



CERTIFIED
MANAGEMENT CONSULTANT

Consultants



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Design: Dr. Samson Ma, Editing: Prof. Alfred Ho

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Institute of Management Consultants Hong Kong (IMCHK) - Newsletter

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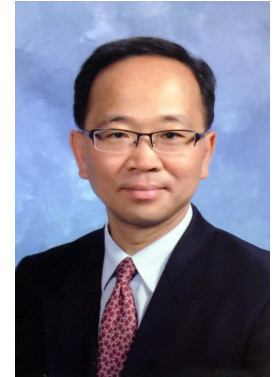
About IMCHK

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

President's Message

First of all, I wish you a strong start in 2020!

This is our first issue of the IMCHK Newsletter and we plan to publish it quarterly so that we can reach out and strengthen our engagement with the community of management consultants both in Hong Kong and Greater Bay Area.



Please feel free to provide your feedback for our continuous improvement.

Best regards,
Daniel Chan, CMC
President
IMCHK



IMCHK News - Academic Fellow

The ICMCI Academic Fellow designation is intended to confer a mark of distinction which recognizes those academics and teaching practitioners who have contributed to the study and teaching of management consultancy. Fellow will be joining an exclusive community who has a passion for the delivery and dissemination of management consulting education.

ICMCI's Board of the Academic Fellow Panel approved the IMCHK's nomination of Academic Fellows. Prof. Gregg Li (FCMC), Dr. C Y Wong (FCMC), and Dr. Samson Ma (FCMC) have accepted the nomination and Academic Fellow honorary designation of ICMCI.

IMCHK President, Daniel Chan awarded the certificates of Academic Fellow to Prof. Gregg Li (FCMC), Dr. C Y Wong (FCMC), and Dr. Samson Ma (FCMC) at the AGM 2019 on 24 August 2019.

Congratulations !

IMCHK Activities

The ISO 20700:2017 Training for IMCHK Council Members was organized on 13 Jul 2019 and 8 Council Members completed the ISO 20700 training for Certified Management Consultants.



AGM 2019 - Annual General Meeting of IMCHK was held on 24 August 2019 (Saturday), 11:30am - 2:00pm at Club One, Spotlight Recreation Club, 4/F, Screen World, Whampoa Garden, Hung Hom.



ISO 20700:2017 Training on ISO:2017 Guidelines for Certified Management Consultant (CMC) - Training on ISO 20700:2017 Guidelines for Management Consultancy Services, specially organized by IMCHK for Certified Management Consultants, was arranged on 2 November 2019 (Saturday) between 9:00 am - 1:00 pm at HKMA, TST East Centre: 3/F Tower 2, South Seas Centre, 75 Mody Road, Tsim Sha Tsui East, Kowloon. **Methodology** employed included Workshop, Case Study and Practices. **Program coverage:** Introduction to Self Declaration Checklist; Application of the Self Declaration Check List; Practices in Contracting; Practices in Execution; Practices in Closure; Practices in Policies.



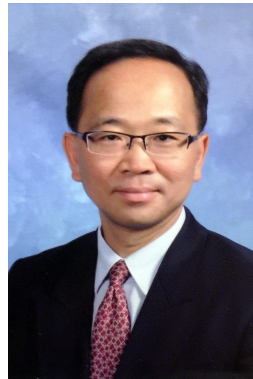
ISO 20700:2017 Guidelines for Management Consultancy Services

To be a successful management consultant, subject matter knowledge and experience alone may not be sufficient to help the clients improve their business processes and operations for profit maximization. From the clients' perspective, they may also want to ensure their money on consultancy projects is well spent and value-added. However, this will not happen unless there is transparency at every stage of the consultancy project, starting from choosing the right consultant upfront, defining roles and expectations, and measuring the consultancy services at project closure.

The ISO 20700:2017 offers practical guidelines to both clients and management consultants to ensure both parties are clear on what is required for an effective and efficient consultancy process, the objectives and their respective responsibilities; thereby avoiding costly disappointment and leading to better outcomes from the consultancy project. Accordingly, ISO 20700:2017 has added a new layer of credibility and confidence in management consultancy services with international recognition.

