
When Pam Yardis took over the chair of IMC in 1993, she also became a member of the CCO Board. She recognized immediately that any collegial feelings that had brought ACME and IMC together were not in evidence by that point, and the IMC representatives on the CCO Board decided to pull out of CCO.

IV.1. Jack Chapin Recalls the 1990’s

Sometimes a story is best told by those who were in the midst of it. Jack Chapin, National Chair from 1994-96, recounts the history of IMC from 1990 through 1998. While this does overlap with the CCO years in the previous chapter, it provides another perspective. Editorial additions are noted in parentheses.

“1990 As the decade of the nineties began, IMC continued to assist in the nurture and evolution of the Council of Consulting Organizations (CCO), smoothing out the remaining kinks left from merging with the Association of Management Consultants (AMC), and, as always, addressing ongoing cost concerns. Just a little over 20 years of age, IMC continued to focus on internal processes.

As a professional association, positioned in a growing, evolving, profitable, diverse, and unstructured profession, we continued to miss the mark in providing a voice and leadership for the profession. Our focus remained on our own organizational interests. Our national leaders who were able to devote time and energy to IMC were stretched by conflicting and higher priority requirements from their individual firms along with the continuing need to make money.

The 1990 National Conference was located in Newport Beach and was co-chaired by Vince Cali (Deloitte & Touche) and Edward Stone (The Dallas Marketing Group), both located in Dallas.


IMC recognized Bob Sabath of Chicago (A.T. Kearney, Inc. and National Chair 1986-1988) as a Fellow of the Institute (FCMC) and the Pacific Northwest Chapter again walked off with the “Outstanding Chapter in the Nation” award. The Greater Chicago Chapter gave them a run for their money and was awarded the “Most Improved Chapter” honors. Banners were presented to the presidents of each chapter representing their respective accomplishments.

1992 The 1992 National Conference was held in Seattle. That move from Florida to the Pacific Northwest symbolized the breadth of the profession and recognized the strength of the Pacific Northwest Chapter.
Chaired by Edward Stone of Dallas (The Dallas Marketing Group) and Tom Captain of Seattle (Deloitte & Touche), the 1992 Conference featured a speaker from Microsoft and ended with a memorable set of consultant interviews conducted by Somers White of Phoenix (Somers H. White Company). This was the first of several closing sessions at National Conferences in which Somers White closed the meeting.

Management consultants spend a great deal of time flying in airplanes, and an optional component of the Seattle meeting was a tour of the Boeing Airplane Company assembly plant in Everett, WA.

Many consultants reported that while they never feared flying prior to visiting the world’s largest assembly plant under one roof at Boeing, whatever fear they did have was totally gone, following that tour. It was quite memorable.

National Chair Vince Cali presided over the board meeting and updated all on the evolution of the CCO. It was hoped that a health care consulting association out of Washington DC would become the third group, joining IMC and ACME under the CCO banner. (It didn’t happen!) Our joint Executive Director, Ed Hendricks, reported on the status of ACME and future plans.

Bill Altier of Buckingham, PA (Princeton Associates, Inc.) and his three regional vice presidents addressed efforts on the chapter territory maps and geographic policy, while others continued work on the “Common Body of Knowledge”.

Budget shortfall concerns received a great deal of attention and all hoped that the new joint facility arrangements in New York with ACME and CCO would avoid any fiscal crises.

The Pacific Northwest chapter, winner of the “Outstanding Chapter in the Country” award for some six years in a row, was a fine host Chapter, setting an example that was followed for several years at National Conferences. It was announced that Chicago would be the site of IMC’s 25th Anniversary National Conference in 1993.

A young woman on Ed Hendricks’ staff named Wendy Benz was beginning to distinguish herself as an organization leader and contributor. Wendy evolved to work full-time for IMC and became our Executive Director. Ed remained the Executive Director of ACME. Bruce McGregor became the CCO Executive Director and required separate support staff.

The Western Region Confab, billed as “By Consultants, For Consultants,” long established as a Western offering in the fall of each year, meeting either in Las Vegas or Reno, was beginning to draw attendees from the Midwest and other points east. Each year several consultants from Canada also attended.

A dedicated committee, mainly from the Northern California Chapter centered in San Francisco, under the leadership of Dick Pinsker and Jim Carey, worked each year on Confab, the largest annual gathering of consultants in North America.
Jack Chapin, Bob Sabath and Terry Harris began meeting each month to plan the 25th Anniversary National Annual Conference to be held at the Intercontinental Hotel on Chicago’s Michigan Avenue the last few days of April 1993. Coming off of a very fine meeting in Seattle and in recognition of the 25th Anniversary, the group wanted the Chicago meeting to be the best of all.

1993

Jim Kennedy was invited to speak and give his 25-year perspective on the profession and IMC’s role in it. Past National officers and Executive Directors were invited to this special anniversary meeting and many attended. It was the best-attended national conference to date.

The initial reunion evening gathering of the 1993 Chicago meeting was held aboard a cruise ship on Lake Michigan. A very unusual and thick fog greeted the attendees that evening, and to this day, no one is quite sure if the boat ever left the mooring. Somers White interviewed Marsha Lewin.

Jim Kennedy produced a 30-page booklet that featured headlines and lead-in topics from his publication *Consultants News* covering the first 25 years of IMC (as he had done in 1988 in Coral Gables, FL for IMC’s 20 year anniversary). His speech was candid and not necessarily complimentary about IMC and our impact on the profession. It was clear that he felt strongly that IMC had yet to fulfill the promise of its founding after the initial 25 years.

ACME agreed to hold their national board meeting in Chicago concurrently with IMC’s 25th Anniversary meeting. A “first of its kind” joint leadership gathering of the two organizations met at the University Club in Chicago during the conference. It was an introductory, get acquainted gathering of the leaders of both associations, since we were now sharing New York headquarters space.

Vince Cali passed the gavel of national leadership to Pamela Yardis of Greenwich (Chestnut Hill Consulting Group, Inc.) as she became the first woman National Chair of IMC.

A University Business School “Consulting Club Challenge” was held concurrently with the National Conference. Wharton, Michigan and Chicago were finalists. A $3,000 check was awarded to the winner. The Board approved a new “student membership” category. It was hoped that the “Consulting Club Challenge” would become a “leadership event” at subsequent conferences, but such was not to be.

A Motorola executive was the kick-off speaker. He got the conference off to a fast pace. At the closing banquet, Pam Yardis responded to Jim Kennedy’s remarks and asked him to look again at IMC next year.

The Pamela Yardis era (1993-1994) was initiated by a critical review of CCO, its cost to IMC and what we were getting from it. The conclusion was that the promise of CCO has not been fulfilled, the financial burden on IMC was a great one, and IMC needed to get out from under these obligations. While accomplishing this objective, Pam contracted a rare form of “lime disease” carried by deer ticks. Pam and her Board also devised and approved the ‘IMC Vision and Mission’, shown in Appendix IV, which is very similar to that issued in 1968.
Our Executive Director Wendy Benz became pregnant in 1993. She chose to be a stay-at-home mom after giving birth to her daughter. Wendy resigned IMC in January of 1994.

1994 While attempting to cope with the savage impact that “lime disease” was taking on her physically as well as mentally, Pam named a temporary Executive Director and kept on going. Cynthia Lyons, a colleague of Pam Yardis, became our temporary Executive Director.

A national search for a new Executive Director under committee chair Ellen Zimmerman of New York (Naremco Services, Inc.) was initiated. Our National Chair, Pam, was unable to attend the 1994 Annual National Conference in Washington DC because of her illness.

Pam negotiated the disengagement and separation of IMC from both ACME and CCO. CCO remained as a legal shell entity, co-chaired by the current National Chairs of IMC and ACME.

The National Board of CCO was dissolved and the two national co-chairs (IMC and ACME) thereafter convened an annual meeting by conference call (to satisfy by-law requirements). Ultimately, CCO was folded into IMC.

(Concerned about the slow growth in membership, Prescott Behn of the New England Chapter submits a memo analyzing the problem. Whether this memo, submitted by Stew Washburn, was brought to the national Board level for action is unknown, but the memo is included here because many of the issues he raises have been bothersome throughout IMC’s history. Here is what Behn said in 1994:

‘IMC bases its membership growth on a number of assumptions which, because they are not working, need to be challenged. I suggest that the following need re-thinking:

1. **IMC is not a marketing organization.** Consulting speaks for itself and does not need promotion. PR is not important enough to justify a significant budget.
   - The lack of market knowledge of IMC and certification is the main deterrent to membership growth, I believe, based on the comments of those who have opted not to join.

2. **Candidates will be willing to join and members to go for certification anyway.** A slow and difficult application process, and the lack of value in membership or certification won’t matter.
   - Has this worked? A few join, but many don’t. Astute consultants look at IMC and ask “What do I have to do and what’s in it for me?” Then they decide to attend meetings without joining.

3. **New-members processing cannot be delegated to the chapters beyond what is already being done.** Chapter performance proves this by its haphazard execution of even simple tasks.
I believe we get ineffective performance at the chapter level precisely because the jobs at that level have so little importance (or in the case of PR, little effectiveness beyond announcing the next meeting). How about some decentralization and job enrichment? Let’s put our budget into things we can’t do for ourselves in the chapters….

4. The application form and the oral interview process have been optimized and shouldn’t be changed.
   Asking candidates to spell out all cases on paper leaves little to discuss in the interviews. Simply by having the candidates write only a short paragraph about four of their cases leaves plenty of room for probing by interviewers and for seeing how candidates think on their feet.

5. Our early decision not to emulate AICPA by certifying through state and federal government was smart. Our freedom from government control pays off in many ways.
   Really? What are those controls and payoffs? How about an optional licensing arrangement? Let’s examine this."

The 1994 National Conference meeting in Washington DC at the Marriott Hotel came off very well in spite of having a temporary Executive Director, (the National Chair being absent due to her illness) and the conference chair, Ted Moline (Janus Consulting, Inc.) suffering a heart attack a few months prior to the conference.

The National Board approved the “Liaison Committee for Education in Consultancy”, and the formalization of a two-year relationship with the National Bureau (Vito Tanzi’s “for profit” consultants association, NBCC, located in San Diego). The stated purpose of this relationship was to promote the teaching of management consulting in the core curriculum of colleges and universities. It was felt that it was better to try to meet this group on some common ground than to continue to ignore the reality of what many considered to be a splinter organization.

Within a month following the Washington DC meeting in May of 1994, Pamela Yardis resigned as National Chair. The lime disease had taken its toll on her and she felt unable to continue in her role as national leader of IMC. The Board asked Jack Chapin of Chicago (Coopers & Lybrand LLP) to become the thirteenth National Chair of IMC, the third from Coopers & Lybrand.

Jack’s first action was to meet with Ellen Zimmerman and the search committee. Jack and the committee interviewed the three finalists for Executive Director and unanimously agreed on Claire Rosenzweig CAE. Claire became IMC’s Executive Director starting in the summer of 1994.

The new IMC National Chair initiated a personal newsletter – for special contact with three groups of IMC members. Following each meeting of the National Board, a personalized newsletter was sent to all Fellows, past National Chairs and Chapter Presidents. His objective was closer involvement in IMC by these leaders.
Jack asked Edward Stone to help him identify potential candidates for the National Board. Among others, Edward subsequently brought Dick Pinsker to the National Board. Dick headed up all national meetings during his time on the Board (as he did at AMC with Graceanne Chally). Confab was to continue as a “nuts and bolts” effort and the National Conference was to focus on strategy consulting and the bigger picture. Jack also began a personal Chapter visitation program to any chapter that was interested.

While on the West Coast on business and to visit with the Los Angeles Chapter, Jack initiated a meeting with Vito Tanzi that took place over lunch at Los Angeles Airport. His purpose was to get acquainted and to see if there was enough common ground to discuss some form of unification or merger between IMC and the National Bureau. Vito agreed to think about it and respond in writing.

Vito’s proposal for the merger of IMC with the National Bureau came via a confidential letter and contained requirements that the national office of the combined organizations be in San Diego, Vito would become the National Executive Director, and he would have a five year renewable contract for the joint organization.

Jack thanked Vito and advised him that his terms were too harsh for IMC to realistically consider. Vito’s letter was passed on to the next National Chair.

1995 The 1995 IMC Annual National Conference was chaired by Bob Thomson and met in St. Louis under the Arch at the Marriott Riverfront Hotel. Special guest speakers included a staff reporter on management consulting from Business Week and Lynn Haight, National Chair of IMC Canada.

Jim Kennedy was awarded the first IMC Lifetime Achievement Award, Marsha Lewin of Los Angeles (Marsha D. Lewin Associates, Inc.) and Pamela Yardis of Greenwich (Chestnut Hill Consulting Group, Inc.) were recognized as IMC’s first female Fellows.

With Jim Kennedy and Lynn Haight, the Canadian IMC National Chair and two new Fellows, the Saturday night Awards Banquet was a special evening. The entire event was carefully orchestrated by Claire Rosenzweig, our Executive Director.

