



masonadvisory

Consulting Excellence Declaration 2025

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Introduction

Since 2014, we have become synonymous with high quality consultancy. We enable organisations to deliver value through digital and technology transformation.

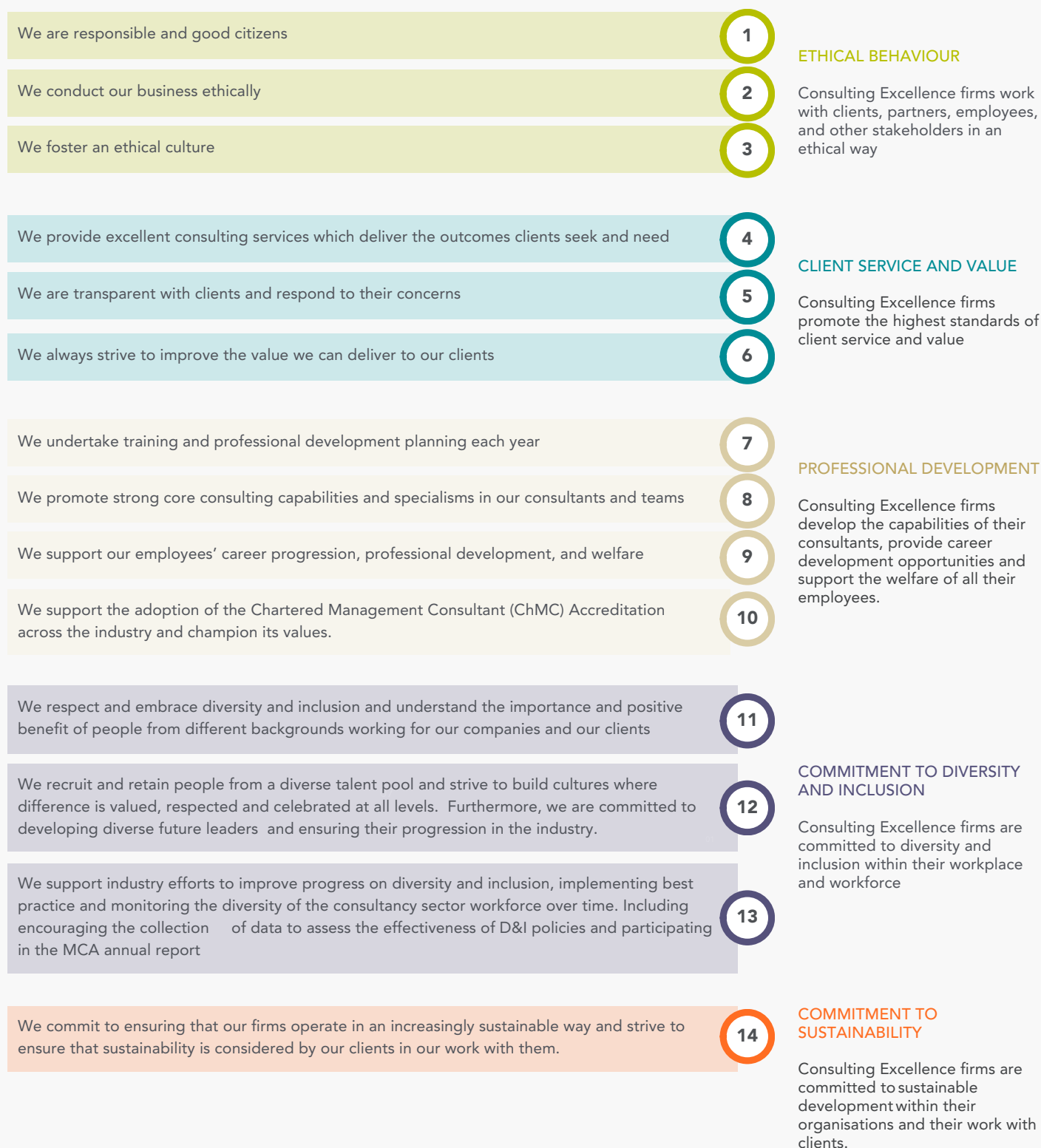
We offer experts who match technology know-how with commercial acumen. Our experienced teams quickly add value to client engagements supporting them to drive change from within the organisation. Our services are designed to support digital & technology programmes from inception to implementation, ensuring the advice clients receive is always realistic and deliverable. We have a simple approach and work collaboratively with clients as part of one team. There is no 'us and them'.