Way forward, IMCHK plans to train all the management consultants (both CMC and non-CMC) in Hong Kong. If you would like to become ISO 20700-trained, please watch out for the course schedules and join us to improve the quality of the consultancy industry in general.

IMCHK is the only accredited institution in Hong Kong to deliver ISO 20700 training, and around 20 Certified Management Consultants have been trained and awarded the certification since its introduction in June 2019. We have formed an ISO 20700 Alumni Network to explore how we can best promote it among consultants and clients in Hong Kong.



Daniel Chan, CMC,
President, IMCHK

ISO 20700:2017 Guidelines for Management Consultancy Services was developed by CMC-Global (International Council of Management Consulting Institutes, ICMCI) and International Organization for Standardization (ISO), to enhance the level of competence of the profession's services. IMCHK is the trainer on behalf of ICMCI to provide training and certification of ISO 20700 in regional area (Hong Kong and Macau). IMCHK conducts and supports ISO 20700 training and certification to management consultants and service providers in required industries and professions.



CMC - Global



Greater Bay Development & Management Consulting

Summary in English

United Nations formulated the "2030 Agenda for Sustainable Development" in 2015, which included 17 sustainable development goals and aimed to integrate and balance economic, social and environmental components of sustainable development worldwide. China's 13th Five-Year Plan proposed the development of the "Guangdong Hong Kong and Macao Greater Bay Area", which connects nine Guangdong regions together with Macau and Hong Kong geographically. The development aligns communities, promotes innovative economy and enhances environment based on the nature and direction of United Nations' sustainable development.

In the Greater Bay development, financial capital is the top priority. However, knowledge and professional skills are the intellectual capital and essential for the development, but they are often overlooked. The intellectual capital can leverage enterprises on the change, innovation, migration, self-development, and improvement of business. Intellectual capital should be one of the major drivers to accelerate the regional economic development and business transformation in the Greater Bay Area.

The Commerce and Economic Development Bureau of HKSAR also recognized the importance of intellectual capital and launched the "Intellectual Capital Management Consultancy Program" to

assist regional organizations to make good use of intellectual capital and consulting services to support their business development. Management consulting services can provide professional skills, knowledge and solutions on business management, accounting, training, communications, IT, engineering as well as other solutions to help industries and business organizations to learn and apply technologies, and introduce innovations on their business change and development.

Life in the Greater Bay Area has been under the influence of the Lingnan culture (Cantonese culture), and Hong Kong people also have inherited the same culture, such as having dim-sum breakfast in teahouses, watching Cantonese opera and eating rice dumplings. Greater Bay Area development is a cross-flow of Lingnan and foreign cultures. Hong Kong is an international city with experience in integrating Chinese and Western cultures. Hong Kong possesses competitive advantages and talents of culture integration. Greater Bay Area development requires a large number of management consultants including international consultants as well as regional consultants that are familiar with Lingnan and Western cultures. They can help traditional businesses, industries, and private enterprises to effectively change and integrate into the development of the Greater Bay Area.

The Institute of Management Consultants Hong Kong (IMCHK) has the role to strengthen the CMC education and certification for management consultants to promote management consultancy and develop intellectual capital to support the long-term development of the Greater Bay Area.



大灣區發展與管理顧問 中文全文

聯合國於 2015 年制定了“可持續發展 2030 議程”，包括 17 個可持續發展目標，提出未來 15 年全球發展之需要、探索、及在全球範圍內實施這些目標的方法。聯合國的可持續發展之理念，就是平衡、結合及推動經濟、社會和環境下之相互發展，速使全球地區合作，包括發展中國家及已發展國家在內，可以持續推動經濟和社會發展，及得以保護地球環境、土地、海洋與氣候之變化。自然資源日益缺少，迫切需要個人、團體及社會實施有效的可持續發展，包括經濟與環境管理之解決方案。中國是聯合國成員國之一，也面對平衡環境保護、經濟發展、及社會改進之間的問題。中國在 2016 年也制定了國家可持續發展方向，在推動經濟、社會及環境保護發展一體化的大前提下，中國在十三五規劃也制定了協同可持續發展的國家目標。並把推動及實施可持續發展之願景，轉化為實踐及地區發展方案。而粵港澳大灣區之發展就是包括九個廣東地區(廣州、深圳、珠海、佛山、中山、東莞、肇慶、惠州和江門)、澳門及香港在可持續發展背景下，與十三五規劃其中的一個重要實踐目標。大灣區之發展是一個以社區(社會)發展為主導之經濟及環境保護之實踐項目，對珠三角地區、香港及澳門未來社會將進一步融合，經濟發展及生活環境改善，將帶來地區上根本性的變化及長遠影響。

