

ISO 20700 Self-Declaration Checklist – Greater Prairie Business Consulting, Inc.

Prepared by James J. Talerico, Jr., CMC ®

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. See Annex C of the ISO 20700 Standard for guidance on the structure of consulting activities and Annex H for examples of typical pre-assignment activities.*

1.1 Outcome -

The following outcome of the contracting phase has been agreed:

	Notes
<input checked="" type="checkbox"/> A quote	A Greater Prairie Business Consulting, Inc. (GPBC, Inc.) quote – i.e., our estimated cost for consulting services – is, typically, included our Scope of Work.
<input checked="" type="checkbox"/> A terms of reference document	Because GPBC, Inc. pursues “negotiated work” as opposed to “bid work,” generally, there is no RFQ; Terms of Reference, however, are revealed during the business analysis and outlined in the Analyst’s Findings Report.
<input checked="" type="checkbox"/> A contract	GPBC, Inc.’s Working Agreement is our contract.
<input checked="" type="checkbox"/> Other	Other GPBC, Inc. contract documents include: A Confidentiality Agreement, or NDA; This Self-Declaration Checklist; Individual & Business Background Information like the consultant’s resume, certifications, awards & testimonials and the company’s vision, mission, values, etc. (all available on the web and social media); Profit Assurance Partnership Program (PAPP) Brochure (GPBC, Inc.’s post-project follow up document); Exit Planning Brochure, and other marketing material.

ISO 20700 Self-Declaration Checklist – Greater Prairie Business Consulting, Inc.

Prepared by James J. Talerico, Jr., CMC ®

1.2 Contents -

1.2.1 General -

The agreement includes:

Included in Agreement
Context: The context in which the consulting project is being conducted is delineated primarily in GPBC, Inc.'s Working Agreement, Survey Report, and Scope of Work. <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Services and deliverables: Project services and deliverables are outlined in GPBC, Inc.'s Working Agreement, Survey Report, and Scope of Work. <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Approach and work plan: The consulting approach and work plan are primarily explained in GPBC, Inc.'s Working Agreement, Survey Report, and Scope of Work. <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Roles and responsibilities: Roles and responsibilities are explained in GPBC, Inc.'s Working Agreement, Scope of Work, and Weekly Summary Reports. <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Acceptance criteria: Acceptance criteria is acknowledged through client signatures on GPBC, Inc.'s contract documents and in various consulting reports, such as SOPs and Weekly Summary Reports. <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Terms and conditions: The terms and conditions of the agreement are spelled out in GPBC, Inc.'s Working Agreement, Scope of Work and "Profit Assurance Partnership Program" (PAPP) Brochure. <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Other: General agreements are, furthermore, mentioned verbally throughout the consulting process and in GPBC, Inc.'s consulting "Institutionals" (or standard scripts) used to explain each part of the project to the client.

ISO 20700 Self-Declaration Checklist – Greater Prairie Business Consulting, Inc.

Prepared by James J. Talerico, Jr., CMC ®

1.2.2 Context -

1.2.2.1 Background information, assumptions, scope, and limits -

The agreement contains the following relevant facts:

Included in Agreement
<input checked="" type="checkbox"/> an accurate description of the organization's current situation: An accurate description of the organization's current situation is identified during the survey and delineated in the Survey Findings Report. This description is further highlighted during the consulting project based on further discovery in our Weekly Summary Reports.
<input checked="" type="checkbox"/> the client's objectives: Client objectives are mutually agreed to and identified during GPBC, Inc.'s business analysis and delineated in both GPBC, Inc.'s Survey Findings Report and Project Scope of Work.
<input checked="" type="checkbox"/> why the work needs to be done: Reasons for the consulting project are identified during GPBC, Inc.'s business analysis and delineated in GPBC, Inc.'s Survey Findings Report and Project Scope of Work.
<input checked="" type="checkbox"/> the assumptions and their impact: Assumptions for GPBC, Inc.'s consulting project and the potential impact of the consulting project are identified during the business analysis and delineated in the Survey Findings Report and Project Scope of Work.
<input checked="" type="checkbox"/> the scope and the limits of the assignment: The scope and limits of GPBC, Inc.'s consulting assignment are delineated in the Working Agreement and Scope of Work.
<input checked="" type="checkbox"/> Other: Some aspects of GPBC, Inc.'s consulting agreement are also addressed verbally during client debriefings and business analysis exercises with the client and the client's employees.
<input type="checkbox"/> None