We have come a long way since the beginning: strong governance and open mindedness has resulted in an efficient business of scale - with an onus on quality. As we continue to deliver innovative and transformational IT projects to our clients, across the UK and abroad, we welcome the opportunity not only to enhance our reputation with the hallmark of quality that the Consulting Excellence scheme provides, but for the growth and improvement within the industry that its five pillars encourage.

With this declaration, we wish to convey our commitment to upholding the guiding principles of Consulting Excellence be it for our ethical behaviour and role in the wider community, providing consistently great client service, the professional development of our employees, and the importance of embracing and championing diversity, inclusivity and sustainability within our business and the industry at large.

The 14 Consulting Excellence Principles

In this document, we have taken each of the 14 Consulting Excellence Principles, shown in the diagram below, and provided an overview of how we bring them to life within our business.



Ethical behaviour

1 We are responsible and good citizens

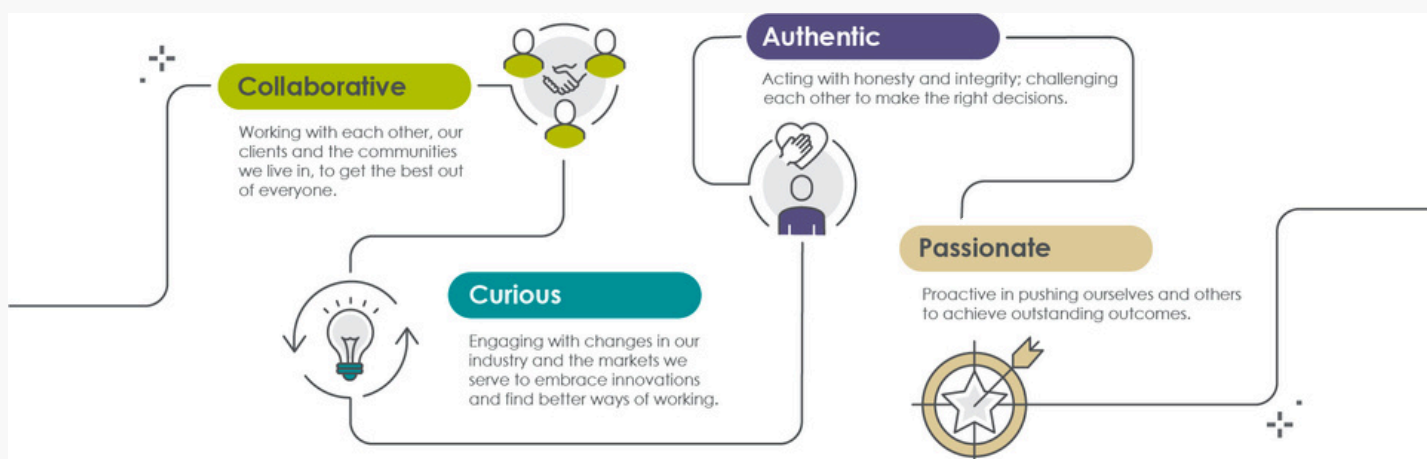
How we conduct ourselves as a company, and as individuals, is the key to our success. Our corporate culture is built on the foundation of two fundamental pillars, honesty and integrity, and our four core values. Our business is built around our Code of Conduct which is firmly rooted in the ten principles of the UN Global Compact. This means operating in ways that meet the fundamental responsibilities in the areas of:

- Human rights
- Labour
- Environment
- Anti-corruption.

The Code sets the values and standards that guide us in the way we conduct our business and is an integral part of our daily actions. It covers equal opportunities, employee accountability, behaviour, sales practices (including trade sanctions), conflicts of interest, and standards of confidentiality.

