design the Post-Crisis Phase: lessons, compensation, and reputation repair

CASE 02

Reputational Crisis — Social Media Scandal

A Saudi retail brand is under attack on social media: a viral post accuses them of discriminatory hiring. Within 6 hours, 50,000 shares. Participants must design and execute the crisis communication strategy.

REQUIRED TASKS

- Apply SCCT to classify the crisis and assess blame level
- Map all stakeholders using the Power-Interest Matrix
- Design the response strategy: what is said, by whom, on which channels, within what timeframe
- Draft the public statement and the internal employee communication
- Design the 7-day reputation management plan

Exercises, Assignment & Assessment

CLASSROOM EXERCISES & WORKSHOPS

Exercise — 72-Hour Crisis Simulation

Participants divide into crisis teams. A crisis scenario unfolds in real time across 3 simulated "time periods" (6 hours, 24 hours, 72 hours). Each period introduces new information. Teams must make decisions, draft communications, and brief the "board" at each stage.

- **Period 1 (6 hours):** first response — classify, activate team, draft initial communication
- **Period 2 (24 hours):** new information arrives — update response, manage media, brief stakeholders
- **Period 3 (72 hours):** crisis evolving — implement containment, prepare post-crisis plan
- **Debrief:** facilitator reviews decisions, communication quality, and team dynamics

PRACTICAL ASSIGNMENT — CRISIS MANAGEMENT PLAYBOOK

Participants produce a full crisis management playbook for a real or assigned organisation.

01 Complete a crisis preparedness audit for the organisation

02 Design the crisis management framework: team structure, roles, escalation protocols

03 Build scenario plans for 3 types of crisis (operational, reputational, regulatory)

04 Design the stakeholder communication strategy (Power-Interest Matrix + communication plan)

05 Build the post-crisis review process

REQUIRED DELIVERABLE — CRISIS MANAGEMENT PLAYBOOK: COOMBS + JAQUES + STAKEHOLDER RESPONSE PLAN

- Crisis preparedness audit results
- Crisis management team structure and RACI
- 3 crisis scenario plans (SCCT-classified, Jaques-phased)
- Power-Interest Matrix: crisis stakeholder map
- Stakeholder communication plan (crisis version)
- First 24-hours protocol
- Post-crisis review process template

ASSESSMENT METHOD	FORMAT	WEIGHT
Crisis Management Quiz	20 MCQ on all models and frameworks	**25%**
Crisis Management Playbook	Full submission	**50%**
72-Hour Crisis Simulation	Observed team performance	**25%**

Advanced Consulting Leadership & Client Engagement

"Develop the leadership skills to master the management of complex consulting programs and portfolios."

DURATION	LEARNING HOURS	LEVEL	MODULE
2 days	14 hrs	Professional Consultant	08 of 10

MODULE PURPOSE

project management is the transition from executing within a plan to owning the plan. Module 8 reinforces the full toolkit from Level 1 and develops the leadership skills necessary to manage complex consulting programs and portfolios — ensuring strategic alignment and maximising client value.

LEARNING OBJECTIVES

- Apply program and portfolio management principles in a consulting context
- Apply transformational leadership models in complex consulting contexts
- Develop a stakeholder-tailored communication plan independently for a complex, multi-audience engagement
- Structure executive-ready updates using recommendation-first narrative
- Manage client relationships across the full engagement lifecycle — not just individual interactions
- Apply relationship-building strategies in multicultural GCC/MENA client environments
- Identify and proactively address unstated client needs and underlying concerns
- Design and implement enterprise-level stakeholder management strategies
- Lead and motivate multidisciplinary consulting teams for optimal performance
- Facilitate strategic workshops with client senior leadership
- Build trusted, partnership-based relationships with clients at the executive level
- Manage complex stakeholder expectations and guide them through change

