BCS Practitioner Certificate in Consultancy Syllabus

Version 3.2
December 2016

This professional certification is not regulated by the following United Kingdom Regulators - Ofqual, Qualification in Wales, CCEA or SQA

Change History

Any changes made to the syllabus shall be clearly documented with a change history log. This shall include the latest version number, date of the amendment and changes made. The purpose is to identify quickly what changes have been made.

Version Number	Changes Made
Version 3.2	Strapline regarding regulated statement has been added
Version 3.1 March 2015	Updated language requirements for extra time and use of dictionaries. Standardised the trainer requirements
Version 3.0 January 2014	Updated the syllabus to reflect the changes in the IS Consultancy scheme. The written and oral assessments as now separate independent examinations. The syllabus is for the practitioner consultancy exam only and not the international diploma in Consultancy, this has a separate syllabus.
Version 2.4 October 2013	Updated trainer requirements to include minimum experience.
Version 2.3 December 2012	Removed reference to principal question as is no longer applicable. Pass mark is 50%.
Version 2.2 July 2011	Updated with BCS logo and new strapline. Incorporated the reading list.
Version 2.1 April 2011	Updated document in accordance with BCS house style. No changes have been made to the technical content.

Contents

Introduction

This certificate brings together the important consultancy skills, practices and techniques that a professional consultant needs to employ. It is aimed at those who have well developed technical or business skills and need to operate in a consultative role to in order to provide expert advice and guidance on technical and business situations to internal and external clients.

Objectives

Holders of the BCS Practitioner Certificate in Consultancy should be able to:

- Define the role of the consultant and identify different consultancy models
- Appreciate and describe client issues and their business context
- Navigate the political landscape that a consultant operates
- Define the generic consultancy assignment life cycle
- Plan and manage client relationships over the consultancy life cycle
- Scope, propose and contract consultancy assignments
- Structure, plan and control consultancy assignments
- Deal with difficult client issues
- Apply a range of best practice consultancy techniques
- Appreciate different personalities and respond appropriately to client behaviours
- Problem solve and communication clearly and consistently
- Take responsibility for personal time management
- Demonstrate interpersonal skills specific to consultants
- Understand the importance of innovative and creative thinking
- Apply quality control and measurement within consultancy assignments

Course Duration and Format

Candidates can study for this certificate in two ways: by attending training courses provided by Accredited Training Organisations or by self-study. An accredited training course will require a minimum of 35 hours of lecture and practical work including a case study assignment which should represent 30 – 40% of the total course content.

The course can be delivered a number of different ways from traditional class-room based training to online e-learning.

Eligibility for the Examination

There are no specific pre-requisites for entry to the examination; however, candidates should possess the appropriate level of knowledge to fulfill the objectives shown above.   All candidates are strongly advised to book onto accredited training courses in order to ensure that they are sufficiently prepared for the rigour of the examination.

For direct entry candidates (not taking the course) it is recommended they have a minimum of 3 years consultancy practice experience or recognised qualifications in the discipline before sitting the examination.

Duration and Format of the Examination

The format for the examination is a two hour written (closed book) examination based on a business scenario with 15 minutes reading time.

The examination paper will contain a scenario from which candidates will be required to suggest responses and to justify the choices made to deal with a range of situations. The pass mark for the examination is 50%.

Additional time for candidates requiring Reasonable Adjustments

Candidates may request additional time if they require reasonable adjustments. Please refer to the reasonable adjustments policy for detailed information on how and when to apply.

Additional time for candidates whose native language is not that of the exam

If the examination is taken in a language that is not the candidate's native / official language then they are entitled to 25% extra time (15 minutes).

If the examination is taken in a language that is not the candidate's native / official language then they are entitled to use their own **paper** language dictionary (whose purpose is translation between the examination language and another national language) during the examination. Electronic versions of dictionaries will **not** be allowed into the examination room.