We are proud of our core values, which encourage and guide our employees to fulfil their goals, support our mission to be known as a trusted partner to our clients through every step of their journey, and play an active role in the wider community:

- **Collaborative** - Working with each other, our clients and the communities we live in, to get the best out of everyone.
- **Authentic** - Acting with honesty and integrity; challenging each other to make the right decisions.
- **Curious** - Engaging with changes in our industry and the markets we serve to embrace innovation and find better ways of working.
- **Passionate** - Proactive in pushing ourselves and others to achieve outstanding outcomes.





Our promise to our Employees

- We will always treat each other with respect and fairness. We are dedicated to maintaining uniform equal opportunity employment practices. We will respect each other's privacy and treat one another with dignity and respect regardless of cultural background, age, gender, sexual orientation, religion, ethnicity, or nationality. We are committed to providing a safe and healthy work environment for all employees.

Our promise to our Customers:

- We are committed to providing high quality, value-driven pricing and honest transactions. All dealings with our customers will be done lawfully and ethically

Our promise to all Communities:

- We view ourselves as a responsible member of the wider community. Our policies are designed to comply with international, national and local laws. We will strive to contribute to our communities through the encouragement of employee involvement and acknowledge our corporate obligations to sustaining and creating a better environment for all.
- We will deal honestly and fairly with our suppliers. We will source product without unlawful discrimination, in a manner supportive of mutually beneficial, long-term relationships.
- We will compete aggressively, but fairly, for business and will base our efforts on the qualities of our value proposition.

2 We conduct our business ethically

We are committed to maintaining and perpetuating the highest standards of ethics and business conduct. These principles flow through all our dealings

including our relationships with our employees, customers, suppliers, shareholders, competitors, and the communities in which we operate.

The Code of Conduct has been developed to help further the Company's core values and to illustrate our commitment to unquestionable organisational integrity. The Standards are interpreted and applied within the framework of the laws and traditions of the jurisdictions in which we operate, while taking into consideration our policies and simple common sense values and to illustrate our commitment to unquestionable organisational integrity.

Our Code of Conduct guides our decisions and actions. We ultimately rely upon individual actions of our employees around the world regarding our integrity, reputation and profitability. Everyone is personally accountable for compliance with our Code and our ISO 9001 accreditation, adherence to which helps us build a culture of continual improvement and supports the fact that all business decisions are made in accordance with our main principles.

Being in an industry driven by changes we do take the approach of constantly challenging ourselves and reviewing our ways of doing business and adapting to the external changes imposed by the communities.





3 We foster an ethical culture

Our way of doing business

- **Walk the talk.** Our culture is determined from the top, and as such we lead by example. This is something our employees say in their annual Staff Survey managed by Great Place to Work® UK, but it is also something our clients observe when working with us which forms part of our USP.
- **We incorporate ethics into hiring, promotion and reward.** We have a very defined recruitment process built on offering equal opportunities and fair processing to all candidates. Our CDPR process includes annual objective setting and review meetings. One of the score card areas is values, behaviours and positive impact on society.
- **Communication is key.** Having clear, frequent, and consistent ways of communicating our standards and expectations to all stakeholders is very important. As such, we use periodical gatherings and have incorporated communication within our policies and procedures. We use these platforms to set the 'tone at the top' but also to enable two-way dialogue and open conversations on ethical matters.
- **Promote our culture.** Once a year Mason Advisory holds a team away day for all staff in the company. During this networking and collaboration event, the company rewards members of staff who have been nominated by their peers for upholding our values. We also measure staff against behaviour, ethics and social impact as part of our career development and performance review process.
- **Transparency always.** Our Quality Management System, built within the guidelines of our Code of Conduct and supported by our ISO 9001 and ISO 27001 certifications, is the main tool we use to support transparency. Living by our principles is the culture we promote with our employees but also the communities and clients we work with.
- **No double standards.** Our standards apply equally to our business partners and we operate policies and procedures that include regulatory compliance and ethical business practices, covering anti-bribery and corruption, whistle-blowing, equal opportunities, environmental responsibilities, corporate risk, and responsible supply chain management.





