



CERTIFIED BUSINESS CONSULTANT

CERTIFIED BUSINESS CONSULTANT (CBC)

STUDY GUIDE

Sponsored by:



Business Training Institute

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

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I. BUSINESS TRAINING INSTITUTE:

The Business Training Institute is the leading online program for specialized niche business certification programs. The team behind the Business Training Institute is comprised of industry experts in niches including marketing, project management, sales, consulting, 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.

The Business Training has provided practical industry-specific certification to over 6,000 clients from the United States, Europe, and more than 75 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.

The Business Training Institute's Mission: To provide professionals with high impact business training and certifications in niche subject areas that are functional and immediately beneficial.

The Business Training Institute 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 as little as a single month or over a period of time; the choice is yours.

MASTER'S CERTIFICATE PROGRAMS: We offer several advanced Master's Certificates that require the completion of five programs from the Business Training Institute platform.

To learn more about these Master's Certificates and how to earn one, please see our website:
BusinessTraining.com/Masters-Certificate

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.

When you join the program you will get to access 35 video modules, 8 expert audio interviews, a practice examination, and list of required readings which you refer to in conjunction with this study guide and the syllabus.

The experts interviewed for this business consultant certification include:



Jerry Weinberg: Jerry is a teacher, author, and researcher on business consulting.

Jerry is a 50-year veteran in this industry and we are honored to have him complete this recorded audio interview with us.

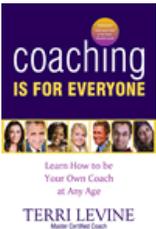


Malko Ebers: is the CEO of New York Business Consultants and on the Board of the New York City Peace Museum. His firm provides consulting for small and mid-sized companies which need help identifying new business opportunities, strategic planning, hiring the right people, and allocating the correct resources in order to

grow. Malko also helps clients with international business development as well.



Andrew Miller: is President of ACM Consulting, Inc. who is known as "The Procurement Guru." Andrew works with both public and private sector businesses in generating operational and financial improvements. He helps clients move faster and more efficiently and in this interview he shares some of the best practices that he has learned along the way. This audio recording was originally produced for another training program but since Andrew works as a consultant this can provide you with a good example of how one consultant is running their business.



Terri Levine: Terri is a business mentor, coach, and consultant. She focuses on working with small business consulting clients which range from startups to larger companies who are looking for new business and executive coaching/consulting help.

She has both corporate and business ownership experience, and she helps her clients with business management, personal, and organizational challenges and she has a Ph.D. in organizational behavior.



Steve Wintner: is owner and founder of Management Consulting Services (MSC). He has over 6 decades of experience as an executive at two architecture firms and owned his own firm in the industry.

He is now focused on providing management consulting services clients in the U.S.

Dave Turkin: Dave is President of Accessible Business Consultants, which is a boutique business consulting firm which serves small to medium sized businesses with expertise in one-on-one consulting.



Bruce Katcher: Bruce is President of Discovery Consulting Group and author of the book shown here to the left, the Insider's Guide to Building a Successful Consulting Practice.

Bruce has a PhD in Organizational Psychology and he has a background in teaching, consulting on employee opinion surveys and organizational behavior, and teaching others how to build their own consulting firms.

Eli David: Eli is a CPA, economist, and MBA graduate with extensive experience in business analysis, business planning, and consulting. Eli is a former auditor at a top accounting firm KPMG, and has also done consulting for BDO Consultants. Eli owns a consulting business and does work with startups and medium size business clients in several areas.