Detailed Topics & Content

8.1 PROGRAM & PORTFOLIO MANAGEMENT

- Differences between project, program, and portfolio; the consultant's role in each
- Program & Portfolio Governance: governance structures, roles and responsibilities, steering committees
- Capacity management and portfolio optimisation
- Advanced risk analysis, program-level risk register, dependency management
- Program and portfolio KPIs and dashboards

8.2 BUILDING EXECUTIVE-LEVEL CLIENT RELATIONSHIPS

- Relationship management, trust-building, and strategic communication
- Managing client expectations
- Validating understanding of client needs through structured feedback loops
- Building sustained professional networks within client organisations
- Cross-cultural client engagement in GCC and MENA contexts

8.3 ADVANCED LEADERSHIP MODELS IN CONSULTING

- Transformational leadership
- Servant leadership
- Situational leadership in consulting

8.4 LEADING HIGH-PERFORMANCE CONSULTING TEAMS

- Team building
- Performance management
- Conflict resolution within teams
- Coaching and mentoring

8.5 FACILITATING EXECUTIVE WORKSHOPS

- Workshop design
- Advanced facilitation techniques
- Managing group dynamics

8.6 ENGAGEMENT RECOVERY & ADVANCED GOVERNANCE

- Signs of engagement derailment: the 8 early warning indicators
- The recovery conversation with the client: what to say, what to own, what to commit
- Steering committee governance: charter, agenda design, facilitation, and follow-through
- Handling scope creep at senior level: the commercial and relationship implications

8.7 CLOSURE & KNOWLEDGE TRANSFER

- Client Feedback: the structured satisfaction survey and how to act on results
- Lessons Log: formal capture — what worked, what to improve, what never to repeat
- Official Project Closure Report: the document that closes the commercial relationship
- Knowledge Transfer Plan: ensuring the client can sustain results after the consultant leaves
- Post-engagement relationship management: the 90-day plan that generates repeat business

Tools, Templates & Frameworks

- Engagement Recovery Plan Template
- Engagement Health Check Dashboard
- Stakeholder Communication Plan Template
- Stakeholder Engagement Plan Template
- Active Listening Diagnostic Checklist
- Client Network Map Template
- Structured Mid-Engagement Feedback Conversation Guide
- GCC/MENA Cultural Communication Quick Reference
- Executive Client Trust-Building Framework

CASE STUDIES

CASE 01

Leading an Organizational Transformation Project

Managing multiple stakeholders in a large-scale transformation project: mapping the stakeholder landscape, aligning competing priorities, and keeping the program moving when executive sponsors disagree.

CASE 02

Resolving a Board-Level Conflict

Applying leadership skills to resolve a dispute among board members: diagnosing the real source of the conflict, facilitating the conversation, and restoring a functioning governance dynamic.

CASE 03

Managing a Large Digital Transformation Program

Designing a governance structure for a multi-project digital transformation program: steering committee design, workstream coordination, and program-level reporting that executives actually read.

Exercises, Assignment & Assessment

CLASSROOM EXERCISES & WORKSHOPS

Exercise — Steering Committee Simulation

Participants rotate as the "engagement manager" running a 15-minute steering committee. The committee includes 2 supportive members and 1 challenging sponsor. Observers assess: opening, progress reporting, issue escalation, and meeting close.

PRACTICAL ASSIGNMENT — FULL CONSULTING PROJECT PLAN + AGILE SPRINT BOARD + GOVERNANCE PACK

Participants build a comprehensive project management package for a full-scale consulting engagement.

01 Write the Project Charter (full scale: scope, WBS, deliverables, governance)

02 Build the multi-workstream Gantt with critical path

03 Complete the RACI matrix (20+ activities)

04 Build the quantitative Risk Register (15 risks)

05 Design the steering committee charter and agenda

06 Build the Agile Sprint Board for 4 sprints

07 Produce the escalation authority matrix

REQUIRED DELIVERABLE — FULL CONSULTING PROJECT RECOVERY PLAN + AGILE SPRINT BOARD + GOVERNANCE PACK

- Full Project Charter (scope, WBS, deliverables, assumptions)
- Multi-workstream Gantt with critical path (12 weeks, 4 workstreams)
- RACI matrix (20+ activities)
- Quantitative Risk Register (15 risks with mitigation plans)
- Steering committee charter and meeting agenda template
- Agile Sprint Board (4 sprints, backlog, ceremonies)
- Escalation authority matrix
- Project Closure Report template (completed)