十三五規劃(2016-2020 年)首次提出，建設大灣區的想法並不是全新概念，可說是以往區域發展，如珠江三角開發及大珠江三角發展等等的可持續發展之創新方案。早期廣東部份地區是以發展成“世界工廠”為目標，而香港及澳門則作為“店鋪”，那就是“前鋪後廠”之發展概念。進入 21 世紀，粵港澳應進入深度融合及協調發展的新階段，而“大灣區”之倡議，就是以自然地理條件及可持續發展為基礎，進一步融合區域之相互合作，地區融合發揮了主導作用，推動創新及經濟發展，進而帶動灣區建設及環境改善。

目的是利用高效率之交通連貫、地域文化協同優勢、及先進通信網絡，來推動地區性融合，進而達到開放經濟結構、提升區域資源配置、及做就長遠地區與環境建設。大灣區的主要城市包括香港，澳門、深圳及廣州都有各自優勢，灣區未來發展應該是區域互補，並由一線城市帶動二線城市及區域發展，例如香港是對外之金融、商業及中西文化中心，應利用現有之優勢及經驗帶動灣區的投資、接合及推動可持續創新，廣州是對內商業及轉接中心，可帶動灣區與各省市之商業發展及連係，澳門及深圳也在灣區內有自身之主導角色。而“粵港澳大灣區”之發展，將進一步推動華南地區經濟升級，及地區可持續發展，對地區建設提供動力及實踐方案。

2017 年 7 月 1 日，國家發展和改革委員會與粵港澳三地政府簽署了《深化粵港澳合作及推進大灣區建設框架協議》。香港將按十三五規劃，為粵港澳大灣區提供金融、航運及貿易支援，而灣區亦將提供地區資源，幫助香港經濟多元發展，特別是在創新科技和創意產業方面之開發。而在灣區發展中，金融資本開發是重中之重，知識資本是企業發展的無形資本，而知識資本之開發也是灣區發展之必要元素，但不少企業往往忽略其重要性。透過知識資本的管理及工具，可以為企業提升經營策略、業務運作及可持續發展。香港特別行政區政府商務及經濟發展局、與工業貿易署及商界團體，也正式展開「知識資本管理顧問服務計劃」，協助地區機構鑑別、評估、保護、發揮和制訂策略和善用知識資本。香港要支援灣區發展，那就要首先推動灣區在金融及知識資本上的開發。在知識資本開發方面，香港在企業融資、工商管理、國際貿易、及管理顧問上可起領頭作用。而在管理顧問專業、知識開發及推展，將會是灣區發展的重要及廣泛之推動力，可大力推動灣區企業創新、業務轉營、自我發展、及完善管理等，並加速推動知識資本開發接合華南地區之經濟發展。「知識資本管理顧問服務計劃」就是利用管理顧問服務去推行知識資本開發及應用。一般人對管理顧問是甚麼行業，又需有甚麼知識都一知半解，顧問或管理顧問服務就一般稱為 Consultants 或 Management Consultants 提供管理、企業、會計、培



訓、通訊、資訊科技、金融等不同行業及領域之顧問或諮詢服務。而國際著名管理顧問公司，如埃森哲 (Accenture)、科爾尼 (A.T. Kearney)、麥肯錫 (McKinsey & Company)、美世 (Mercer Management Consulting)、波士頓諮詢公司 (Boston Consulting Group)、畢馬威 (KPMG)、德勤 (Deloitte)、羅兵咸永道 (PricewaterhouseCoopers, PwC)、貝恩策略顧問 (Bain & Company)、和安永 (Ernst & Young) 等等的管理顧問服務，就是不同行業及領域之顧問專業，向有需要客戶提供不同行業及領域之顧問服務，幫助受委托之客戶在企業運作、財務管理、業務發展、營商策略、客戶服務、產品研發、科技應用、業務創新、及在不同類型之需要，提供諮詢服務、專業意見及技術支援。

