

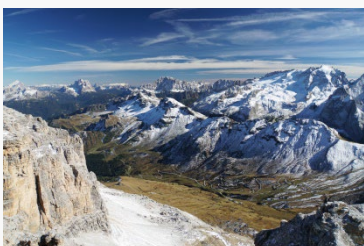
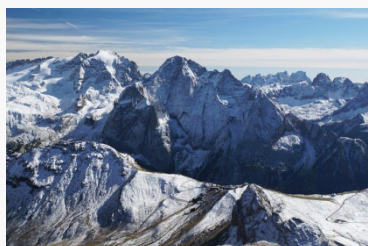
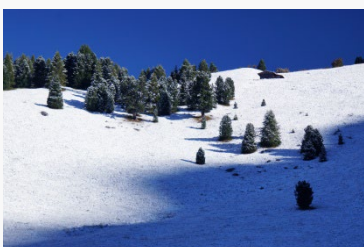
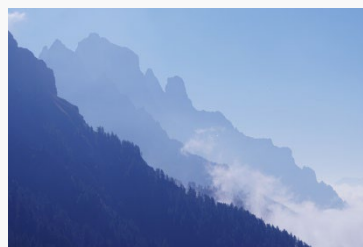
INSTITUTE OF MANAGEMENT CONSULTANTS HONG KONG

Management Consultants Handbook - Knowledge, Skills & Practices

For Management Consultants & Business Management

Samson C.W. Ma, Gregg Li, Alfred S. P. Ho

May 2025



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Institute of Management Consultants Hong Kong

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Acknowledgments

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Finally, we would like to further appreciate the help from IMCHK President, Mr. Daniel Chan, and IMCHK Executive Vice President, Mr. Allan Lee, in the publication and launch of the Management Consultants Handbook.

IMCHK Editorial Board
May 2025

Foreword

When I heard Dr. Samson Ma had initiated the planning for the Management Consultants Handbook for IMCHK members two years ago, I immediately expressed my support. I recognized the value and necessity of this publication for IMCHK members and the promotion of Certified Management Consultants (CMC) in the Greater Bay Area.

Fortunately, the Editorial Board of IMCHK was established in a timely manner and gained the support of ICMCI Academic Fellows to design and plan the writing of “Management Consultants Handbook - Knowledge, Skills & Practices”. It is most fitting to launch the first edition of the Handbook on the 25th Anniversary of IMCHK, in conjunction with the IMCHK Asia Pacific Conference and ICMCI Asia Pacific Hub Meeting in Hong Kong on 8th and 9th May 2025.

With the rapid changes in business markets, technologies, industries, and the field of management consultancy are becoming ever more challenging. Having partial knowledge and skills is insufficient to sustain a management consulting business or its services in today’s competitive markets. The Handbook introduces and elaborates on the essential knowledge, skills, and practices of management consulting, aligning with the ICMCI Common Body of Knowledge and ISO 20700. It serves as valuable learning material for junior consultants and offers a comprehensive reference for senior consultants to enhance their consulting knowledge.

IMCHK fully supports the publication of the Handbook, which can be used as both a learning text and a reference book for management consulting and business management. The Handbook identifies the necessary knowledge and skills in major consulting areas that contribute to the inquiry, contracting, execution, and closure phases of consulting services. Both external and internal consultants may find this Handbook to be a valuable resource that broadens and enriches their knowledge and skills in practical consulting situations.

Finally, I would like to extend my gratitude to the Editorial Board for their efforts and to the authors of the book chapters for their contributions.

Daniel Chan, CMC®
President, IMCHK
May 2025

Introduction

About the Institute of Management Consultants Hong Kong (IMCHK)

The **Institute of Management Consultants Hong Kong (IMCHK)** is the professional chapter and qualifying body for management consultants in Hong Kong. Established in 2000, IMCHK aims to set and maintain high quality, independence, objectivity, and integrity standards for awarding **Certified Management Consultants (CMC)** originating in Hong Kong and Macau. IMCHK represents the **International Council of Management Consulting Institutes (ICMCI)** in Hong Kong, with over 60,000 certified members (CMCs) worldwide.

