



CERTIFIED BUSINESS CONSULTANT

**CERTIFIED BUSINESS CONSULTANT (CBC)  
STUDY GUIDE**

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## **TABLE OF CONTENTS:**

Please use this guide to assist in preparation for your Certified Business Consultant (CBC) Certification examination.

The contents of this study guide are as follows:

- I.** An Overview of Business Training.com
- II.** Certified Business Consultant (CBC) Program Details and Timeline
- III.** Required Readings
- IV.** Certified Business Consultant (CBC) Exam Preparation
  - 1. Exam Composition
  - 2. Terms and Concepts to know
  - 3. Sample Questions
- V.** Book Summaries
- VI.** CBC Strategic Project Instructions
- VII.** Frequently Asked Questions

## **I. BUSINESS TRAINING:**

**BusinessTraining.com** is the leading online program for specialized niche business certification programs. The team behind BusinessTraining.com is comprised of industry experts in niches including online marketing, project management, public relations, consulting, and many more.

This experience, combined with our advisory board's expertise in online education and training, is what makes it possible to provide the training and certification programs found on our website.

BusinessTraining.com is part of the G.T.C. Institute, a global training and certification organization that has provided practical industry-specific certification to over 1,000 clients from the United States, Europe, and more than 30 other countries around the world.

We provide high value training programs that provide function knowledge on very specific business topics such as public relations, online marketing, project management, international business, and consulting.

**BusinessTraining.com's Mission:** To provide professionals with high impact business training and certifications in niche subject areas that are functional and immediately beneficial.

**BusinessTraining.com** helps you to:

- Quickly gain specialized knowledge in highly valuable business niches.
- Enhance your credibility, resume, and overall value in the marketplace.
- Complete our training programs in 5 months from anywhere in the world.

Our programs accept participants year-round and are flexible to work with your current work schedule and academic constraints. You can complete one of our programs in 2 months or 2 years; the choice is yours.

## **II. CBC DETAILS AND TIMELINE:**

### **PROGRAM DETAILS:**

The **Certified Business Consultant (CBC)** certification program is unique in that it is modeled after many online courses offered at Ivy League institutions today, offering more value for a more cost-effective program. The CBC Program is a self-study program that includes educational multimedia resources in video form, a study guide, required readings, and a flexible online examination process, accessible around the world.

The online exam is structured so that in order to complete the exam within the 2-hour time frame one must read through all of the assigned materials and conceptually understand the majority of the material to score well enough to pass the exam.

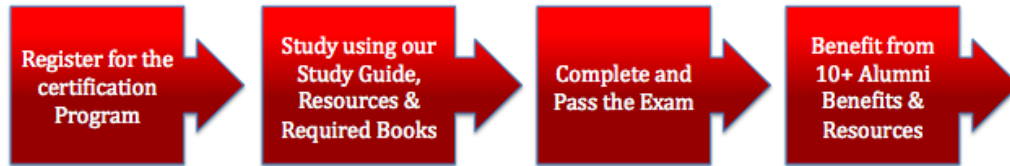
Our goal is to offer the most challenging program in the industry while also providing all of the learning tools possible to ensure participants get the most out of the experience. By testing the knowledge depth and comprehension from the materials digested, the CBC certification prepares individuals for successful, real-world application.

The Certified Business Consultant (CBC) program is sponsored by the GTC Institute and offered by BusinessTraining.com. This certification program is designed to show and certify that you have gained an in-depth understanding and high-level, specialized knowledge.

In addition to the benefits of gained knowledge, growing industry recognition, more knowledgeable career choices, and networking, our organization is also developing additional resources for CBC Participants. This includes video and MP3 recordings on Q&A or strategies and tactics, webinars, access to interviews with

internet marketing professionals who have more than 10 years of experience in the industry, among many more benefits.

### 4 STEP CERTIFICATION PROCESS



#### TIMELINE & EXAMINATION DATES:

Programs are offered through open enrollment, making our programs 100% flexible with your current work or academic schedule. After joining you may select an examination date that works well for you from the following dates we offer annually: January 10<sup>th</sup>, April 10<sup>th</sup>, July 10<sup>th</sup>, and October 10<sup>th</sup>.