從經濟和社會發展及環境保護三個角度分析，中央政府確實深思熟慮地規劃了大灣區之需要及未來發展，為進一步實踐及推展一國兩制下之經濟、社會、及環境保護發展一體化，與地域和合上創造條件。從地區發展歷史來看，大灣區可以說是嶺南文化發展之中軸地區，灣區社會生活都成傳嶺南文化，而香港及澳門雖然曾經長時間是英國及葡國殖民地，但也同時承傳著固有的嶺南文化及生活方式，我們都會到茶樓飲早茶，看大戲，到雜貨店買東西，到涼茶舖飲涼茶，說白話(廣東話)，食裹蒸糰及飛機攪等等，香港及澳門都生活在固有的嶺南文化之中。大灣區可說是整合嶺南文化帶動下的區域性經濟和環境建設之發展項目。而香港不單是承傳嶺南文化，也是個成功把中西文化交流及融合之國際城市，大灣區文發展是雙向的，包括引進及輸出企業投資及科技，是中外交融的發展。香港應更好把握現有之中西文化融合之優勢、經驗及人才，帶領灣區成傳嶺南文化，進一步推展中西文化及制度上之交流，推動灣區在經濟、社會、及環境上融合不同文化，經濟及社會制度，建設一個中西文化及制度融合之灣區。而灣區之生活、文化、與區域性之交通快速發展，如城軌、港珠澳大橋、及高鐵之開通，將大大推動灣區內之社區聯繫，加快社會互動與合作，在未來灣區之開展策略，應是進一步加

強交通運輸系統、通訊互連、社區設施整合、文化生活互動、社會制度連接、工商發展分工、經濟活動融合、科技研發互保、城市建設互通、及地區環境建設一體化等等，進而推展灣區之交通、信息、文化、制度、商業、科技、及資金流動，加強知識資本管理，整合及深化灣區發展創造條件。



灣區之社會、經濟及環境設施之相互及平衡發展，應以中西文化及制度融合為本，推動知識資本之開發、專業及應用，鼓勵管理顧問專業發展，在加強知識資本發展在不同領域及行業之專業管理顧問及相關服務。在社會、經濟及環境整體建設上，是需要不同行業之專業管理顧問提供專業建議、指導及支援，加快及引領灣區內多行業及不同領域上之平衡發展。就灣區之長遠發展，需要大量專業管理顧問，不單是國際性之管理顧問，還需要區域性及熟悉嶺南文化之專業管理顧問，幫助灣區內不同社區、機構、行業、民營企業融入灣區整體發展。香港管理顧問學會對大灣區發展非常重視，並對灣區之發展進行學術研究，希望加強灣區內專業管理顧問培訓，並在專上教育及學術機構推展專業管理顧問課程及資歷考核，訓練對區域及嶺南文化熟悉之專業管理顧問，加快灣區內管理顧問服務之發展，提供管理顧問相關專業，推動灣區內知識資本管理及長遠發展。



Dr. Samson Ma, FCMC, CMC-AF
Honorary Secretary, IMCHK



Certified Management Consultants (CMC) Mentorship Program

The Mentoring Program of IMCHK was developed in 2017 to help IMCHK members to settle into the management consulting industry effectively. The CMC Mentorship Program is a new extension of Mentoring Program in 2020 to promote IMCHK mentoring and CMC recruitment. Doctorate candidates or chartered / certified professionals may apply to join the CMC Mentorship Program to earn their CMC qualification. They may develop their second profession in management consultancy to extend their career development path. The candidates will be assigned a mentor (senior CMC) to guide their CMC competency development, which includes short training, case study, interview and ethical test within 6 to 12 months.