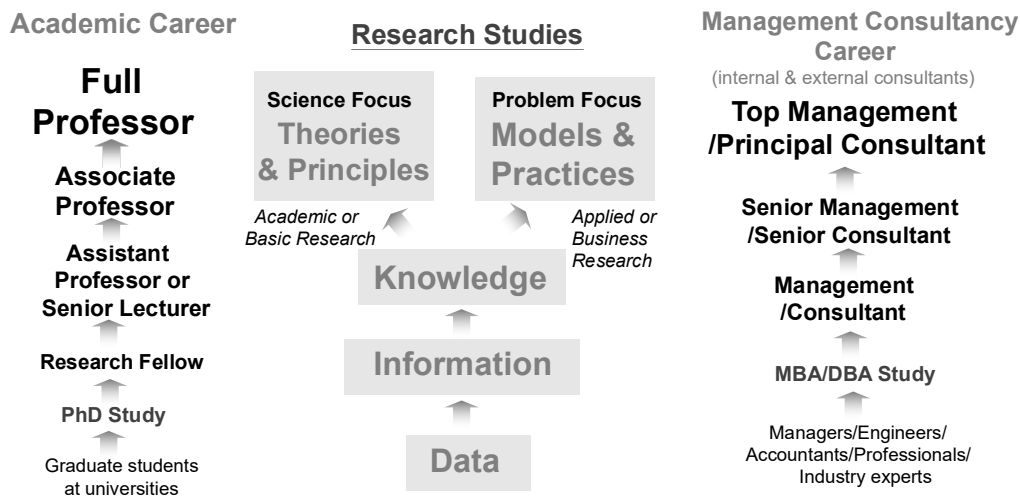
ICMCI aims to enhance the practicing standards of management consultants and build clients' confidence in consulting services globally. IMCHK awards CMC designation on behalf of ICMCI, which is recognized by the United Nations and covers 50 countries worldwide. IMCHK is responsible for providing training and knowledge sharing to CMCs and promoting management consulting skills and professionals in regional areas.

Management Consultants & Knowledge

Management Consultants are professionals who help clients solve problems and achieve business goals through better utilization of resources. Clients hire **external consultants** from consulting firms, while **internal consultants** are in-house consultants who provide services to internal clients within the same organization. Both external and internal consultants are knowledge-based professionals, with accumulated knowledge and skills in business or industries as their key assets. Similarly, academic scholars possess additional management consulting knowledge and skills in academic settings.

The career development of management consultants and academic scholars is similar, involving the application of knowledge to their careers, supporting research-required studies, and using titles such as "Emeritus" (e.g. Professor Emeritus, CMC Emeritus) upon retirement. Although they serve in different areas, support different research, and contribute knowledge in various aspects, the capture and application of knowledge are crucial for the career development of management consultants and academic scholars. They must frequently enrich their knowledge and skills to keep pace with the world. For management consultants, proper and fundamental knowledge, skills, and practices of consultancy are essential and a beginning for the development of their knowledge-based careers.

Similarities & Differences Between Academic Scholars & Management Consultants



IMCHK Editorial Board and Publication

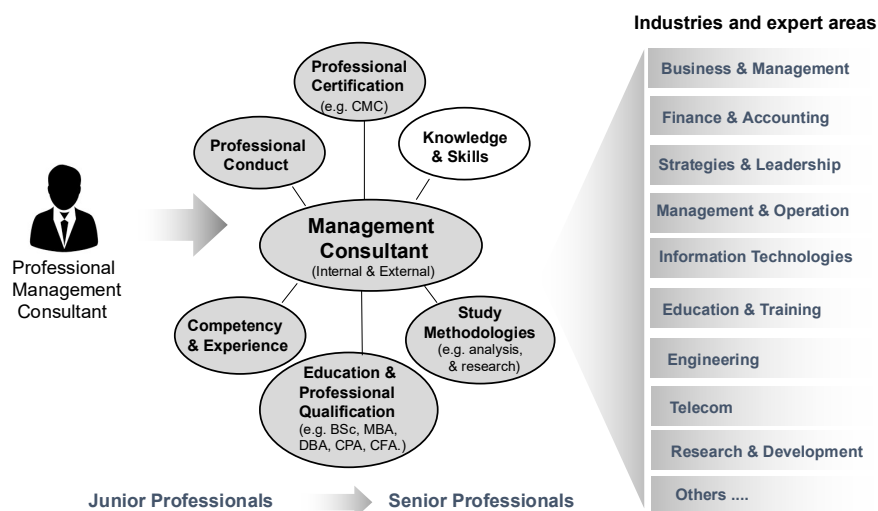
The IMCHK Editorial Board, in association with ICMCI Academic Fellows, contributes their knowledge and experiences to help the young and junior consultants build proper and fundamental knowledge, skills, and practices of management consultancy, allowing them to enrich consultants' knowledge and skills and develop their professional careers. The Handbook will be promoted and published in the Greater Bay Area to accelerate the development of new businesses, the consulting industry, and CMC professionals in regional areas.

Management Consultants Handbook

To become a professional and qualified management consultant like a CMC, six professional areas of the Professional Framework should be maintained: (1) Professional Certification, e.g. CMC qualification, (2) Professional Conduct, (3) Consulting Knowledge & Skills, (4) Consulting Study Methodologies, (5) Consulting Competence & Experience, and (6) Education & Professional Qualification. The ICMCI - CMC Common Body of Knowledge defines the scope and requirements of consulting knowledge and skills for CMCs. The IMCHK publication of **"Management Consultants Handbook - Knowledge, Skills & Practices"** is designed to support and further elaborate on the CMC Common Body of Knowledge (ICMCI reviewed in Oct 2021) and aims to help CMCs capture the required knowledge and skills. This Handbook allows them to apply knowledge and skills in their consulting practices. It may also serve as a guide for methodologies and help non-CMC business management identify their business improvement needs and changes. The first edition of the Handbook consists of thirteen chapters that complement the ICMCI Common Body of Knowledge. The first edition is

planned to be published on the 25th Anniversary of IMCHK in 2025 and will be formally launched at the ICMCI Asia Hub Meeting in Hong Kong.