BusinessTraining.com exams are administered 100% online. When you have completed the strategic project (outlined later in this study guide), please follow the project submission instructions. Once you have submitted your completed project, you are welcome to schedule your exam date.

**Please note that your exam date request must be received at least 3 weeks before the exam date.** For example, if you would like to sit for the January 10<sup>th</sup> exam, we would need to receive your request no later than December 20<sup>th</sup>.

#### To register for an examination date:

- 1.) Email your completed CBC project (*explained in detail in this study guide*).
- 2.) Include your desired exam date in the email with your completed project.

#### LEARNING OBJECTIVES OF THE CBC:

1. Core Business Consulting Fundamentals & Best Practices
2. Fundamentals of Structuring Consulting Assignments
3. Consulting Delivery Models, Client Retention, Service Line Management & Branding
4. Ethical Considerations and Guidelines

#### BENEFITS OF THE CBC:

- Add the Certified Business Consultant (CBC) to your resume, business cards, client proposals, and consulting firm's website showing clients that you have invested in your own education and use of best practices within your delivery to them
- Speak the business language - Earning the Certified Business Consultant (CBC) Designation assures that you can attend conferences, interviews and other networking events while being able to contribute to conversations and understand discussions about current events or trends within the consulting industry. Our program will help you to understand the terms and implement the tactics and tools of leading business consulting professionals
- Advance your business or career by raising your level of business consulting knowledge and increase your ability to work quickly and effectively.
- Exclusive Access to tools and multimedia training resources found online within the Certified Business Consultant (CBC) Program

- Gain valuable insight into business consulting delivery models, best practices processes, client management techniques and methods you can employ starting today without the need of a costly seminar or conference

**III. Required Readings:**

- 1) Flawless Consulting: A Guide to Getting Your Expertise Used by Peter Block ISBN# 0-7879-4803-9
- 2) The McKinsey Engagement: A Powerful Toolkit For More Efficient & Effective Team Problem Solving by Paul N. Friga, PH.D. ISBN# 978-0-07-149741-1

**IV. CBC Exam Preparation**

**1) Exam Composition:**

There are a total of 100 points available to earn for the exam, 80 of which can be earned from the multiple choice or true/ false questions that are worth 2 points each, and 20 of which can be earned from 2 short answer questions that are worth 10 points each. Please see below for the composition and distribution of the points in-depth.

<b><u>Topics and Weights</u></b>	
The McKinsey Engagement	25 Multiple Choice Questions
Flawless Consulting	35 Multiple Choice Questions
Business Training.com Video Modules	20 Multiple Choice Questions
Conceptual Ideas & Best Practices	2 Essays

You will have 2 hours to complete the exam. Those who have not made the effort to read the materials will have a hard time completing the exam within the allotted time, but for participants who have read the required readings and watched the video modules 2 hours is typically more than enough time to answer all of the questions.

**2) Terms and Concepts to Know:**

Below, please find the terms and concepts that you should be able to define after having read the required readings.

Please define the terms from the required readings and videos rather than a dictionary. You will be tested on the definitions that authors have provided.

- Five Phases of Consulting Projects
- Being Authentic
- Triangular and Rectangular Contracting
- Consulting
- Contracting
- Line Managers
- Internal Consultants
- External Consultants
- Consulting Contracts
- Feedback Meetings

- Consulting Ethics
- Mutual Consent
- Valid Consideration
- Confidentiality
- Contracting Meeting
- Social contracts
- Good Faith
- Funneling data
- Talk
- Evaluate
- Assist
- Organize
- Frame
- Collect
- Understand
- Synthesize
- Story Telling
- What is efficiency? (Consulting Definition)
- What is effectiveness? (Consulting Definition)
- Issue Trees
- Hypotheses
- Deliverables
- Personal Growth Objective
- Ownership
- Accountability
- Myers-Briggs Type Indicator (MBTI)
- DISC: Dominance, influence, steadiness, and compliance
- Big Five: openness, conscientiousness, extraversion, agreeableness, and neuroticism (OCEAN)
- Strengths Finder
- Waterfall Charts
- Era Charts
- Flowcharts
- Gantt Charts
- Primary Data
- Secondary Data
- Buy-In

