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ISO 20700:2017 Guidelines for management consultancy services

CMC-Global 20700 Toolbox

PSC Committee – 1st Edition September 2017

Part 1: ISO 20700:2017 Roadmap

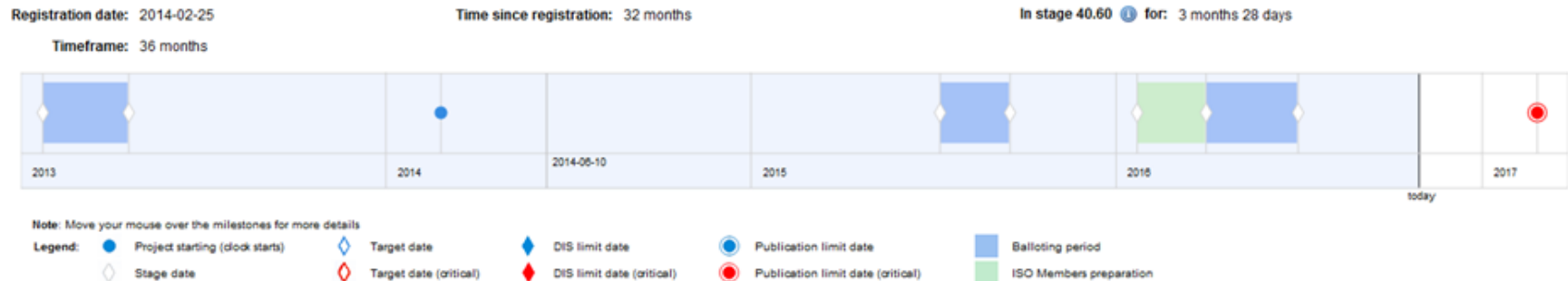**Part 2: Introduction to ISO 20700:2017**

Part 3: Use of ISO 20700:2017

Part 4: Get involved with ISO 20700:2017

Part 5: Self Assessment Check List

Part 1:

ISO 20700:2017 Roadmap

Development of the ISO Standard started in Milano 2014 and finished in Bejing 2016.

Registration date: 2014-02-25   Time since registration: 32 months   In stage 40.60 ⓘ for: 3 months 28 days

Timeframe: 36 months

2013   2014   2014-06-10   2015   2016   today   2017

Note: Move your mouse over the milestones for more details

Legend:
- ● Project starting (clock starts)
- ◇ Target date
- ◆ DIS limit date
- ◉ Publication limit date
- ▪ Balloting period
- ◇ Stage date
- ◇ Target date (critical)
- ◆ DIS limit date (critical)
- ◉ Publication limit date (critical)
- ▪ ISO Members preparation

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- 2014-02 Milano

- 2014-10 London

- 2015-03 Milano

- 2015-06 Paris

- 2015-10 Toronto

- 2016-01 Milano

- 2016-09 Milano

- 2016-10 Beijing

Taking management consultancy services
to another level

by Clare Naden

Consultancies can change your business and make a big contribution to the economy... or they can be a financial black hole. How can you ensure the money you spend on consultancy fees doesn't end up being spent on endless hours of nothing?

16 | #ISOfocus_116

Chair Robert Bodenstein Austria

48 countries

ISO 20700

4 plenary meetings

Editing meetings and telephon calls

Chaired by Robert Bodenstein Austria 48 countries where actively involved in developing this standard on management consultancy services.

In Plenary Meetings,

in Editing Meetings,

In a lot of telephone calls made that project come to live.

Part 2:

Introduction to

ISO 20700:2017

ISO 20700:2017 Introduction

"…..Management consultants

use their know-how

to support clients in any sector

locally, regionally, and/or globally

to deal with important issues

as to handle complexity,

achieve sustainable organizational growth,

innovate, to achieve change, enhance productivity.

The management consultancy industry

makes a substantial contribution to the world economy….."

ISO 20700:2017 Introduction

This document is based on good practice from the management consultancy industry. It includes recommendations to improve the specification, execution, acceptance of the outcome and closure of management consultancy services, based on research and the experience of a wide range of MCSPs[1] and their clients.

Innovation, differentiation and ethical behaviour are important parts of an MCSP's value proposition. This document focuses only on the deliverables and outcomes of management consulting. MCSPs are free to use their own methods and approaches.

[1] MCSP = Management Consultancy Service Provider

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This document takes the form of an easy-to-understand guidance document, written from the perspective of management consultancy. It applies to all MCSPs, whatever their size or specialism, including sole proprietors, partnerships, associations, governmental and non-governmental organizations, internal departments of corporations, etc.