1996 With little accomplished in the joint effort with the National Bureau to promote the teaching of management consulting in business schools and universities, and believing that there was little common ground for the IMC and the National Bureau to work together, Jack advised Vito Tanzi that IMC would not be renewing the two-year agreement when it expired in June, 1996.

Following the success of the St. Louis National Conference in 1995, the Kansas City Chapter served as the host chapter of the 1996 IMC Annual National Conference with Dale Keith serving as conference chair.

National Chair Jack Chapin had reached the mandatory retirement age for Partners at Coopers & Lybrand LLP and was within six months of his first
retirement. He was pleased to pass the gavel to Chair Elect Steve Savia of Palo Alto (The Sage Group).

At this meeting Bob Kahn of Lafayette, CA (Robert H. Kahn & Associates) and Tom Lawrence of Kansas City (Lawrence-Leiter and Company, IMC National Chair 1978-1980) received IMC Lifetime Achievement Awards.

E. Michael Shays of Burlingame, CA (EMS Consultants, IMC National Chair 1983-1985 and ICMCI founder) announced four new Fellows in the same manner as the initial group of Fellows was named in 1988 by Bob Sabath. Michael selected a special attribute of each and built each individual’s announcement around that special attribute.

Fellows recognized that evening in Kansas City by Michael and IMC included Jack Chapin of Chicago (Coopers & Lybrand LLP), Mickey Rosenau of Bellaire, TX (Rosenau Consulting Company), Edward Stone of Dallas (The Dallas Marketing Group), and Dick Ten Eyck of Denver (Ten Eyck Associates).

The annual audit by our independent outside auditors for the year ending December 31, 1996 indicated that IMC had completed its second consecutive year with a positive cash flow from operations and had a membership exceeding the 3000 mark. IMC was in good shape from every consideration – programs, operations, and finances. Claire Rosenzweig and her New York headquarters staff of three knew what the job was about and were doing it well.

Marvin Bower, founder of IMC and our first National Chair sent Jack Chapin a handwritten note expressing his appreciation for having been kept informed for two years and for the state of the institute.

The first crack in the IMC armor came with Claire’s resignation late in 1996. She was hired away by another professional association headquartered in New York to lead a staff of twelve. Again, as was done in 1994 when Wendy Benz resigned as Executive Director, a committee was formed and a national search began. This time the committee was chaired by Dick Pinsker.

1997

With the active involvement of National Chair Steve Savia, the committee settled on Joanne Dunne of Washington DC as IMC’s new Executive Director. (She had previously served as an assistant, but never a full, executive director.) She was introduced to the National Board in Houston during a meeting in early February, but she did not move to New York until later in the spring.

The Board changed the Fellow designation from “FCMC” to “CMC, FIMC” to be consistent with other ICMCI members, noting the Fellow recognition is for life.

The 1997 Annual National Conference returned to Chicago at the Marriott Lincolnshire under the leadership of Norm Eckstein of Chicago (Eckstein Management Consulting).

A large number of nominations for Fellow had been received, and ultimately those recognized in Chicago included Bill Altier of Buckingham, PA (Princeton Associates, Inc.), Vince Cali of Dallas (Deloitte & Touché), Jim Carey of
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Burlingame, CA (Carey Associates, Inc.), Cox Ferrall of San Francisco (FCP Consulting), Ian Jacobsen of Sunnyvale (Jacobsen Consulting Group), Dick Pinsker of Saratoga (Pinsker and Company, Inc.), Jim Soudriette of Phoenix (The Galaxy Organization, Ltd.), and Stew Washburn of South Dartmouth, MA.

National took over the accounting and administrative work for Confab as a move to integrate all conferences and activities hoping that there would be potential for increased income to IMC by so doing. These activities had been previously performed by the West Coast Confab committee.

1998 The 1998 Annual National Conference was held in Dallas with Edward Stone again filling the role of conference chair. Notable at this conference was a guest speaker from Southwest Airlines who chose to focus on unsuccessful management consulting experiences. Somers White again closed the conference with his traditional interviews of well-known consultants.

Steve Savia passed the baton to incoming National Chair Gary Brooks of New York (Allomet Partners, Ltd.) as our 15th National Leader in our 30 years of existence. At the Dallas gathering, ongoing discussions with the AMCF (new name of ACME) National Chair Dick Metzler of Chicago (Metzler & Associates) continued regarding further separation of the two organizations.

New Fellows recognized at the Dallas meeting were Bob Kahn, of Lafayette, CA (Robert Kahn & Associates) and Teri Selcoe, of Albuquerque. Bob had previously been recognized with a Lifetime Achievement Award and Teri was the second woman member to join IMC.

Items of interest at the board meeting continued to be the process of re-certification and of outsourcing of the certification process in its entirety to Northeastern University. Roger Herman of Greensboro (The Herman Group) headed up a drive for new members through the chapters and Bob Thomson of St. Louis (Thomson Consulting) conducted monthly conference calls with chapter presidents.

At the Board of Directors meeting held in conjunction with the Reno Confab meeting in October, major conflicts of opinions surfaced among the Board and National Chair Gary Brooks.

The concerns causing the heated discussions apparently remained unresolved, as it was within that same quarter that Gary Brooks resigned the job of National Chair and a very difficult period in the history of IMC ensued. Chair Elect Edward Stone stepped into the role of National Chair.”


Ed Stone recounts how things came to a threatening and painful head in 1998, and how he sorted out the chaotic situation and resolved many of the operational challenges before the threat of personal legal action forced him to resign. Importantly, Ed set the stage for
Jerry Savin to complete the resolution of this critical period. As is often the case, dire situations can bring out the best in an organization’s leadership.

“In April 1998 at the Annual Conference in Dallas I was elected National Chair-Elect. Through the next six months I was informed of activities and actions being taken by the Chair, Gary Brooks, but only through periodic meetings of the Executive Committee.

Throughout the summer and fall of 1998, there were many questions raised about the expanding staff at the New York office, the competency of the staff, and continuing problems with the New York office.

In an effort to offset some of the high costs of the New York office (occupying prime New York real estate on 43rd Street at Fifth Avenue) it was determined that some of the excess space in the New York office should be sublet. In the summer of 1998 the IMC Chair decided that he would rent some of the excess space for his office. He signed a lease with IMC and moved into the space. There were conflicting opinions on the move … it did contribute some revenue, it did give onsite oversight, but the staff felt it was too intimidating and that his presence minimized their effectiveness.

Through the summer and fall of 1998 there was a growing tension surrounding Confab. The Confab Committee had always maintained their own checking account, provided a Profit & Loss summary of the event, and used the profits to fund the seed money for the next year’s Confab. The Chair wanted all financial matters handled through New York, even if it put the Committee at a disadvantage and took more administrative time. The NorCal chapter was becoming more and more dissatisfied.

The Board Meeting in Reno in October of 1998 exploded. Subsequently two Board members submitted their resignations and I convinced them to stay on until we could try to resolve the situation.

In November 1998, the Chair had scheduled an Executive Committee meeting in St. Louis to discuss the NorCal and Confab issues. Because of bad weather, another Board member and I could not get to the meeting and joined in by conference call from my office. The meeting ended with no resolution. The other Board members withheld their support for NorCal’s withdrawal or canceling future Confab events.

Another issue discussed at that meeting was the correct application of revenues. The Chair indicated that the late-in-the-year receipts of dues would be used to payoff obligations incurred from the previous year. Jerry Savin was adamant that IMC needed to regard its year-end cash receipts (dues income) as the cash it needed to cover anticipated expenses in the next year. A serious difference of opinion existed on this point.

In December 1998 the Chair resigned his position. As Chair-Elect, and under the By Laws of the Institute, I assumed the Chair and immediately began trying to
mend the tears in the relationship with NorCal and Confab and to assess the budget and operations.

During the first week of 1999, I went to New York to meet with our Executive Director and to better understand the state-of-affairs of IMC. I was told that the Institute had $400,000 in receivables and about $400,000 in debts ... hence it appeared we were in reasonable balance.

I reviewed the debts and found that the hotel had not been paid for the Dallas conference 10 months earlier; the *Journal of Management Consulting* had not been paid for some time; an obligation to Northeastern University for development of an outsourced CMC process had not been paid; a direct mail marketing firm who had been retained to put together membership development programs had not been paid a substantial amount; and multiple other obligations existed, including nearly $1,000 for staff meeting lunches owed to the deli in the building.

When we began looking at the receivables, it became evident that members who had not paid dues for several years were being carried as active receivables. In fact, we only had about $30,000 in legitimate current receivables.

At the January 1999 Board Meeting in Washington I advised the Board that we had sufficient operating capital to last about two weeks and that the Institute was essentially bankrupt. We tried to assess all the options and ways to salvage the organization.

In attendance at that meeting were:

Bud Boucher   Victor Prushan  
Charles Day   Steve Savia    
Jerry Eisen   Jerry Savin     
Ted Fisher    Edward Stone   
Roger Herman  Bob Thomson    
Judith Light  Mary-Vickers Koch 
Dick Morgan   Ellen Zimmerman 
Dick Pinsker  Joanne Dunne, Executive Director

It was agreed that the Executive Director be terminated at the end of the 4-month notice period (consistent with the terms of her employment contract with IMC). I met with the Executive Director in the presence of Jerry Savin and Mary Vickers-Koch and told her of our decision and plans.

It was also decided that the New York office must be closed and vacated within 90 days and the sublessors be given their 30-days notice at an appropriate timing prior to our vacating the premises. Ellen Zimmerman (who lived in New York) provided oversight to the process of staff terminations.

Roger Herman suggested that we retain a professional association management firm. He had previously submitted information on Smith-Bucklin. It was agreed
that Steve Savia, Ellen Zimmerman, Mary Vickers-Koch and I would identify alternative firms and conduct interviews in February 1999.

During the Washington Board meeting Jerry Savin was asked to serve as Chair-Elect and agreed to do so.

I was advised by Steve Savia to contact an IMC member in the Bay Area who specialized in real estate negotiation. The consultant provided some direction on how to approach the landlord and to begin the process of breaking the lease that had several years remaining.

I also contacted three respected members (Jack Chapin, Somers White and Carter Freeman) to seek some suggestions on how we might try to manage the remaining financial affairs.

In February 1999, I attended the NorCal chapter Board Meeting and monthly meeting and tried to explain what National was doing, what was happening, and why it was important for NorCal and Confab to remain associated with National and with IMC.

In a series of conference calls with the Board and the Fellows, we discussed possible solutions to the quagmire in which we were immersed. Issues discussed included continuation of the organization, canceling the planned Washington Annual Conference, and other possible alternatives to ensure survival. Following one of those calls in early February I received a call from a member in a large firm who offered a substantial cash contribution to sustain the IMC through this difficult period. I graciously accepted the offer. That money was able to be recycled at least two times: once to pay the up-front costs of the Washington conference and then again to pay the up-front costs of the 1999 Reno Confab.

In the meantime, we had been advised by the consultant in San Francisco to forego rent on the New York space, so we could utilize the cash to sustain operations, and to wait until we heard from the landlord on how we could negotiate the lease.

During February, we also received an invoice for $9,000 for the IMC Directors and Officers Insurance premium. That policy was originally written for CCO and covered both IMC and AMCF. The IMC portion was about $2,000 and the AMCF portion was about $7,000. I then made a decision to let that policy lapse and have a new policy written for IMC only. I was concerned that AMCF was also having financial problems and, if we paid their portion of the bill with our very limited available funds, we might not be repaid very quickly. We desperately needed any cash we could find and could not finance AMCF. Accordingly, there would be a lapse in coverage of about 60 days before a new policy was obtained and became effective.

Throughout this period, Mary Vickers-Koch, Jerry Savin and I spoke frequently, if not daily, to evaluate each check received and each bill received and to try to determine how we could stay afloat while we closed the New York office and tried to make a transition to a professional management firm.
In February 1999, the team interviewing management firms interviewed four different firms: one based in Chicago, one based in New York and two based in Washington, DC. After a careful evaluation and detailed deliberation, we all agreed that Smith Bucklin Associates (SBA), with offices in Washington, DC, would best serve our needs and began the process of finalizing a contract.

On Friday afternoon, March 5, 1999, I received a call from the group of sublessors (and their attorney) at the New York office expressing concern that we had been collecting their rent and not paying the rent to the landlord. They noted that they were aware of the lapse in the Directors & Officers insurance (since my predecessor maintained an office in that space) and they would hold me personally liable for their inconvenience and “contingent liability.” I was told that if I did not give them positive assurance by the following Monday that they would be able to continue subleasing their space, they would file an action against me personally by mid-week. Knowing that we were negotiating the lease and the sublessors “Notices to Vacate” would be issued soon, I could not provide those assurances.

That was a bad weekend for me and my family. I was not financially able or desirous of being involved in a lawsuit. During that weekend I was on the phone constantly with Mary Vickers-Koch and Jerry Savin. There was serious consideration of just closing down IMC. The facts were that there was considerable debt and not enough revenue. Efforts to raise money or reduce the debt had been slow to materialize. Jerry Savin repeatedly noted that “associations have a life of their own and creditors will not foreclose on a non-profit organization with no assets.”

