

ISO Central Secretariat

1, ch. de la Voie-Creuse
Case postale 56
CH - 1211 Genève 20
Switzerland

Telephone + 41 22 749 01 11
Fax + 41 22 733 34 30
E-mail central@iso.org
Web www.iso.org

Organisation internationale de normalisation
International Organization for Standardization
Международная Организация по Стандартизации



Our ref. TMB / NWIP

TO THE ISO MEMBER BODIES

Date 2013-01-23

New work item proposal – *Management Consultancy*

Dear Sir or Madam,

Please find attached a new work item proposal submitted by UNI (Italy) entitled *Management Consultancy*. It should be noted that, if the NWIP is approved, the work is proposed to be carried out in a Project Committee.

You are kindly invited to complete the ballot form ([Form 05](#)) which could be downloaded at www.iso.org/forms and send it, preferably in Word format, to the Secretariat of the ISO Technical Management Board at tmb@iso.org before **23 April 2013**.

Yours faithfully,

A handwritten signature in black ink, appearing to read 'S. Clivio', written in a cursive style.

Sophie Clivio
Secretary to the Technical Management Board

Encl: NWIP (Form 04)
ANNEX 1: Items proposed for the study of ISO standard on "management consultancy"



NEW WORK ITEM PROPOSAL	
Closing date for voting	Reference number (to be given by the Secretariat)
Date of circulation	ISO/TC / SC N
Secretariat	<input checked="" type="checkbox"/> Proposal for new PC

A proposal for a new work item within the scope of an existing committee shall be submitted to the secretariat of that committee with a copy to the Central Secretariat and, in the case of a subcommittee, a copy to the secretariat of the parent technical committee. Proposals not within the scope of an existing committee shall be submitted to the secretariat of the ISO Technical Management Board.

The proposer of a new work item may be a member body of ISO, the secretariat itself, another technical committee or subcommittee, or organization in liaison, the Technical Management Board or one of the advisory groups, or the Secretary-General.

The proposal will be circulated to the P-members of the technical committee or subcommittee for voting, and to the O-members for information.

IMPORTANT NOTE: Proposals without adequate justification risk rejection or referral to originator.

Guidelines for proposing and justifying a new work item are contained in [Annex C of the ISO/IEC Directives, Part 1](#).

The proposer has considered the guidance given in the [Annex C](#) during the preparation of the NWIP.

Proposal (to be completed by the proposer)

Title of the proposed deliverable. <i>(in the case of an amendment, revision or a new part of an existing document, show the reference number and current title)</i>
English title Management consultancy
French title (if available)

Scope of the proposed deliverable.

To prepare an ISO standard for organizations providing management consultancy services, working out guidelines for the effective delivery of management consultancy services.

The service standard on Management Consultancy is entirely customer-driven. The concern is

- how the purchased service fits into the buying organisation;
- how the latter decides its needs and supplies an external service, i.e. how to select, to manage and to judge potential consultancy service providers;
- how to assess the result coming from the consultancy service.

The intention is to use best practices for a reliable provision of consulting services (with a managed and reduced risk to the client), and to increase the probability that the use of the management consultancy service will enhance the capability and the capacity of both the client and the overall economy.

The standard is expected to be applicable to all organizations providing management consulting services including public and private companies, government entities, not-for-profit organizations and internal consultancy units and operations, regardless of their ownership, structure, size or sector.

The standard is expected to apply to any type of management consultancy assignment and to any type of client. It may be of value to clients, but does not intend to place any obligations on them.

Recommendations for management consultancy assignments will be considered, including typical issues such as:

- Legal and ethical issues;
- Management, communications and evaluation;
- Client relationships;
- Proposing and agreeing an assignment;
- Planning and execution;
- Closure of the assignment.

A European standard (EN 16114) is available and may represent a good basis for this proposed International Standard.

The standard aims at being independent from other Standards, such as:

- The provision of support to small businesses (see CEN TS 99001);
- Quality Management Systems (see ISO 9001:2008);
- Procurement (see ISO TC 259 on "outsourcing");
- Corporate Social Responsibility (see ISO 26000);
- Project management (see ISO 21500);

even if it intends to take into due account all these documents while developing the works.

