

## **Guidelines for Preparing Engagement Summaries:**

**Project summaries should include the following information. It is strongly recommended that these**

**section headings be used in each summary to facilitate the review process.** The engagement

summaries should each be approximately two (2) pages in length.

1. Please place at the top of each page your name and contact information.
2. Engagement Name, Dates & Size: Identify the project's name, its start and end dates and its size (in terms of total hours). Indicate the industry and context of the engagement.
3. Candidate's Specific Role: Identify your specific management consulting role(s) and level of participation (total effort or fees) on the project. Include the number of actual consulting hours you delivered on the engagement.
4. Objective(s) of the Engagement: List both the project's overall objectives and specifically what you planned to achieve in your role as consultant.
5. Methodology Used: List the individual steps or phases you undertook to complete your role in the project. Do NOT simply list the names of the methodologies used.
6. Results vs. Objective(s): List the results you achieved in your role and link them to the project's overall objective(s). Focus on those project results for which you were directly responsible or involved.
7. Client Liaison: With whom in the client organization did you have contact? Include their title, and their role in the project. How frequent was the contact? What was the nature of the contact?
8. Demonstration of Independence: How did you (as an external or internal consultant), carry out the engagements? What degree of independence and objectivity did you have?
9. Professional Development: How did you grow as a consultant from this engagement? Include evidence that reflects your increasing insights into your professional competencies, knowledge, skills and abilities, and approach to consulting. (You may refer to the CMC competency framework

[http://www.camc.com/site/CAMC\\_21/pdf/CMC\\_competencymatrix\\_0999-1.pdf](http://www.camc.com/site/CAMC_21/pdf/CMC_competencymatrix_0999-1.pdf))

### **NOTES:**

- You do not need to disclose client company or personnel names. You can refer in general terms (i.e. Client A, Manager C, etc.)
- As part of the CMC program requirements, you will be asked to prepare 5 engagement summaries – you will be able to use these summaries to meet that