In summary, the guiding principles of this Standard are that it:

a)   is written as guidance;

b)   is applicable to all MCSPs;

c)   applies to organizations, not their internal resources;

d)   is based on outcomes;

e)   protects innovation and differentiation;

f)   emphasizes importance of understanding clients' needs;

g)   is easy to understand;

Part 3:
Use of
ISO 20700:2017

A list of Terms and Definitions

Principle:

The standard consulting process is the base of the standard i.e.

•**Contracting:** (3.7 contracting set of activities aimed at reaching an *agreement* (3.1) to provide *MCS).*

•**Execution:** (3.9 execution: performance of the *management consultancy service).*

•**Closure:** (3.5 closure: set of activities aimed at ending the *assignment* (3.2) between the MCSP, the *client* (3.4) and the *recipient* (3.21).

Policies in that process are

- Awareness of regulatory framework
- Stakeholder engagement and commitment
- Code of ethical and professional conduct
- Project governance
- Capability
- Communication
- Data protection and confidentiality
- Protection of intellectual property
- Social responsibility
- Health and safety
- Risk and quality management

Ongoing evaluation and improvement

Claims and dispute

After listing the basic

principles, the phases of the consulting process are described in detail:

Offering		Execution		Closure
· General		· General		· General
· Purpose		· Purpose		· Purpose
· Input		· Input		· Input
· Outcome		· Outcome		· Outcome
· Contents		· Contents		· Contents

Informative Annexes A to G are added

• Annex A: Examples of typical stakeholders

•Annex B: Basic structure of consulting activities

• Annex C: Examples of guidelines for MCSPs for a code of conduct

• Annex D: Examples of guidelines to manage conflicts of interest

• Annex E: Examples of criteria to evaluate capability

• Annex F: Examples of guidelines for MCSPs for typical risk management

• Annex G: Examples of typical understanding activities "pre-assignment"

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Part 4:

Get involved with

ISO 20700:2017

The aim of this standard is to improve

- transparency and understanding
- between clients and management consultancy service providers
- in order to achieve better results from consultancy projects.
- By improving
- quality,
- professionalism,
- ethical behaviour
- and interoperability of management consultancy,
- this standard is intended to enhance
- the effectiveness of the management consulting industry
- and accelerate the development of the profession.

Appropriate application of the standard enables MCSPs

to provide better value for clients

and reduce risk in management consultancy assignments.

The standard focuses only on the deliverables and outcomes. MCSPs are free to use their own methods and approaches.

Inform your clients that you deliver your management consultancy services according to ISO 20700!

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Spread the message:

on your website

"as provider of management consultancy services we deliver our services according to ISO 20700:2017"

on your Business card

"provider of management consultancy services deliver according to ISO 20700:2017"

Part 5:

Self Assessment Check List

ISO 20700:2017

Self Declaration Check List:

1) We understand the relevant terms the same way
☐ Yes ☐ No ☐ other

2) Appropriate resources from MCs provenance and clients responsibility identified and available
☐ Yes ☐ No ☐ other

3) All relevant national and international norms and standards considered
☐Yes ☐ No ☐ other

4) Ongoing evaluation and improvement process is installed
☐ Yes ☐ No ☐ other

5) Significant laws and norms are specified and agreed on
☐ Yes ☐ No ☐ other

Self Declaration Check List:

6) Suitable dialog with the clientis set up
☐ Yes ☐ No ☐ other

7) Relevant stakeholders are identified and engaged
☐ Yes ☐ No ☐ other

8) Our ethical and professional conduct is aligned with the clients
☐ Yes ☐ No ☐ Not necessary ☐ other

9) We have a code of conduct
☐ Yes ☐ No ☐ other

10) We decided on how to confront identified differences between ours and the clients code of conduct
☐ Yes ☐ No ☐ Not necessary ☐ other

Self Declaration Check List:

11) We govern our projects
☐ Yes   ☐ No   ☐ other

12) We made sure that we have the appropriate capabilities throughout the assignment
☐ Yes   ☐ No   ☐ other

13) We protect our confidential data and information and safeguard the rights of privacy of stakeholders

☐ Yes   ☐ No   ☐ Not applicable   ☐ other

14) We protect our intellectual property and the rights of the clients intellectual property
☐ Yes   ☐ No   ☐ Not applicable   ☐ other

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Self Declaration Check List:

15) We consider social responsible, health and safety issues in doing our business
☐ Yes   ☐ No   ☐ other

16) We manage risks and quality issues continually
☐ Yes   ☐ No   ☐ other

17) We have an identifiabel process from contracting to closure the assignement
Contracting Execution Closure
☐Yes   ☐ No   ☐ other

18) We gather feedback to learn from our projects
☐ Yes   ☐ No   ☐ other

We Work with ISO 20700:2017