



## Uniform Code of Professional Conduct

# Trust

### A Commitment to Integrity

All Association members share a devotion to high professional standards and best practices. This is made concrete by the fact that every member at every level – from student to CMC – must agree to abide by this stringent Uniform Code of Professional Conduct.

#### Building Trust

To succeed as a consultant your clients must believe in you, and trust that you are working in their best interest.

In a profession where there are often few guideposts, membership in the Association, coupled with this Code and the global CMC designation, serves as a benchmark for the client community to aid them in sourcing the best consulting talent. The Association's very public establishment and promotion of this Code sets you apart from non-members and aids you in building a professional relationship with your clients founded on trust.

#### Purpose

The purpose of this code is to identify those professional obligations that serve to protect the public in general, and the client in particular. The code is also designed to identify clearly the expectations of members with respect to other members and the profession.

#### Definitions

"Council" is the Council or Board of any provincial or regional institute of Certified Management Consultants affiliated with the Canadian Association of Management Consultants (the Association).

"Member" is any individual in good standing with the Canadian Association of Management Consultants.

#### Responsibilities to the Profession

##### Knowledge

A member shall keep informed of the applicable Code of Professional Conduct and the profession's Common Body of Knowledge.

A member shall strive to keep current with developments in any area of the profession where specific expertise is claimed.

##### Self Discipline

A member shall recognize that the self disciplinary nature of the profession is a privilege and that the member has a responsibility to merit retention of this privilege. Therefore, a member shall report to Council unbecoming professional conduct by another member.

##### Responsibilities for Others

A member shall ensure that other management consultants carrying out work on the member's behalf are conversant with, and abide by, the applicable Code of Professional Conduct.

##### Image

A member shall behave in a manner that maintains the good reputation of the profession and its ability to serve the public interest.

A member shall avoid activities that adversely affect the quality of that member's professional advice.

A member may not carry on business that clearly detracts from the member's professional status.

#### Responsibilities to Other Members

##### Review of a Member's Work

A member who has been requested to review critically the work of another member shall inform that member before undertaking the work.

## Responsibilities to the Client

### Due Care

A member shall act in the best interest of the client, providing professional services with integrity, objectivity, and independence.

A member shall not encourage unrealistic client expectations.

### Business Development

A member shall not adopt any method of obtaining business that detracts from the professional image of the Institute or its members.

### Competence

A member shall accept only those assignments that the member has the knowledge and skill to perform.

### Informed Client

A member shall, before accepting an assignment, reach a mutual understanding with the client as to the assignment objectives, scope, workplan, and costs.

### Fee Arrangement

A member shall establish fee arrangements with a client in advance of any substantive work and shall inform all relevant parties when such arrangements may impair or may be seen to impair the objectivity or independence of the member.

A member shall not enter into fee arrangements that have the potential to compromise the member's integrity or the quality of services rendered.

### Conflict

A member shall avoid acting simultaneously for two or more clients in potentially conflicting situations without informing all parties in advance and securing their agreement to the arrangement.

A member shall inform a client of any interest that may impair or may be seen to impair professional judgment.

A member shall not take advantage of a client relationship by encouraging, unless by way of an advertisement, an employee of that client to consider alternate employment without prior discussion with the client.

### Confidentiality

A member shall treat all client information as confidential.

## Objectivity

A member shall refrain from serving a client under terms or conditions that impair independence and a member shall reserve the right to withdraw from the assignment if such becomes the case.

## Responsibilities to the Public

### Legal

A member shall act in accordance with the applicable legislation and laws.

### Representation

A member shall make representation on behalf of provincial, regional, or national institute members only when authorized.

### Public Protection

A member shall be liable for suspension or expulsion from membership where that member has behaved in a manner unbecoming to the profession, as judged by the Council or Board of any provincial or regional institute of Certified Management Consultants affiliated with the Association.

This Uniform Code of Professional Conduct has been adopted, in substance, by the following provincial and regional Institutes of Certified Management Consultants in Canada and applies to all their members.

Institute of Certified Management Consultants of British Columbia

Institute of Certified Management Consultants of Alberta

Institute of Certified Management Consultants of Saskatchewan

Institute of Certified Management Consultants of Manitoba

Institute of Certified Management Consultants of Ontario

Institute of Certified Management Consultants of Atlantic Canada

In addition, the Code applies to all members in good standing with the Canadian Association of Management Consultants.

## About the Association

The Canadian Association of Management Consultants is the single voice of management consulting in Canada. With over 4,500 members across the country, the Association represents the largest professional association of management consultants in the world. The Association's objectives are two fold:

- To ensure Canadian Management Consultants are able to compete effectively in a constantly changing marketplace;
- To ensure Canadian business and organizations of all sizes have access to increasingly effective management consulting services.

The Association is actively involved in professional development for management consultants and in addressing the issues and policies that affect the profession.

We aid the client community by administering the CMC (Certified Management Consultant) designation for individuals who meet the established criteria; and monitoring adherence to our Uniform Code of Professional Conduct.

## For More Information

Canadian Association of Management Consultants  
BCE Place  
181 Bay Street, Box 835  
Toronto, Ontario M5J 2T3

Tel: 416 860-1515 / 1-800-268-1148  
Fax: 416 860-1535 / 1-800-662-2972

camc@camc.com  
www.camc.com

Goettschalk-Ash International 0102



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