

ISO 20700:2017-06 (E)

Guidelines for management consultancy services

Contents		Page
	Foreword.....	v
	Introduction.....	vi
1	Scope	1
2	Normative references	1
3	Terms and definitions	1
4	Principles	4
4.1	General.....	4
4.1.1	Scope.....	4
4.1.2	Typical consulting process.....	4
4.1.3	Responsibilities.....	5
4.2	Other standards.....	5
4.3	Ongoing evaluation and improvement.....	5
4.4	Policies.....	6
4.4.1	Regulatory framework.....	6
4.4.2	Stakeholder engagement and commitment.....	6
4.4.3	Code of ethical and professional conduct.....	6
4.4.4	Project governance.....	7
4.4.5	Capability.....	7
4.4.6	Communication.....	8
4.4.7	Data protection and confidentiality.....	8
4.4.8	Protection of intellectual property.....	8
4.4.9	Social responsibility.....	8
4.4.10	Health and safety.....	8
4.4.11	Risk and quality management.....	9
4.4.12	Guarantees.....	9
5	Contracting	9
5.1	General.....	9
5.2	Purpose.....	9
5.3	Input.....	9
5.4	Outcome.....	10
5.5	Contents.....	10
5.5.1	General.....	10
5.5.2	Context.....	10
5.5.3	Services and deliverables.....	10
5.5.4	Approach and work plan.....	11
5.5.5	Roles and responsibilities.....	11
5.5.6	Acceptance criteria.....	11
5.5.7	Terms and conditions.....	12
6	Execution	12
6.1	General.....	12
6.2	Purpose.....	12
6.3	Input.....	12
6.4	Outcome.....	12
6.5	Contents.....	13
6.5.1	General.....	13
6.5.2	Refining the agreed work plan.....	13
6.5.3	Implementing the work plan.....	13
6.5.4	Assignment management and monitoring.....	13

	6.5.5	Approvals and acceptance.....	15
7		Closure.....	15
	7.1	General.....	15
	7.2	Purpose.....	15
	7.3	Input.....	15
	7.4	Outcome.....	16
	7.5	Contents.....	16
	7.5.1	Legal and contractual matters.....	16
	7.5.2	Final evaluation and improvement.....	16
	7.5.3	Administrative matters.....	17
	7.5.4	Communication.....	17
	7.5.5	Outstanding minor issues.....	17
		Annex A (informative) Supplementary information on ISO standards.....	18
		Annex B (informative) Examples of typical stakeholders.....	19
		Annex C (informative) Basic structure of consulting activities.....	20
		Annex D (informative) Examples of guidelines for MCSPs for a code of conduct.....	22
		Annex E (informative) Examples of guidelines to manage conflicts of interest.....	23
		Annex F (informative) Examples of criteria to evaluate capability.....	25
		Annex G (informative) Examples of guidelines for MCSPs for typical risk management.....	27
		Annex H (informative) Examples of typical understanding activities “pre-assignment”.....	28
		Bibliography.....	29