1.2.2.2 Constraints and risks -

Constraints and risks have been considered in the assignment and recorded in the agreement.

See Annex G of the ISO 20700 Standard for examples of guidelines for typical risk management.

More detail can be added in Section 2.11 Risk and Quality Management

ISO 20700 Self-Declaration Checklist – Greater Prairie Business Consulting, Inc.

Prepared by James J. Talerico, Jr., CMC ®

A risk management system has been agreed.

	Small
<input checked="" type="checkbox"/> Yes	Project constraints, such as GPBC, Inc.'s disclosure that it does not practice tax or law, are delineated in the Working Agreement; The main risk of not achieving a project ROI (i.e., client commitment and follow up) is mentioned specifically in the Guarantee Agreement and is a condition of working together discussed verbally. In most cases, the client's commitment is documented in a Client Commitment Checklist. GPBC, Inc.'s PAPP Program is also designed to reduce this risk. "PESTLE" factors and additional risks of attaining a project ROI in the short-term are disclosed in the Guarantee and Exit Planning Document.
<input type="checkbox"/> None / Not Applicable	G.P.B.C., Inc.'s project quality control process (developed based on GPBC, Inc.'s CEO experience as Quality Manager for two-(2) national consulting forms) further helps ensure that project objectives are attained. An addition protection for the client is GPBC, Inc.'s E&O Insurance policy.

1.2.2.3 Stakeholders -

Relevant stakeholders are those that could be affected by the project. *A list of typical stakeholders is included in Appendix B of the ISO 20700 Standard.*

For more detailed information, see Policies 2.2: Stakeholder engagement and commitment in this document.

Agreements have been negotiated with relevant stakeholders.

	Notes
Employees: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	G.P.B.C., Inc.'s agreements speak to the two principal stakeholders – the client and company employees.
Suppliers: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	G.P.B.C., Inc.'s agreements speak to the two principal stakeholders – the client and company employees. Other stakeholders, such as suppliers, are added if relevant.
Clients: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	G.P.B.C., Inc.'s agreements speak to the two principal stakeholders – the client and company employees. Other stakeholders are added if relevant.

ISO 20700 Self-Declaration Checklist – Greater Prairie Business Consulting, Inc.

Prepared by James J. Talerico, Jr., CMC ®

Owners / Shareholders: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	G.P.B.C., Inc.'s agreements speak to the two principal stakeholders – the client and company employees. Other stakeholders are added if relevant.
Other Stakeholders: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	G.P.B.C., Inc.'s agreements speak to the two principal stakeholders – the client and company employees. Other stakeholders are added as needed. Contract documents have been reviewed for statements about being sensitive to "other relevant stakeholders."

1.2.2.4 Services and deliverables -

The ISO 20700 includes the following statement: *The services should be able to be evaluated with formal evaluation criteria.*

The agreed services (i.e., workshops, diagnostic study, mentoring...etc.) to be delivered during the assignment have been included in the agreement.

	Small
<input checked="" type="checkbox"/> Yes	Agreed services to be delivered are detailed in GPBC, Inc.'s Scope of Work and this information is further elaborated on in GPBC, Inc.'s Weekly Summary Reports.
<input type="checkbox"/> None / Not Applicable	Agreed services are, furthermore, explained verbally in GPBC, Inc.'s Survey and Consulting "Institutionals" (scripts.)