ASSESSMENT METHOD	FORMAT	WEIGHT
Project Management Quiz	25 MCQ on all tools	**20%**
Full Project Management Pack	Full submission	**60%**
Steering Committee Simulation	Observed 15-minute facilitation	**20%**

MODULE 09 OF 10 · 14 HRS · 2 DAYS

Business Development & Account Management

"Win the work before you do the work — the commercial discipline every junior consultant must develop."

DURATION	LEARNING HOURS	LEVEL	MODULE
2 days	14 hrs	Professional Consultant	09 of 10

MODULE PURPOSE

Junior consultants are often shielded from the commercial side of consulting — but understanding how business is won and proposals are written is essential for professional growth and for contributing to your firm's revenue. Module 9 builds the full BD and proposal toolkit: from qualifying opportunities and structuring proposals to pricing engagements and writing Statements of Work.

LEARNING OBJECTIVES

- Map the consulting business development cycle from prospecting through to expansion
- Apply BANT to qualify consulting opportunities before investing proposal effort
- Write a compelling, client-centric consulting proposal using the MCPC proposal structure
- Apply win themes to differentiate a proposal from competing submissions
- Build a consulting pricing model using time-and-materials, fixed-fee, and value-based methods
- Produce a Statement of Work with all essential commercial and legal elements
- Manage contract amendments using the formal variation order process

Detailed Topics & Content

9.1 BUSINESS DEVELOPMENT FOR CONSULTANTS

- The Consulting BD Cycle: Prospect → Qualify → Propose → Win → Expand
- BD Strategies: partnership building, strategic alliances, market entry strategies
- Lead Generation: referrals, thought leadership, events, and partnerships — which work in GCC and international markets
- CRM Basics for Independent Consultants: how to track a pipeline without a CRM system
- The BD Mindset: serving vs. selling — the fundamental difference that wins long-term relationships

9.2 CLIENT RELATIONSHIP & ACCOUNT MANAGEMENT

- Ideal Client Profile (ICP): defining who you are best placed to serve
- Target Account Selection: prioritising your BD effort
- Account plan development, growth strategies, strategic client relationship management
- Client Relationship: understanding client needs, managing expectations, building trust & rapport
- Influencing stakeholder decisions through evidence-based persuasion
- Continuous Development: seeking feedback, self-reflection, learning from experience

9.3 OPPORTUNITY QUALIFICATION

- BANT Qualification: Budget, Authority, Need, Timeline
- Discovery Conversations: the 5-question diagnostic for qualifying an opportunity
- Go/No-Go Decision Framework: when to invest proposal effort and when to walk away
- Competitive Intelligence: understanding the win landscape

9.4 PROPOSAL WRITING MASTERY

- Proposal Structure: Executive Summary → Our Understanding → Our Approach → Our Team → Commercials
- Client-Centric Language: mirroring the client's priorities and vocabulary in the proposal
- Win Themes: the 3 things that make this proposal distinctive — leading with them, not burying them
- Unsolicited vs. Solicited Proposals: different audiences, different persuasion strategies
- Common Proposal Mistakes: the 8 errors that cause proposals to lose even when the work is good
- RFP Response Strategy for Large Tenders: reading the RFP for scoring criteria and hidden priorities

9.5 PRICING MODELS & COMMERCIAL STRUCTURES

- Time & Materials: simplest model, hidden consultant risks
- Fixed-Fee: client predictability, consultant margin exposure
- Value-Based Pricing: charging based on value delivered — the most advanced model
- Day Rate Benchmarks: international vs. GCC consulting markets at junior and professional levels
- Building the cost model: direct costs, overhead, and target margin
- Commercial Negotiation: protecting rate while remaining competitive
- Payment Terms and Milestone-Based Billing: structuring cash flow in consulting engagements