On Monday, I consulted with my personal attorney. I was advised that no matter what my commitment or loyalty to IMC, the association was not worth risking my personal assets. Considering the tenor of the threats, I was advised not to accept any risk. Therefore I was forced to resign as Chair, but agreed to continue on the Board, which I did for the following two years.

Jerry Savin had been asked to serve as Chair-Elect, but there had been no election. He was asked to serve as interim Chair until the Washington Conference in April, where he was elected to his own term of office. Under Jerry’s leadership and guidance (and heartache and diligence), IMC was able to locate a competent attorney to negotiate settlements with major creditors and help us to begin the road to recovery.”


All that remained of the IMC New York staff with the Smith Bucklin transition was Lisa Burdige, who had headed communications for the Institute for a number of years. She continued part-time to support the website, and to write and publish the IMC Times electronically. Smith Bucklin took over the management of IMC. The office in New York City was closed, and Steve Worth of SBA, the new IMC Executive Director, led the transition to their Washington, DC office.
In survival mode, IMC hunkered down and focused on extricating itself from the threat of financial ruin. President Jerry Savin handled the negotiations, recriminations and implementations that arose. Frustration abounded, as a $76,929 balance in 1995 turned into a deficit of $101,051 by 1997 (reputedly $180,000 by 1998) and no one could comprehend how this was allowed to occur. The Journal was temporarily suspended as a member benefit (the Journal was the largest expenditure in the IMC budget at the time), in order to conserve cash, but IMC members were offered a special purchase price of $15.00 per issue.

Bob Thomson, who had been successful in his leadership of the Chapter Presidents Council, reaffirmed his commitment to IMC by taking over certification and re-certification (despite having been diagnosed with brain cancer).

SBA’s Steve Worth was replaced by Jennifer Lewis. The IMC dues structure was changed to a flat $300 annual fee per year, regardless of certified or non-certified status. The IMC Board felt that this reduction would level the playing field and simplify administration.

In 2000 Jennifer Lewis was replaced by David Rohn.

Jerry Savin, who had said “associations have a life of their own and creditors will not foreclose on a non-profit organization with no assets” now had the chance to prove this correct. Here he recounts his 1999-2001 presidency:

“By the beginning of 1999, ignoring IMC’s dire financial situation was no longer possible. IMC had several large obligations and a bunch of lesser obligations, which together far exceeded IMC’s financial resources. On the positive financial side, IMC did have over $110,000 in savings. This provided the funds needed to make several painful decisions and settle several of the larger obligations.

IMC’s largest obligation, by far, was its lease on the New York office space on Fifth Avenue. CCO had signed a long-term lease when times were much better. Now CCO was dissolved, AMCF was moving to less expensive offices, and IMC was left with the Fifth Avenue office space. Fortunately, IMC had subleased office space to several consultants and consulting firms to help pay the cost of the space, but this recovered only a small portion of the monthly rent, leaving IMC with a large regular obligation.

At the same time, IMC made a painful assessment of its office staff. As a result, IMC terminated its Executive Director and began evaluating other alternatives for a national office.

IMC decided to vacate the New York Office space and move from having its own national staff to a professional association management firm. An executive team evaluated four alternatives and decided Smith Bucklin was “head and shoulders” above the rest and IMC began negotiating a contract with them, resulting in IMC’s move from New York City to Washington, DC, in the spring of 1999.
IMC attempted to explain its predicament to its New York landlord. Unfortunately, the office building was just being sold. As a result, nearly six months went by before the building was in a position to address IMC’s request to be released from its lease. While it did not seem like a great offer at the time, the landlord released IMC from its lease, contingent on the payment of past due rent and forgave IMC any future liability, which at the time was approximately 18 additional months of rent.

The next biggest challenge was an expensive multi-year membership growth contract that had been entered into to increase membership – IMC paid for members who joined as a result of this. The short-term and long-term effects of the contract were difficult to measure. Given our financial situation, IMC notified the marketing firm involved that it wished to terminate the contract. Unfortunately, the contract contained no early termination provisions. Ultimately, IMC was sued and forced to pay a significant amount of money to end the contract.

There were other financial disputes yet to be resolved but smaller in comparison with the New York office lease and the marketing contract.

My goal was to focus our resources in several select areas to stem the erosion of membership and begin rebuilding IMC. However, to the extent money played a significant role, IMC was hobbled by a significant deficit that permitted few expenses, aside from those required to keep the lights on and the telephone connected.

Despite IMC’s financial problems and a declining membership, we did accomplish a number of objectives during this period.

- IMC reconfirmed its strategic vision and developed a strategic plan.
- IMC refined its CMC certification process and cut processing time from years to months.
- IMC held a successful joint annual conference with Canada in Toronto.
- IMC began developing new educational products, including “Dream Job, Worst Nightmare.”

After two years of extricating IMC from financial ruin and resulting chaos, Jerry Savin handed the leadership baton to Michael Shays, who agreed to serve an unprecedented second term as the President of IMC (he successfully led and grew IMC during his inspirational tenure in 1983-85). Michael instituted a monthly electronic communication to the membership to keep them informed – and motivated – as IMC began to move ahead under his leadership. While funds were scarce, Michael brought IMC back to health.

Given the tremendous toll the IMC presidency takes on a consultant’s practice and family life, Michael’s second presidency was hailed as a turning point. While Ed Stone sorted the operational mess and Jerry Savin calmed the financial whirlpool, Michael’s term marked the beginning of IMC’s refocus from survival mode. In response to why Michael again gave so freely of his time, effort and heart, he noted that:
“When I was asked to rejoin the IMC Board in 1999, I felt I might bring a sense of history back to the Institute as the Board wrestled with the difficulties of putting IMC back on a firm footing. I later agreed to serve again as Chairman because it was apparent to me that straightforward communication with the membership was essential to building confidence in the process of reconstruction. The members had to feel good about IMC or the Institute would Balkanize and eventually dissolve as a national entity.

In my first term as President of IMC, in 1983-85, the 13 two-page reports I mailed to the membership seemed to keep the membership connected to the Institute. In the one year as Chairman in 2001, I sent out over 30 single-subject email progress reports to the full membership, and responded individually to over 60 inquiries or complaints by members.

My objective was to energize the Field by getting them involved in approximately 24 national task forces. Over 200 members volunteered for one or more such task forces. Some Board members criticized that we were spreading our resources too thin, that we should be concentrating only on our top three priorities. But most of these were members who would not have otherwise become national resources. To me it was important to get members involved at a national level, and so long as each task force was also focusing on our three priorities, what mattered was that we had 200-plus members energized on national projects.

During that year, the Board approved several changes to strengthen the Institute. Based on the feedback and responses I received, I believe we accomplished a sense that the Institute was moving forward in a positive way.

The future of the Institute will depend upon building a solid base for leadership succession. To bring me back as Chairman was evidence that the leadership field was already too narrow and that succession had not been pre-planned. My regret was that during my one-year term in office, I was not able to broaden this leadership succession base.”

In May, 2001, the College of CMCs was formed as the CMC Global Network, under the leadership of the Northern California Chapter, “to provide grass roots marketing for the CMC mark.” The College provides web presence and listings for CMCs. It aimed to be a repository for speakers and senior consultant information for potential clients, but for CMCs only. The College’s website is currently separate from IMC USA’s web site, which allows for Internet-based searches, and creates a presence for all IMC members (CMCs and non-CMCs alike). When T.Cartter Frierson initiated a web presence for IMC members in the late eighties, forming Management Consultants Network, Inc. (MCNI) with Michael Shays, it was too early in the Internet’s evolution to stick. However, a decade later, the Internet became the delivery method for IMC’s member services, and the best way for potential clients to search for an appropriate consultant.¹

¹ A merger of the College and IMC USA websites is currently underway. Also, in 2004, the College of CMCs changed its name to Council of CMCs to better align with the new direction being charted by the 2004 Chair, Baldwin Tom.
In 2001 IMC changed its name from IMC to IMC USA to conform to the ICMCI institute naming convention that identifies the country of the respective institute and differentiates it from the other IMCs internationally.

In 2002, Norm Eckstein took over as IMC Chair and served from 2002-2004. He began the process of creating a more efficient structure by which to manage the many new volunteers and committees established under Michael Shays. In 2003, Gaylen Camera replaced David Rohn as SBA’s IMC Executive Director.

Baldwin Tom was elected Chair in May, 2004. Pledging to focus on Value and Membership, he initiated a series of initiatives to involve the senior IMC USA members, the Fellows, including the development of this history.

According to SBA records, in June of 2004 IMC USA’s membership was 1578, of which 869 are CMCs. In comparison, the 1989-90 IMC Directory showed a total membership of 2131, of which 1579 were CMCs.²


The sturm und drang³ of IMC’s troubles were being acted out on a background of troubles for the consulting profession as a whole. The pull out from IMC of support by the larger firm members continued. The AMC spirit now permeated IMC, and was reflected by the membership change from thirty years earlier. The entrepreneurial consultant comprised the vast majority of members. As the Big 8 were reducing to the Big 4 (and in danger of shrinking even further), other large firms now loomed as competitors: the consulting divisions of traditional vendors such as IBM and Shell Oil, populated the consulting landscape in visible numbers and international consultants, facilitated by the Internet, competed readily.

Consultants were bad-mouthed in the press, but Jim Kennedy was no longer around to corral the public indictments into a dialogue. Tom Rodenhauser became the voice of the consulting profession, although softer. (Tom had been hired by Jim as his successor in 1995, and left a year later to form his own firm to report on the profession.) Kennedy Publications, no longer playing the same role as Jim Kennedy had, focused on research and was a repository of data reports geared to segmented consulting audiences. Alan Weiss teamed with Kennedy Information to market his books and seminars.

IMC also became populated with members from the National Speakers Association (NSA), which increased greatly the quality of delivery at local and national meetings. However, content remained an issue. Often one could laugh at a meeting, but not remember later any meat that went with it.

² Of this figure, 540 or 34% were from large firms; 390 were Associate members; 116 were Senior Associates; and the remaining 47 were in other categories.

³ Definition: a state of violent disturbance and disorder (as in politics or social conditions generally).
NBCC, still headed by Vito Tanzi, continued its existence in San Diego, eventually giving up advocacy of consultant licensing. Vito was getting anxious to retire, and no successor from within the NBCC membership stepped up to the plate. In May, 2004, the IMC Board, approved, in concept, the assimilation of NBCC into IMC, with Vito assuming a position on the IMC Board for 2 years and the grandfathering in of the certified NBCC members, by conversion of their CPCM certification to the CMC. The 15-year courtship (through various formal and informal liaisons) was finally consummated.

The Enron debacle in 2001 was proof-positive that foxes in hen houses could not be trusted to safeguard the interests of their hens. The result was the Sarbanes-Oxley Act of 2002, which separated audit services from consulting services to the same client, thereby removing the strength of the Management Advisory Services (MAS) firms in the consulting arena that had been a concern of IMC in its earliest days. Trustworthy consultant became an oxymoron, as publications indicted the entire consulting profession under the banner of Arthur Andersen, Enron’s consulting firm that is no longer in business.

ACME, now renamed AMCF (the Association of Management Consulting Firms) became headquartered on Lexington Avenue in New York City, comprised of larger companies such as Peoplesoft, IBM Consulting, and Deloitte and a number of smaller (but not single-person) consulting firms, numbering 37 (per web site as of May 2004) in all. There is a strong IT flavor to their larger member firms. The minimum requirement for membership is having been in business at least two years. The relationship to IMC is not formalized in any fashion.

ICMCI continues with its annual meetings, and biennial congresses. IMC USA is allowed one trustee for each 500 members and currently has three trustees. Characteristically IMC USA has two representatives attending each congress. Many CMCs have their contact information represented on the ICMCI web site.

A new organization for individual consultants arose in 2003, as Alan Weiss started his own organization, the Society for Advancement of Consulting\textsuperscript{SM}, LLC, (SAC\textsuperscript{SM}) while still a member of the IMC USA National Board. While there was some sense from the National Board that SAC\textsuperscript{SM} was not a competitor, there was a strong feeling that there was a potential conflict of interest, as he embarked upon creating “… a new organization … to improve the business and skills of solo practitioners in consulting and related professions.”

The aims of Alan’s organization sounded quite reminiscent of AMC, namely:

“…to create a community of colleagues without rank, elites, or internal awards, whose members learn from each other on a continuing basis, augmented and supported by a lean national organization. …local chapters are encouraged, supported, and independent (keeping 100% of all dues money, for example, for
local promotion and development, and with no need for all chapter members to even join the national organization). Our mission is clear: To build the businesses of our members and to provide development opportunities to enable them to build their businesses.”

But what is different from the previous associations, including AMCF, AMC, IMC, and CCO, is the profit motive encouraging this type of structure.

