

THE STRATEGY EXPERT®

Code of Ethics

1. We treat all client information that is not public knowledge as confidential and will take reasonable steps to prevent access by unauthorized personnel. All representatives are required to execute a comprehensive confidentiality agreement. We do not keep client files in the cloud or in any online databases.
2. We reserve the right to serve any and all potential clients within an industry, even among competitors; however, we agree not to take advantage of proprietary or privileged information, either for use by ourselves, the client, or other clients.
3. We will serve clients with integrity, competence, independence, objectivity and professionalism. We pledge to tell clients what they “need” to hear and not necessarily what they “want” to hear.
4. We will form a strategic relationship with clients. We will establish a realistic mutual understanding of the objectives, scope, work plan, possible results, possible benefits and fee arrangements before executing an engagement.
5. We will accept assignments in which we believe we possess the requisite experience and competence to serve clients effectively. All senior-level consultants have at least a Master’s degree and 10 years or 10,000 hours of experience.
6. We will agree, in advance, with a client the requisite fees and expenses and will charge fees that are reasonable and commensurate with the services delivered and the responsibility accepted.
7. We will not accept commissions, remuneration or other benefits from a third party in connection with the recommendations to a client without that client’s prior knowledge and consent, and will disclose in advance any financial interests in goods or services that form part of such recommendations.
8. We will offer to withdraw from a consulting engagement when we believe our objectivity or integrity may be impaired.