9.6 STATEMENT OF WORK & CONTRACT BASICS

- SOW Structure: Scope → Deliverables → Timeline → Fees → Exclusions → Assumptions
- Key Contract Clauses: IP ownership, confidentiality, liability cap
- Managing Contract Amendments: the formal Variation Order process
- Post-Engagement Relationship Management: the 90-day follow-up that generates referrals

Tools, Templates & Frameworks

- Consulting Proposal Template (10-page structure)
- BANT Qualification Scorecard
- Go/No-Go Decision Matrix
- Win Theme Builder
- Pricing Model Template (Excel — 3 models)
- Statement of Work Template
- Competitive Intelligence Map
- Variation Order Template
- CRM Pipeline Template (Excel)
- Ideal Client Profile Worksheet
- Proposal Scoring Rubric
- RFP Analysis Template
- Post-Engagement Relationship Plan

CASE STUDIES

CASE 01

Writing a Winning Proposal — Saudi Healthcare RFP

A Saudi healthcare group has issued an RFP for a 12-week HR transformation engagement. Budget: SAR 600,000. Three firms are competing. Participants write the winning proposal.

REQUIRED TASKS

- Analyse the RFP and extract the 5 most important client priorities
- Define 3 win themes that will make this proposal distinctive
- Write the Executive Summary and Our Understanding sections of the proposal
- Build the commercial model: fixed-fee pricing with 3 milestones
- Complete the SOW for this engagement

CASE 02

The Qualification Decision — Should We Bid?

A potential client in an international market contacts a consulting firm about a 6-week operational review. The project seems small, the timeline is short, the contact is a middle manager (not the decision-maker), and the budget has not been confirmed. Participants must decide whether to bid.

REQUIRED TASKS

- Complete the BANT qualification scorecard for this opportunity
- Apply the Go/No-Go framework and make a recommendation
- If Go: identify 3 risks and how to mitigate them in the proposal
- If No-Go: draft a professional decline communication

Exercises, Assignment & Assessment

CLASSROOM EXERCISES & ROLE-PLAYS

Exercise — Win Theme Workshop

Participants receive a client RFP and must identify the 3 most important hidden client priorities (beyond what is stated). Working in pairs, they develop 3 win themes and draft the opening paragraph of the proposal that leads with those themes.

Exercise — Pricing Model Build

Participants build all 3 pricing models (T&M, fixed-fee, value-based) for the same 8-week engagement scenario. They then present their recommended pricing approach to the group and debate the trade-offs.

PRACTICAL ASSIGNMENT — COMPLETE CONSULTING PROPOSAL + SOW + COMMERCIAL OFFER

Participants write a full proposal and SOW for their program's simulated consulting engagement.

01 Complete BANT qualification and go/no-go decision

02 Identify 3 win themes

03 Write the full 8-page consulting proposal

04 Build the pricing model with 3 commercial options (Excel)

05 Complete the Statement of Work (3 pages)

REQUIRED DELIVERABLE — COMPLETE CONSULTING PROPOSAL + SOW + COMMERCIAL OFFER

- BANT qualification scorecard and go/no-go decision
- 8-page consulting proposal (full structure, client-centric language, 3 win themes)
- Pricing model (3 commercial options: T&M, fixed-fee, hybrid)
- 3-page Statement of Work (scope, deliverables, timeline, fees, exclusions)
- Variation Order template (completed for a hypothetical scope change)

ASSESSMENT METHOD	FORMAT	WEIGHT
BD & Proposal Knowledge Quiz	20 MCQ on all topics	**25%**
Full Proposal Submission	Graded by client-facing proposal rubric	**60%**
Pricing Model Accuracy	Excel model review	**15%**

Financial Acumen for Consultants

"Read the numbers, tell the story, build the business case — the financial literacy every consultant needs."