Anver Suleiman also reemerged in 2004, with a new national consulting organization, similar to Alan’s, but with a heavy seminar focus (his original focus). Whether these for-profit entities will become characteristic, and leaders, of the consulting profession in the next years remains to be seen. Inevitably private gain tends to outstrip original goals benefiting the many, no matter how good the original intentions.
Chapter IV -5. The Rest of the Naughty Aughties.

Picking up just before the original writing (2004) of the IMC History left off, we start with the Chairs of 2002 through 2008. Some thoughts on lessons learned from this period are included in this chapter as well.1

Under Michael Shays IMC had gained back ground lost during the sturm und drang of the CCO divorce, and communications had restarted with the membership, ICMCI, and other consulting organizations interested in joining IMC. As promised, he held the chairman position for a single year, after which Norm Eckstein from the Chicago Chapter, took over, serving from May 2002 to May 2004. He was followed by Baldwin Tom, who served from May 2004 to May 2006. Mark Haas, in turn, served from May 2006 to May 2008, and at this writing Drumm McNaughton is Chair.

Observing IMC USA during that time, one quickly notes the familiar cycle of spending the 24 months of each chairmanship with successive phases of analysis, strategy determination, commitment to action, and inadequate time to effect the goals before another chair initiated the same process. Coupling this tradition with major changes in the economy and the consulting profession, emergence of the Internet as the communications medium, and noting the lack of a full-time Executive Director, IMC USA’s survival is commendable.

The Leadership Cycle

Each Chair wanted to leave his imprimatur on the organization. Each continued the pattern of evaluating the organization and its needs and goals, determining a strategy, and then selling that strategy to his Board and getting the Board on board. By the time this was accomplished, the remainder of his term was inadequate to accomplish the goals, and the next Chair was ready to repeat the cycle. Without an Executive Director providing the full operations direction and Board guidance, the Chair and Board assumed operations responsibilities, as well as setting policy for the organization.

What Didn’t Work

IMC USA demonstrated it still could not absorb other organizations, despite well intended mergers with Suleiman’s group (Independent Consultants Association, ICA) and with Vito Tanzi’s group (National Bureau of Certified Consultants, NBCC), and Vito’s position on the Board. At this writing, only 18 members of the former and 96 of the latter remain in IMC USA.

1 In the original version, the lessons learned were in a separate chapter (VII). However, to minimize the complexity of updating, they are joined together in this chapter. It is envisioned that future updates of the history can be done in the same fashion, as part of Chapter V.
While the concept of adding outside, non-consultants, to the IMC USA Board had the merits of introducing the same objectivity to our leadership that we advocate providing to our own clients, the reality fell short. None added stayed on beyond their initial terms.

The annual National Conference was canceled in 2006, after a disastrous two consecutive years of heavy conference losses. A national conference was co-sponsored with AMA in 2007, but it was not repeated. Whether it was the cost, the marketing efforts, changed personnel within the organizations, the program, or too much other competition, interest in leading and attending such conferences had disappeared.

Erosion of IMC Membership

While each Chair talked of increasing membership, the IMC membership at this writing (March, 2010), even after absorbing two other professional organizations, hovered at 1267, down from 1690 in 2009, and from 2054 in 2002. While these losses can be explained by the Great Recession, retirement of older CMCs, and the renewals pending in March, the explanation is only partially satisfying. Perhaps the entrepreneurial consultant of the aughties can’t be reached in the same fashion as previously, and the benefits IMC USA provides are not perceived as such. Additionally, at this writing, less than half of the existing members are Certified, creating an interesting dialectic: if less than half the members are certified, how will efforts to publicize awareness of the CMC in the client marketplace benefit the majority of IMC USA members?

What Did Work

The most success seems to have been achieved when there was a Chair-Elect (formally or informally) who became active prior to assuming the Chair, and remained active after his term was completed. This was true during Mark Haas’ tenure, when he was active in meetings with the prior Chair, and maintained involvement after his term in activities he had started. Such cooperation and devotion manifested a lengthy time commitment, but did result in achieving long-term benefits for IMC USA, such as a contemporary website.

The Annual Confab became, de facto, the annual IMC USA conference. It persisted despite changes in IMC USA national leadership because its leadership was consistent over the years. At nearly 300 attendees in the early aughties, the 2009 attendance was 180, with only 123 paying consultants. However, being located in Reno, NV, not exactly a major airport, and its focus on new consultants, has raised the question of whether it needs relocation, rejuvenation, and/or refocus.

Solving The Dilemma of the Internet Age

While IMC did have a web site early on, it was static and not member nor prospect friendly. Additionally, as the technology evolved and as chapters developed their own

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2 Alex Zabrosky, who has provided over 14 years of pro bono service on the Board, has served, bringing not only his legal counsel to the Board, but his knowledge of the consulting profession and larger firms in it, making him more of an insider than outsider.
sites there were duplications and inefficiencies. A new, consistent Internet presence was needed, but the time, funding and energy required to implement a modern site was put on the back burner until Mark Haas took it on during his term as Chair, and then oversaw its implementation during the subsequent Chair’s term in office. It went live in 2009, and chapters have been migrating to National’s web site ever since.

The new site solved many problems of archaic, paper communications, reducing costs of former paper mailings, enabling faster and easier communication of job opportunities, allowing for invoicing members on-line, adding chat capabilities for members – and creating the virtual community with which so many now were comfortable in the tech-savvy aughties.

However, the opportunities being posted (and alerts notifying members who have expressed interest in those areas) tend to be job opportunities rather than consulting assignments, and highly specialized. Whether these are appropriate for the IMC USA audience should be evaluated, now that the site is more robust and data can be mined.

But the Internet cannot alone create those personal relationships amongst the various consulting entities in the profession – the AMCF leadership, the Kennedy Information publicists – and the non-professional entities who seek quotes and information from individuals. Personal relationships, normally those that would be nurtured and sustained by long-term executive directors, generally are more successful than biennial two-year stands. Now that IMC USA’s financial situation has been improved, funding for a full-time professional ED, such as with Claire Rosenzweig, should be considered.

The IMC USA Branding Iron

What is the organization’s brand? How does it get publicized and the CMC valued more deeply by prospective clients? This thorny dilemma continued to haunt the aughties’ chairs, without apparent resolution. And, as noted above, the transition to CMC by non-certified members indicates the CMC designation itself needs to be valued more deeply by IMC USA’s regular members – certainly enough to seek certification for themselves.

A. Norm looks back upon his term, 2002-2004:3

Financial/Membership

As we left the 1990’s the financial situation of IMC USA began to stabilize. Smith Bucklin, which represented our biggest expense, showed their faith in us by continually deferring enough of the fees that we owed them to keep us solvent. By late 2001 we owed them close to $200,000 and began to pay them back in small increments, but the combination of a continually decreasing membership and several financially unsuccessful national conferences kept us taking one step backward for every two steps forward.

3 In keeping with the original IMC USA History, a different font, arial, is used when quoting others.
In 2002 our treasurer, Deborah Rechnitz, to ensure a continued diminishing of our deficit, began a budget discipline with the Board where a surplus was required for us to be considered at break-even, along with monthly financial review. This forced us to continually reduce expenses to maintain that surplus. It wasn’t until 2005, when Treasurer John Newman, a turnaround consultant, forced the issue and got the Board to cut expenses almost in half, that we made major progress and eliminated the deficit in less than three years.

**Organization/Communications**

The 24 Task Forces formed by Michael Shays developed a number of significant initiatives, many of which needed monitoring and support. Since the Executive Committee had been discontinued during the events of 1998-99, all of these reported directly to the Chairman, and I found that I could only work with several at a time, frustrating many of our volunteers. We re-formed an Operating Committee and assigned each officer specific committees. Progress was reported through this structure, with reports going to the Board in advance of meetings. Since the Board was only dealing with the priority items, we were able to reduce the business portion of Board meetings from two full days to less than a day, allowing us time for planning and training in governance.

Although I continued the regular progress reports that Michael Shays had started, the chapters were becoming impatient with the (perceived lack of) progress in resolving our financial issues and in the support we could provide to them. At the 2003 National Conference in Chicago the Board and Chapter Presidents Council held a first ever combined meeting which led to a two-day Planning Meeting that July. Ten directors and 15 chapter presidents developed approaches and tactics to advance the objectives of IMC USA and to improve the communications within the organization necessary to accomplish this. Chapter presidents were invited to future Board meetings and we devised ways to provide financial resources to chapters for recruitment and other IMC strategies.

**National Bureau of Certified Consultants (NBCC)**

Through an intermediary I was informed in late 2003 that Vito Tanzi was interested in winding down the NBCC and wanted to see if we could find a way to absorb his members and “recognize” their certification. The Chair of our Certification Committee reviewed the process that NBCC followed to verify that it was comparable to ours and, after a considerable period of negotiation we came to an agreement in May of 2004. All certified members of NBCC who wanted to join IMC were absorbed and granted CMC status over a one year period, their organization and certification were eliminated, and Vito became a member of our board for a two year period. This left the CMC as the sole certification for consultants.
A Celebration
The years 2004-2006 can be considered ones that reaffirmed the resiliency of IMC USA. This period can also be considered a celebration of the partnership between the IMC National Board and our association management firm, SmithBucklin, who stepped up, together with us, to face the significant challenges that arose and to make IMC financially whole once again. Finally, it is my opinion this period brought closure to the New York City financial fiasco as the IMC coffers finally made it back into the black at the end of 2006 with no debt. In that sense, it completed what the prior four national chairs and their boards started in “plugging holes” and “holding on” anticipating the moment when things would completely turn around. The courageous 2004-2006 Board members assumed leadership, drew a line in the sand, and took on the difficult task to make unpopular decisions that reversed the trajectory of IMC by 180-degrees to finish what the prior chairs began.

The Back Story
Often it is the story behind the story, or the back story that is more interesting than the story itself. The public account of the 2004-2006 administration of IMC USA is that of the same problems (about increasing membership and funds), some new solutions (improving governance) and, finally, resolution of most of the challenges (fiscal solvency). This summary tells the back story as it was truly Business as Unusual. In the first period, we hit the ground running to set up the people and resources and Board structure to prepare to take on the business and membership challenges. In the second period, we were fully challenged by the need to find $100,000 quickly in response to SmithBucklin’s Senior Vice President. During the third period, the entire Board was laser focused on making IMC ‘whole’ again.

Chair-Apparent
Having been on the National Board only two years while serving as the national certification chair, I knew that the Institute was not operating ideally. Most notably I did not understand why it was so difficult to determine our membership numbers and why we would run out of money before the end of each year. Eventually I learned the origin of those difficulties, as did other Board members. Yet there was no Board action to change this, even as a few Board members spoke up. The Board had the attitude that this was the way it was and moved on to other business.

What I brought to the position was the high expectation that if we leveraged the collective knowledge of key persons within IMC USA, we would have an excellent chance to move IMC forward to greater successes. This meant forming

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4 This has been abbreviated from the original document, which can be obtained directly from Dr. Baldwin Tom.
teams of CMC members. A first priority as IMC USA Chair was to establish a robust team, a team of IMC Fellows to support my administration.

**My Challenges in 2004**

In retrospect, we members of the Board, in my opinion, did not take seriously that our financial position linked to operational defects, we rationalized it, we talked about the undesirable financing of IMC USA activities but were not compelled to act. We debated, but largely ignored the pending doom. The insanity of it was that we did this each year around budget time.

As soon as I accepted the nomination, I made my list of key challenges for IMC USA because I needed to know what was going to require the Board’s focus.

What we needed was a focused, energized Board, clarity of purpose for IMC, and the will to fix a broken business model.

From a 10,000 foot perspective, IMC was simply made up of three components – history, people, and activities (that benefit members). We needed to move quickly to leverage the positive attributes of IMC USA to then take small but necessary steps forward. We needed to engage all leaders within IMC plus build a strong Board to lead the way forward through re-considering the vision, mission and goals of IMC USA. Importantly, I had the ambitious plan to change the downward trend IMC was headed by changing the problematic business model. At the beginning, I only knew that a starting point was with the Board as IMC’s leaders and that we needed alignment in IMC USA’s purpose, followed by optimizing the processes and operational structures. I did not know how we were going to make the ‘turnaround,’ just that we would need to make it happen. While all efforts of ‘rearrangement’ and ‘realignment’ were taking place, it was important to continue to show member value and benefit in all IMC activities.

Before actually starting my chairmanship, I made plans to fast-track efforts. In January, 2004, I invited any Fellow willing to serve as a sounding board and counsel to me to be part of an *Executive Advisory Council*, like a ‘kitchen cabinet’ (see insert). We need to learn from history, or we will repeat its failures. So, the first request I made to the Council was to help compile and write the IMC history. Marsha Lewin served as editor and with members of the *Legacy Task Group* (see insert), produced the complete IMC history volume in nine months. This document is found on the IMC USA Website, and describes the basis from which IMC arose and survived the different challenges it faced. Importantly it notes the dedication and sacrifice members have given to help build IMC USA. It also gives us members bragging rights in the longevity of this Institute, now 42 years old.

