

DRAFT SAINT LUCIA NATIONAL STANDARD

DNS/ISO 20700: 2017

**GUIDELINES FOR MANAGEMENT CONSULTANCY SERVICES (ISO
20700:2017, IDT)**

Stage 40 – Enquiry stage

DECEMBER 2017

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Saint Lucia Bureau of Standards, (2017)

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THIS IS AN IDENTICAL ADOPTION OF ISO OF 20700: 2017, IDT

GENERAL STATEMENT

The Saint Lucia Bureau of Standards was established under the Standards Act (No. 14 of 1990) and started operations on 01 April 1991. A broad-based 15-member Standards Council directs the affairs of the Bureau.

The Standards Act gives the Bureau the responsibility to develop and promote standards and codes of practice for products and services for the protection of the health and safety of consumers and the environment as well as for industrial development in order to promote the enhancement of the economy of Saint Lucia. The Bureau develops standards through consultations with relevant interest groups. In accordance with the provisions of the Standards Act, public comment is invited on all draft standards before they are declared as Saint Lucia National Standards.

The Bureau also administers the Metrology Act No. 17 of 2000. This legislation gives the Bureau the responsibility to regulate all weights and measures and to manage and co-ordinate the metrication of Saint Lucia.

The Bureau operates a Product Certification Scheme applicable to all products for which national standards exist. If a product satisfies all the requirements for certification, a licence to carry the Saint Lucia Standard Mark is issued to the manufacturer of the product. The presence of the mark on a product indicates that the product conforms to all the requirements of a specific national standard and assures consistent quality (of the product) to the consumer.

The Bureau is a member body of the National Organisation for Standardisation (ISO), an affiliate member of the National Electrochemical Commission (IEC) and a member of the CARICOM Regional Organisation for Standards and Quality (CROSQ) and the Pan American Standards Commission (COPANT). The Bureau is the local agent for several foreign standards bodies such as the British Standards Institution (BSI) and the ASTM National (formerly known as the American Society for Testing and Materials). The Bureau serves as the enquiry point for the World Trade Organisation (WTO) on matters pertaining to the Technical Barriers to Trade (TBT) Agreement. The Bureau also serves as the National CODEX Alimentarius enquiry point with responsibility for coordinating national positions on CODEX matters.

In accordance with good practice for the adoption and application of standards, Saint Lucia National Standards are subject to review every five years. Suggestions for improvements are always welcomed at any time after publication of the standard.

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(ISO 20700: 2017, IDT)**

AMENDMENTS ISSUED SINCE LAST PUBLICATION

Amendment No.	Date of Issue	Type of Amendment	Text(s) Affected

FOR PUBLIC COMMENT

ATTACHMENT PAGE FOR SLBS AMENDMENT SHEET

FOR PUBLIC COMMENT

DRAFT SAINT LUCIA NATIONAL STANDARD

DNS/ISO 20700: 2017

GUIDELINES FOR MANAGEMENT CONSULTANCY SERVICES (ISO 20700: 2017, IDT)

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National foreword

This national standard is an identical adoption of ISO 20700: 2017. This is a newly adopted national specification adopted by the Standards Council on...

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;
- f) is easy to understand.

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.

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.

Note 2 to entry: Objectives can have different aspects (such as finance, health and safety, security and environment) and can apply at different levels (such as strategic, organization-wide, project, product, and process).

Note 3 to entry: Risk is often characterized by reference to potential events and consequences, or a combination of these.

Note 4 to entry: Risk is often expressed in terms of a combination of the consequences of an event (including changes in circumstances) and the associated likelihood of occurrence.

Note 5 to entry: Uncertainty is the state, even partial, of deficiency of information related to, understanding or knowledge of an event, its consequence, or likelihood.

[SOURCE: ISO Guide 73:2009, 1.1]

3.25 stakeholder

person, group or *organization* (3.13) that has interests in, or can affect, be affected by, or perceive itself to be affected by, any aspect of the *assignment* (3.2)

Note 1 to entry: Refer to Annex B for examples of typical stakeholders.

[SOURCE: ISO 21500:2012, 2.14, modified]

NOTICE

Given Copyright agreement with the International Organisation for Standardisation (ISO) we are unable to circulate the full text of this standard for public voting and perusal online.

Only informative sections of the standards are publically available ONLINE.

To access the full text/content of this standard please contact the Saint Lucia Bureau of Standards for more information to obtain a copy of the full text available to you for comment.

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