Management Consultant & Professional Framework

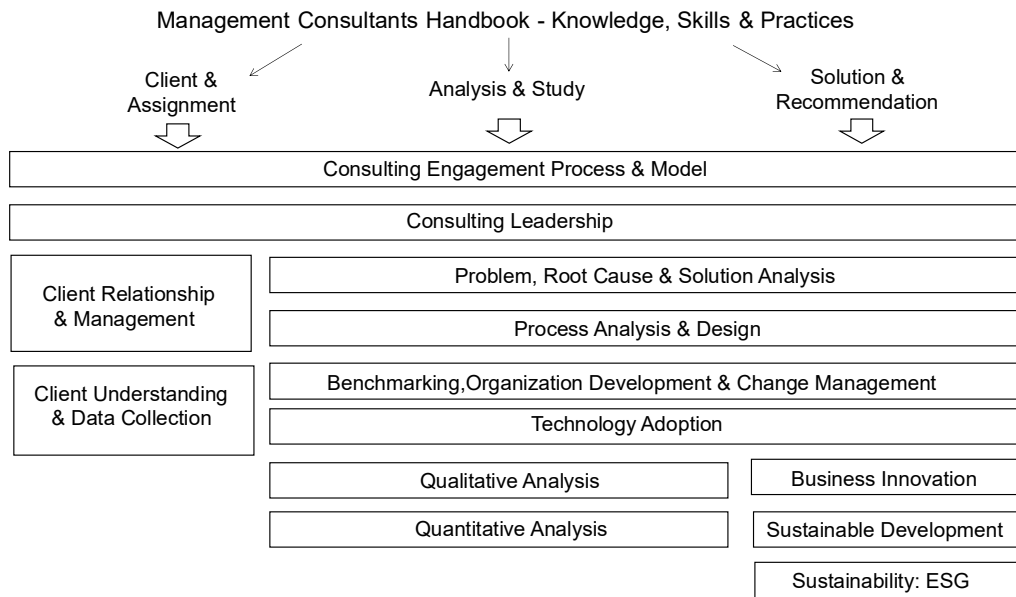


Management Consultant Knowledge, Skills & Practices

With rapid technological changes and competitive markets, management consultancy is a highly challenging industry. Capturing and applying knowledge are daily tasks for professional management consultants in their consulting services. In management consulting services, knowledge, skills, and practices are integrated and work together without boundaries to deliver consulting assignments to clients.

To thrive in the management consultancy profession, there are three major work areas that all consultants must master: Client & Assignment, Analysis & Study, and Solution & Recommendation. These areas support the phases of inquiry, contracting, execution, and closure of consulting services. Different kinds of knowledge, skills, and practices may be needed to fulfill the requirements of different consulting areas and services.

Based on practical needs, the development of the “Management Consultants Handbook - Knowledge, Skills & Practices” pursues thirteen types of knowledge and skills foundational to management consultants. Consultants should familiarize themselves with these when delivering consulting services. The thirteen chapters of the Management Consultants Handbook introduce and deeply describe the required knowledge, skills, and practices.



Chapters 1 and 2 focus on the three consulting areas:

Chapter 1 - Consulting Engagement Process & Model

Outlines the standard processes and client engagement in delivering management consulting services.

Chapter 2 - Consulting Leadership

Explores the distinctions between managing and leading within a management consultancy and how leadership supports the delegation of tasks and duties to different levels of management consultants.

Chapters 3 and 4 address Client & Assignment:

Chapter 3 - Client Relationship & Management

Covers strategies for building connections and managing relationships with various levels of clients as well as handling clients' expectations.

Chapter 4 - Client Understanding & Data Collection

Focuses on ways to understand clients' business and the methods for collecting data and information from clients.

Chapters 6 and 7 delve into Analysis & Study:

Chapter 6 - Qualitative Analysis

Examines the objectives, functions, and techniques of qualitative study for management consultancy.

Chapter 7 - Quantitative Analysis

Detail the objectives and methods of quantitative study for management consultancy.

Chapters 5, 8, 9, and 10 span both areas of Analysis & Study and Solution & Recommendation:

Chapter 5 - Problems, Root Causes & Solution Analysis

Describes the processes for analyzing problems, identifying root causes, and developing solutions.

Chapter 8 - Process Analysis & Design

Discusses the aim and methods of the process study and design.

Chapter 9 - Benchmarking, Organization Development & Change Management

Highlights the purposes and methods of benchmarking, organization development, and change management for management consultancy.