**PERIOD ONE - Taking Office**

I addressed the May 2004 National Conference on the...
theme of Value and Leadership -- Value to members and Leadership of the Institute. I noted two major goals: 1) Change the business model; and 2) Rebuild the value and benefits of membership and certification.

We began the journey with a Board Retreat in July 2004 in Chicago. One goal of the retreat was to identify those behaviors that would be conducive to high performance by the Board. After Chicago, this Board worked very effectively and issues that arose were dealt with directly without personal rancor.

On the business side we reviewed IMC’s purpose - to be a certifying body or to help new consultants find business and (maybe) become certified members. Somewhere along the way in our anxiety to build membership, our goal targeted helping new consultants grow in their profession. While this was an honorable purpose, it created a split in the focus for bringing value to members. In my opinion, we neglected the CMCs and focused our attention on educating newer consultants. This focus was unfortunate as resources and efforts were diverted from support of the CMC. This necessitated a major review of the purpose of IMC USA, with its vision, mission, and goals by our Board.

Structural Changes to Improve Governance and Communications
We made three significant changes to our structure beginning in 2004 – adding two new vice chair positions, agreeing on seeking Outside Directors, and on bringing onto the Board the Chapter Presidents’ Council (CPC) President and one International Council of Management Consulting Institutes (ICMCI) Trustee. Since these individuals were not elected to the Board, these were non-voting positions. During the course of this Administration, two Outside Directors were recruited to bring new ideas to IMC. In 2004, Steve Hitchcock (Management Consulting Group PLC), representing a large consulting firm, became our first Outside Director. Dr. Earl Smith (Longview), a consultant, executive coach and author became our second Outside Director in 2005. With the goal of rebuilding value and benefit to members it made business sense to have the President of the CPC, Loraine Huchler, serve on the Board to provide valuable insight from the chapters. Jerry Savin, a long-time ICMCI Trustee, was assigned the position of Lead Trustee to participate in Board affairs. Jerry provided the international context to our deliberations, as well as his past leadership expertise of IMC.

Improving Committee Management – From One to Three Vice Chairs
Operationally we simplified the committee and reporting structure by establishing three Vice Chair positions (two new) whereby all committees reported to an assigned Vice Chair. Our original three Vice Chairs were Mark Haas, Operations; Vito Tanzi, Marketing and Member Development, and Michael Wheeler, Professional Development and Membership. By 8 July 04, the Institute’s committees were reset for Vice Chair management:

1. Membership Development (Member retention, Membership growth, Diversity Task Force)
2. Member Services (Awards, Benefits, Chapter President’s Council [Chapter Innovation Fund here], Conference Coordination, Professional Development, Professional Knowledge, Future View Forum task force)
3. Marketing (Outreach/communication PR, Website, Newsletter, Member communications, Member directory, College of CMCs)

The Vice Chairs were responsible for engaging, supporting, eliminating, or consolidating the committees and for managing reports from them.

Improving Board Management – ExCom and OpCom

We took another step to solidify the activities of the Board by creating an Executive Committee (ExCom) who would have the power of the Board on items that the Board assigned to it. This allowed decisions to be made outside of a full scheduled Board meeting and helped expedite decisions for the full Board. As a means to leverage collective knowledge in planning Board meetings and deciding on the multiple issues needing to be raised to the Board level, an Operating Committee (OpCom) was established. The OpCom was tasked with sorting through all the issues and topics raised by Institute members as well as by the Board. OpCom was not empowered to make decisions for the Board, but was tasked to do the research to bring topics to the Board for full deliberation. OpCom activities were critical in managing the challenges arising from the need to make IMC USA solvent again. Both ExCom and OpCom were established on 15 July 2004.

Table 1. New Structure (From May 2004) and Membership on the National Board

<table>
<thead>
<tr>
<th>Title</th>
<th>New Structure</th>
<th>Role</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chair</td>
<td>Chair</td>
<td>Titular Head of IMC USA</td>
<td>Set agenda, run board meetings, lead executive committee, serve as Institute spokesperson; interact with SmithBucklin.</td>
</tr>
<tr>
<td>Vice Chair</td>
<td>Vice Chair</td>
<td>Project/Program Managers</td>
<td>Provide management of Institute committees, support chair</td>
</tr>
<tr>
<td>Treasurer</td>
<td>Treasurer</td>
<td>Financial Manager</td>
<td>Provide oversight of all financial matters; guide annual budgeting; interact with SmithBucklin</td>
</tr>
<tr>
<td>Immediate Past Chair</td>
<td>Immediate Past Chair</td>
<td>Past Chair with historic perspectives</td>
<td>Participate and offer insight to Board</td>
</tr>
<tr>
<td>Board Member</td>
<td>Board Member</td>
<td>Elected official of the Institute</td>
<td>Think, discuss, plan, and work on behalf of the Institute and provide oversight of the Staff</td>
</tr>
<tr>
<td>Outside Board Member</td>
<td>Outside Advisor</td>
<td></td>
<td>Offer expanded perspective on Institute issues with best practices from the ‘outside’</td>
</tr>
<tr>
<td>Chapter Presidents’ Council President</td>
<td>Non-voting member of Board of Directors (BOD) representing Chapter Presidents</td>
<td>Bring chapters’ and members’ perspectives and needs to the attention of the Board</td>
<td></td>
</tr>
<tr>
<td>ICMCI Trustee</td>
<td>Non-voting member of BOD representing Trustees for ICMCI</td>
<td>Provide updates on the ICMCI activities and on National Institutes worldwide.</td>
<td></td>
</tr>
<tr>
<td>Legal Counsel</td>
<td>Legal Counsel</td>
<td>Legal consultant to the Board</td>
<td>Keeps Board and Board Chair operating under the laws of nonprofit organizations</td>
</tr>
<tr>
<td>Executive Director</td>
<td>Executive Director</td>
<td>Coordinator, manager of Board</td>
<td>Provide logistics for Board meetings and Institute committees</td>
</tr>
</tbody>
</table>
By October 2004, or roughly 50% into the first year of this administration, we reviewed key initiatives to see where we were.

**Other Consulting Organizations - NBCC**
With the challenge of retaining members and encouraging them to seek the CMC, the Board became aware of two national, for-profit organizations that looked like competitors to our mission, and thus our membership. These were clearly a distraction, as we talked about them when we considered activities. One was the National Bureau of Certified Consultants (NBCC) founded by Vito Tanzi. NBCC had many of the characteristics of IMC USA: certification (Certified Professional Consultant to Management, CPCM), service to management consultants, conferences, and newsletters. Vito had reached out to IMC USA before to merge operations and mission. In fact, IMC had an agreement with Vito in 1994 to jointly work on management consulting training (see IMC History, Volume IV.1, Jack Chapin’s recollections) that was cancelled in 1996 for lack of success. Vito wanted to shut down NBCC and wanted to give his members a place to land. Thus, at the suggestion of Jim Soudriette, a Fellow and also a member of NBCC, I reinitiated a conversation, originally started by Norm Eckstein in 2003, to determine how IMC and NBCC could craft a win-win scenario. It was a time when our membership numbers were declining, so the potential for new CMCs was very attractive. In February 2005, 207 new CMCs and 6 members migrated over from the NBCC rolls and IMC grandfathered all Certified Professional Consultants to Management (CPCM) as CMCs, and gave Vito a seat on the National Board.

After two years, a number of the NBCCs did not renew their memberships; the net gain for IMC was something less than 100 members who remained with IMC.

**Other Consulting Organizations – ICA**
During this same period, Jim Soudriette suggested that I contact Anver Suleiman, someone Jim had met years ago who was now running a new consulting organization, a for-profit venture, the Independent Consultants Association (ICA). In 2002, Anver founded the ICA, with Tom Peters on ICA’s Advisory Board. The goal was to develop a means to create a database of consultants from which to launch a major conference that would bring together consultants of all types within a learning and networking forum. During the several years ICA was in place, they provided daily tips, a monthly newsletter, conferences, and had started a chapter.

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5 In fact, Vito had folded his prior organization, SPMC, into IMC in 1988. He later formed NBCC.
6 This raised the 2005 year-end membership numbers to 1889.
7 As of February, 2010, only 96 remained.
8 This was déjà vu all over again, as Anver had been around the world of consulting organizations since 1979 when he led seminars, cf. IMC History, Chapter II.
In late 2004, I contacted Anver and he indicated he was interested in helping IMC by providing some of his organization’s materials - his membership list, his newsletter, and his daily tips. Discussions began in earnest in January 2005 with Anver.

In a January conference call the IMC Board suggested Anver attend the 2005 National Conference to meet the leadership of IMC USA. He attended and shared his original goal to create the Grande Conference through ICA - not to compete with IMC USA, but to establish a substantial database from which to launch the Conference. There seemed to be a good opportunity to team with Anver with IMC providing speakers and content for a conference if Anver’s group would provide the logistical/marketing support. Anver thereafter drafted a set of ideas for a move of ICA members to IMC USA, along with ICA’s intellectual property in exchange for IMC helping on the content portion of the Conference.

In June 2005 a due diligence team consisting of ICA and IMC members (Sarah Layton, Michael Wheeler, Alan Frayer-ICA, Susan Easter-ICA) met electronically to sort out all the intellectual property and transfer options presented to IMC by ICA. The purpose was to determine where there were costs and how these would be addressed, since IMC USA was on a tight budget that did not allow new expenses. They completed their work and provided their report to Baldwin and Mark for review and report to the national board.

The Board voted in July 2005 to prepare an agreement with Anver Suleiman and ICA, and in August approved an enabling Memorandum of Understanding (MOU) to move forward on the migration of ICA’s intellectual property, with instructions to further delineate the nature of a proposed new national conference led by ICA, the Grande Conference. On 31 December 2005, the Grande Conference MOU was finalized, detailing the roles and responsibilities of IMC USA and The Suleiman Group. We used the working title, Grande Conference of the Americas for Consultants. As plans moved forward on the Conference, Anver applied for certification, at age 72, and received it in 2007.

The conference would not replace the IMC USA national conference since IMC would only be a participant, not owner of the conference and would not impact CONFAB since it would be held in the Spring. The Grande Conference was ultimately held 24-26 June 2007 in Orlando, Florida sponsored by the American Management Association (AMA) with IMC a cosponsor. Anver made a business arrangement with AMA to provide the muscle in presenting the conference. It was an excellent conference, but not well attended.

PERIOD TWO - Closing the Interest-Free Bank

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9 There had been no 2006 national conference for IMC USA.
In May 2005, SmithBucklin informed us that we were out of 2005 funds. [In years past, the short-fall did not occur until September or October.] What SB had been doing for a number of years was to ‘loan’ funds by not cashing their fee from IMC. SB would no longer do this and unless IMC USA found a way to raise $100,000 in 30-days, harsh measures would be taken. We took this challenge very seriously.

A number of actions were thereafter taken to reduce costs and personnel effort and to seek intake of new funds. Our Vice Chairs were asked to manage the committees to focus efforts that would provide benefits with as little cost as possible. We looked to stop projects that required funds, but did not help increase value and benefits. Beyond cost reduction, we wanted to bring in new revenues while energizing the members. Mark Haas led the effort to seek non-dues revenues. This included reaching out to engage large firms to hire IMC members as subcontractors, and to find large consulting firms interested in the CMC certification for their employees.

As part of the consolidation of resources, I moved to shut down the College of CMCs after trying to make it a viable partner with IMC, including changing its name to Council of CMCs. The concept for the College was excellent and it served its CMC marketing purpose during the years when IMC was unable to un-track itself to mount any form of a marketing effort for the CMC. However, as IMC gained its feet and was moving toward an active marketing effort, the College was seen as competing with IMC and a distraction for the Board. There was no longer a purpose to have a separate arm of IMC to market. The College leadership eventually closed their operations and provided its remaining funds to IMC in 2006.

The Turnaround Moment
We can pinpoint the moment when IMC began the turnaround. It was at the Board meeting in Kansas City on 20 May 2005, when the ad hoc Turnaround Task Force of John Newman, Mark Haas, Vito Tanzi, Gaylen Camera and Deborah Rechnitz reported to the assembled Board members the “50% plan” aimed at reducing all expenditures by 50%. This included payments to our association management firm, Smith-Bucklin, Chapter allocations, legal payments, Board reimbursements for travel, and other expenses.

John Newman’s recollection of the Turnaround
It was a Thursday in May of 2005. The sun was shining bright as I rode into Kansas City with my six shooters blazing. No, not really, but I felt like a hired gun, an unpaid one, as I arrived for the board meeting of the troubled Institute of Management Consultants. Deborah Rechnitz was completing her 3-year term as treasurer and I was the replacement. We had met 10 years earlier in Reno and had remained friends. To the rest of the board, though, I was a stranger, a turnaround guy from somewhere down in Arkansas. After a few board meetings, I would be just another member, albeit a difficult one, but for now I was the outsider, the expert, and that was a weapon I could use. The crisis was the other. Twenty years of turnarounds had taught me how to leverage such situations. Board members would have two choices. Vote for the plan, or accept responsibility for killing IMC.

