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# Guidelines for management consultancy services

***ISO Standard 20700***

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# What is the idea behind ISO 20700

This standard, written from the perspective of management consultancy, 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;
- h) is easy to use.

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

Registration date: 2014-02-25

Time since registration: 32 months

In stage 40.60 for: 3 months 28 days

Timeframe: 36 months



Note: Move your mouse over the milestones for more details

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



Chaired by Robert Bodenstein Austria 48 countries where actively involved in developing this standard on management consultancy services. In 4 plenary Meetings in Milano, London, two times in Toronto and once in Beijing and editing meetings in Milano, Paris, Vienna and a lot of telephone calls made that project come to live.

## A list of Terms and definitions

### Principle:

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

- Contracting
- Execution
- Closure

## **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**

# Structure of the standard

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

<b>Offering</b>		<b>Execution</b>		<b>Closure</b>
· General		· General		· General
· Purpose		· Purpose		· Purpose
· Input		· Input		· Input
· Outcome		· Outcome		· Outcome
· Contents		· Contents		· Contents

## Informative Annexes A to G are added

- Typical stakeholders
- Examples of guidelines for MCSPs for a code of conduct
- Conflict of Interest
- Examples of criteria to evaluate capability
- Examples of guidelines for MCSPs for typical risk management
- Examples of typical understanding activities “pre-project”



## **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!

**Spread the message:**

**on your website**

“as provider of management consultancy services we deliver our services according to ISO 20700”

**on your Business card**

“provider of management consultancy services deliver according to ISO 20700”