

DIN EN ISO 20700:2019-01 (E)

Guidelines for management consultancy services (ISO 20700:2017)

Contents		Page
European foreword		4
Foreword		5
Introduction		6
1	Scope	7
2	Normative references	7
3	Terms and definitions	7
4	Principles	10
4.1	General	10
4.1.1	Scope	10
4.1.2	Typical consulting process	10
4.1.3	Responsibilities	11
4.2	Other standards	11
4.3	Ongoing evaluation and improvement	11
4.4	Policies	12
4.4.1	Regulatory framework	12
4.4.2	Stakeholder engagement and commitment	12
4.4.3	Code of ethical and professional conduct	12
4.4.4	Project governance	13
4.4.5	Capability	13
4.4.6	Communication	14
4.4.7	Data protection and confidentiality	14
4.4.8	Protection of intellectual property	14
4.4.9	Social responsibility	14
4.4.10	Health and safety	14
4.4.11	Risk and quality management	15
4.4.12	Guarantees	15
5	Contracting	15
5.1	General	15
5.2	Purpose	15
5.3	Input	15
5.4	Outcome	16
5.5	Contents	16
5.5.1	General	16
5.5.2	Context	16
5.5.3	Services and deliverables	16
5.5.4	Approach and work plan	17
5.5.5	Roles and responsibilities	17
5.5.6	Acceptance criteria	17
5.5.7	Terms and conditions	18

6	Execution	18
6.1	General	18
6.2	Purpose	18
6.3	Input	18
6.4	Outcome	18
6.5	Contents	19
6.5.1	General	19
6.5.2	Refining the agreed work plan	19
6.5.3	Implementing the work plan	19
6.5.4	Assignment management and monitoring	19
6.5.5	Approvals and acceptance	21
7	Closure	21
7.1	General	21
7.2	Purpose	21
7.3	Input	21
7.4	Outcome	22
7.5	Contents	22
7.5.1	Legal and contractual matters	22
7.5.2	Final evaluation and improvement	22
7.5.3	Administrative matters	23
7.5.4	Communication	23
7.5.5	Outstanding minor issues	23
	Annex A (informative) Supplementary information on ISO standards	24
	Annex B (informative) Examples of typical stakeholders	25
	Annex C (informative) Basic structure of consulting activities	26
	Annex D (informative) Examples of guidelines for MCSPs for a code of conduct	28
	Annex E (informative) Examples of guidelines to manage conflicts of interest	29
	Annex F (informative) Examples of criteria to evaluate capability	31
	Annex G (informative) Examples of guidelines for MCSPs for typical risk management	33
	Annex H (informative) Examples of typical understanding activities “pre-assignment”	34
	Bibliography	35