DURATION	LEARNING HOURS	LEVEL	MODULE
2 days	14 hrs	Professional Consultant	10 of 10

MODULE PURPOSE

Financial acumen is the final frontier for many junior consultants — and one of the most important differentiators at . Without the ability to read financial statements, calculate ratios, and build a business case, a consultant can never fully engage in the commercial layer of a client relationship. Module 10 builds this capability from the ground up: accounting foundations, the three financial statements, ratio analysis, EBITDA, enterprise valuation, and NPV/IRR business case construction.

LEARNING OBJECTIVES

- Explain the double-entry accounting system and the accounting cycle in business context
- Read and interpret an income statement to identify revenue trends and margin patterns
- Read and interpret a balance sheet to assess asset quality, debt levels, and capital structure
- Read and interpret a cash flow statement to distinguish profit from cash generation
- Calculate and interpret the 4 categories of financial ratios: profitability, liquidity, leverage, efficiency
- Explain EBITDA and calculate it from a P&L statement
- Build a business case model with NPV, IRR, and payback period calculations in Excel

Detailed Topics & Content

10.1 ACCOUNTING FOUNDATIONS FOR CONSULTANTS

- Types of Accounting: financial accounting (external reporting) vs. management accounting (internal decision-making)
- Accounting Standards & Regulations: IFRS, local GAAP, and why they matter in a GCC consulting context
- The Double-Entry System: every transaction has two sides — the basis of all financial reporting
- Cash vs. Accrual Accounting: the critical difference and why "profit but no cash" is a real and dangerous phenomenon
- The Accounting Cycle: journal entries → ledger → trial balance → financial statements → closing

10.2 THE THREE FINANCIAL STATEMENTS

- Income Statement: revenue, COGS, gross profit, operating expenses, EBIT, interest, tax, net profit
- Reading the income statement diagnostically: what margin trends tell you about strategy execution
- Balance Sheet: assets (current and fixed), liabilities (current and long-term), and equity
- Reading the balance sheet: what does the capital structure tell you about financial risk?
- Cash Flow Statement: operating, investing, and financing activities
- The cash conversion cycle: why a profitable company can run out of cash
- Linking all three statements: how the P&L, balance sheet, and cash flow are connected

10.3 FINANCIAL RATIOS & EBITDA

- Cash Budget: planning and managing cash flow for a business over a 12-month horizon
- Profitability Ratios: gross margin, operating margin, net margin, ROE, ROA, ROCE
- Liquidity Ratios: current ratio, quick ratio, cash ratio — measuring short-term solvency
- Leverage Ratios: debt-to-equity, interest coverage, net debt/EBITDA
- Efficiency Ratios: asset turnover, inventory days, receivable days, payable days
- EBITDA: definition, calculation from P&L, and why it is the most commonly used metric in M&A and consulting
- Enterprise Value basics: EV = market cap + debt – cash, and the EV/EBITDA multiple
- Management accounts vs. statutory accounts: why they differ and which to use for consulting

10.4 BUSINESS CASE MODELLING

- Business case structure: strategic rationale, operational case, financial case, risk case
- Net Present Value (NPV): discounting future cash flows to present value — the fundamental investment metric
- Internal Rate of Return (IRR): the return rate that makes NPV zero — how to calculate and interpret
- Payback Period: the simplest metric — when do you get the money back?
- Discount rate selection: WACC basics and how to use a client's hurdle rate
- Sensitivity analysis in a business case: what happens to NPV if costs are 20% higher?
- Building the business case in Excel: step-by-step model construction
- Presenting the business case: making the numbers tell a decision-ready story

Tools, Templates & Frameworks

- Financial Ratio Analysis Template (Excel — 4 categories)
- Enterprise Value Calculator (Excel)
- 3-Statement Financial Model (Excel)
- Management vs Statutory Accounts Comparison Tool
- Business Case Model (NPV/IRR/Payback — Excel)
- Accounting Cycle Reference Guide
- EBITDA Bridge Template
- Financial Red Flags Checklist
- Cash Flow Forecast Template
- Ratio Benchmarking Dashboard (Excel)
- Cash Budget Template
- Business Case Presentation Template

CASE STUDIES

CASE 01

Reading the Financial Story — Saudi Manufacturer in Distress

A Saudi manufacturer's revenue is growing at 15% annually, but cash is tight, debt has doubled in 2 years, and the CEO is surprised. Participants receive 3 years of financial statements and must diagnose the situation.