The expected outcomes (i.e., successful certification, improved market share, process improvement...etc.) of the assignment have been included in the agreement.

	Small
<input checked="" type="checkbox"/> Yes	The expected outcomes are listed in GPBC, Inc.'s Survey Findings Report, ROI Guarantee, and "Recommendation for Improvement" – which is part of the Weekly Summary Reports.
<input type="checkbox"/> None / Not Applicable	Expected outcomes are, furthermore, mentioned verbally in the Survey and Consulting "Institutionals" (Scripts.)

The deliverables of the assignment (i.e. reports, solution options, recommendations...etc.) as expected have been included in the agreement.

ISO 20700 Self-Declaration Checklist – Greater Prairie Business Consulting, Inc.

Prepared by James J. Talerico, Jr., CMC ®

	Small
<input checked="" type="checkbox"/> Yes	Final deliverables are referenced in GPBC, Inc.'s Scope of Work, ROI Guarantee, and listed at the end of each Weekly Summary Reports.
<input type="checkbox"/> None / Not Applicable	Deliverables are, furthermore, mentioned verbally in the Survey "Institutional" (Script.)

1.2.3 Approach and work plan

Approach and work plan (i.e., project organization, project governance, knowledge transfer, quality and risk management, Human resources, and their responsibilities...etc.) have been included in the agreement.

	Small
<input checked="" type="checkbox"/> Yes	The approach and work plan are outlined in GPBC, Inc.'s Scope of Work, and, during the consulting project, in the Weekly Project Summary Reports.
<input type="checkbox"/> None / Not Applicable	

1.2.4 Roles and responsibilities

1.2.4.1 General

Assigned roles and responsibilities (MCSP, Client, and Stakeholder) are included in the agreement.

	Small
<input checked="" type="checkbox"/> Yes	Assigned roles and responsibilities are described in GPBC, Inc.'s Institutionals and documented in GPBC, Inc.'s Working Agreement and Weekly Summary Reports.
<input type="checkbox"/> None / Not Applicable	

ISO 20700 Self-Declaration Checklist – Greater Prairie Business Consulting, Inc.

Prepared by James J. Talerico, Jr., CMC ®

1.2.4.2 Assignment monitoring and control

Assignment monitoring and control (Designated project sponsor/leader, decision-making process, direction, and control process) are included in the agreement.

	Small
<input checked="" type="checkbox"/> Yes	Monitoring project progress, assigning accountabilities and developing metrics and controls are addressed in GPBC, Inc.'s Institutionals during the business analysis and consulting project, and are, furthermore, documented in GPBC, Inc.'s Working Agreement SOPs, and Weekly Summary Reports.
<input type="checkbox"/> None / Not Applicable	Post project accountability usually rests with the business owner(s) but is supported by GPBC, Inc.'s PAPP program.

1.2.4.3 Evaluation of the assignment

The evaluation of the assignment (i.e., measure of milestones, reporting of final evaluation results...etc.) have been included in the agreement.

	Small
<input checked="" type="checkbox"/> Yes	Regular evaluations of GPBC, Inc.'s consulting services are documented the firm's Weekly Summary Reports, in the Client's Closing Letter & YouTube Testimonial, GPBC, Inc.'s PAPP Reports, and, moreover, revealed during GPBC, Inc.'s One-On-One Owner(s) and Employee Interviews.
<input type="checkbox"/> None / Not Applicable	

1.2.5 Acceptance criteria -

The acceptance criteria (i.e., KPIs...etc.) have been included in the agreement.

	Small
<input checked="" type="checkbox"/> Yes	Acceptance criteria such as KPIs, proforma financial statements, employee satisfaction surveys, etc. are tracked before, during, and after the project as documented in GPBC, Inc.'s Scope of Work and PAPP brochure.

ISO 20700 Self-Declaration Checklist – Greater Prairie Business Consulting, Inc.