I told Deb, you tell me what you want, and I will make it happen. She was ready. After three years of feeling like a lone voice for fiscal sanity, this was her last shot. She said fine, here’s what we’re gonna do. We’ll cut overhead in half.

I thought, "Whoa, 50%? No way."

I said, "Sounds good."

In the first half of 2005, IMC lost $40,000. From July to December, with expenses reduced by half, we made a profit of $130,000. The following year was even better and by December, 2006, we were debt-free.
The impact of the 50% plan on the Board was palpable. It became clear very quickly that there would be no discussion about the cuts, just questions about how we might make this happen. It was as if the Board knew this was needed because I did not recall heated discussions about the cuts. It was more about questions on implementation. One topic that did create some drama was the recommended cut from 15 to 9 Board members. Discussion focused on how we were going to do this and who might be asked to resign. Importantly, since the only benefit of a reduced Board was to eliminate lengthy discussions and to speed deliberations, not meaningful cost savings, it did not make sense to eliminate the importance of geographical representation and healthy discussions. Further discussions would be needed to rethink the Board numbers.

Managing the Fallout

We were fully aware of the challenge of keeping erroneous information from being spread via unofficial back channels, the rumor mills. Our response was to send out four sequentially more detailed memos within 14-days. We immediately drafted the first of four memos at the Board meeting for me to personally present to the Chapter Presidents who were meeting the next evening. We did not provide all the details about the “50% Plan” nor provide any financial information. Instead we decided that our Treasurer, John Newman, would be best to provide a factual memo to the CPC about the financial situation. We followed with a detailed memo to all IMC leadership that covered all aspects of the reorganization. On the same day, I sent a memo to SmithBucklin noting our decision to seek a 50% reduction in cost for administering IMC.

Beyond these crisis communiqués, I provided weekly and monthly notes to the membership to maintain transparency of our activities. A significant help was provided by Chair-apparent¹⁰, Mark Haas. Mark played a valuable ghost-writing role on my many memos and eventually took over serving as the communicator of our turnaround efforts. Of interest was the way the Board and our marketing folks worked to find just any good news to communicate to the members. As we gained new members, that fact engendered a ‘press release’ to our members. Every effort was made to show our every success as we continued to rebuild IMC USA. I know our efforts worked because we no longer received critical notes from members, but supportive ones thanking us for taking action. But I was frustrated that after 36 years, IMC was still at around 2000 members; I noted that if IMC is not a stable organization, then no plan will work in such an environment. Thus stabilizing the enterprise was a first priority.

PERIOD 3 - The Phoenix Rises Once Again

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¹⁰ I had designated Mark the Chair-elect at the May 2005 one-year anniversary of my administration, but was reminded by our Legal Counsel, Alex Zabrosky, that the title was incorrect since Mark was only selected and not elected.
Changing the Business Model

The most confusing aspect of IMC’s operations was its business model -- the way funds were received and used. In 2004, nearly all funds to operate IMC were from member dues. Revenues from Confab and the annual conference were uncertain and, in fact, were net losses in 2004 and 2005.\(^{11}\)

The way dues were collected was based on the date a member started, which could be any day of the year, followed by a 90-day grace period (during which they were counted as members for budgeting purposes).\(^{12}\) There is not an accounting program that could clearly present this information so a business could confidently run and fund its operations, unless one determined the statistical probability when grace period members would pay their dues within the 90-days. Without this, it was impossible to present accurate numbers.

This business model made it extremely difficult to manage cash flow and to set budgets. It was a constant frustration to my first SB Executive Director David Rohn to provide membership data to us but I realized that it was impossible for David to provide accurate numbers with the staggered anniversary date model. More telling on IMC operations was that the Treasurer was hard pressed to set a budget guessing what projected (based on membership) funds would be available. It is clear that the idea of a balanced budget was unrealistic. How can one spend only what one makes if one does not know what is being made?!

The Board was forced to authorize borrowing from the subsequent year’s dues because of this fuzzy budgeting, i.e., the Board guessed the money coming in and mostly guessed wrong. Thus, IMC coffers would be bare before the end of the year, sometimes in October, then September, then August, and, as noted above, by May just five months into the calendar year. This business model was broken!

The IMC Board moved to change the membership anniversary date back to January 1. Toward the end of 2005, we asked members to pay 2006 dues, together with any months left on their staggered period. This would then get them synchronized on the January 1 anniversary date. This was done without much complaint from the membership. It was now possible to more accurately estimate funds coming into the Institute’s coffers and to provide a better number for membership. Because the projected funding was much more reliable, it was possible to truly budget with some confidence that we would stay within budget.

\(^{11}\) Nearly $100,000 accrued in losses in those two years’ annual conferences alone.
\(^{12}\) The practice of using accrual basis accounting was supposed to have been discontinued long before. That alone would have made the books representative of the true financial situation, as only cash (dues) received would be counted. Previously, dues were kept ‘pending’ for more than 90 days – into months and even a year – which skewed the balance sheet greatly.
Indeed, this is what happened to set the stage for IMC to become solvent at the end of 2006 with a profit and no debt!  

Looking Outward - Building Relationships with Potential Strategic Partners
One of the goals of my administration was to start looking outward to see how we might reach out to other organizations that could bring new resources and ideas, along with prestige, to IMC. We made four efforts to connect with significant organizations that would bring new value and benefits to our members. Each provided different potential for IMC benefits and most required an ongoing relationship building effort to have the relationships/partnerships sustain itself to the point of success for both parties. In retrospect, while we succeeded in some form with each of the four opportunities, we lacked the dedicated effort to maintain ongoing touch points with each opportunity.

Harvard Business School. In November 2005, I had an exploratory meeting with Cathy Cranston, Publisher of the Harvard Business Review (HBR) and her marketing consultant, Jim Richardson. We brainstormed how IMC USA and Harvard Business School Publishing (HBSP) might benefit each other and met yet again in January 2006 with Mark Haas and others at HBSP, making an agreement to move forward to provide HBSP resources (case studies, articles, journals) to IMC members at a discount, with details to be determined later. For HBSP, they saw in IMC the potential to reach a significant number of IMC members who serve small businesses. I turned over the next step efforts to Mark. When this partnership was finalized, it became a major benefit to IMC members.

Outreach to Related Organizations: American Society for Training and Development (ASTD). In August 2005, I met with Tony Bingham, President and CEO of ASTD. Tony mentioned that ASTD has a small group of members who identified themselves as management consultants and that they do not provide the types of support IMC can and does. He said that there might be something we could do together. The following were the points touched on during the meeting:

- Co-location of conferences. (This was a simple first step to have both ASTD and IMC hold conferences at the same time and same location.)
- Swap marketing for each association to respective members. (This too was simple to do)
- Combine membership marketing with discount to join both organizations.
- ASTD might accept other certifications to waive part 2 of their certification requirements
- ASTD receives member discount to attend Confab.

13 The lack of advance expenses (deposits, printing and mailings, speakers fees) that would have been required had the annual National conference not been cancelled would also have contributed towards the profit realized in 2006.
Jennifer Leake, who was working on the 2005 Confab, was contacted to help arrange member registration for ASTD folks. This was done. After Confab in October, I do not believe we continued to build the relationship with ASTD.

American Management Association. Anver made contact on our behalf to meet with Ed Reilly, CEO of the AMA. Since Anver had the Grande Conference details to work out with AMA, he offered to join us in New York to meet with Ed. Our visit coincided with our travels to the HBSP luncheon, so Mark Haas and I again represented IMC. Thus, we met the AMA leadership on the morning of 26 January 2006, had lunch with HBSP, and then had a dinner with AMA hosted by Anver -- a busy day in New York City for IMC.

Our meeting with Ed was friendly and positive. It was clear that there were opportunities to partner if AMA could see value in IMC. What was most attractive to AMA was IMC’s membership of management consultants who should see the many AMA courses as valuable for their personal growth. Further, they would be interested in any members interested in becoming instructors for AMA. Since Anver had already begun conversations with Ed about the Grande Conference, that topic quickly took center stage. We discussed what IMC could bring to the table and what AMA could do to support this. With AMA’s full-service conference planning staff, it was clear that AMA would provide the marketing and logistical muscle to establish the conference. IMC would lead and provide content design and planning, including the selection of speakers, all in collaboration with AMA and tapping their large cadre of world-class speakers. The visit ended with steps to move forward on the conference. Mark Haas would be the point of contact for IMC and a new conference manager would be AMA’s contact.

Academy of Management, Management Consulting Division (MCD). Sometime in 2005 I was referred to Richie Moore, Division Chair of the MCD. The Academy was an organization for management professionals from academia. Thus they were more into research and publication of management studies than client consulting. The MCD was the division where the management consultants would best align with IMC USA. I reached out to Richie, who was working in France, to sell him the merits of IMC. Richie felt that some MCD members might consider membership in IMC. We spoke about the potential to work with their members in academia to jointly produce a research paper. As a first step, I suggested that we provide them member rates to attend Confab. We provided Richie an electronic file for Confab registration which he sent to his members. I recall that no MCD members, that the Confab committee could identify, signed up for the conference. Shortly thereafter, Richie completed his term as Chair of MCD. We did not follow up to continue the dialogue with MCD.
Looking Backward – An Amazing Journey!

I set out in 2004 to turn IMC around. Together with our hard-working team, we did just that. Once again we showed IMC’s resiliency and proved that with commitment, we can accomplish anything.

While this was a team effort, I need to highlight three individuals who were key to our successes. Both Treasurers Deborah Rechnitz (2004-2005) and John Newman (2005-2006) made the turnaround happen. They came from the same pragmatic cloth, demanding focus on the budgets and discipline in the use of funds. With constant communication, Mark Haas effectively served as a ‘co-chair’ with me during this period, doing whatever we needed to keep everyone informed and supporting each initiative I began. It was an ideal partnership in moving the Board and IMC members forward to success. Together this core group and the National Board stepped up and made a difference in setting the stage for IMC USA to migrate from a debt-laden, financially challenged, process disabled organization to a more streamlined, financially responsible Institute on its way to full solvency. SmithBucklin needs tremendous credit for staying the course with us. Managed in the trenches by Gaylen Camera and supported by Executive VP Mike Olson, we could not have navigated this successful course without their willingness to give us time to right the ship. Thank you.

Now that it’s over, I can say that this was mentally, physically and psychologically challenging for most of the time. It affected both my personal and professional lives. Was this stressful? Yes. Was it worthwhile? Of course. Do it again? Absolutely as long as I have the same team!

C. Mark Reflects on His Term, 2006-2008:

IMC USA History (2006-2008)

IMC USA entered 2006 "at a crossroads," a phrase that seems to describe IMC in almost every year. Since moving to Washington, DC in 1999, IMC had struggled with finances, membership and relevance in the market. While IMC provided service, connections and collegiality to many of our members, we were challenged by how to turn around an organization whose fundamentals had changed. The irony was not lost on the members of a professional association whose skills and expertise are about improving the effectiveness of organizations. Was our challenge that we needed to do something different or that we needed to do what always needed to be done, but just do it better?

Having read the History of IMC - several times - I concluded that many good people had tackled similar challenges before and had made progress. Chapter VII - Lessons Learned provides timeless context for every IMC leader at the chapter or national level. Also, like past Chairs, I sought the advice of those who came before me. Each had the same advice: "Select two or three things you
want to accomplish. There are far more opportunities and challenges to be tackled but try to focus." And, I suspect, like many of my predecessors, I was only partially listening. We had a talented Board, dedicated committees, committed chapter leadership, and a clear set of growing challenges facing us. There was so much potential to improve our association and fulfill our mission to promote excellence and ethics in management consulting.

In management, as in medicine, prescription without diagnosis is malpractice, so we first took a hard look at where we were. Our assessment was focused not just on what processes were not working, but to take several steps back to see whether IMC should even exist and, if so, what should our role be in a global, virtual, information-driven world. This was not the same environment in which we started in the 1960s. Did we still have a place in 2006? Could we create an organization that served the needs of our members, our profession and our communities? Did we have the resources, talent and will?

2006 Situation

Here is what IMC looked like as we entered 2006:

**Finances:** Our financial position remained weak, net assets languishing below zero since IMC moved to Washington, DC. Despite effective debt reduction with creditors during the Savin Administration, IMC had two national conferences in 2004 and 2005 that lost a total of nearly $100K, and before the May 2005 "intervention," we were projected for a year-end net asset position of negative $250K on a budget of $600K. Our annual budget was inadequate to fund any chapter or national initiatives.