Excluded areas:

The standard will provide guidance to users and not seek to impose or interfere with any contractual obligations or intellectual property rights. Therefore it will not require or imply a need for third-party certification and it is not intended or designed to be used as the basis for any personal or

organizational qualification or certification. This proposed new work will neither address nor cover the detailed aspects of support to business.

<p>Purpose and justification of the proposal.</p> <p>There is a growing need for clarity about what clients can expect from a management consulting organization they contract with. Clients increasingly insist on more transparency with regard to the services provided by the management consulting organization and the process used to provide the management consultancy services.</p> <p>Clarity in the way management consultants work and how the process of consultancy develops can lead to successful outcomes. The need for clarity has resulted in management consulting becoming an international professional community with its specifications, ethics, education, qualification, codes of conduct and professional institutes. The consulting competency shall be broadened in order to include the necessary skills to support organizations so that the "everyday business" may effectively run.</p> <p>Today, clients want more value for the money they pay for management consultants and the latter have to keep to this, if they take their job seriously and contribute to the client's corporate governance. Clients no longer accept the "one size fits all"-approach or standardized solutions, they would rather seek tailored made solutions and long term utility of implemented concepts.</p> <p>This means:</p> <ul style="list-style-type: none"> - support from "advising" to implementation; - reduced "time to solution"; - productivity and return on investment; - innovative and global thinking; - professional competency. <p>Management Consultancy is a service which, if successful, can considerably enhance the effectiveness and efficiency of the organizations using management consultancy and the relevant costs can be remarkably turned into benefits. Developing a service standard for organizations providing management consultancy would contribute to the success, ethics and transparency of the management consulting profession.</p>
<p>If a draft is attached to this proposal,:</p> <p>Please select from one of the following options (note that if no option is selected, the default will be the first option):</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Draft document will be registered as new project in the committee's work programme (stage 20.00) <input type="checkbox"/> Draft document can be registered as a Working Draft (WD – stage 20.20) <input type="checkbox"/> Draft document can be registered as a Committee Draft (CD – stage 30.00) <input type="checkbox"/> Draft document can be registered as a Draft International Standard (DIS – stage 40.00)
<p>Is this a Management Systems Standard (MSS)?</p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>NOTE: if Yes, the NWIP along with the <u>Justification study</u> (see Annex SL of the Consolidated ISO Supplement) must be sent to the MSS Task Force secretariat (tmb@iso.org) for approval before the NWIP ballot can be launched.</p>
<p>Indication(s) of the preferred type or types of deliverable(s) to be produced under the proposal.</p> <p><input checked="" type="checkbox"/> International Standard <input type="checkbox"/> Technical Specification <input type="checkbox"/> Publicly Available Specification <input type="checkbox"/> Technical Report</p>
<p>Proposed development track <input type="checkbox"/> 1 (24 months) <input checked="" type="checkbox"/> 2 (36 months - default) <input type="checkbox"/> 3 (48 months)</p>
<p>Known patented items (see ISO/IEC Directives, Part 1 for important guidance)</p> <p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes", provide full information as annex</p>

A statement from the proposer as to how the proposed work may relate to or impact on existing work, especially existing ISO and IEC deliverables. The proposer should explain how the work differs from apparently similar work, or explain how duplication and conflict will be minimized.

The proposed standard can support or can obtain benefits from the application of standards or works of other committees:

- the guidance given by ISO 21500 (Project management);
- the opportunities offered by the outsourcing, studied in ISO TC 259 "Project committee: Outsourcing";
- the management of human resources, covered by ISO TC 260 "Human resource management";
- the learning aspects, specified in ISO 29990:2010 "Learning services for non-formal education and training -- Basic requirements for service providers" and in the activity of ISO TC 232 "Learning services for non-formal education and training";
- ISO 10667 "Assessment service delivery - Procedures and methods to assess people in work and organizational settings".

Management systems for safety, quality, environment, social responsibility are important issues, already addressed in International Standardization and therefore they will not be dealt with in the proposed standard.

No overlap is supposed or expected with other ISO activities and no standards similar to this proposal are now available in ISO.

A listing of relevant existing documents at the international, regional and national levels.