Prepared by James J. Talerico, Jr., CMC ®

<input type="checkbox"/> None / Not Applicable	
--	--

1.2.6 Terms and conditions -

1.2.6.1 Commercial terms -

The Commercial terms (i.e., fees and charges, payment schedule...etc.) have been included in the agreement.

	Small
<input checked="" type="checkbox"/> Yes	Commercial terms are listed in GPBC, Inc.'s Working Agreement, Client Invoices, and Final Reconciliations when project financing is offer to clients.
<input type="checkbox"/> None / Not Applicable	

1.2.6.2 Contracting standard terms and conditions -

The contracting standard terms and conditions (i.e., legal and regulatory requirements, statutory obligations, professional standards, claims and disputes handling process...etc.) have been included in the agreement.

	Small
<input checked="" type="checkbox"/> Yes	These disclosures are made in GPBC, Inc.'s Working Agreement and Weekly Project Summary Reports.
<input type="checkbox"/> None / Not Applicable	

1.2.6.3 Policies to be included in the agreement -

The policies (i.e., corporate specific policies related to culture, beliefs, causes...etc.) have been included in the agreement.

	Small
<input checked="" type="checkbox"/> Yes	Policies relating to GPBC, Inc.'s culture, beliefs, etc. are listed in 1.1 above.) Relevant client policies are noted in GPBC's Finding Report, Scope of Work and Weekly Summary Reports.
<input type="checkbox"/> None / Not Applicable	

ISO 20700 Self-Declaration Checklist – Greater Prairie Business Consulting, Inc.

Prepared by James J. Talerico, Jr., CMC ®

2 Policies:

2.1 Regulatory framework -

Relevant laws and regulations for the assignment have been included in the agreement.

	Small
<input checked="" type="checkbox"/> Yes	Operating within relevant laws and regulations is specifically mentioned in GPBC, Inc.'s Scope of Work.
<input type="checkbox"/> None / Not Applicable	

The resolution of any conflict has been documented.

	Small
<input checked="" type="checkbox"/> Yes	Per IMCUSA's Code of Ethics, any "conflicts of interest" would have to be disclosed and would cause GPBC, Inc. to decline the project. Any "potential conflict" would also have to be disclosed and addressed with the client before I was able to move forward. Any conflicts that arise during the project would have to be addressed as outlined above and would be documented in GPBC, Inc.'s Weekly Project Summary Report.
<input type="checkbox"/> None / Not Applicable	

2.2 Stakeholder engagement and commitment -

Relevant stakeholders (*i.e., suppliers, employees, shareholders, clients...etc. detailed in Appendix B of the ISO 20700 standard document*) to the assignment have been identified.

	Small
<input checked="" type="checkbox"/> Yes, in the agreement	Relevant stakeholders are usually the owner(s) and employees but, depending on the project, other relevant stakeholders could be identified.

ISO 20700 Self-Declaration Checklist – Greater Prairie Business Consulting, Inc.

Prepared by James J. Talerico, Jr., CMC ®

<input type="checkbox"/> Yes, in a separate document	(Relevant stakeholder engagement and commitment is documented in GPBC, Inc.'s Scope of Work.)
<input type="checkbox"/> None / Not Applicable	

Involvement of the stakeholders (i.e., access to information, consultation, communication, roles, and responsibilities...etc.) has been agreed.

	Small
<input checked="" type="checkbox"/> Yes, in the agreement	Relevant stakeholder involvement is also documented in GPBC, Inc.'s Scope of Work.
<input type="checkbox"/> Yes, in a separate document	
<input type="checkbox"/> None / Not Applicable	

2.3 Code of ethical and professional conduct -

A Code of Conduct has been agreed.

See Annex D of the ISO 20700 Standard for example guidelines.

	Small
<input checked="" type="checkbox"/> Yes	GPBC, Inc.'s Code of Conduct is a starting point for establishing a code of conduct for the project with the client.
<input type="checkbox"/> None / Not Applicable	

Conflict of Interests has been identified.