Client service and value

4 **We provide excellent consulting services which deliver the outcomes clients seek and need We foster an ethical culture**

Successful programme results are those that are tailored to specific client needs and that drive change from within the organisations: our consultants use their expertise to complement client capabilities – ‘working with’ and not ‘doing to’. This approach allows clients to navigate the delivery and continue implementing our advice following handover of our assignments through knowledge transfer. Clients rely on us to deliver honest, outcome-oriented advice, and we bring an impartial, objective view to engagements. This honesty also means braving difficult conversations and challenging our clients when we believe that what they request is not going to bring about the best outcome.

We provide complete lifecycle support: from conception, strategy, business case, sourcing, selection and contract development; through to delivery assurance, service management and contract performance management.

We have ensured that these services meet client expectations from day one, following ISO 9001-certified Quality Management processes in addition to ISO 27001 and Cyber Essentials Plus, to protect our clients’ data and confidentiality. We focus on building trusted relationships with organisations who face challenges where technology can be a key issue or facilitator. With a diverse public and private sector client base, our growth strategy is based on developing long-term, significantly sized accounts, with 90% of clients wanting to work with us again beyond our first engagement - fostering close bonds is imperative to our approach and values. We work collaboratively with clients; aligning to their business practices and seeking their input on how best to drive delivery in the most efficient way.

5 **We are transparent with clients and respond to their concerns**

We foster strong relationships with clients and seek their support on how to embed within their organisations in the most effective way; working to understand requirements, critical success factors and expectations from the outset. This collaborative approach brings

together ideas from all levels of the organisation through workshops, interviews, questionnaires, and briefings. We ensure people with the right blend of skills, cultural fit and availability are chosen for engagements, and we can flex resources when required, and supplement teams with consultants with specialist skills for short periods, as appropriate.

Our engagement management style ensures we share information quickly and openly in regular progress update meetings, supported by appropriate documentation. This transparency covers our view of client programmes and our reporting on our own engagement (how much time we have spent on tasks, the value we are delivering etc.). We also use a process of peer reviews and project oversight, built into our procedures, to remove errors and provide robust insights. Client concerns are dealt with by the project manager and escalated to the project director where necessary. Clients are able to contact our CEO or our ISO 9001 lead if they require support independently of the project team.

We work closely with clients to define KPIs and measures for the success of our work from the outset. This information is communicated back to the client in an agreed format - a balanced scorecard to indicate our contribution to the project and the organisation’s wider strategic aims or incorporated directly into project status reports. The key is for clients to be able to take on the information quickly and use it in their own reporting. Clients can also benefit from a more efficient use of time if we work to build an integrated team with them, replacing consulting time with

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Mason Advisory supported me in delivering a global Delivery Framework; it was a great piece of work – the team was very knowledgeable, flexible in their way of working and very outcome driven, focused on helping me achieving the outcome I was looking for..

**Thorsten Schulz-Gerhardt, Group IT
Director Change Ardagh Group**

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internal staff time if it is appropriate to do so. This increases the capability of internal staff through knowledge transfer and moves more towards a smoother transition to business-as-usual operation. For example, for a global pharmaceutical client, one of our consultants was leading the strategic development of a large IT transformation project. Once the implementation programme was established, although the client wanted the comfort of our resource on a full-time basis, we advised that we should start ramping down and handing over to the internal team, as the activities we were then undertaking were fairly low-level project management work, rather than the original strategic work we had been commissioned to do.

Openness and transparency are not solely confined to the workplace. Client project dinners, where client project teams, regularly go out with Mason Advisory team and managers, provides opportunity to discuss work, opportunities and wider general life topics. Similarly, account/client dinners provide an opportunity to catch up and review client deliverables, but also discuss wider challenges and issues in a less formal manner. This also provides insight for the wider team.

6 We always strive to improve the value we can deliver to our clients

We work to enhance the ways we deliver value to our clients, and achieve this through best use of resources; flexible engagement models; and our continuous improvement approach, based on our Quality Management System, where consultants take part in lessons learned reviews as part of our project close-out process and receive feedback from our client satisfaction surveys issued by our marketing team. The survey is a metric that is used extensively to measure successful contributions and value added, according to the clients. The feedback allows customers to explain the extent to which our consultants have delivered value by addressing their wider challenges and helps us identify areas for improvement and areas where excellence should be recognised.



