

LETA ADVISORY / FREE TRAINING RESOURCE

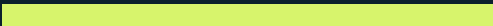
ISO Management Systems for Professional Services

High-level training pack for UAE consultancies, technology teams, agencies and business services

RELEVANT FRAMEWORKS	DESIGNED FOR
ISO 9001 ISO/IEC 27001 ISO 22301 concepts	Partners, delivery leads, sales, project teams, HR, IT, finance and information owners

CONSULTANCY AND TRAINING SUPPORT ONLY

LETA does not issue ISO certificates. An independent certification body conducts certification audits and makes certificate decisions.



01 Learning purpose

Use this pack for a 45-60 minute management or team discussion. It explains management-system thinking through familiar operational situations. It does not reproduce ISO clauses, replace the authorised standard, provide legal advice or determine conformity.

Learning objectives

- + Control proposals, scope, changes and client deliverables without bureaucracy.
- + Protect client information across people, suppliers and cloud tools.
- + Plan competence, review and continuity around critical services.
- + Use project lessons and customer feedback to improve reusable ways of working.

Industry scenario

A consultancy grows quickly across remote teams. Proposal assumptions do not reach delivery, client files sit in personal drives, subcontractors use different review methods and lessons learned are discussed but not built into future projects.

The management-system lens

For each operational risk, ask five questions: What result is required? What could prevent it? What control is proportionate? Who owns the control? What evidence shows it worked?

02 Follow the work, not the paperwork

A practical system follows the actual flow of work. Use the sequence below to identify hand-offs, decision points and evidence rather than creating separate procedures for every department.

STAGE	CONTROL QUESTION
Opportunity	What must be confirmed, controlled, recorded and escalated here?
Proposal and review	What must be confirmed, controlled, recorded and escalated here?
Contract hand-over	What must be confirmed, controlled, recorded and escalated here?
Planning	What must be confirmed, controlled, recorded and escalated here?
Delivery/review	What must be confirmed, controlled, recorded and escalated here?
Acceptance	What must be confirmed, controlled, recorded and escalated here?
Learning and follow-up	What must be confirmed, controlled, recorded and escalated here?

Example risk and evidence map

AREA	POTENTIAL FAILURE	PRACTICAL EVIDENCE
Scope	Delivery team misses a proposal assumption	Contract review, hand-over and change approval
Quality	Deliverable is issued without independent review	Review criteria, competent reviewer and release evidence
Information	Client data is shared or retained incorrectly	Classification, access, approved tools and retention control
Continuity	Critical knowledge depends on one person	Deputy, documented hand-over, backup and exercise

03 Facilitated team exercise

Choose one typical client engagement. Build a one-page delivery control map covering scope, inputs, review, information access, change, acceptance and lessons learned.

Use this worksheet

PROCESS STAGE	RISK / FAILURE	CONTROL	OWNER	EVIDENCE

Discussion prompts

- + Which control depends on one person or an informal message?
- + Where could outdated information be used?
- + Which evidence is created naturally through the work?
- + What should trigger an NCR, escalation or management decision?
- + Which control can be simplified without increasing risk?

04 Knowledge check and action plan

#	QUESTION	FACILITATOR ANSWER
1	When should scope changes be controlled?	Before the changed work is committed or delivered wherever practicable.
2	Is a policy enough to protect client information?	No. Access, tools, behaviour, monitoring and evidence must support it.
3	What makes a useful lesson learned?	A specific change with an owner and a mechanism that affects future work.

30-day action plan

ACTION	OWNER	DUE	SUCCESS EVIDENCE

Next step

Use the completed exercise to brief management, focus a gap analysis or define an implementation workshop. LETA can review the result online or on site and help translate it into minimum-effective documentation, internal audit and Automated NCR follow-up.

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