**3) Sample Questions:** (Answers below.)

1) *The #1 question that Paul Friga suggests your team should be asking yourselves over and over while trying to pull meaning from data is?*

- A) Why did this happen?
- B) So what?
- C) What is the root cause?
- D) What does this mean to the client?

2) *Which of the following is not one of the Big Five or OCEAN personality profiling components?*

- A) Openness
- B) Extraversion
- C) Efficiency
- D) Agreeableness

3) *While it is important to keep team members on your consulting project motivated you should focus 95%+ of your energy on the clients direct needs and immediate challenges and not on personal self development or growth objectives.*

- A) True
- B) False
- C) Most organizations and people stop at good because that is enough; there is not much pressure many times to become truly great, so many never reach that level.
- D) He is referring to how good companies often beat out companies who are great.

4) *Funneling Data means:*

- A) Getting data directly from your web analytics or IT department
- B) Requires the construction of consulting procedures which if followed by your team should produce

consistent high quality data for the client.

C) Finding consistent sources of data that can be funneled using technology and automated systems

D) Reducing data to a manageable number of items so feedback provided to clients is practical and actionable.

5) *While paying attention to client's feelings may sound nice, consultants get paid to bring results and implementation plans so Peter Block would suggest spending at least 90% of your energy on the tangible deliverables you have been hired to produce for your client.*

A) True

B) False

6) According to Peter Block's guide to navigating contracting meetings, the first step is:

A) Personal Acknowledgement

B) Research

C) Define consultant wants and offers

D) Communicate understanding of the problem

**Answers:**

1) B

2) C

3) B

4) D

5) B

6) A

## V. BOOK SUMMARIES:

### **Flawless Consulting: A Guide to Getting Your Expertise Used by Peter Block**

Flawless consulting was selected as a required reading for the Certified Business Consultant (CBC) program because it contains timeless insights, advice, case studies, and best practices that consultants can use to become more valuable to their clients and more successful in their career or business. This is a book that a few of our own team members have used as a reference while growing a consulting firm or working inside of one. This is how we know first hand that this is not just good advice, but practical advice that can be put into practice very quickly.

*Within this book we require the appendix and all of the chapters except for chapter #10, #11, #12, and #19.*

**Chapter 1:** This chapter provides an overview of what a consultant is and does and within this chapter a consultant is defined as being "a person in a position to have some influence over an individual, a group, or an organization, but has no client power to make changes or implement programs." This chapter also defines what a manager and line manager is and how these two roles are entirely different from one another. Within this part of the book Peter Block discusses the three types of skills needed in consultation. These are technical skills, interpersonal skills, and consulting skills, you should study and know these for the examination. It is important to know the five phases of consulting from this chapter as well, this material may show up on the examination.

**Chapter 2:** This second chapter discusses the importance of the relationship and feelings of your client and being sensitive to those while trying to tackle objective problems or challenges. Many times the interpersonal part of the consulting equation is overlooked or undervalued. Peter Block breaks this part of the business up into areas he labels responsibility, feelings, trust, and your own needs. It is important to read this whole chapter to get a good understanding of the assumptions that the author makes throughout the rest of the book. This chapter also discusses various roles that consultants play and these are important to know for the examination as well.

**Chapter 3:** Chapter 3 talks about the direct issue of being a great consultant by paying attention to both being authentic with the client as well as completing the consulting phase you are currently in. This chapter provides a very detailed analysis of different phases of the consulting process and breaks them down into parts. Try to gain a good understanding of these phases without worrying about trying to memorize every small detail about them. The end of this chapter touches on the subjects of getting results and being accountable for your work.