See Annex E of the ISO 20700 Standard for examples of guidelines to manage conflicts of interest.

	Small
<input checked="" type="checkbox"/> Yes	IMCUSA's Code of Ethics establishes guidelines for managing conflicts of interest.
<input type="checkbox"/> None / Not Applicable	

ISO 20700 Self-Declaration Checklist – Greater Prairie Business Consulting, Inc.

Prepared by James J. Talerico, Jr., CMC ®

2.4 Project Governance -

A project governance system (i.e., scope of work and deliverables, management structure, policies, limits of authority, interactions and reporting, management of risks...etc.) has been agreed.

	Small
<input checked="" type="checkbox"/> Yes, in the agreement	Before GPBC, Inc. starts working with a client, GPBC, Inc.'s Working Agreement and Scope of Work are signed. These documents outline all relevant project governance procedures.
<input type="checkbox"/> Yes, in a separate document	
<input type="checkbox"/> None / Not Applicable	

2.5 Capability -

Capability to conduct this assignment including internal and external resources has been confirmed. *See Annex F of the ISO 20700 Standard for examples of criteria to evaluate capability.*

	Small
<input checked="" type="checkbox"/> Yes, in the agreement	GPBC, Inc. only seeks projects for which it has previous experience and has demonstrated capability. Documents like Annex F of the ISO 20700 Standard and IMCUSA's Code of Ethics address this topic.
<input type="checkbox"/> Yes, in a separate document	
<input type="checkbox"/> None / Not Applicable	

ISO 20700 Self-Declaration Checklist – Greater Prairie Business Consulting, Inc.

Prepared by James J. Talerico, Jr., CMC ®

2.6 Communication -

A communication policy (covering the client and recipient) has been agreed.

	Small
<input checked="" type="checkbox"/> Yes, in the agreement	The communication policy covering the client and consultant is outlined in GPBC, Inc.'s Working Agreement.
<input type="checkbox"/> Yes, in a separate document	
<input type="checkbox"/> None / Not Applicable	

A communication policy (covering the relevant stakeholders) has been agreed.

	Small
<input checked="" type="checkbox"/> Yes, in the agreement	If other relevant stakeholders other than the client and employees are identified, they would be added to GPBC, Inc.'s Scope of Work document.
<input type="checkbox"/> Yes, in a separate document	
<input type="checkbox"/> None / Not Applicable	

2.7 Data protection and confidentiality -

A data protection and confidentiality policy (i.e., covering data, information...etc.) has been agreed/identified.

	Small
<input checked="" type="checkbox"/> Yes, in the agreement	A Confidentiality Agreement that is binding to the consultant and client is executed with the client before the business analysis begins. As a matter of policy, the consultant does not access the client's computer systems during the project.

ISO 20700 Self-Declaration Checklist – Greater Prairie Business Consulting, Inc.

Prepared by James J. Talerico, Jr., CMC ®

<input type="checkbox"/> Yes, in a separate document	
<input type="checkbox"/> None / Not Applicable	

2.8 Protection of intellectual property -

The MCSP’s data, information and intellectual property rights (i.e., databases provided by MCSP) remain as the property of the MSCP.

	Small
<input checked="" type="checkbox"/> Yes, in the agreement	A Confidentiality Agreement that is binding to the consultant and client is executed with the client before GPBC, Inc.’s business analysis begins. This agreement covers the consultant’s data, information, and intellectual property rights, in addition to protecting the client’s data, information, and intellectual property rights.
<input type="checkbox"/> Yes, in a separate document	
<input type="checkbox"/> None / Not Applicable	

The ownership of intellectual property rights arising from the outcome or deliverables of the project have been agreed with the client and documented.

	Small
<input checked="" type="checkbox"/> Yes, in the agreement	A Confidentiality Agreement that is binding to the consultant and client is executed with the client before GPBC, Inc.’s business analysis begins. GPBC, Inc.’s Confidentiality Agreement covers ownership of intellectual property rights arising from the project outcome or deliverables.
<input type="checkbox"/> Yes, in a separate document	
<input type="checkbox"/> None / Not Applicable	

ISO 20700 Self-Declaration Checklist – Greater Prairie Business Consulting, Inc.

