

ISO 20700 : Guidelines for Management Consultancy Services

Duration: 5 Days

Target Audience: Management Consultants, Consultancy Managers, Project Leads, Quality & Compliance Professionals, and Client Representatives involved in consultancy projects.

Course Overview

This 5-day course provides comprehensive guidance on the effective delivery of management consultancy services according to the ISO 20700:2017 international standard. Participants will learn the principles, processes, and best practices to enhance transparency, professionalism, ethical behavior, and quality in consultancy assignments. The course is designed to enable Management Consultancy Service Providers (MCSPs) and clients to work collaboratively for improved project outcomes, risk reduction, and value creation.

Pre-requisites

- Basic understanding of management consultancy or professional services delivery
 - Familiarity with consultancy project management or quality management systems is helpful but not mandatory
 - Participants should be involved in or interested in improving consultancy service delivery and client engagement
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Course Outline / Table of Contents

Day 1: Introduction & Fundamentals of ISO 20700

- Introduction to ISO 20700 and its relevance in management consultancy
- Scope and objectives of the standard
- Key terms and definitions (MCSP, client, assignment, deliverable, outcome, etc.)
- Principles underpinning management consultancy services
- Overview of the typical consulting process: Contracting, Execution, and Closure
- Roles and responsibilities of MCSPs and clients

Day 2: Contracting Phase

- Contracting: Purpose, inputs, and activities
- Establishing clear agreements between MCSP and client
- Stakeholder engagement and communication during contracting

- Understanding the regulatory framework and ethical considerations
- Code of ethical and professional conduct
- Managing conflicts of interest
- Capability assessment and acceptance criteria

Day 3: Execution Phase

- Execution of consultancy services: Purpose and key activities
- Collaborating with clients to deliver agreed outcomes
- Managing project governance and resource allocation
- Communication strategies and maintaining transparency
- Handling confidentiality, data protection, and intellectual property
- Risk and quality management during execution
- Monitoring and ongoing evaluation for continuous improvement

Day 4: Closure Phase & Deliverables

- Purpose and process of closure in consultancy assignments
- Delivery and acceptance of final outcomes and deliverables
- Legal and contractual matters at closure
- Final evaluation, feedback, and lessons learned
- Administrative closure activities
- Communication of results and outstanding issues management

Day 5: Practical Application, Case Studies & Implementation

- Case study: Applying ISO 20700 in real consultancy projects
- Best practices for implementing ISO 20700 guidelines
- Tools and techniques for effective consultancy service delivery
- Challenges and solutions in management consultancy
- Developing an action plan for organizational adoption
- Q&A and interactive group exercises

Additional Course Elements

- **Course Methodology:** Lectures, group discussions, case studies, practical exercises, and quizzes
- **Learning Outcomes:**
 - Understand and apply ISO 20700 guidelines to improve consultancy project success
 - Enhance client-MCSP relationships through clear contracting and communication
 - Implement ethical and professional standards in consultancy services
 - Manage consultancy projects with focus on quality, risk, and delivery
 - Successfully close consultancy assignments with agreed outcomes