Chapter 10 - Technology Adoption

Tracks the evolution of technologies and explores how to adopt and leverage them in studies and solution-finding for management consultancy.

Chapters 11, 12, and 13 focus on Solution & Recommendation:

Chapter 11 - Business Innovation and Consulting

Analyzes client needs and various types of business innovation, introducing methods for fostering and managing innovation.

Chapter 12 - Sustainable Development

Addresses the importance and growth of sustainability in clients' businesses and the professional role of management consultants in sustainable development.

Chapter 13 - Sustainability: Environmental, Social and Governance (ESG)

Explores the needs and advancement of Environmental, Social, and Governance (ESG) practices in business sustainability.

Introduction to Book Chapters

Chapter 1 - Consulting Engagement Process & Model

This chapter links up the typical processes and steps of management consultancy to establish an engagement model, including the major consulting activities and client engagements, from initial inquiries to assignment closure.

It describes the functions and requirements of each activity and step within the engagement model. Explores the connection between the engagement model and ISO 20700 and describes their relationship.

The chapter further covers the inclusion of the engagement model at different stages of management consulting and outlines the requirements to support the engagement model in the delivery of management consulting services.

Chapter 2 - Consulting Leadership

This chapter introduces the essence of leadership within management consultancy. Details how management consultants demonstrate leadership to navigate challenges, uncertainty, difficulties, and risks.

The chapter further examines the professional leadership expected at various levels within the consultancy, illustrating how consultants in different roles effectively collaborate with consulting teams, clients, and external stakeholders.

Chapter 3 - Client Relationship & Management

This chapter introduces the fundamental concepts of client interfacing to build good relationships with clients. It outlines strategies for achieving mutual understanding and mitigating potential misunderstandings, barriers, and risks during client engagement.

The chapter also delves into the nuances of managing relationships with clients at different levels. Describes how to tailor service mindset, communication, and interactions to meet diverse needs.

Lastly it introduces the relationship cycle and customer relationship management (CRM) principles to effectively manage client requirements and expectations. Describes the concepts of smart consultants to skillfully navigate the complexities of client relationships.

Chapter 4 - Client Understanding & Data Collection

This chapter focuses on the crucial process of understanding a client's business situation and its broader impacts, including the client's organization, culture, business, products, services, industry, market, competition, policy, strategy, resource, operation, and supply chain management.

It then highlights common data collection methods for supporting client studies. Distinguishes between informal or formal/complex study, such as research projects. Outlines the arrangement of data collection for formal studies to facilitate qualitative and quantitative analysis.

Chapter 5 - Problems, Root Causes & Solution Analysis

This chapter outlines the systematic steps of problem-solving, beginning with problem identification, progressing to root cause analysis, and culminating in solution finding. Describes the ways to identify the real problem from trouble and symptoms, analyze the root causes of the real problem, and find out the potential solutions based on the results of problem identification and root cause analysis.

The chapter also addresses the reality of multiple potential solutions. It discusses the factors and methodologies for selecting feasible and acceptable options for clients. Finally introduces the concept and practice of solution mapping, a tool for visualizing and managing the interconnections of problems, root causes, solutions, and action plans.

Chapter 6 - Qualitative Analysis

This chapter introduces the purpose, concepts, characteristics, and advantages of qualitative analysis in research studies. Explores the applications and practices of qualitative analysis within management consultancy.

The chapter details the methodologies of qualitative analysis, using Grounded Theory, covering data acquisition, analysis focus, coding and categorization, identification of patterns and meanings, and conceptualization. It also addresses the presentation of qualitative analysis results.

It concludes by briefly describing the complementarity of qualitative and quantitative studies, highlighting how the results can be triangulated to enhance research findings.

Chapter 7 - Quantitative Analysis

This chapter explores the concepts, characteristics, and advantages of quantitative analysis and research. It details the applications and practices of quantitative analysis in management consultancy.

The chapter covers essential quantitative methodologies, including hypothesis development, questionnaire design, data sampling, secondary data utilization, data collection, mixed-mode approaches, and statistical analysis.

It further addresses data preparation and the presentation of analysis results through descriptive statistics, graphs, charts, and tables.

Chapter 8 - Process Analysis & Design

This chapter introduces the concepts of Porter's Value Chain and process analysis within business operations. Examines different approaches to process analysis, including Business Process Management (BPM), Business Process Improvement (BPI), and Business Process Re-engineering (BPR). The chapter also describes the life cycle of process analysis and design, encompassing Present Mode Operation (PMO), Transit Mode Operation (TMO), and Future Mode Operation (FMO).

It details study methods such as Process Flow Mapping, Volume Flow Analysis, Process Time, Cycle Time, Fallout, Rework, and Activity-Based Costing (ABC).

The chapter concludes with a discussion on the application of process analysis and design in business reviews and its role in supporting transformation, innovation, technology adoption, and sustainable development.