Objectives:

- Recruiting potential CMC candidates to train up management consultant professionals in Hong Kong and the Greater Bay Area.
- Speeding up the development of CMC professionals of IMCHK and ICMCI in regional areas.
- Establishing effective career development paths and promoting the management consultancy industry.
- Helping professionals, experts and management to develop their second profession in management consultancy.

Admission Requirement

- 1) Holding a bachelor degree from a recognized university;
- 2) Working as a management consultant for 3 years (internal or external consultants);
- 3) DBA or PhD candidate of a recognized university, or Chartered / Certified Professional (e.g. Accountant, Engineer, Financial Planner, IT Professional, etc.)

Roadmap and Learning Process

- 1) Apply and join IMCHK as a full / professional member (MIMC)
- 2) Join the CMC Mentorship Program
- 3) Attend the 2-day CMC Certification Training (e.g. Consulting, ISO20700, case study, and ethics training)
- 4.1) Join and pass the ethical test (10 multiple choice questions)
- 4.2) Present and pass the case presentation and interview (a panel of 3 examiners)
- 5) Register and pay annual subscription for CMC

Successfully Completed the CMC Mentorship Program

Receiving Certificate

Receive CMC Membership and ISO20700 Certificate from IMCHK and ICMCI

Designation and Reciprocity



The CMC Designation can be used worldwide and CMC reciprocity offers to all ICMCI member countries.
e.g. Simon Chan BSc, MBA, CMC

CMC Logo on Business Name Cards

CMC Logo can be used on business name cards to distinguish you are an internationally recognized and certified management consultant.

Displaying CMC Certificate

CMC certificate can be posted in your office to signify your CMC professional status.

Using CMC Designation

CMC Designation can be used on letterheads, fax sheets, proposal templates, resumes, biographies, e-mail signatures, and professional profile to identify your CMC commitment and qualification.



ISO20700 Certificate & Logo

ISO20700 Certificate can be posted in your office to demonstrate your ISO 20700 training, and ISO20700 logo can be used on business name cards for individuals.



Membership Upgrading

CMC with 10 years' consulting experience and has contribution to IMCHK or the consulting industry may be invited to upgrade to fellowship status of IMCHK. Fellows can use the FCMC, or FIMC, CMC designation.

ICMCI Academic Fellow

IMCHK will nominate distinct CMCs who are taking research and / or teaching of internal or external management consulting at a publicly accredited university to be elected Academic Fellows of ICMCI. ICMCI Academic Fellows can use the CMC-AF designation worldwide.



Enquiry: IMCHK Administration e-mail adminsec@imchk.com.hk, Phone +852 2865 2108



IMCHK Council Members

(2018 ~ 2020)

President:

Mr. Daniel Chan

Vice President:

Mr. Philip Wai

Honorary Secretary:

Dr. Samson Ma

Honorary Treasurer:

Ms. Ridy Suen

Past President:

Mr. Alvin Wong

Council Members:

Mr. Antony Yip,

Mr. Share Tai Ki

Mr. Barkis Ip

Mr. Wayne Yau

Mr. Anthony Cheng

Mr. Patrick Wong

Ms. Ada Wong

Honorary Auditor

(non-Council Member)

Mr. Raymond Hui

Professional Training



ISO 20700, A Standard for Outstanding Practices (2-hour talk for introduction), 2 CPD units

Introduction about ISO 20700 (Understand client's expectation to the consultants & service providers), 13 Feb 2020 (Thursday) 3:30 - 5:30 pm



ISO 20700 Training for Consultancy & Service Providers (1 Day Training) , 7 CPD units

Providing ISO 20700 training and certification to consultants or service providers (Enhance service quality & build trust with clients), 1 day (Saturday), 29 Feb 2020 (Saturday) 9:00am - 5:00pm



Executive Certificate in Change Management in the Digital Transformation Era, 35 CPD hours

Equipping knowledge to adopt digital economy and transformation, Understanding concepts, theories and approaches of change management in Digital World, Acquiring skills and tools for leading, managing and presenting in business innovation.

5 days (on Saturday), The 1st training section start on 15 Feb 2020 (Sat)

Institute of Management Consultants Hong Kong

Visit to IMCHK website at www.imchk.com.hk