Certified Business Consultant (CBC) Video Modules

1. Top 4 Business Consultant Mistakes
2. The Verne Harnish Method of Positioning Your Consulting Firm
3. Leveraging Long Tail Keywords & SEO in Business Consulting
4. Leveraging Ken Wilber's Development Strategies for Consultants
5. Leveraging Interns For Your Consulting Business

6. Key Technologies and Software To Use in Business Consulting
7. In the Land of the Blind
8. Implementing Automated E-mail Follow Up Systems
9. How to Write an Industry Leading White Paper
10. How to Start Your Own Consulting Practice From Scratch
11. How to Manage Your Consulting Work Schedule Efficiently
12. How to Make More Money As a Business Consultant
13. How to Lock-In Long-Term Recurring Consulting Clients
14. How to Grow a Global Business Consulting Firm
15. How to Gain Speaking Engagements as a Business Consultant
16. How to Complete Request For Proposals (RFPs)
17. How to Create Powerful Webinars To Grow Your Consulting Business
18. How to Create New Products and Service Lines in Your Consulting Business
19. How to Automate Your Consulting Firm
20. How to Conduct Powerful Seminars to Grow Your Consulting Firm
21. How to Know What to Charge Your Clients
22. How to Attract Valuable Talent to Your Consulting Team
23. Growth and Future of the Business Consulting Industry
24. Using Ghostwriters to Grow Your Consulting Firm
25. Addicting Your Consulting Clients to Your Offering
26. Diversifying Your Consulting Business
27. Creating Your Consulting Client Avatar
28. Client Reporting for Consultants
29. The Angels & Demons Approach to Converting Consulting Clients
30. Leveraging the Power of Authority in Business Consulting
31. How to Get a Business Consulting Internship
32. Applying the Power of the Liking Principle in Business Consulting
33. Leveraging the Power of Social Proof in Business Consulting
34. Leveraging the Power of Commitment in Consulting
35. Leveraging the Power of Reciprocation in Consulting
36. Ways to Save Money While Operating a Business Consulting Firm
37. The Business Consulting Process

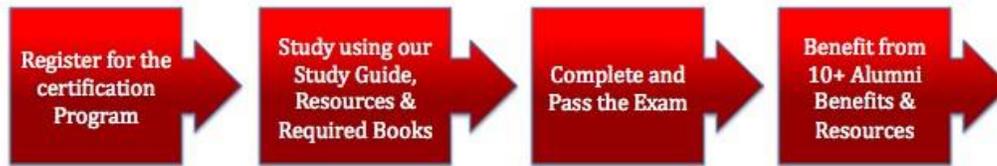
The online exam is structured so that in order to complete the exam within the 2-hour time frame one must read through all of the assigned materials and conceptually understand the majority of the material to score well enough to pass the exam.

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 offered by the Business Training Institute. 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. We offer exams on the 1st Wednesday of the new month.

The Business Training Institute exams are administered 100% online. **Please note that your exam date request must be received at least 2 weeks before the exam date.**

To register for an examination date:

- 1.) Email your desired exam date to support@businessstraining.com

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 1 point 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.

<u>Topics and Weights</u>	
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

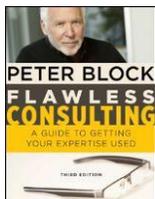
6) According to Peter Block's guide to navigating contracting meetings, the first step is:

- 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 not required for this program

Chapter 11: This chapter is not required for this program

Chapter 12: This chapter is not 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.

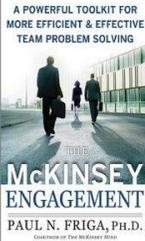
Chapter 17: Chapter 17 helps provide some tools for engagement, specifically providing 8 structures that you can use for engagement. This chapter is practical and useful for all types of consulting

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 dilemmas 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 not 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 over focus 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. FAQ (FREQUENTLY ASKED QUESTIONS):

Have more questions or need more information? Please see our constantly updated FAQ (Frequently Asked Questions) section on the Business Training Institute website here at BusinessTraining.com/FAQ

You can also get in touch with the Business Training Institute team over email at Team@BusinessTraining.com, by phone at (305)503-9050, and through our Click and Chat tool, accessible from our homepage: BusinessTraining.com.

To learn more about the Master's Certificates and how to earn one, please see our website:

BusinessTraining.com/Masters-Certificate

For more information and to register for this self-paced business consultant training and certification program, please visit our website at:

BusinessTraining.com/Business-Consultant

Thanks for joining the Business Training Institute! Please let us know if you have any questions.

-The Business Training Institute Team

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