Chapter 9 - Benchmarking, Organization Development & Change Management

This chapter explores the impact of market competition and how consultants use benchmarking, business transformation, and change management to enhance client competitiveness.

It details the purposes and methods of business benchmarking and its role in driving products, services, and process improvements.

The chapter also examines the history and perspectives of organization development, analyzing the dynamics and emotional aspects of organizational change.

Lastly, it discusses intervention strategies for driving transformational changes, including diagnostic research, dialogic facilitation, learning and coaching, and techno-structural redesign.

Chapter 10 - Technology Adoption

This chapter focuses on the role of management consultants in facilitating technology adoption and its impact on consulting services. It explores the concepts, theories, and practices used to implement and apply technologies across different stages of consulting engagements. The chapter systematically reviews the evolution of technology changes in response to organizational needs and business improvement.

It introduces the NASA Way of Technology Adoption, including Model-Based Systems Engineering (MBSE) and Digital Transformation (DT) Strategic Framework, and discusses NASA's technological readiness concepts.

The chapter concludes by outlining the history and requirements of business adoption under technology changes, detailing the consultant's role and professional requirements, and providing examples of contemporary technology adoption, such as Digital Transformation and Artificial Intelligence (AI).

Chapter 11 - Business Innovation and Consulting

This chapter examines the drivers of business innovation, including technology evolution, market change, and evolving consumer behavior. It defines the purposes, concepts, and types of business innovation.

The chapter explores the application of consulting practices in driving innovative change and identifies strategies for achieving business innovation. It introduces innovation philosophies such as Disruptive and Shan Zhai Innovations.

The chapter concludes by discussing how to foster innovation within businesses, develop the Build-Operate-Transfer (BOT) Model of Innovation, and inculcate a culture of innovation.

Chapter 12 - Sustainable Development

This chapter addresses the urgent need for sustainability, outlining the challenges facing the Earth and the requirements for balanced human life, society, resources, environment, and ongoing development.

It introduces the history and sustainable development initiatives of the United Nations, including the Decade of Education for Sustainable Development (DESD) and the 17

Sustainable Development Goals (SDGs). The chapter emphasizes the urgency and importance of sustainability for countries, organizations, businesses, and individuals.

It introduces the three components of sustainability (environmental, social, and economic) and their application in business planning and management. The chapter discusses various sustainability implementations, such as Sustainable Business (SB), Corporate Social Responsibility (CSR), Environmental, Social and Governance (ESG), and Carbon Neutrality (CN).

Finally, it addresses the cultural, ethical, and professional requirements of management consultants in delivering sustainability-focused services to clients.

Chapter 13 – Sustainability: Environmental, Social and Governance

This chapter delves into the background, needs, definition, development goals, and fundamental components of sustainability. It explores the relevance of sustainability to businesses, considering externalities, internalities, responsibilities, strategies, cultures, and profitability.

The chapter focuses on Environmental, Social, and Governance (ESG) factors, detailing how businesses participate in, assess, and report on their sustainability performance through materiality assessments, ESG strategies, reporting, regulatory compliance, and investor engagement.

It further emphasizes the importance of sustainability and ESG in addressing climate change, pandemics, resilience, and quality of life, and discusses how leadership and management can support consultants in navigating these areas.

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Dr.Sc, PhD, Ed.D, DBA, MSc, MBA, BSc(Hons), FBCS, CITP, CMC-AF, FIMC, CMC[®], FInstLM

Dr. Ma has served in the telecom, IT, and service industries for many years. He has worked with different business units in engineering, R&D, business development, and consulting services in various sections under Cables & Wireless, HK Telecom, and PCCW Limited. He participated in management consultancy for more than 30 years, and he is a management consultant with specialties in telecom, IT, and business management. Now, he is the Principal Consultant of ValuePartners & Consultancy and Associate Partner of Ovum (UK) Ltd., providing consulting services in the Asia Pacific region. He also contributes his knowledge and experience of management consultancy in teaching, research, and development to institutes, universities, and professional bodies.

Dr. Ma has joined various development and improvement projects under Cable & Wireless, Unisys, Shell, Bain & Company, HK Telecom, Telcordia Technologies, PwC, PCCW, ValuePartners, and Ovum. He applied different shelf-developed models, methodologies, and technological approaches to handle different challenges in the development and improvement projects and achieved excellent results. He successfully delivered more than 40 major consulting projects to his clients including public corporations, government agents, and service providers in Greater China (Mainland, Taiwan), Hong Kong, and the Asia Pacific regions (e.g. ASEAN countries), which involved various consultancy services such as IT automation, technology adoption, business process reengineering, industry transformation, industry regulation, government policy, marketing research, product development, services improvement, logistics enhancement, business migration, strategies setting, performance management, sustainable development, etc.