We operate pragmatic processes, based on a commitment to continuous improvement and innovation - conscious that the need for IT advisory skills has changed over recent years, and adapting to the market. The most important role nowadays, is that consultants work alongside internal IT teams, bringing external perspective to ensure that the best decisions are taken in the interests of organisations. Central to this culture is the belief that people develop most rapidly through exposure to real client problems and situations.

Our team's experience and expertise are the backbone of our business, making it vital that we maintain their training and professional development – we want our employees to be curious, and to share their opinions and interests - demonstrating a desire for continual development, learning, ability to adopt and evolve. This can often be seen through attendance of courses, seminars or events; blogposts they have written; or simply their desire to engage in discussions about what we as a business are currently working on.

We actively promote networking, collaboration and shared inspirational thinking, holding industry events such as our C-level forums which bring together Chief Information Officers, and participating in professional networks and industry bodies such as BAPCO and the ITSM Forum to improve our knowledge and encourage sharing of best practice and industry insights.



Experienced skills continue to be in short supply particularly in specialist areas such as IT architecture, cloud strategy planning and cybersecurity, so we continue to build a set of specialist capability groups to ensure we can offer best-in-class advice across all areas of IT. These are led by Managing Consultants, with every consultant in the company assigned to one of the groups to help share and develop skills, marketing collateral and delivery tools.

Continuous Improvement (CI) is vital to developing our client services and delivering better value. This is based on a PDCA (Plan-Do-Check-Act) cycle that remediates any issues and feeds lessons learned into future work (such as creation of better templates and client collateral, improved staff training or experience, or more efficient processes). This helps us deliver the best outcome at the first time of asking, while allowing us to be nimble enough to agree expected outputs for future tasks based on feedback and learnings from previous ones. This means clients are getting the best quality outcome in as short a period as possible.

7 **We undertake training and professional development planning each year**

Mason Advisory views its people as its primary asset and is committed to develop the capabilities of our consultants, provide career development and support the welfare of our employees.

Annual meetings to review and set objectives help staff understand how they are performing and to plan for growth and career development. They also have regular 'check-ins' throughout the year with their line managers, to refresh SMART objectives and help maintain momentum. These prove invaluable in identifying personal and professional training requirements and goals, demonstrating where different project selection is required to support development, and provides input into promotion and rewards. We use a capability database and succession planning, which allows managers to recognise and plan professional and technical development across a range of areas and levels.

We encourage our employees to offer feedback on how they view the company is performing. We use an external staff survey (run by Great Places to Work® UK) to identify areas to celebrate and those for

improvement. The feedback helps us to understand the needs of our staff, it provides insight to enable empowerment and job enrichment, in-turn helping individuals to meet personal objectives and us to meet market needs. Our career development and performance review (CDPR) process is a clear framework to show what employees need to do to progress from the most junior roles right through to CEO. This provides a clear pathway and allows transparency around promotions and reward.

Our Learning & Development (L&D) programme supports staff, with professional memberships such as [itSMF](#) and the [Global Sourcing Association](#).

8 **We promote strong core consulting capabilities and specialisms in our consultants and teams**

All consultants, including new joiners to our team, are expected to actively engage in and consistently update the capability database matrix. This matrix serves as a dynamic representation of their skill levels and qualifications, allowing us to pinpoint strengths and identify areas for growth. Our consultants and line managers collaboratively utilise this tool to facilitate skills development, employing approaches such as training, mentoring, or project assignments. We foster an environment where our consultants have the opportunity to contribute to a diverse range of projects, and we exercise careful discernment in project selection to ensure optimal on-the-job learning experiences. Our commitment to cultivating experience and expertise is further reinforced through our flat hierarchy and open forum methodologies workshops, knowledge-sharing sessions, monthly internal briefings, and informal team gatherings.

This is further encouraged by setting time aside for non-client facing activities to ensure we provide the most up-to-date views and opinions, and exposure to industry best practice and insight. We place value on 'teamwork' and encourage knowledge accumulation and sharing such as attendance and speaking at conferences and trade shows.