**Chapter 4:** This chapter discusses contracting, what it means to establish a contract and why contracts are useful. It also discusses mutual consent and valid consideration which are important points to understand completely if you are going to ever run your own consulting firm or become a partner or one who brings in new clients for your firm. This chapter provides a template which will help you structure a consulting contract if you need to write one or review and analyze a contract that someone may ask you to sign at some point. Make sure and review the final part of this chapter for a checklist of contract components as well as a list of ground rules for contracting in general.

**Chapter 5:** One of the hardest parts of consulting and contracting can be the meeting where the contract is discussed and decided. This chapter will help you navigate that process including preparing for the event, and negotiating during the meeting. Again, in this chapter don't so much

try to memorize names of steps to take, just try to develop a deep understanding of this process so you can integrate it with how you act and work within contracting meetings yourself. This is how you will get maximum value out of this program and required reading.

**Chapter 6:** This chapter provides solutions to some challenges which often come up in contracting. If you are already an experienced consultant you will surely recognize many if not all of these situations. This chapter covers low client motivation, endless negotiations, and other smaller "agonies" as Peter Block calls them. This chapter ends with a good real-life case study on how to move past some of these issues.

**Chapter 7:** Chapter 7 discusses internal consulting and how it is different from acting as an external consultant. To describe how some of the politics and business relationships work in these different areas Peter Block uses diagrams of triangles and rectangles. These are valuable explanations and they will help you understand what it means should you ever be offered an internal consulting job offer at one of your clients.

**Chapter 8:** This chapter is one of the top three most valuable chapters in this book because it helps you better understand common types of resistance or roadblocks that clients or someone at your client can put up to slow down your work. By analyzing these one-by-one and having solutions to each of them you can more readily move through your consulting career without having to figure out a solution to each of these challenges the hard way. In this chapter you really get to benefit from Peter Block's deep consulting experience by seeing how he has gotten past some of these issues.

**Chapter 9:** Really this chapter should be called Chapter 8 Part 2 as it continues on with the theme of dealing with resistance while consulting. This chapter is short and expands with some techniques both practical and psychological in dealing with challenges in working with consulting clients.

**Chapter 10:** This chapter is now required for this program

**Chapter 11:** This chapter is now required for this program

**Chapter 12:** This chapter is now required for this program

**Chapter 13:** Chapter 13 provides a framework for providing feedback to clients that you are consulting with. This chapter provides specific tips, numbered lists, and very specific Do's and Don'ts when it comes to providing your client with suggestions. There is some great advice early in this chapter to focus on highlighting ideas for the client that they can 1) have control over changing 2) are important to the client, and 3) leverage an existing commitment within the organization to take action on. This chapter covers some language to use while providing feedback and it also touches on the topic of confrontations with clients.

**Chapter 14:** Sometimes the way something is presented can be just as important as what is presented. This chapter is an extension of chapter 13 as it helps you understand exactly how to structure each part of the feedback meeting. Page 231 of the book provides a great step-by-step process to follow during these types of meetings while page 242 provides a checklist for when you are planning such a meeting.

**Chapter 15:** This chapter is about getting our consulting advice to actually be put into place, to spur action, and make changes at our consulting client's operations. As consultants we must lead

clients towards measuring implementation and making that more than just verbal commitments are made or our contribution to the organization could be marginalized.

**Chapter 16:** This chapter covers various strategies of engagement that you can use while consulting. It discusses how feelings help influence very important decisions in hiring you as a client, working with you efficiently during a project, or taking action after hearing your advice. Make sure and take note of the accountability and innovative engagement in five easy pieces sections of this chapter.

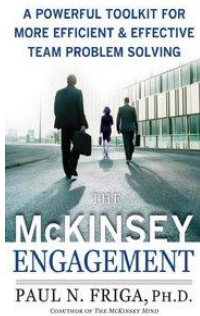
**Chapter 17:** Chapter 17 helps provide some tools for engagement, specifically providing 8 structures that you can use for engagement. This chapter is practical and useful for all types of consulting engagements. Be sure and take note of these different structures and the checklists found on pages 302 and 304.