Other than consulting services, Dr. Ma also participated in many training and professional development sessions in specific knowledge and skills through training agents of HKUSPACE, FHKI, HKPC, HKMA, PolyU, IMCHK, WISDP, HiESD, HKSAR, and Macau SAR to businesses, industries, and government. He supports some joint research of industry development among institutes, corporations, and universities (e.g. research between HiESD, ZTE, and CUHK) as well as the doctoral research studies of universities. Dr. Ma also contributed his knowledge and assisted the professional development of Certified Management Consultants (CMC[®]) to accelerate the regional business and industry development.

Author: Gregg Li



Gregg is a graduate of Washington University in St. Louis (BA), HKU (MPhil), UCLA (MBA), Hawaii (MA), and Warwick University in the UK (Eng. D); and looking to graduate as a Space Global Mentor before 2030. As an “Astropreneur” and a Comprador of NewSpace, he is now connecting entrepreneurs, governments, universities, engineers, and venture capitalists to prepare their livelihood for the arrival of the NewSpace and Digital economy.

Professor Gregg Li, FCMC

Governance and Management Consultant, Astropreneur, and Comprador of NewSpace

From a summer engineering intern at Pearl Harbor in 1976 to a stint as ICMCI’s ambassador to China, when China opened its doors and invited professional management consulting as an industry in 2002, Gregg has been a bridge builder and a connector. Fixing wicked problems has been his life and forte. He’s been an Internal Consultant at American Express, an External Consultant with Coopers (aka PWC),

Consulting Principal of the Management Think Tank at the University of Hong Kong, Member of the HKSAR Government Central Policy Unit, the founder of his regional consulting firm in Family Business Governance and lastly headed up the Global Enterprise Risk Management and Corporate Governance Practice at Aon. Gregg has never turned down any 1,500-plus wicked challenges his clients wanted resolution. What he couldn’t solve alone, he would invite other professionals from ICMCI, IBM, the World Bank, Protiviti, Citibank, and IMC members to join forces. Educated as a systems engineer and governance architect, Gregg has had over four decades of professional consulting experience helping disparate parties find common grounds for mutual gains, navigate hyper-growth, and install resilient governance architectures.

Time permitting, he has shared his know-how as an Adjunct and Visiting professor at local and overseas universities, including the inquisitive ones at universities in Beijing, Bombay, Chicago, Clayton, Haidian, Helsinki, Hong Hum, Manoa, Palo Alto, Shatin, and Yangpu. He has enjoyed sharing and researching esoteric subjects like Family Business, Corporate Governance, Systems Engineering, and Space Entrepreneurship. He has been proud to claim that scores of his students and mentees are now partners at leading consulting firms, global heads at MNCs and family business empires, and founders of disruptive startups (none is in jail so far). They have been co-travellers on his journey of discovery, and many are now changing the world for the better. Many have joined him hitchhiking the galaxy at the Orion Astropreneur Space Academy he founded in Hong Kong, where he is also a voluntary researcher and Ambassador at the Lab for Space Research at HKU.

Author: Alfred S. P. Ho



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Professor Alfred S. P. Ho

Alfred Ho's distinguished five-decade consulting career began in 1970 as a personal assistant to the Managing Director of a Hutchison International Group engineering conglomerate, gaining a comprehensive understanding of the operations and corporate dynamics through internal assignments. He subsequently developed expertise in change implementation, organizational, and entrepreneurial development, holding key positions at Hutchison Whampoa Group, Hong Kong Polytechnic University, the Management Development Centre of Hong Kong (Vocational Training Council), the Poon Kam Kai Institute of Management (University of Hong Kong), and the Hay Group.

A pioneer in competency-based assessment and development systems in Hong Kong during the early 1990s, Alfred was instrumental in introducing methodologies that significantly enhanced local enterprise performance. As Hong Kong's first Oxford University Certified Development Adviser, Assessor, and Internal Verifier for the UK's National Vocational Qualification (NVQ) system, his expertise proved invaluable, influencing the SAR Government's subsequent adoption and development of Hong Kong's Qualifications Framework.

Since the turn of the century, as a Partner at G. Li & Co., Ltd. and Executive Director of the Academy of Management Consultancy Ltd., he has focused on strengthening governance structures and practices for public organizations, NGOs, and family businesses, providing executive coaching for sustainable growth and operational excellence.

Alfred maintains a strong and enduring association with tertiary education. From 2009 to 2014, as Consultant-in-Residence at the HKU Business School, he established consulting practicums for business and economics students, providing them valuable real-world experience while benefiting local SMEs. He has taught management, strategy, entrepreneurship, consulting, and innovation at most Hong Kong universities, fostering future leaders. Furthermore, he has supervised and supported over a dozen doctoral research candidates, contributing to the advancement of management research. His international experience extends beyond teaching, encompassing leading strategy formulation, change facilitation, consulting practices, and senior management seminars in Mainland China, Macau SAR, Thailand, Singapore, Sri Lanka, Malaysia, and Australia.