EN 16114 published by CEN TC 381 "Management consultancy services"

A simple and concise statement identifying and describing relevant affected stakeholder categories (including small and medium sized enterprises) and how they will each benefit from or be impacted by the proposed deliverable(s)

Considering the six basic categories:

- A. Industry and commerce: very interested and very affected, especially small and medium enterprises;
- B. Government: interested and affected. The standard aims at being applicable to government entities as well;
- C. Consumers: not directly affected, because the proposal is for a business-to-business (B2B) standard and not for a business-to-consumers (B2C);
- D. Labour: partially and indirectly affected, because the 'role of persons' is to be considered in any case; to be considered later, if the discussion proves that a specific research is needed or if the results of a research are collected and assessed;
- F. Standards application;
- G. NGO: interested and affected. The standard aims at being applicable to NGO as well.

Liaisons:

A listing of relevant external international organizations or internal parties (other ISO and/or IEC committees) to be engaged as liaisons in the development of the deliverable(s).

ICMCI, International Council of Management Consulting Institutes;
 FEACO, European Federation of Management Consultancies Associations;
 ISO/TC 232 Learning services for non-formal education and training
 ISO/PC 259 Outsourcing
 ISO/ TC 260 Human resource management

Joint/parallel work:

Possible joint/parallel work with:

- IEC (please specify committee ID)
- CEN (please specify committee ID)
- Other (please specify)

A listing of relevant countries which are not already P-members of the committee.	
Preparatory work (at a minimum an outline should be included with the proposal) <input type="checkbox"/> A draft is attached <input checked="" type="checkbox"/> An outline is attached <input type="checkbox"/> An existing document to serve as initial basis The proposer or the proposer's organization is prepared to undertake the preparatory work required <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Proposed Project Leader (name and e-mail address) Ilse Ennsfellner Kreuzwiesensteig 22 A 2384 Breitenfurt Austria ie@ennsfellnerconsulting.eu	Name of the Proposer (include contact information) G.L. Salerio UNI - Ente Nazionale Italiano di Unificazione Via Sannio 2 20137 Milano - Italy gianluca.salerio@uni.com
Supplementary information relating to the proposal <input checked="" type="checkbox"/> This proposal relates to a new ISO document; <input type="checkbox"/> This proposal relates to the amendment of existing ISO document <input type="checkbox"/> This proposal is for the revision of an existing ISO document; <input type="checkbox"/> This proposal relates to the adoption as an active project of an item currently registered as a Preliminary Work Item; <input type="checkbox"/> This proposal relates to the re-establishment of a cancelled project as an active project. Other:	

Annex(es) are included with this proposal (give details)

- Annex 1 - Items proposed for the study of ISO standard on "management consultancy"

Annex 1

Items proposed for the study of ISO standard on "management consultancy"

Introduction

- 1. Scope**
- 2. Normative references**
- 3. Terms and definitions**
- 4. Principles**
- 5. Offering**
- 6. Execution**
- 7. Closure**

Annexes

Introduction

Management consultancy services make a substantial contribution to the economy.

The aim of a standard is to improve transparency and understanding between clients and management consultancy service providers (MCSPs). This should lead to better results from consultancy projects and reduce barriers to cross-border trade in management consultancy services.

Successful application of this document should enable MCSPs to provide better value for clients and reduce risk in management consultancy assignments. By improving the quality, professionalism 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.

It includes recommendations to improve the specification, execution, acceptance and closure of management consultancy services, based on research and the experience of a wide range of MCSPs and their clients.

This document applies to all MCSPs, whatever their size or specialism, but does not place requirements or obligations on individuals.

Innovation and differentiation are important parts of an MCSP's value proposition. The proposal focuses only on the outputs and outcomes; MCSPs are free to use their own methods and approaches.

This document:

- a) is written as guidance;
- b) does not require certification;
- c) focuses on MCSPs, not on clients;
- d) focuses on MCSPs, not individual internal resources;
- e) is applicable to all MCSPs;
- f) is based on outcomes;
- g) protects innovation and differentiation;
- h) emphasises importance of understanding clients' needs;
- i) is easy to understand.

1. Scope

This document gives guidelines for the effective delivery of management consultancy services. It is applicable to all MCSPs: public and private companies, government entities, not-for-profit organizations and internal consultancy units, regardless of their ownership, structure, size or specialism.

It applies to any type of assignment for any type of client. It does not place any obligations on the client.