Prepared by James J. Talerico, Jr., CMC ®

2.9 Social responsibility -

Consideration of social responsibility (i.e., demonstration of the MCSP's contribution to stakeholders, contribution to sustainable development, ethical project governance, including transparency, alignment with norms and standards that are documented by relevant organizations...etc.) has been included in the outcomes.

	Small
<input checked="" type="checkbox"/> Yes, in the agreement	Consideration of relevant issues involving social responsibility are documented in several project documents and outcomes are typically delineated in GPBC, Inc.'s Weekly Summary Reports.
<input type="checkbox"/> Yes, in a separate document	
<input type="checkbox"/> None / Not Applicable	

2.10 Health and safety -

Assignment related risks to health and safety of MCSP, client and other relevant stakeholders has been identified and health and safety management methodology has been put in place. This could include the client's specific health and safety regulations and policies.

	Small
<input checked="" type="checkbox"/> Yes, in the agreement	OSHA health and safety issues are included in all GPBC, Inc.'s project scopes. Other industry health & safety related issues are addressed as need. As previously mentioned, legal issues are beyond the scope of GPBC, Inc.'s consulting expertise.
<input type="checkbox"/> Yes, in a separate document	
<input type="checkbox"/> None / Not Applicable	

ISO 20700 Self-Declaration Checklist – Greater Prairie Business Consulting, Inc.

Prepared by James J. Talerico, Jr., CMC ®

2.11 Risk and quality management -

The risk and quality management methodology and scope and the required resources to minimize, monitor and control the probability and impact of unforeseen events have been identified and agreed.

	Small
<input checked="" type="checkbox"/> Yes, in the agreement	Risk management has been addressed in 1.2.2.2 above. GPBC., Inc.'s quality project management methodology comes from GPBC., Inc.'s CEO's experience as a Quality Director at two-(2) national consulting firms and extends to GPBC., Inc.'s post-project phase.
<input type="checkbox"/> Yes, in a separate document	
<input type="checkbox"/> None / Not Applicable	

2.12 Guarantees -

Conditions of guarantees have been negotiated and agreed with the client.

	Small
<input checked="" type="checkbox"/> Yes, in the agreement	GPBC., Inc. has a separate Guarantee Agreement it executes with clients before the project begins with almost project.
<input type="checkbox"/> Yes, in a separate document	
<input type="checkbox"/> None / Not Applicable	

ISO 20700 Self-Declaration Checklist – Greater Prairie Business Consulting, Inc.

Prepared by James J. Talerico, Jr., CMC ®

3 Execution:

The purpose of the execution phase is described in the ISO 20700 as follows: *to deliver what has been agreed.*

The execution phase is documented.

	Small
<input checked="" type="checkbox"/> Yes	Information about the execution of a GPBC., Inc. project is outlined in the Scope of Work.
<input type="checkbox"/> None / Not Applicable	

3.1 Input -

The input (start of the execution, change requests, agreed consequences) has been documented.

	Small
<input checked="" type="checkbox"/> Yes	Execution of a GPBC, Inc. project is outlined in the Scope of Work, Management Meeting Minutes, Weekly Summary Reports, etc.
<input type="checkbox"/> None / Not Applicable	

3.2 Outcome -

The outcome (services and deliverables, recommendation and approach for the future, ongoing evaluation, and improvement) have been documented.

	Small
<input type="checkbox"/> Yes	Project outcomes are documented in GPBC, Inc. Management Meeting Minutes, Weekly Summary Reports, etc. and GPBC, Inc.'s Profit Assurance Partnership Program documents following the project.
<input type="checkbox"/> None / Not Applicable	

ISO 20700 Self-Declaration Checklist – Greater Prairie Business Consulting, Inc.

