IMC
INSTITUTE OF
MANAGEMENT
CONSULTANTS

*The home of professional
management consultants*

**Trained in
ISO 20700:2017
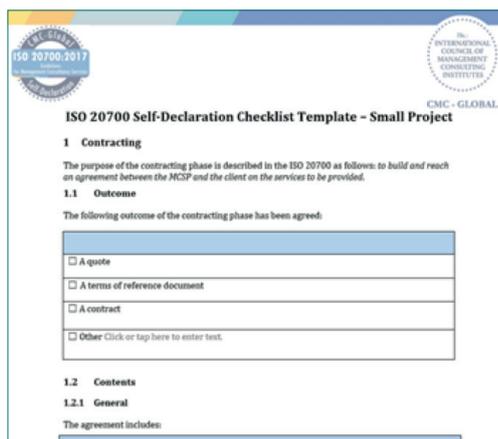Guidelines
for Management Consultancy Services
by CMC-Global**

ISO 20700 SELF-DECLARATION CHECKLIST TRAINING FOR MANAGEMENT CONSULTANTS

*open to all internal and external management
consultants practising in Australia or New Zealand*

IMC is now delivering training for all internal and external management consultants in the ICMCI CMC-Global's Project Self-Declaration Checklist to enable you to demonstrate to your clients compliance with the new International Standard for Management Consulting Services.
See the available course dates and register at **imc.org.au/events**

What is the ISO 20700:2017 Self-Declaration Checklist?

The **CMC-Global ISO 20700:2017 Project Self-Declaration Checklist** provides a value-added service offering for management consultants who undergo training in ISO 20700, where they will be authorised and recognised as able to self-declare their projects with their clients that their processes conform to the new International Standard ISO 20700, by an independently recognised authority.

ISO 20700 Self-Declaration Checklist Template – Small Project

1 Contracting

The purpose of the contracting phase is described in the ISO 20700 as follows: to build and reach an agreement between the MCSP and the client on the services to be provided.

1.1 Outcome

The following outcome of the contracting phase has been agreed:

☐ A quote
☐ A terms of reference document
☐ A contract
☐ Other Click or tap here to enter text.

1.2 Contents
1.2.1 General
The agreement includes:

What is the Aim of the Checklist?

The Aim of the **Project Self-Declaration Checklist** is to form a guide for the Consultant and Client to work through Policies and the three fundamental steps of the project (Contracting, Execution, Closure) to ensure that all required points are covered in an agreement with each other.

Why Should I Use the Checklist?

As CMC-Global states, the benefits of **using the Project Self-Declaration Checklist** are that it:

➤ enables ISO 20700:2017 to be actionable

➤ enables ISO 20700:2017 to be used as a checklist

➤ ensures that you are covering the full extent of the Standard

➤ can be adapted to suit all aspects of different types and sizes of projects regardless of duration, cost, impact, client relationship etc.

➤ can be easily adapted to suit other project factors including:

  • a standard or customised/bespoke offering

- local or cross border project
- government or corporate project
- industry or sector specific
- and many others.

What Does the Checklist Include?

The **Project Self-Declaration Checklist** includes the full requirements and all elements of the Standard. These can then be individually tailored and agreed between client and consultant for each project.

They will vary typically based on the type of project and on factors such as the size of the project, duration, cost, impact, client relationship; whether the project is standard or a customised offering, local or cross border, government or privately funded, industry specific or applicable across industry sectors etc.

An example of **Policies and Regulatory Framework** included in the Guidelines and how these can be adapted is shown below:

> **4.4 Policies**
>
> Policies as written in 4.4.1 to 4.4.12 are to guide the MCSP in the delivery of the assignment and apply during the assignment.
>
> **4.4.1 Regulatory framework**
>
> The MCSP should maintain an appropriate level of awareness of the relevant laws, policies, rules, regulations and standards that govern their services and those of the client.
>
> The MCSP should:
>
> — engage in dialogue with the client to determine the relevant laws and regulations for the assignment;
>
> — manage any conflict between laws and regulations relevant to its general activities and those relevant to the specific assignment.
>
> If conflicts exist, to ensure clarity the relevant laws and regulations for the assignment should be identified in the agreement.
>
> NOTE   In case of multiple jurisdictions, the aim of this subclause is to select and specify which laws are relevant to the assignment depending where the MCSP operates and where the recipient operates. This also creates awareness of potential conflict between laws for cross border assignments.

An example of the **Self-Declaration Checklist** dealing with the Regulatory Framework:

> **4   General**
>
> **4.1   Regulatory framework**
>
> Relevant laws and regulations for the assignment have been included in the agreement.
>
> | | Small |
> | --- | --- |
> | ☐ Yes | Click or tap here to enter text. |
> | ☐ None / not applicable | Click or tap here to enter text. |
>
> The resolution of any conflict has been documented.
>
> | | Small |
> | --- | --- |
> | ☐ Yes | Click or tap here to enter text. |
> | ☐ None / not applicable | Click or tap here to enter text. |

What are the Benefits of Completing the Training in the Checklist?

Training in the **CMC-Global ISO 20700:2017 Project Self-Declaration Checklist** provides these benefits:

➤ You will be accredited by CMC-Global and IMC Australia to self-declare and "stamp" your projects as conforming with ISO 20700:2017

➤ Your clients will be aware of the standard that the international community has established as the base requirements for a management consulting engagement which will help set expectations and raise awareness

➤ You will be able to highlight how, as an IMC certified management consultant, you operate at a much higher level of maturity and professionalism because of our Code of Conduct

➤ A clear understanding of the differences between the CMC designation, which assesses individual competence, and the ISO 20700:2017 Guidelines which recognise process compliance, for both the CMC and the client

➤ Recognized by CMC-Global as trained in ISO 20700:2017 by CMC-Global.

What Will be Provided in the Training in ISO 20700:2017 Project Self Declaration Checklist?

The training will provide participants with:

➤ Guidance for the use of the Checklist for small, medium and large projects

➤ Practical case studies for completing the Checklist for Small and Large Projects

➤ Electronic copies for use of the Checklist for Small, Medium and Large Projects

➤ Electronic mark that can be used for personal communications and promotions

➤ Training certificate issued by CMC-Global and IMC Australia

➤ Listing on the CMC-Global site of trained consultants (optional)

How do I register for the training?

Further details and dates for the **ISO 20700:2017 Project Self-Declaration Checklist** Training Programs are available at **imc.org.au** Register now. Places are strictly limited.

For further information please contact Christine Cox, Executive Officer, IMC, at **imc@imc.org.au**.

Past Attendee's Testimonials

"This short course on the ISO20700 standard for consulting was a great eye opener regarding the things I should have thought about and didn't; it confirmed some of the things I was doing but could have been doing better; and answered many of the questions I still had about the profession and where it was heading. It was great to meet other experienced consultants to see what they do and how they do it. A great learning opportunity. Thanks IMC for hosting this event."

Tony Simmonds MIMC CMC - Owner/Director
Interlink Technology Pty Ltd & Interlink Technology Services Pty Ltd (RTO: 31926)

"I found the ISO 20700 training both informative and professionally rewarding. The workshop sessions enabled me to gain an understanding of the content of the Standard and how I might profitably apply the checklist to my management consulting practice. In summary, it was time well spent."

Samuel S Durland CMC CPEng NER -
Certified Management Consultant & Chartered Professional Engineer

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