It provides recommendations for carrying out management consultancy services, including:

- legal and ethical matters;
- management, communications and evaluation;
- client relationships;
- proposal and agreement;
- planning and execution;
- closure of the assignment.

This document does not impose upon or interfere with any contractual obligations or intellectual property rights. Also, it does not require or imply a need for third-party certification. It is not intended for certification, regulatory or contractual use, and it is not intended nor designed to be used as the basis for any personal or organizational qualification.

Any offer to certify, or claims to be certified, to this document would be a misrepresentation of the intent and purpose and a misuse of this document. As this document does not contain requirements, any such certification would not be a demonstration of conformity with this document.

It is not intended to provide a basis for legal actions, complaints, defences or other claims in any international, domestic or other proceeding, nor is it intended to be cited as evidence of the evolution of customary international law.

2. Normative references

To be defined

3. Terms and definitions

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

3.1

management consultancy service, MCS service

set of multidisciplinary activities of intellectual work, within the field of management activities, which aim to create value or promote changes, by providing advice or solutions, by taking actions or by producing deliverables

3.2

management consultancy service provider, MCSP

enterprise providing management consultancy services

3.3 ...

Other terms to be defined. See EN 16114:2011

4. Principles

4.1. General

This document is structured to reflect the typical phases of a consultancy assignment. It also describes a guiding policy framework, and includes guidelines for on-going evaluation and improvement.

Offering phase:

The first phase of a consultancy assignment is Offering. The MCSP and the client reach a clear agreement on the service to be provided and commit to working together. Transparency is critical to avoid misunderstanding and minimise risk.

Execution phase:

Once agreement has been reached, the second phase of the assignment is Execution. The MCSP implements the service, following the agreed approach and plan. To achieve a mutually positive outcome, the MCSP and the client need to collaborate with confidence, fairness and mutual respect.

Closure phase:

The final phase is Closure. After completion of the deliverables and assessment of the outcomes, the assignment is completed by resolving any open items and meeting all contractual and legal obligations. It is critical that the MCSP gains acceptance from the client that the assignment is complete.

4.2. Policies

MCSPs should maintain an appropriate level of awareness of the relevant laws, policies, rules, regulations and standards that govern their services. To ensure clarity these should be identified, if necessary, in the agreement.

Clear understanding between the client and the MCSP is critical for the success of the assignment. Effective communication maximizes understanding, creates confidence and minimizes risks. An effective communication strategy and policy should exist for the duration of the assignment.

A professional code of conduct and business ethics should be observed in order to guide the professional conduct of MCSPs.

A statement of values should exist to guide the professional conduct of MCSPs.

A statement of corporate social responsibility should exist to guide the professional conduct of MCSPs.

The MCSPs should only accept those assignments that they are able to fulfil in a professional manner in accordance with this document.

If an MCSP has reason to believe that the agreed outcomes of the assignment will not be met within the terms of the agreement, the MCSP should, without delay, inform the client of its findings and renegotiate the agreement.

The MCSPs should consider preparing a quality plan to anticipate, manage and quantify risks and issues.

MCSPs should negotiate and agree the conditions of any guarantee of the services to be provided.

A statement of health and safety should exist to guide the professional conduct of MCSPs.

4.3. Ongoing evaluation and improvement

The purpose of evaluation is for the MCSP to assess the assignment. The MCSP should establish a structured process for proactive evaluation. This allows the results of the assignment to be recorded and assessed.

Evaluation also allows the client and the MCSP to:

- diagnose the effectiveness of the assignment;
- make recommendations for corrective action;
- implement new processes and methods.

The effectiveness of evaluation should be assessed. An effective evaluation strategy and policy should exist for the duration of the relationship between the client and the MCSP. Even if no evaluation is included in the

agreement, the MCSP should have a process to learn from the work it undertakes. If evaluation is required for contractual reasons to determine the fees paid, the MCSP and the client should agree the most appropriate method of evaluation.

5. Offering

See EN 16114:2011.

6. Execution

See EN 16114:2011.

7. Closure

See EN 16114:2011.

Annexes

Examples can be proposed in informative annexes (as per EN 16114:2011)

- *Ethical guidelines for MCSPs*
- *Values for MCSPs*
- *Content of a corporate social responsibility statement*
- *Evaluation criteria*