Alfred has a strong public service record, including appointments as a 'first-generation' District Board Member (1982-83), on the HKSAR Government's SME Committee (1998-2001), the Committee on Management and Supervisory Training (2002-2008, 2009-2013); and as a Management Subject Specialist for the Hong Kong Council for Accreditation of Academic and Vocational Qualifications (2010-2012). He has also been a key advocate in promoting professionalism, co-founding the International Institute of Management (1995), the Institute of Management Consultants - Hong Kong (2000), and the Knowledge Management Development Centre (2004). Currently, he advises the Hong Kong General Chamber of Small & Medium Business Ltd. and is Secretary of the International Council of Orion Astropreneur Space Academy (HK) Ltd., continuing to contribute to business and innovation.

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Dr. Thomas S.K. Tang

Dr. Thomas Tang is a former President of IMCHK and has been an accredited Certified Management Consultant (CMC®) since 2000.

Dr. Tang has over 30 years' experience in sustainability consulting. He is a practitioner in ESG, climate risk, decarbonization, urban design, stakeholder engagement and social impact. He is an Executive Director with an engineering firm based in Hong Kong where he is working on infrastructure and planning projects.

Dr. Tang is also an Adjunct Professor for the City University of Hong Kong, where he lectures on ESG and sustainability.

In his spare time, Dr Tang serves as a Director, Chung King Ministry (faith-based NGO) and is a mentor and former advisory committee member for Engineers Without Borders (HK).

Author: Stephen W. K. Ng



Stephen Ng holds an MSc. Degree with Distinction and an Engineering Doctorate Degree from The University of Warwick, U.K. He is a Fellow of The Institute of Purchasing and Supply of Hong Kong; a Fellow of The Chartered Institute of Purchasing & Supply; an Associate of the Chartered Governance Hong Kong; a Fellow of Chartered Institute of Logistics & Transport; a Fellow of The Institute of Management Consultants Hong Kong; and Academic Fellow (CMC-AF) of ICMCI.

Prof. Stephen W.K. Ng

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Stephen is currently President of The Institute of Purchasing & Supply of Hong Kong, Managing Director of QuST Continuation Limited, a management consulting network focusing on Speed, Quality and Teamwork. He was the Associate Director of Poon Kam Kai Institute of Management, the University of Hong Kong (1999-2003), prior to this, he was with Motorola 30 years and had facilitated a series of Executive Development Programs for Motorola University in Asia including Leadership, Change, Service Quality, Logistics, Supply & Supply Chain Management and Six Sigma & Beyond.

Stephen is a seasoned Fellow management consultant and a professional facilitator working in the areas of Leadership, Quality, Change, Services, Logistics, Global Supply, and Supply Chain Management. Serviced as internal consultants for Motorola Asia Pacific and external consultants for over 30 years. Organizations that he has serviced in the staff development & management consulting include Dairy Farm, Pricerite, DHL, TNT, Fedex, Hong Kong Post, IBM, Swire China, Bank of China, Motorola, MTL, HAECO, HAESL, Fujitsu, Whirlpool and the SAR Hong Kong Government such as CSB, EU, Customs & Excise, Police, Transport Department, Hospital Authority etc.

Stephen is an Ex-Member of the Hong Kong Logistics Development Council, Hong Kong SAR Government; Ex-Director of International Federation of Purchasing & Supply Management (IFPSM); Adjunct Professor of Beijing Jiaotong University, and Adjunct Professor of The Hong Kong Polytechnic University over 15 years.

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Dr. C.Y. Wong holds a Dip.M.S. from Hong Kong Polytechnic University; an M.Sc. from the University of Durham, England, UK; a Ph.D. from the University of Wollongong, Australia; and a D.Sc. from Azteca University (European Program-Austria). He is also an Oxford University (UODLE) certified National Vocational Qualifications (NVQ) Adviser, Assessor, and Verifier in Management; a Chartered Professional Engineer (Australia); an APEA Engineer (Mechanical); a Certified Management Consultant (CMC®); an Academic Fellow of The International Council of Management Consulting Institutes; a Fellow of the International Institute of Management (FIIM); a Fellow of the Institute of Certified Management Consultants (FCMC); and a Member of Engineers Australia (MIEAust).

Dr. C.Y. Wong

FCMC, CMC-AF, DSc(Azteca), PhD(Wollongong), MSc(Durham), DipMS. (PolyU), CPEng, MIEAust, FIIM.

Dr. Wong is one of our most seasoned industrial engineers and consultants, with over 30 years of both hands-on consulting and training experience. Dr. Wong is a quality guru and trainer, notably in areas such as Human Resources, workflow, productivity improvements, and quantum efficiency improvement. For over 15 years, Dr. Wong has been associated as a Senior Advisor at the Management Development Centre (MDC) of the Vocational Training Council, specializing in Manpower Planning, Project Management, Cost-Benefit Analysis, Engineers as Managers, Training Needs Analysis, Quality Improvement, and Service Quality. During that period, Dr. Wong has trained thousands of human resource practitioners.