Guidance for Accredited Training Organisations

Each major subject heading in this syllabus is assigned an allocated time. The purpose of this is two-fold: first, to give both guidance on the relative proportion of time to be allocated to each section of an accredited course and an approximate minimum time for the teaching of each section; second, to guide the proportion of questions in the exam.

The case study will cover all the major elements of the syllabus. It will enable candidates to demonstrate their abilities in using practical techniques to produce specified deliverables. The scenario for the case study project assignment will provide sufficient scope for all the deliverables across the full consultancy assignment lifecycle.

The total time specified is a minimum of 35 hours of lecture and practical work including a case study assignment which should represent 30 – 40% of the total course content.

It is recommended that accredited courses leading to the certificate use role play and simulation to enable candidates to gain practical experience of employing key consultancy skills to deal with common situations that arise in real consultancy practice. It is recommended that role play and simulation be used to reinforce learning wherever possible within the overall course content.

Accredited Training Organisations may choose to extend the duration of the course and spend more time than is indicated and candidates may spend more time again in reading and research.

The course can be delivered a number of different ways from traditional class-room based training to online e-learning.

Excerpts from BCS Books

ATOs may include excerpts from BCS books in the course materials. If you wish to use excerpts from the books you will need a license from BCS to do this. If you are interested in taking out a licence to use BCS published material you should contact the Head of Publishing at BCS outlining the material you wish to copy and the use to which it will be put.

Syllabus

1. Overview and principles of consultancy (10%)

1.1. The structure and drivers of the IT/IS industry
1.2. The role of the consultant
1.3. Competencies of consultants
1.4. Consultancy models: expert, doctor/patient, collaborative/process
1.5. Considerations for the external consultant, internal consultant and sole practitioner
1.6. Managing change

2. Conducting a consultancy assignment – life cycle (15%)

2.1. The life cycle of a consultancy assignment
2.2. Gaining entry
2.3. Contracting and assignment initiation
2.4. Identification of problems and business needs
2.5. Diagnosis and solution definition
2.6. Solution appraisal and evaluation
2.7. Implementation and taking action
2.8. Closure and review

3. Conducting a consultancy assignment – tools and techniques (25%)

3.1. Consulting services portfolio
3.2. Qualification of opportunities using MANDACT
3.3. Terms of Reference
3.4. Business environment analysis
3.5. Root cause analysis and creative problem solving
3.6. Investigation techniques and data collection
3.7. Generating options
3.8. Implementation and taking action
3.9. Disengaging and expansion
3.10. Withdrawal from the assignment
3.11. Evaluation, follow up and business development

4. Managing relationships (25%)

4.1. Management of client relationships
4.2. Building rapport
4.3. Handling client meetings
4.4. Client behaviours and objectives
4.5. Assessment of readiness for change

4.6. Proposals and bids

4.7. Contracts and IPR

4.8. Influencing and negotiation

4.9. Working in teams

4.10.Team management and delegation

4.11.Management of expectations

4.12.Conflict management

4.13.Motivation and continuous professional development of the consultant

4.14.Selling of consultancy services

4.15.Issues in the use of consultants

5. Managing consultancy assignments (25%)

5.1. Scoping of assignments and projects

5.2. Project planning and project management principles

5.3. Progress monitoring, completion and handover

5.4. Communications and reviews

5.5. Quality management systems

5.6. Risk management

5.7. Change control

5.8. Legislation, ethics and professional standards

5.9. Financial management

5.10.The economics of consulting

5.11.Transferring experience to the client

5.12.Benefits management

Levels of Knowledge / SFIA Levels

This course will provide candidates with the levels of difficulty / knowledge skill highlighted within the following table, enabling them to develop the skills to operate at the levels of responsibility indicated.

