AS ISO 20700:2025
ISO 20700:2017

Australian STANDARD®

STANDARDS Australia

Guidelines for management consultancy services



AS ISO 20700:2025

This Australian Standard® was prepared by MB-001, Management Consultancy. It was approved on behalf of Standards Australia's Standards Development and Accreditation Committee on 07 April 2025.

This Standard was published on 17 April 2025.

The following are represented on Committee MB-001:

Australian Industry Group
Australian Organisation for Quality
Consult Australia
Governance Institute of Australia
Institute of Management Consultants
RMIT University
The Institute of Internal Auditors — Australia
University of Technology Sydney

This Standard was issued in draft form for comment as DR AS ISO 20700:2025.

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ISBN 978 1 76175 149 3

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First published as AS ISO 20700:2025.

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How to read this Standard

This page explains the meaning of the language and structure of this Standard.

Refer to Standards Australia's Standardisation Guide 006 for more details about drafting rules.

Australian and Australian/New Zealand Standards are voluntary unless they are referenced in legislation or called up in contracts.

Requirements

To conform to a Standard, all requirements in the Standard need to be met.

A requirement is any statement in the Standard which uses the word "shall".

Recommendations, permissions and possibilities

The following words are commonly used in Standards, but statements using them do not have to be followed to conform to the Standard:

(a) "should" means that something is recommended.

(b) "may" means that something is permitted.

(c) "can" means that something is possible.

Structure of Standards

A Standard always has the following parts:

(i) The Preface states who developed the Standard, what the Standard is aiming to do, and how it relates to other documents.

(ii) The Scope states what the Standard is about, what it covers and what it does not cover.

(iii) The Normative references clause lists other documents that are referenced in the Standard as part of requirements.

(iv) The Terms and definitions clause defines important terms to help with understanding the Standard.

A Standard may also include other parts, such as the following:

(1) A normative appendix sets additional requirements that need to be conformed to.

(2) An informative appendix provides additional information or guidance. They usually do not contain requirements. If an informative appendix does contain requirements, the Standard will explain when those requirements apply

(3) A Bibliography lists documents referenced in the Standard but not as part of requirements.

Many Standards include notes. Notes provide recommendations and/or guidance only. They never contain requirements.

Preface

This Standard was prepared by the Standards Australia Committee MB-001, Management Consultancy.

The objective of this document is to provide guidelines for the effective delivery of management consultancy services.

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

This document is identical to, and has been reproduced from, ISO 20700:2017, *Guidelines for management consultancy services*.

As this document has been reproduced from an international document, a comma is to be read as a full point when referring to a decimal marker.

Australian or Australian/New Zealand Standards that are identical adoptions of international normative references may be used interchangeably. Refer to the online catalogue for information on specific Standards.

The terms “normative” and “informative” are used in Standards to define the application of the appendices or annexes to which they apply. A “normative” appendix or annex is an integral part of a Standard, whereas an “informative” appendix or annex is only for information and guidance.

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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*.

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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.

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NOTES

Australian Standard®

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)

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