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Vägledning för managementkonsulttjänster (ISO 20700:2017)

Guidelines for management consultancy services (ISO 20700:2017)

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Europastandarden EN ISO 20700:2018 gäller som svensk standard. Detta dokument innehåller den officiella engelska versionen av EN ISO 20700:2018.

Denna standard ersätter SS-EN 16114:2011, utgåva 1 och SS-EN 16114:2011, utgåva 1

The European Standard EN ISO 20700:2018 has the status of a Swedish Standard. This document contains the official version of EN ISO 20700:2018.

This standard supersedes the SS-EN 16114:2011, edition 1 and SS-EN 16114:2011, edition 1

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EUROPEAN STANDARD

EN ISO 20700

NORME EUROPÉENNE

EUROPÄISCHE NORM

September 2018

ICS 03.100.01

Supersedes EN 16114:2011

English Version

Guidelines for management consultancy services (ISO 20700:2017)

Lignes directrices relatives aux services de

conseil en management (ISO 20700:2017)

This European Standard was approved by CEN on 6 May 2018.

CEN members are bound to comply with the CEN/CENELEC Internal Regulations which stipulate the conditions for giving this European Standard the status of a national standard without any alteration. Up-to-date lists and bibliographical references concerning such national standards may be obtained on application to the CEN-CENELEC Management Centre or to any CEN member.

This European Standard exists in three official versions (English, French, German). A version in any other language made by translation under the responsibility of a CEN member into its own language and notified to the CEN-CENELEC Management Centre has the same status as the official versions.

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EUROPEAN COMMITTEE FOR STANDARDIZATION
COMITÉ EUROPÉEN DE NORMALISATION
EUROPÄISCHES KOMITEE FÜR NORMUNG

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European foreword

The text of ISO 20700:2017 has been prepared by Technical Committee ISO/TMBG "Technical Management Board - groups" of the International Organization for Standardization (ISO) and has been taken over as EN ISO 20700:2018 by Technical Committee CEN/TC 381 "Management consultancy services" the secretariat of which is held by UNI.

This European Standard shall be given the status of a national standard, either by publication of an identical text or by endorsement, at the latest by March 2019, and conflicting national standards shall be withdrawn at the latest by March 2019.

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. CEN shall not be held responsible for identifying any or all such patent rights.

This document supersedes EN 16114:2011.

According to the CEN-CENELEC Internal Regulations, the national standards organizations of the following countries are bound to implement this European Standard: Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, Former Yugoslav Republic of Macedonia, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Norway, Poland, Portugal, Romania, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey and the United Kingdom.

Endorsement notice

The text of ISO 20700:2017 has been approved by CEN as EN ISO 20700:2018 without any modification.

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)