**Chapter 18:** This chapter reviews some ethical considerations and delimas that are going to come up within your consulting career. You should know this entire chapter well for the examination as the ethical component of the Certified Business Consultant (CBC) program is very important to help raise industry standards related to ethics.

**Chapter 19:** This chapter is now required for this program

**Appendix:** This chapter provides a number of checklists, tools, and processes that you can use to improve your consulting skills and career. This chapter could be the most useful and practical as it helps turn much the book's advice into actions you can take to be a better consultant right now. Use this chapter to help yourself review material covered within other chapters.

## **The McKinsey Engagement: A Powerful Toolkit for More Efficient & Effective Team Problem Solving**



This book provides a powerful framework of principles, best practices, and methodologies to use while consulting. Paul N. Friga, PH.D. is the author of this book and he is arguable the most respected and well known book author in the business consulting space. This book along with the Flawless Consulting book are valuable to consume in combination with our video training modules on consulting as they all approach the topic from different perspectives.

Due to the brief nature of this text (under 200 pages), and easy to consume style of the book we have required this whole book as reading material for participants within this Certified Business Consultant (CBC) program.

**Introduction:** The introduction of this book provides a detailed overview for the structure within the rest of the text. Each chapter will be providing to you a concept, rules of engagement, operating tactics, stories from the field, and a case study as well. While reading this introduction you should know what TEAM FOCUS stands for and why it is important.

**Chapter 1:** This chapter is on "Talk." Within this chapter Paul Friga explains the three rules of Talk, communicate constantly, listen attentively, and separate issues from people. This chapter alone is so valuable in consulting that if you study it and read it several times over and internalize these insights you will drastically improve your ability to operate effectively as a business consultant.

**Chapter 2:** Chapter 2 is called "Evaluate." This chapter provides guidelines that are based on some key questions described on page 30 of this text. Paul Friga notes in this chapter that while evaluation is very valuable and feedback is a gift over-evaluation can sometimes have a negative effect on team members. You should know the meaning behind each of the three critical success factors for a good evaluation system from this chapter, which are openness, explicitness, and agreement. Also study the rules of engagement that are suggested and know how these relate to each other. As always focus more on gaining a practical and deep understanding of the material rather than memorize lists of definitions.

**Chapter 3:** Chapter 3 "Assist" is about aiding your team and project to ensure smooth sailing and successful completion of the consulting project. Paul Friga suggests that confusion over roles, lack of feedback, and overfocus on everyone's own assignments are the three key areas where issues tend to arise. So in turn to fight this the rest of the chapter suggests to leverage expertise on your team, provide adequate timely feedback, and to keep each team member accountable. The stories and case studies from this chapter are especially helpful.

**Chapter 4:** Chapter 4 "Motivate" is as you probably guessed all about how to motivate yourself and your team to perform more efficiently on your consulting projects. This is probably the most simple chapter within this whole book, some of this may seem like common sense. What is not common sense however is remember to and having systems in place that prompt consulting team managers to consistently take actions that keep the consulting team motivated. Remember, Michael Jordan was the greatest of all time by shooting jump shots so the fundamentals are critical to being a great business consultant.

**Chapter 5:** Chapter 5 "Frame" is in Paul Friga's opinion the most valuable chapter in this book. If you are going to read one chapter more times than another than consider this one to be it. To

integrate the techniques within this book make sure and read the rules of engagement but focus on the operating tactics and stories from the field which are a bit more practical and may help with your comprehensive of how this can be directly valuable to you as a business consultant.

**Chapter 6:** Chapter 6 "Organize" is about organizing our past analysis work to help make sure we are doing the right thing and doing it well. This chapter ties in with a few other chapters including Chapter 5 so makes sure that you are reading this book in sequential order and not skipping around. Much of this chapter is about presenting the story well so your ideas are not ignored.