**Membership:** We were bringing in members at a healthy rate but losing them at about the same rate. The CMC renewal rate was higher than that of Professional Members but we needed new sources of members or members who were more likely to renew and more actively participate in our community. As in the past, some chapters were successful in retaining and bringing in new members but other chapters lost members. We had no effective national plan to grow membership. Also, CMC membership was starting to slide as CMCs who joined IMC in the 1970's and 80's began to retire.14

**Member Services:** A quick analysis of our member services arrayed in a matrix of "Get Smart," Get Known," and "Get Business" against level of professional and career development (affiliation, development, accomplishment, distinction and mastery) showed most of our services were targeted to new consultants or those who were seeking certification. IMC USA provided little value for members once they became certified or to individuals who were senior consultants or leaders in the profession. Many members report that they only hear from IMC

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14 Membership at year-end 2008 was 1714, down from 2054 in 2002. CMCs were down to 629 in 2008, from 866 in 2002. 2010 numbers are 1267 members, including 439 CMCs.
during renewal season. We had ceased publication of the IMC Times, so there was no regular means of communicating IMC news to members other than through the chapters.

**Knowledge Assets:** Despite our mission to promote excellence and ethics, it was unclear what we had in the way of knowledge assets on which to effect that promotion to the consulting profession. We had many excellent chapter professional development programs, Confab, and C2M, but little else. Other than the vast knowledge of our individual members and C2M, what could we claim as residual value if IMC were "broken up for parts?" We were creating little new knowledge about the profession, consulting practices, and training collateral for our members.

**Certification:** The cornerstone of our association, the Certified Management Consultant (CMC), was struggling for recognition in the marketplace, although it was popular among those members who had sought and achieved certification. Part of the problem was the inefficient processes used to manage certification, with some applicants languishing in the certification process for more than a year. We were still a manual process in a digital age. Finally, we lacked a working Competency Framework or Body of Knowledge, the presumed basis on which our certification process rested.

**Brand:** The CMC brand was relatively unknown to business and the IMC brand was relatively unknown to consultants, making us the best kept secret in consulting. These were linked - if the market didn't demand the CMC, why should IMC and its certification be needed? Many new members reported that they had never heard of IMC but once they knew what we were, found the value of membership compelling and then joined.

**Ethics:** IMC approved a new Code of Ethics and Enforcement Procedures in 2005 and had successfully adjudicated several alleged ethics violations. However, we still lacked ethics educational or support resources, and we were not encouraging chapters to make ethics a part of their programming.

**Chapters:** Our chapters were distinct entities, self-managed, each with their own website with a distinct brand, and not always serving their members well. Some chapters provided effective leadership, vibrant community and superb service but others rarely met, their leadership was disengaged and members had low renewal rates. Many chapters asserted that they could not increase membership without additional financial support, although some chapters grew significantly without any additional support.

**External Relations:** IMC had few relations with business, other professional associations or local communities. This disconnectedness was tied to our lack of recognition in the consulting or client communities. We had a few vendor relationships but these lacked strategic purpose and few members used them.
ICMCI: ICMCI stated that, as the member with the largest consulting marketplace in the world, IMC USA was not contributing proportional to its potential to the management consulting profession, specifically in terms of our membership.

The common characteristic of these challenges was that many lacked the infrastructure to support their resolution. Whether knowledge, budget, communication, tools, staffing, or other resource, IMC lacked a foundation on which to build its finances, membership, market value and service to the profession.

**2006-2008 Strategy**

The strategy to address these challenges built on existing capabilities but recognized inherent lack of staff and budget resources, and would rely heavily on the volunteer efforts of a small contingent of highly committed members. The theme of this administration would be "ABC" to address the following:

- **Assets**: IMC needed significant improvement in both the financial and knowledge assets. We needed to eliminate our persistent budget shortfall that prevented any significant investment in value building initiatives and needed to generate intellectual property from IMC USA as an institution.
- **Brand**: IMC needed to increase visibility and market valuation of both IMC and the CMC. Greater awareness and appreciation of both brands would acquire and retain more members and reinforce our value to the profession. To be relevant to the profession, rather than just adding members, we also needed to move away from a focus on new consultants and build a foundation for an IMC that represented new ideas and distinction in the profession.
- **Communities**: IMC needed to build its reach into six types of communities: chapters, local communities, business, professional associations, international and virtual. Although the path to significant presence in these communities would take several years, we were going to take deliberate steps to begin the process.

These three elements of our strategy are mutually reinforcing. Greater community builds brand recognition and strengthens finances. New knowledge assets increase our value to business communities and feed value to members and the CMC education base. Building virtual communities through technology could unite our chapters and create new opportunities for members. To the extent possible, we would create new functions, activities and assets that could serve multiple purposes.

Without a detailed description of how each was achieved, other than to say that each had one or more champions and dedication of members at the national and chapter level, we describe the highlights of IMC’s major accomplishments.

**2006-2008 Results**
Knowledge Assets

One of the most prized benefits of IMC membership was a subscription to the quarterly journal C2M (Consulting to Management). However, due to increased publishing costs and reduced subscriptions, C2M ended publication with its June 2006 issue. IMC members were left without a regular source of new ideas and best practices in a range of consulting disciplines. However, IMC invested in this knowledge by purchasing the assets of IMC and makes over 800 articles and book reviews available free to members through our website. Our intent is to restart a journal like C2M in the next few years, and we have been in discussion with the Academy of Management about how they could contribute to a hybrid peer-reviewed management journal that contained both research/academic content with significant practical/operational content.

As part of our effort to increase brand awareness of IMC and build our knowledge assets, IMC started publishing a Daily Tip for Consultants. These tips are published by email weekdays. The tips address issues raised by members and other consultants in the areas of client service, marketing, practice management, ethics, work-life balance and professional development. As of 2008 the subscriber base had grown to 5,000 and was being read in more than 100 countries. Mark Haas was the editor and principal author of these tips, which started in 2006 and by 2009 totaled more than 1,000. Compilations of these tips are planned for publication and further branding of IMC.

Several years before, IMC had ceased publishing the IMC Times, a hardcopy monthly publication of IMC and member news and consulting content. Without such a publication, we had limited contact with members other than through chapters. Several attempts to restart a monthly newsletter had been unsuccessful. In April 2007, we started the IMC Connector, with the purpose of creating more visibility for IMC as a professional organization and to connect members to IMC and vice versa.

We started Chair Chat in 2007 (sort of like Saturday Night Live’s Church Chat, but not as funny) – a semiannual conference call (actually several calls over a few week period) with chapter presidents and anyone else who wanted to join in. People seemed to like them and the next Chair continued this (most recent one was Jan 4, 2010).
In 2006, the IMC USA Academy for Professional Development finally started to get some traction. The Academy was intended to deliver professional development for all IMC members and nonmember consultants, build the IMC brand as a provider of leading management and consulting content, and to increase non-dues revenue.

**Financial Assets**

We made a commitment to create, by 2012, a reserve fund of $200,000. We ended 2006 with a positive $45,000 net cash position and 2008 with a net position of $204,000, well ahead of our reserve development target. This was one of the most important reasons IMC was able to build infrastructure and allow IMC to restore full chapter allocations in 2007, after cutting them by 50% as an emergency step to strengthen our balance sheet in 2006. Much of the credit goes to Treasurer John Newman for providing “turnaround” skills and the discipline to keep us on track.

**IMC Brand**

In an increasingly virtual and knowledge based economy, our website neither represented IMC well nor served as a platform to serve our members. In 2006, we replaced our static 1.0 website with an open source site with greater functionality, such as calendar of events, member news, different sections targeted to members, consultants and managers. The intent was to build a web capability for IMC that would serve our needs until budget was available to create a full web 2.0 level (interactive) site. Ultimately, we would use the website platform for branding, member service, communication, records management, and cost control.

In 2008, we selected software to satisfy the IMC USA web site requirements. The site was rolled out on New Year’s Day, 2009, under the Chairmanship of Drumm McNaughton. As any computer-savvy consultant or Information Technology specialist knows, the years before and after this implementation required of Mark major tasks of selecting software, designing, building, and maintaining the site, and training chapter administrators. This was in addition to building and maintaining IMC’s site for the two years beforehand. Effecting change within our own organization was and is a non-trivial task.
member profiles and member to member messaging, as well as calendar and registration for chapter and national events, communities of practice, blogs and discussion forums, email, a robust find a consultant service and the ability to post consulting opportunities for members, document repositories and resource libraries.

Despite the opinions of our members, IMC had little direct data on how people perceived IMC and its value to consultants. With the leadership of Michael Egan (DFW) and support of eRewards Market Research, IMC fielded a professional market survey in 2008 to identify areas in which we needed to focus our marketing and member service efforts. The professionally conducted survey provided a statistically valid view across members and nonmembers, firm sizes and location, and awareness of and involvement in IMC. The important findings, on which we are basing our marketing and membership development plans going forward, are that the most important benefits of a professional membership are focused on connecting with others through business development and improving skills.

We had always relied on anecdotal data, however well considered the source, to define our growth and operational strategies. For the first time, IMC had some solid data on which to confirm or refute the wisdom of our strategies and objectives. For example, large firms, more than small firms, saw the importance of establishing strong ethical standards and small non-IMC members highly valued a community of like minded professionals with shared values. Although logical, these were a base on which we could comfortably design outreach efforts to large and small firms to broaden our membership and strengthen the organization. The value of this market research can't be overestimated and future administrations should study the survey results and conduct similar studies as needed.
During 2008, we rewrote our "How to Hire a Management Consultant and Get the Results You Expect" and created a government version, compliments of Baldwin Tom. These were made available to members and the public in printed and electronic versions. The intent was to use these with several versions of prepared PowerPoint presentations that CMCs could give to chambers of commerce and trade groups to publicize IMC and improve the selection and use of management consultants. Although these resources are a seemingly effective way to elevate the profession and gain exposure for the individual CMC, and some members found them significant avenues of exposure, few members took advantage of this opportunity. The question remains as to how much IMC should be creating resources or opportunities for members if most members do not find value in them.

Mostly due to lack of funds, IMC had never had a significant presence at trade shows or other professional conferences. We purchased a portable trade booth display that would provide a more...
professional image for IMC, first used at ConsultingWorld in 2007 and continually at Confab.

With “How to Hire” as collateral, we also sought a more active outreach to those who purchased consulting services. Primarily as market research, we exhibited at the April 2008 National Contract Managers Association conference in Cincinnati. Attended by 1,500 government and commercial procurement officials, it was an efficient way to learn how those who are heavily involved in buying consulting services viewed consultants, IMC USA and the CMC. Board members Gayle Carson, Drumm McNaughton and Mark Haas represented IMC USA. As we suspected, few government or commercial procurement officials were aware of IMC but their comments helped us refine our message for businesses and public agencies that use management consultants.

We also made a concerted effort to broaden our media presence. Several Directors made appearances on local media and in articles. The October 2006 Business Week Magazine published a Letter to the Editor from IMC about the value of certification (in response to a Jack Welch editorial about consultants being less than useful). Mark Haas represented IMC USA in a discussion thread in the Wall Street Journal over several weeks about the management consulting profession. Other Directors appeared in Internet or business radio to discuss consulting, ethics, and business trends.

IMC created a 15-minute video about IMC, our IMC mission, the value of IMC as a professional association for management consultants, and the range of member benefits. The professional video was created through the George Washington University School of Media and Public Affairs and featured Board Chair Mark Haas and was made available to each chapter through a DVD and posted on the IMC website. It was a popular way for chapters to summarize the benefits of membership for member recruitment events or for new members to hear about how they could leverage their membership.

With the decision to not hold an annual conference in 2006, the Board looked for another way to expand our presence in the consulting and business market at minimal risk and cost to IMC, so we partnered with the American Management Association to hold the first ConsultingWorld conference in Orlando, FL in June 2007. Keynote speakers included Steven M.R. Covey and Oren Harari. It was judged by attendees to be a huge success but attendance was not as high as anticipated. AMA covered all expenses for the conference but, concerned about its ability to manage a conference that
attracted enough consultants to make a profit, AMA elected to not sponsor another conference.

**CMC Brand**

IMC had made several attempts to more vigorously and effectively publicize the CMC, but we never seemed to get traction, mostly due to a lack of funds and lack of clarity around the compelling value of the CMC. However, in 2006, the Board approved a fee to go with annual dues of $50 for each Certified Member. The **CMC Marketing Fund**, about $35,000 per year, was segregated and to be used only for CMC marketing and branding purposes and not commingled with general treasury funds.

In the absence of a well funded national campaign to promote the value of certification, we recognized the need to provide the resources to CMCs to help them brand and market the CMC. Based on foundational work by NorCal members Al Peterson, Rogene Baxter, David Hodgin, Charles Wilson, Dale Radcliff and Deborah Hornberger, we created and made available to Certified Members a "**CMC Marketing Toolkit**" that contained logos, email and press release templates, sample talking points, and other resources to increase the CMC value.

**Communities**

Alliances between IMC and other entities were traditionally episodic and opportunistic. To address a lack of overall structure we thought about our mission and what **leading management-focused organizations** had in common: the desire to advance the effectiveness of management:

- Training: American Management Association
- Research: Kennedy Information
- Publishing/Media: Harvard Business School Publishing
- Consulting: Institute of Management Consultants USA

With each of these entities we established relationships to varying degrees. AMA contributed an Outside Director, deep discounts to IMC members on management and training materials, and sponsorship of the 2007 ConsultingWorld conference. Kennedy Information provided discounted materials, inclusion in their surveys of consultants, and visibility for IMC (by referring interested parties to IMC USA and citing us as a resource for management consultants). HBSP provided discounts on management materials
and a commitment to tie all of their content (books, videos, case studies) to our Competency Framework.