Dr. Wong is also a management subject specialist and university lecturer. He possesses extensive experience in management development and teaching. He was a part-time lecturer for management subjects at the Faculty of Social Sciences, University of Hong Kong, and Hong Kong Polytechnic University. He was the trainer for the Professional Diploma in Management Consulting and Risk Management organized by HKPC. He was appointed by the Hong Kong Council for Accreditation of Academic & Vocational Qualifications (from 2007 to 2012) as a Specialist to assist the HKSAR Government in developing the “Qualification Framework” by using the Competency Approach.

Dr. Wong is also a seasoned management consultant and executive coach, having coached board directors from local listed public companies and manufacturing firms in Mainland China over the years. Dr. Wong is an ex-Executive Vice President of the Institute of Management Consultants and has assessed numerous consultants for the certification of CMC® (Certified Management Consultants). Dr. Wong is also an expert in Manpower Planning & Human Resources Management, Executive Coaching, Leadership Skills, Risks & Crisis Management, Project Management, Quality Operational Improvement, Corporate Turnaround, Train the Trainer, Presentation Skills, Problem Solving, and Decision Making.

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Dr. Terence Chung was one of the founding committee members of IMCHK and has been an accredited Certified Management Consultant (CMC®) since 2000. In 2022, he was awarded the designation of Academic Fellow (CMC-AF) from ICMCI in recognition of his contribution to thought leadership within the management consulting profession.

Terence founded Integral Training & Consulting Ltd. in 2004. He is a seasoned management consultant, executive trainer, executive coach, associate professor, and professional facilitator, with over 30 years of experience in corporate and consultancy. He has collaborated with more than 250 client organizations in different industries across Asia, specializing in organization development (OD), change management, strategic group facilitation, leadership development, project management, and executive coaching.

As a scholar-practitioner with over 30 years of experience, Terence serves as an Adjunct Associate Professor at the University of Hong Kong, teaching postgraduate programs in the Department of Engineering and the Institute for China Business. He was presented with the Academic Advisor and Outstanding Teacher awards by the university. Terence holds a PhD in Organizational Development & Change from the Fielding Graduate University in Santa Barbara, an MA in Human & Organizational Systems, an MSc in Management, a Certificate in Evidence-based Coaching for Organizational Leadership, a PgD in Management Consulting and Change (with Distinction), and a PgD in Training Management (with Distinction).

Terence is accredited with professional qualifications: ICMCI Certified Management Consultant - Academic Fellow (CMC-AF), ICF Professional Certified Coach (PCC), PMI Project Management Professional (PMP), IAF-Certified Professional Facilitator - Master & Assessor (CPF|M), and Chartered Professional in Human Resources - Canada (CPHR).

In his leisure time, he loves traveling to appreciate different cultures and landscapes. He serves as a volunteer in the Church bereavement services and leadership coaching for NGOs in Hong Kong.

About the Institute of Management Consultants Hong Kong (IMCHK)

The **Institute of Management Consultants Hong Kong (IMCHK)** is the professional chapter and qualifying body for management consultants in Hong Kong. Established in 2000, IMCHK aims to set and maintain high standards of quality, independence, objectivity, and integrity for awarding **Certified Management Consultants (CMC)** originating in Hong Kong and Macau. IMCHK represents the **International Council of Management Consulting Institutes (ICMCI)** in Hong Kong, which has over 60,000 certified members (CMCs) worldwide. ICMCI aims to enhance the practicing standards of management consultants and build clients' confidence in consulting services globally. IMCHK awards the CMC designation on behalf of ICMCI, which is recognized by the United Nations and covers 50 countries worldwide. IMCHK is responsible for providing training and knowledge sharing to CMCs and promoting management consulting skills and professionals in regional areas.

Management Consultants Handbook

To become a professional and qualified management consultant like a CMC, six professional areas of the Professional Framework should be maintained: (1) Professional Certification, e.g. CMC qualification, (2) Professional Conduct, (3) Consulting Knowledge & Skills, (4) Consulting Study Methodologies, (5) Consulting Competence & Experience, and (6) Education & Professional Qualification. The ICMCI - CMC Common Body of Knowledge defines the scope and requirements of consulting knowledge and skills for CMCs. The IMCHK publication of “**Management Consultants Handbook – Knowledge, Skills & Practices**” is designed to support and further elaborate on the CMC Common Body of Knowledge (ICMCI reviewed in Oct 2021) and aims to help CMCs capture the required knowledge and skills. This Handbook allows them to apply knowledge and skills in their consulting practices. It may also serve as a guide for methodologies and help non-CMC business management identify their business improvement needs and changes. The first edition of the Handbook consists of thirteen chapters that complement the ICMCI Common Body of Knowledge. The first edition is planned to be published on the 25th Anniversary of IMCHK in 2025 and will be formally launched at the ICMCI Asia Hub Meeting in Hong Kong.



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