

## MANAGEMENT CONSULTANT SUPPLEMENTAL INFORMATION

Name of Applicant \_\_\_\_\_

1. Indicate the percentage of your income derived from the following types of practice:

- |                                    |                                 |
|------------------------------------|---------------------------------|
| General Management _____ %         | Administrative Services _____ % |
| Finance & Accounting _____ %       | EDP/M.I.S. _____ %              |
| Manufacturing & Operations _____ % | Human Resources _____ %         |
| Materials Management _____ %       | Research & Development _____ %  |
| Physical Distribution _____ %      | Other _____ %                   |
| Marketing _____ %                  |                                 |

### CLASSIFICATION OF PRINCIPAL AREAS OF CONSULTING SPECIALIZATION (CHECK ALL THAT APPLY TO PREVIOUS ENGAGEMENTS)

**GENERAL MANAGEMENT**

- 1.00  Corporate objectives and policies
- 1.20  Feasibility studies
- 1.10  General business surveys
- 1.30  Management audits
- 1.10  Management reports and controls
- 1.50  Mergers, acquisitions, divestments, joint ventures
- 1.40  Management and ownership succession planning
- 1.20  New business start-ups
- 1.00  Organization development
- 1.00  Organization planning
- 1.10  Profit improvement programs
- 1.00  Productivity improvement
- 1.25  Project management
- 1.20  Strategic and long-range planning
- 1.50  Turnarounds

**FINANCE AND ACCOUNTING**

- 1.25  Budgeting
- 1.40  Capital investment programs
- 1.40  Cash management
- 1.25  Credit and collection
- 1.30  Financial information and reporting
- 1.50  Financing and management of funds
- 1.20  General and cost accounting
- 1.25  Long-range financial planning
- 1.40  Valuations and appraisals

**MANUFACTURING**

- 1.20  Automation and robotics
- 1.00  Facilities planning
- 1.00  Incentives
- 1.30  Industrial engineering
- 1.20  Labor and equipment utilization
- 1.00  Maintenance management
- 1.00  Manufacturing layout
- 1.30  Production engineering
- 1.20  Production planning, scheduling and control
- 1.20  Productivity improvement
- 1.00  Quality Assurance
- 1.20  Standard Costs
- 1.25  Value engineering

- 1.25  Work measurement, standards development

**MATERIALS MANAGEMENT**

- 1.00  Inventory Management
- 1.00  Materials handling
- 1.00  Materials requirements planning
- 1.00  Purchasing

**MARKETING**

- 1.00  Advertising and sales promotions
- 1.00  Attitude and opinion surveys
- 1.00  Competitive analysis
- 1.00  Consumer marketing
- 1.00  Customer service
- 1.00  Direct marketing
- 1.00  Distribution channels
- 1.00  Franchising
- 1.00  Industrial/marketing
- 1.00  Marketing audits
- 1.00  Marketing organization
- 1.00  Marketing planning and strategy
- 1.00  Marketing research
- 1.00  Merchandising
- 1.00  New Products/Services Development
- 1.00  Pricing
- 1.00  Product line planning
- 1.00  Sales compensation
- 1.00  Sales forecasting
- 1.00  Sales management training

**ADMINISTRATIVE SERVICES**

- 1.00  Clerical work measurement
- 1.00  Forms design
- 1.00  Office automation
- 1.00  Office layout
- 1.00  Office management
- 1.00  Order processing and fulfillment
- 1.00  Records management and information retrieval
- 1.00  Systems and procedures

**OTHER**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**PHYSICAL DISTRIBUTION**

- 1.00  Customer Service
- 1.00  Distribution networks
- 1.00  Traffic and transportation
- 1.00  Warehouse location/space planning

**EDP & MANAGEMENT INFORMATION SYSTEMS**

- 1.25  Computer security
- 1.25  Data communications
- 1.25  EDP audit
- 1.25  EDP department management
- 1.25  Equipment evaluation and selection
- 1.25  Management information systems
- 1.25  Software development
- 1.25  Systems design
- 1.25  Turnkey installations

**HUMAN RESOURCES MANAGEMENT**

- 0.90  Attitude security
- 0.90  Compensation and benefits planning
- 0.90  Employee communication and motivation
- 0.90  Employee services
- 0.90  Job evaluation
- 0.90  Labor and union relations
- 0.90  Performance appraisal
- 0.90  Personnel policies and procedures
- 0.90  Personnel recruiting, selection and placement
- 0.90  Training and development
- 0.90  Executive search

**RESEARCH AND DEVELOPMENT**

- 1.00  Technological forecasting
- 1.00  R&D planning
- 1.00  R&D operations

2. Describe your last three assignments (use additional sheet if necessary).

Description

Date Completed

_____	_____
_____	_____
_____	_____

3. Does your firm regularly render opinions, or make recommendations, which will ultimately be used by your client as the basis of an equipment purchase or installation?  Yes  No If yes, please explain. \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

4. List any continuing education activities the principals of the firm engage in that are related to your professional or business activities. \_\_\_\_\_

\_\_\_\_\_

5. List any federal, state, or municipal licensing or certification requirements you currently comply with in your professional or business activity. Include the type of license or certification and its expiration date.

\_\_\_\_\_

\_\_\_\_\_

6. Does any of your professional activity fall outside of the description in #1 above?  Yes  No  
If so, please describe. \_\_\_\_\_

\_\_\_\_\_

Date: \_\_\_\_\_ Signature: \_\_\_\_\_

Title: \_\_\_\_\_