**Chapter 7:** Chapter 7 "Collect" is a short chapter on how to collect valuable interviews, data, secondary data and the importance of tracking where each piece of data came from. If it was not so short we would not require this chapter as it is one of the less valuable within the book, but it does help strengthen the overall framework of the approach suggested in this book. You will probably be fine reading this chapter just once while completing this Certified Business Consultant (CBC) certification program.

**Chapter 8:** Chapter 8 "Understand" is about forming the highest quality insights possible for your clients. When going through data it can help to ask each other on your consulting team, "so what?" to try and dig into the meaning and insight behind the facts. This chapter like the others provides three rules that together can help you add more value to your clients. The difference of providing a great insight or not can mean being re-hired or passed over the next time your client is looking to hire a consultant.

**Chapter 9:** Chapter 9 "Synthesize" is about making sure that you have involved the client during the data collection, analysis, and feedback or presentation components of the project. This is done so that the clients reality, perspective, and constraints are reflected in your end suggestions and implementation plans. It is easy to provide a broad overview of your insights and findings but almost every client will then ask what your specific instructions are or implementation steps. You must have these ready and be proactive in suggesting in very practical ways how instant action can be taken to implement your suggestions.

## **VI. CERTIFIED BUSINESS CONSULTANT (CBC) STRATEGIC PROJECT:**

The **Certified Business Consultant (CBC)** Program requires participants to complete a Strategic Business Consulting Project in order to graduate from the program. This plan is worth 100 points and accounts for 50% of the total grade within the program. As such, non-submission of this strategic plan will result in an automatic failing grade for the CBC program.

**Once you have completed this project**, please send it and your request to take your desired exam date at least 3 weeks before the scheduled exam date. To schedule yourself for an exam date, this project must be received, completed, at least 3 weeks before the exam date. For example, to take the October 10<sup>th</sup> exam date, this project must be received (as well as a request to take the exam) no later than September 19<sup>th</sup>.

### **INSTRUCTIONS:**

This strategic project is going to attempt to directly apply what you have been learning within this program to your current business consulting business or career.

Your Assignment: You have been hired by ABC Marketing Consulting, Inc. to start a new division offering consulting services to mid-sized corporations. Your new division of the firm will now be offering a niche offering of identifying where the company's best ideas have come from, what products are selling most profitably, analyzing the competition in each industry they operate in and then identifying where the firm's strategic thrusts should be over the next 1, 3 and 5 years.

You have been put in charge of creating this division from the ground up. Based on what you have learned within this program please answer the following questions in less than 100-300 words each.

- 1) How do you plan on identifying which professionals you will be hiring to join your team? What exact objective measurements will you use and what long-term considerations do you make while putting these policies in place?
- 2) After you have hired a team of consultants, how will you manage them? What systems will you use, and what will you do and not do?
- 3) What is your plan for attracting new clients to your consulting firm? How will you generate new business?
- 4) What policies will you put in place to set ethical standards for how your team operates?
- 5) What do you believe are the five most important principles and best practices that if rigorously implemented will place your consulting division above all of your competitors? Without doing competitive industry research, which do you think are the most valuable consulting best practices that you will absolutely integrate into every consulting project you complete?

**Submit Your Answers:** Once you have answered these questions please check them over to make sure that your answers are complete and concise and then submit them to our team at [CBC@BusinessTraining.com](mailto:CBC@BusinessTraining.com) for review.

## **VII. FAQ (FREQUENTLY ASKED QUESTIONS):**

**Have more questions or need more information?** Please see our constantly updated FAQ (Frequently Asked Questions) section on the BusinessTraining.com website here at <http://BusinessTraining.com/FAQ.html>.

You can also get in touch with the BusinessTraining.com team over email at [Team@BusinessTraining.com](mailto:Team@BusinessTraining.com), by phone at 503.664.0678, and through our ClickAndChat tool, accessible from our homepage: <http://BusinessTraining.com>.

Thanks for joining BusinessTraining.com! Please let us know if you have any questions.

**-The BusinessTraining.com Team & G.T.C. Institute**