

INTRODUCTION TO THE WORKSHOP

The Workshop

The training workshop will be highly interactive with participants learning how to use the ICMCI ISO 20700:2017 Project Self-Declaration Checklist through case study work and role play in which participants will take the roles of Consultants and Clients (alternatively played by the trainer). It is up to the individual trainer to decide whether they take the role of the Client or allocate this role to participants so that they can provide coaching and advice to the participants during the process.

The participants may be divided into two or three teams depending on the number of participants – ideally in each team there should be three or four Consultant personnel and two Client personnel.

To add interest to the workshop the teams could be put in competition with each other – with a small prize for the best Checklists produced.

The Case Studies

There are case studies – representing projects of varying sizes and complexity.

Case studies have two briefing documents, one for the Consultant and one for the Client.

The case study briefing for the Consultant contains enough information for the participants to understand the client's business and the project background. The project objective, tasks and expected outcomes are described in enough detail for the participants to understand the work required.

The case study briefing for the Client contains all the client business and project information the participant/trainer needs to answer Consultants' questions about the project in terms of what is required for the Consultant and Client to complete a Project Self-Declaration Checklist.

The Roleplay

The roleplay process takes the form of a series of meetings with the Client, selected from the Contracting, Execution and Closure stages of the project, where some participants play the role of the Consultant team conducting the project and other participants play the role of the Client. Execution and Closure could be covered by short discussions while the main focus is given to Contracting and Policies.

During the meetings the Consultant team must gather all the data they need from the Client to make decisions on the best way to complete a Project Self-Declaration Checklist for the assignment according to the guidance in ISO 20700:2017.

One of the participants should play the role of an observer and take notes of the process and the Consultants' performance.

The Result

By the end of the workshop the participants should have constructed sample entries for the Project Self-Declaration Checklists for at least one of the case studies. Satisfactory completion of the Checklist samples, in the judgement of the trainer, will result in recommendation for the award of "**Accredited in** using the ISO 20700:2017 Guidelines for Management Consultancy Services Checklist".

The Clients

Small Project:

The Client role for "small project" is supposed to be representing a small/micro business or a preliminary diagnostic study with a short duration, 1-2 Consultants and impact limited to the client.

Large Project

The Client role for "large project" is supposed to be representing a large business or one with specific industry related requirements, complex, full project management, possibly cross-border and high impact beyond the Client.