**Chapters**

With debt under control and membership a high priority, we talked to chapters about their needs to grow membership. Almost all said that their greatest challenge to growing membership was lack of money to fund membership events or collateral. In response, IMC set aside $15,000 in 2007 and $20,000 in 2008 for **member development "grants"** to be used by chapters to design and implement member development events. Each chapter could apply for a grant, but their proposal had to include a specific plan of action, a budget (including how much matching funds the chapter would contribute), and a plan of how the impact of the member development strategy would be evaluated and communicated to other chapters.

Houston, New England, and Dallas received several thousand dollars of grant funds to hold chapter events. Although the approaches varied, the principal insight gained was that the most effective member recruitment approach involved current members recommending and actively recruiting prospective members. Dallas was most effective in this approach, converting more than half of the prospects attending the member development event.

We also created a **CPC operating budget** of $10,000 to support CPC communication and enable it to offer funds to support selected chapter initiatives. As part of this effort, the CPC granted the Georgia chapter $5,000 to roll out several membership growth and member service activities. CPC funds created a new shared fiscal responsibility for chapters, not just the national Board, and greatly engaged the chapters in “competing” for resources. The intent was to put resources closer to the people who would use it, something for which that the chapters were widely appreciative.

If we were to leverage the collective expertise and experience of chapter leaders, we needed to facilitate better communication between chapters. Each had become a separate entity with little knowledge of other chapter practices or awareness of IMC resources on which they could draw. In May 2006, we convened an **IMC Leadership Summit** to bring chapter leaders together to share strategies and offer solutions to improve member services and chapter operations. The Chicago Conference was attended by 21 people representing 17 chapters, many of whom had never met before. The second Summit was held in Dallas in May 2008, with 49 leaders representing 17 chapters in attendance and Judith Light facilitating. The Summit is now an annual event, either as a standalone conference or in conjunction with Confab, and provides an opportunity for chapter presidents to come together annually to share information.
The **Chapter Presidents Council (CPC)** significantly increased its efforts and effectiveness during this time. A strong CPC is critical to continuity of chapter operations, effective communication between the Board and members, and creation of a steady stream of leadership talent. The leadership of Loraine Huchler as CPC Chair during this time was exceptional due to her recognition of the importance of the position to IMC’s success, her diligence in organizing and managing CPC activities and her skills and personality in advancing coordination between chapters and support of their leaders. Participation on monthly CPC conference calls is the best indicator of its value to chapters and during Loraine’s tenure as Chair, chapter representation on the calls was usually well over 50%.

**Local Communities**

IMC chapters exist in a local community that would benefit from the contribution of member expertise in areas as varied as governance, marketing, operations, finance and human resources. We started a Community Service Fund, which raised more than $10,000 in the first two years from member donations and vendor contributions. Funds are used for reimbursement of chapter administrative and operational expenses incurred by chapters or as a contribution to a nonprofit. No funds are used to pay for consulting services by members. The intent is to encourage chapters to connect to their communities and provide members a chance to get to know each other better. Several chapters have conducted these types of community service projects but getting traction on a widespread effort has been difficult. A more concerted effort is needed to convince chapters and members that community involvement is a part of every professional’s responsibility.

**Business and Government**

With an eye to creating professional and vendor relationships that both aligned with our mission and the needs of our members, IMC created more than a dozen **affiliation relationships** with various business vendors and professional organizations. Appendix A lists some of these as of 2007, with IMC adding more in 2008 such as Regus office space, Prevue Assessments, and MyStrategicPlan. The principal lesson learned is that regardless of what kind of relationships we establish, only a small percentage of members will take advantage of each benefit. For example, 10% of members (about 200) would purchase a Business Source subscription, another 10% would purchase a RainToday product, and another 5% would take an Academy course. Because
our membership is so varied in characteristics and needs, our member benefits and business relationship need to be similarly varied.

Professional Associations

As had been done in the past, we looked at establishing closer relations with other professional associations such as the Project Management Institute, Society for Human Resource Management and the American Society for Training and Development. However, we concluded that these relationships were, at least for the time, best developed at the local level and, as working relationships were established, we could scale up these to a national level. It is unclear whether this is the appropriate strategy as IMC grows. In this administration, as has been true in past ones, our attempts to find and secure a formal relationship with other professional associations was deemed important but lacked a compelling articulated value, a committed champion and sustained Board support.

International

ICMCI criticized IMC USA’s lack of participation in international activities of the Council and our low membership numbers. We did increase our participation on ICMCI committees and attended Congresses and Working Sessions but were unable to meet ICMCI’s desire to increase membership. During this time, ICMCI was becoming more Europe-centric and moved its headquarters from California to the Netherlands. We began planning to create an America’s Hub with Canada, USA and the Caribbean Institute, and began discussions with Mexico and Panama about starting Institutes.

Virtual

We recognized the changing demographics of the consulting and business workforce and the influence of new technologies on younger generations’ desire to work virtually. A large part of our decision to migrate our website to a web 2.0 platform was its ability to move IMC from pushing static pages to an environment where members could collaborate and work in a virtual space as well as communicate and interact with other consultants and managers. Two features of our website, Communities of Practice and discussion forums, are in place but not yet widely used. Communities of Practice are groups (with the same functionality as a chapter site) built around an industry (e.g., transportation, healthcare), a discipline (e.g., strategy, marketing), management theme (e.g., leadership, agility), client type (e.g., family owned business, international), or consulting firm type (e.g., mature solo, large firm). The design is to let these Communities grow organically – anyone can suggest a Community and those that are active will be supported and those that fail to attract “customers” will be removed. Communities are open to members and nonmembers, but the latter have to register as Guests on the site.
We expected that technology would be the easy part of this and getting members used to static websites (or not working online at all) to participate, the hard part. This is what happened. Members who are at ease in the online environment want to participate in the Communities of Practice but there are not enough of them in IMC to reach a critical mass for sustained interaction. What is required is a committed moderator for a Community to encourage and sustain discussion long enough to get people used to the idea that a Community can provide value in the form of knowledge, networks or business. This will be a work in progress but a lesson to not start something for which we don’t have the resources to support (in this case, volunteer moderators). This is a hard process because, unlike LinkedIn and other portals, IMC’s site is known mostly by its members. We need to do more to facilitate, especially among our older and less technically savvy members, their use and benefit from the online IMC community.

Operations and Governance

To expand our external perspective and begin to develop deeper relationships with business, the Nominating Committee had previously created three Outside Director positions who would provide access to influence in the marketplace, such as funding and communications. The outside directors were useful mostly as a reality check on Board perspective and discussions that sometimes appeared to be “more of the same.” Their perspectives and comments, sometimes blunt, about why and how IMC could matter to business and to new members, were a departure from much of our previous discussions and did help guide our strategy going forward. We did have difficulty providing reciprocal value for the outside directors and future outside directors should be selected for whom IMC can provide some material value, either personally or for their institutions.

In response to concerns that the Board was not sufficiently addressing the concerns of either the chapters or ICMCI, we had created two Board positions for the CPC Chair and the lead ICMCI Trustee. These Director positions were initially designated nonvoting because the persons occupying these positions would not be elected by the membership but appointed by the Chair. This act alone greatly increased communication with, and trust by, chapters with the Board. Jerry Savin (lead ICMCI Trustee) and Loraine Huchler (CPC Chair) occupied these roles.

In 2006, IMC’s Executive Director of several years, Gaylen Camera, resigned from SmithBucklin and left the association management business. Combined with 50% reduction in SmithBucklin budget for administrative support, this put significant strain on volunteers to pick up the slack. While many IMC administrative duties were assumed by Megan Renner at SmithBucklin, much of the Executive Director responsibilities fell to the Chair and Vice Chairs. While much was accomplished over the next year, the lack of an experience Executive
Director constrained our operations until Gail McCauley joined us in October 2007.

To provide more discipline in operations and improve communicate plans and accomplishments to the membership, IMC began an experiment using **One Page Business Plans** for the Chair, Vice Chairs and Committees. The One Page Planning process was specifically selected because of its methodology to impose discipline to create a simple set of objectives and hold plan owners accountable. The experiment failed in the first year because not enough Board members and Committee Chairs were sufficiently engaged in the planning process to complete and commit to their plans. Although the Chair drafted many of the plans to try to jump start the process, this attempt to formalize planning and management of IMC functions was unsuccessful.

This may be a lesson for future administrations, taken in concert with similar experience with almost every IMC strategic plan: brilliant insights and planning, ambitious goals and objectives, but poor execution and follow through. Even a simplified planning and management process could not overcome our seeming inability as an organization (or, at least, a collection of consultants) to manage an organizational improvement process. The irony that our organization is filled with individuals, many of whose businesses are organizational improvement, is apparent.

**Conclusion**

The 2006-2008 period was one of active management and change in many areas. While membership held steady, we did deliver on our objectives of significantly strengthening our financial and knowledge assets. For the first time since moving from New York to Washington, DC, IMC now had the financial resources to deliver more chapter and member services and more actively support the profession. We formally researched and acted on building the professionalism of IMC and built the brand of both IMC and the CMC with both business partners and the media. Many chapters were more active and provided with a new website and financial and content resources to better serve their members. Many Board members, committee chairs and members, chapter leaders and volunteers share the credit for restoring the strength of IMC and building for its future.

Yet, as we said at the beginning of this segment of our history, another crossroads appears ahead.
## Appendix A – Summary of Member Benefits in 2007

<table>
<thead>
<tr>
<th>Get Smart</th>
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<tbody>
<tr>
<td><strong>American Management Association (AMA)</strong></td>
<td>online management training resources available at no cost ($225 value); discounts on its training courses and facility rental.</td>
</tr>
<tr>
<td><strong>The Business Source</strong></td>
<td>two concise summaries monthly of professional books designed to be read in 15 minutes; 70% off normal cost.</td>
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<tr>
<td><strong>Group Mind Express (GME)</strong></td>
<td>collaborative technology allowing consultants to effectively manage virtual consulting teams and client projects, and to develop new technology-based services for clients; 30% discount on purchases of GME product suites.</td>
</tr>
<tr>
<td><strong>Spy-Ops</strong></td>
<td>individual training briefs and certificate programs that address corporate fraud, white-collar crime, money laundering, operational risk management, espionage and other areas that must be addressed to reduce risk and ensure business integrity; 15% discount.</td>
</tr>
<tr>
<td><strong>IMC USA Academy for Professional Development</strong></td>
<td>teleseminars and webinars aimed at improving consultant’s ability to define business, market offerings, deliver services, and manage practice; organized around the Management Consulting Body of Knowledge, the Academy courses are a key component in education toward certification; 20-30% discount on IMC courses and 10-20% on affiliate courses.</td>
</tr>
<tr>
<td><strong>QuadRed</strong></td>
<td>assessments focusing on strategic business performance to generate additional income.</td>
</tr>
<tr>
<td><strong>Kennedy Information</strong></td>
<td>the leading researcher and publisher for the management consulting market; best prices for Consultants News and KI research reports, as well as the opportunity to participate in and receive special reports from KI surveys on small consulting practices.</td>
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### Get Known

| **Yearbook.com Expertclick** | provides visibility and publicity services for consultants by finding experts to interview for news stories and other organizations; discount; Yearbook makes a $100 donation to the IMC USA Community Service Fund for each member who subscribes. |
| **American Small Business Coalition** | connects federal agencies and federal contractors with each other; free membership to ASBC (normally $95) giving access to ASBC resources in 17 states and 4 countries. |
| **RainToday** | provides professional services marketing research and information; 20% discount on reports and best practice summaries. |
| The IMC USA Community Service Fund | created to encourage IMC USA members to engage with their communities through service projects, supports the growth of these volunteer projects by providing financial assistance for one team to develop resources that can be used by other teams. |
| Association of Management Consulting Firms (AMCF) | the professional association of management consulting firms (formerly ACME); offers member pricing for its conferences and opportunities to participate in research studies and other events. |

### Get Business

| The One Page Business Plan Company (OPBP) | a powerful, practical addition to the consulting toolkit, to create spectacular breakthroughs in sales and profitability with longer assignments. |
| Blue Chip Expert | connects hiring managers with uniquely qualified consultants, contractors and interim executives; aimed at the high end of the consulting market; offers CMCs preferential position in their hiring process. |

### More Benefits

| Citrix | provides webinar capabilities to the IMC USA board, chapters and committees; discounts on retail Citrix fees for their GoToMeeting and GoToWebinar tools. |
| Katzman Insurance | provides E&O and other forms of business insurance to members at highly competitive prices. |
| The International Council of Management Consulting Institutes (ICMCI) as a UN NGO | represents 44 national management consulting certifying institutes worldwide; registered with the United Nations as a Non Governmental Organization, which provides a vehicle for members to access UN international development funding opportunities. |