Prepared by James J. Talerico, Jr., CMC ®

3.3 Contents -

3.3.1 General -

The components of the execution phase (i.e., refining of the agreed work plan, implementing the work plan, assignment management and monitoring, approvals, and acceptance...etc.) have been documented.

	Small
<input checked="" type="checkbox"/> Yes	Project outcomes are documented in GPBC, Inc. Management Meeting Minutes, SOPs, spreadsheets, Weekly Summary Reports, etc. and GPBC, Inc.'s Profit Assurance Partnership Program documents following the project.
<input type="checkbox"/> None / Not Applicable	

4 Closure:

The purpose of the closure phase is described in the ISO 20700 as follows: *to achieve an orderly end to the assignment, after completion of the delivery of the service in accordance with the agreement. See Annex C of the ISO 20700 Standard.*

4.1 Contents -

4.1.1 Legal and contractual matters -

Legal and contractual matters (i.e., invoicing and payment, formal sign off and acceptance, warranties and guarantees, ownership of intellectual property, obligations that remain after closure...etc.) have been fulfilled and/or documented.

	Small
<input checked="" type="checkbox"/> Yes	All the above are documented during GPBC, Inc.'s consulting process.
<input type="checkbox"/> None / Not Applicable	

ISO 20700 Self-Declaration Checklist – Greater Prairie Business Consulting, Inc.

Prepared by James J. Talerico, Jr., CMC ®

4.1.2 Final evaluation and improvement -

MCSP self-evaluation: Final evaluation and improvement (i.e. lessons learned, improving process, innovation of new services...etc.) have been fulfilled and/or documented.

	Small
<input checked="" type="checkbox"/> Yes	GPBC, Inc.'s client debriefing process seeks information from each client to improve. One-on-one interviews with the client and managers, employee surveys, the client's closing letters & YouTube testimonials, and GPBC, Inc.'s PAPP documents are ways this information is collected.
<input type="checkbox"/> None / Not Applicable	

Agreed with Client: Final evaluation and improvement (i.e., process effectiveness, MCSP performance, utilization of resources, satisfaction...etc.) have been fulfilled and/or documented.

	Small
<input checked="" type="checkbox"/> Yes	A client debriefing process seeks information from each client about ways to improve. One-on-one interviews with the client and managers, employee surveys, client closing letters & YouTube testimonials and GPBC, Inc.'s PAPP documents are ways this information is collected. Feedback is, furthermore, sought weekly from the client and documented in GPBC, Inc.'s Weekly Summary Reports.
<input type="checkbox"/> None / Not Applicable	

ISO 20700 Self-Declaration Checklist – Greater Prairie Business Consulting, Inc.

Prepared by James J. Talerico, Jr., CMC ®

4.1.3 Administrative matters -

Administrative matters (i.e., indexing, filing, return of client property, release of resources...etc.) have been fulfilled and/or documented.

	Small
<input checked="" type="checkbox"/> Yes	GPBC, Inc.'s administrative closeout process includes indexing, return of client property, release of resources, etc. is documented in the Scope of Work and final Weekly Summary Report.
<input type="checkbox"/> None / Not Applicable	

4.1.4 Communication -

Communication (i.e., confidentiality agreements, case studies, articles, request for references, client debriefing...etc.) have been fulfilled and/or documented.

	Small
<input checked="" type="checkbox"/> Yes	Paper and electronic project files are maintained by GPBC, Inc. Detailed project communications are documented in GPBC, Inc.'s Weekly Project Summary Reports.
<input type="checkbox"/> None / Not Applicable	

4.1.5 Outstanding minor issues -

Outstanding minor issues have been fulfilled and/or documented.

	Small
<input checked="" type="checkbox"/> Yes	A final project punch list is shared with GPBC, Inc. clients to facilitate all outstanding project TO DOs before closing out the project and transiting to the post project phase.
<input type="checkbox"/> None / Not Applicable	