
**Guidelines for management
consultancy services**

Lignes directrices relatives aux services de conseil en management

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Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular the different approval criteria needed for the different types of ISO documents should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see www.iso.org/directives).

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be in the Introduction and/or on the ISO list of patent declarations received (see www.iso.org/patents).

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

For an explanation on the voluntary nature of standards, the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the World Trade Organization (WTO) principles in the Technical Barriers to Trade (TBT) see the following URL: www.iso.org/iso/foreword.html.

This document was prepared by Project Committee ISO/PC 280, *Management consultancy*.

Introduction

Management consultants use their know-how to support clients in any sector locally, regionally and globally to deal with important issues such as handling complexity, achieving sustainable organizational growth, innovating, achieving change and enhancing productivity. The management consultancy industry makes a substantial contribution to the world economy.

The aim of this document is to improve transparency and understanding between clients and management consultancy service providers (hereinafter referred to as MCSPs), in order to achieve better results from consultancy projects. Appropriate application of this document enables MCSPs to provide better value for clients and reduce risk in management consultancy assignments. By improving quality, professionalism, ethical behaviour and interoperability of management consultancy, this document is intended to enhance the effectiveness of the management consulting industry and accelerate the development of the profession.

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 and their clients.

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.

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.

This document:

- 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 the importance of understanding clients' needs;
- g) is easy to understand.

Guidelines for management consultancy services

1 Scope

This document provides guidelines for the effective delivery of management consultancy services.

NOTE Refer to Annex A for supplementary information on ISO standards.

2 Normative references

There are no normative references in this document.

3 Terms and definitions

For the purposes of this document, the following terms and definitions apply.

ISO and IEC maintain terminological databases for use in standardization at the following addresses:

- ISO Online browsing platform: available at <http://www.iso.org/obp>
- IEC Electropedia: available at <http://www.electropedia.org/>

3.1 agreement

formal binding *outcome* (3.15) (preferably documented in writing) from the *contracting* (3.7) phase

3.2 assignment

service to be provided by the *MCSP* (3.12) to the *client* (3.4) and the *recipient* (3.21) as described in the *agreement* (3.1)

Note 1 to entry: An assignment is typically performed as a *project* (3.18) by the *MCSP* (3.12). Other formats of assignment could be encountered, such as the provision of ongoing support.

3.3 capability

staff, contractors, knowledge, methodology, third parties, technology and other relevant *resources* (3.23) or *processes* (3.17)

3.4 client

organization (3.13) that agrees to the *management consultancy services* (3.11) supplied by the *MCSP* (3.12)

3.5 closure

set of activities between the *MCSP* (3.12), the *client* (3.4) and the *recipient* (3.21) aimed at ending the *assignment* (3.2)

3.6 communication

maintenance between the *MCSP* (3.12) and the *client* (3.4) of clear and systematic flow of information

3.7 contracting

set of activities aimed at reaching an *agreement* (3.1) to provide *MCS* (3.11)

**3.8
deliverable**

tangible item produced by the *MCSP* (3.12) as part of an *assignment* (3.2)

EXAMPLE A report, a plan, a document.

Note 1 to entry: Output is considered synonymous with deliverable.

**3.9
execution**

performance of the *management consultancy service* (3.11)

**3.10
intellectual property**

any identifiable product of the mind attributable to any person(s) or one or more legal entities that can be represented or communicated physically and protectable by copyright or similar laws

[SOURCE: ISO/IEC 21000-19:2010, 3.1.28]

**3.11
management consultancy service
MCS
service**

set of multidisciplinary activities of intellectual work, within the field of management, which aims to create value or promote changes, by providing advice and proposing solutions, by taking into account actions or by producing *deliverables* (3.8)

**3.12
management consultancy service provider
MCSP**

organization (3.13) that offers and delivers *management consultancy services* (3.11)

Note 1 to entry: An *organization* (3.13) acting as a broker or as an introducer (facilitator) of *MCS* (3.11) or providing administrative support (e.g. invoicing, payment of salaries) to MCSPs is not considered an MCSP.

**3.13
organization**

person or group of people that has its own functions with responsibilities, authorities, relationships and *resources* (3.23) to achieve its objectives

Note 1 to entry: The concept of organization includes, but is not limited to, sole-trader, company, corporation, firm, enterprise, authority, partnership, association, charity or institution or part or combination thereof, whether incorporated or not, public or private.

[SOURCE: ISO 9000:2015, 3.2.1]

**3.14
organizational governance**

system by which an *organization* (3.13) makes and implements decisions in pursuit of its objectives

[SOURCE: ISO 26000:2010, 2.13]

**3.15
outcome**

impact or result of an action or *process* (3.17)

EXAMPLE An improvement in profitability or value.

**3.16
policy**

intentions and direction of an *organization* (3.13) as formally expressed by its top management

[SOURCE: ISO 9000:2015, 3.5.8]

3.17**process**

set of interrelated or interacting activities that use inputs to deliver an intended result

Note 1 to entry: Whether the “intended result” of a process is called output (3.8), product, or service (3.11) depends on the context of the reference.

Note 2 to entry: Processes in an *organization* (3.13) are generally planned and carried out under controlled conditions to add value.

[SOURCE: ISO 9000:2015, 3.4.1]

3.18**project**

unique *process* (3.17), consisting of a set of coordinated and controlled activities with start and finish dates, undertaken to achieve an objective conforming to specific *requirements* (3.22), including the constraints of time, cost and *resources* (3.23)

[SOURCE: ISO 9000:2015, 3.4.2]

3.19**project governance**

system by which an *organization* (3.13) makes and implements decisions in relation to projects

3.20**project management**

direction of the *project* (3.18) under the authority of *project governance* (3.19)

Note 1 to entry: Project management is the application of methods, tools, techniques and resources to the management of a project and includes the integration of the various phases of the project life cycle. Project management is accomplished through processes.

3.21**recipient**

organization (3.13) receiving the *MCS* (3.11) agreed by the *client* (3.4)

Note 1 to entry: Often the recipient is the client.

3.22**requirement**

need or expectation that is stated, generally implied or obligatory

Note 1 to entry: “Generally implied” means that it is custom or common practice for the *organization* (3.13), its customers and other interested parties, that the need or expectation under consideration is implied.

[SOURCE: ISO 9000:2015, 3.6.4]

3.23**resources**

assets, people, skills, information, technology (including plant and equipment), premises, supplies and information (whether electronic or not) that an *organization* (3.13) has available to use, when needed, in order to operate and meet its objectives

[SOURCE: ISO 22301:2012, 3.47]

3.24**risk**

effect of uncertainty on objectives

Note 1 to entry: An effect is a deviation from the expected — positive or negative.