The levels of knowledge and SFIA levels are explained in on the website www.bcs.org/levels

Level	Levels of Knowledge	Levels of Skill and Responsibility (SFIA)
K7		Set strategy, inspire and mobilise
K6	Evaluate	Initiate and influence
K5	Synthesise	Ensure and advise
K4	Analyse	Enable
K3	Apply	Apply
K2	Understand	Assist
K1	Remember	Follow

Format of the Examination

Type	Written closed book examination based on a business scenarios
Duration	2 hours preceded by 15 minutes reading time. Candidates are entitled to an additional 30 minutes if they are sitting an examination in a language that is not their native/official language as well as the use of a paper dictionary.
Pre-requisites	None
Supervised / Invigilated	Yes
Open Book	No
Pass Mark	50%
Distinction Mark	None
Delivery	Paper based examination

Trainer Criteria

Trainer Criteria	• Hold the Practitioner Certificate in Consultancy • Have 10 days training experience or hold a trainer the trainer qualification • Have a minimum of 3 years practical experience in IS Consultancy

Classroom Size

Trainer to candidate ratio	1:16

Recommended Reading List

General Consulting Texts

Title: The Trusted Advisor
Author: David Maister, Charles Green, Robert Gallford
Publisher: Free Press (Simon and Schuster)
Publication Date: 2002
ISBN: 978-0743207768

Description: A detailed but easily understood primer about best practices in the management of the consultant/client relationship. Each chapter ends with comprehensive check lists of points covered for use in practice.

Title: Practical Management Consultancy
Author: Calvert Markham
Publisher: Chartered Institute of Accountants
Publication Date: 2003 (4th Edition)
ISBN: 1853557277

Description: Practical treatment on how to operate as a consultant. Useful hints and suggestions on every aspect of consulting assignments. Strongly recommended.

Managing Risk

Title: Breakthrough Technology Project Management
Author: Bennet Lientz and Kathryn Rea
Publisher: Academic Press
Publication Date: 1999
ISBN: 0124499708

Description: Compact but comprehensive text. Emphasis on risk of failure is particularly helpful. Also contains IS case studies to illustrate main points. Strongly recommended.

Management of Software Development

Title: The Mythical Man Month - essays on software engineering
Author: Frederick Brooks
Publisher: Addison Wesley
Publication Date: 1995 (2nd Edition)
ISBN: 978-0201835953

Description: A series of essays about the planning, programming and management of processes involved in the development of large scale software projects. Extensive and useful bibliographies for each essay. Well written and interesting to read.

Miscellaneous

Title: Information, Systems and Information Systems – Making Sense of the Field
Author: Peter Checkland and Sue Holwell
Publisher: John Wiley & Sons
Publication Date: 1998
ISBN: 0471958204

Description: Readable text on the concepts which both distinguish and bring together the elements of information systems. Excellent bibliography and subject index.

Definition of Terminology

Term	Writing the Question
Describe	The word describe can be used on its own or qualified in many ways e.g. describe how, describe when etc.
Explain	Very similar to describe but the emphasis here is to elicit specific points raised.
Discuss	This usually requires a candidate to provide a balanced view of a topic. This may include, where appropriate, the benefits and drawbacks of a particular idea.
Compare	Need to describe those areas where the two processes are similar in objectives, techniques etc.
Compare and Contrast	Need to cover both similarities and differences – see the separate terms for examples of each.
Define	Here a precise definition is required. A full and descriptive definition which shows the marker that a candidate fully understands the term is necessary to be awarded full marks.
Contrast	Need to describe those areas where the two processes are different, i.e. in scale, impact and timescales
Justify	Candidates will need to set out the reasoning behind a particular view. This would normally include a description of benefits that may result, the likely scenario if the action is not taken and the positive financial implications.
List	A simple numbered or bullet point list is needed.
List and Describe	More is needed here than a simple list. Each point will need to be expanded upon to include details of exactly what will be achieved, how this will come about and any other relevant details.
Outline	Similar to 'describe' but in overview form. This term is also often used where the markers know that a very full answer could be given if there were no time constraints, but where a high level – broad answer is sought in the limited time available. It can be better to cover a wide area in less detail than just a very narrow point or two in great depth.
Identify the benefits	The positive outcomes of a particular activity. For example to an individual or an organisation.
Problems	Problems are best broken down into cause and effect. Care should be exercised to identify which problems are being sought. Problems for implementing a process differ from problems of creating a process.