REQUIRED TASKS

- Calculate all 4 categories of financial ratios for all 3 years
- Identify the 3 most significant deteriorating trends
- Calculate EBITDA for each year and explain the trend
- Explain why revenue growth and cash shortage are occurring simultaneously
- Write a 1-page financial diagnostic note for the CFO

CASE 02

Build the Business Case — Operational Excellence Program

The consulting team is recommending a 2-year operational excellence program costing EGP 8M. The CEO wants to know: what is the ROI? Participants build the full business case model.

REQUIRED TASKS

- Build the investment schedule: when is EGP 8M spent and on what?
- Build the benefits model: what cash flows does the program generate and when?
- Calculate NPV (using a 12% discount rate), IRR, and payback period
- Run a sensitivity analysis: what happens to NPV if savings are 20% lower than forecast?
- Present the business case in a 5-slide executive summary

Exercises, Assignment & Assessment

CLASSROOM EXERCISES & WORKSHOPS

Exercise — Financial Statement Diagnostic Speed Round

Each participant receives a 1-page set of financial statements. They have 15 minutes to calculate 8 ratios, identify the top 3 financial health issues, and write the 3-sentence CFO briefing. All results shared and compared.

Exercise — NPV Build Race

Pairs compete to build a 5-year NPV model for a given investment scenario in Excel. Speed and accuracy are both scored. The winning pair explains their model to the group. Common errors are debriefed.

PRACTICAL ASSIGNMENT — FINANCIAL ANALYSIS REPORT: RATIOS + EBITDA + NPV/IRR BUSINESS CASE

Participants conduct a complete financial analysis for a real or assigned company AND build a business case model for a consulting recommendation.

- 01 Download or receive 3 years of financial statements
- 02 Calculate all 4 categories of financial ratios (trend analysis)
- 03 Calculate EBITDA for each year with interpretation
- 04 Identify and explain 5 key financial health findings
- 05 Build the business case model: NPV, IRR, and payback period (Excel)
- 06 Run sensitivity analysis on the business case (2 variables)
- 07 Produce a 12-page financial analysis report

REQUIRED DELIVERABLE — FINANCIAL ANALYSIS REPORT: RATIOS + EBITDA + NPV/IRR BUSINESS CASE

- 3-year financial ratio dashboard (Excel — all 4 categories with trend commentary)
- EBITDA calculation and bridge (3 years)
- 5 key financial health findings with evidence
- Business case model (Excel): NPV, IRR, payback period
- Sensitivity analysis (2 variables)
- Enterprise value estimate with EV/EBITDA multiple
- 12-page financial analysis report with executive summary

ASSESSMENT METHOD	FORMAT	WEIGHT
Financial Acumen Exam	30 MCQ + ratio calculation problems	**30%**
Financial Analysis Report	Full submission including Excel models	**55%**
Business Case Presentation	5-slide, 10-minute observed delivery	**15%**

GMCI

GLOBAL MANAGEMENT CONSULTANT INSTITUTE

GMCI-CPC · PROFESSIONAL CONSULTANT CERTIFICATION

From Consultant to Trusted Advisor

Ten modules. One complete professional consulting journey — from advanced diagnostics and strategy through solution design, change, crisis, leadership, and business development, to the financial acumen that closes the commercial loop. The portfolio you build across this program is the evidence of your readiness to lead.

PROGRAM	MODULES	PORTFOLIO	OUTCOME
GMCI-CPC	10 Modules	10 Deliverables	Professional Consultant Certification