Mandatory training is provided in line with regulatory and compliance requirements on health and safety, cybersecurity, and GDPR. We also offer individuals the chance to pursue courses that will support their

Professional development

growth, progression and professional expertise, such as ITIL4, Agile, and TOGAF qualifications and support staff with other courses such as MBAs, that may not directly be required for their jobs, offering help with course costs and study leave.

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It has been great to work on client engagements where my existing knowledge and experience was vital, but I have also been supported in attending industry body online workshops and events to further my understanding (and also to give a little of my experience back to the community). Furthermore, I have been encouraged (and expected) to make use of detailed training from tool providers to further my knowledge of specific platforms, which has benefited both my career progression and client deliveries.

Dominic Stanley
Senior Consultant

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9 We support our employees' career progression, professional development and welfare

We prioritise our employees' career progression, professional growth, and overall wellbeing through a comprehensive approach. This includes providing regular opportunities for skill enhancement and learning, tailored mentorship and guidance, and open communication channels for feedback and goal alignment. Our L&D offering is designed to suit all grades, experience and levels of capability. Staff can use our 'Personal Development Planning Tool' to assess and map out career goals and actions to achieve those goals in collaboration with their Line Managers; Staff can select a fully funded pathway to follow from our L&D catalogue, each pathway is geared to enhance learning in specialist fields at every level; Staff can also map their own journey, using our 'interactive' Consultant Competency Framework, checking for areas of focus to elevate their own competence and boost their career. Through this offering, we foster an environment where employees can thrive both personally and professionally.

Our Early Careers Academy fosters new talent, offer an opportunity to talented individuals who otherwise may never have entered into the world of Consulting.

The 4-5 week bootcamp at the beginning of their journey is designed to set our Academy Delegates up for success, they learn about the Industry, ourselves, our specialisms, but best of all how we solve complex challenges for our clients. The Academy is two-year programme throughout the programme delegates are assessed and guided, allowing them to achieve breadth and depth of knowledge and experience, along with fully funded professional qualifications and an automatic sign-on to the ChMC Associate Level programme. Our selection process has intentional steps that have removed opportunities for bias, producing the most diverse team result imaginable. With welfare 121s and a strong pastoral support network our Academy has a 100% retention rate.

Our Senior Managers and the wider business are sensitive to the needs of our employees and monitoring their welfare. Our CDPR includes annual objective setting and review meetings, along with more regular check-ins with line managers.

The suggested areas of discussion include career progression and recognition, personal development and perception of their wellbeing. We also have wider initiatives including key elements of our benefits package and our flexible working policy.

Staff can discuss whichever elements they wish to focus on in their sessions, although all areas should be covered during the year. The outputs should be documented and stored in our online HR system, allowing line managers, staff and the HR department to monitor progress and identify areas for additional focus.

Having a balanced approach to work and personal time is a core element of our values. Our team work extremely hard and we understand that managing this balance can be a challenge for our consultants who often work long spells away from home. We therefore monitor the impact this has on their lives and ensure they are compensated. As well as fulfilling our legal requirement to consider all flexible working requests. We also offer a pragmatic policy that allows staff to work from home when it is reasonable to do so, e.g. due to medical appointments, urgent personal commitments, or simply because the nature of the work will benefit from concentrated time at home. The company has the IT Infrastructure to accommodate remote working and endorses this flexibility where it is appropriate.



Professional development

10. We support the adoption of the Chartered Management Consultant (ChMC) Accreditation across the industry and champion its values.

We also worked with the MCA and the Chartered Management Institute on the Chartered Management Consultant (ChMC) programme, the first professional recognition scheme for consultants, with our Vice Chair, Steve Watmough, sitting on the governance board. We have since achieved accreditation for our own in-house ChMC externally accredited Chartership programme. We offer full support to all our consultants who wish to apply.

Currently we are supporting a number of staff members to attain the Chartered Management Consultant (ChMC) accreditation. Since our programme became accredited, interest among our Consultants and sign-up has increased by more than 500%. Notably, our commitment to professional excellence has been exemplified by two Management Consultants achieving the ChMC accreditation through the experienced professional route.

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I received exceptional support from the team throughout: commencing with the provision of information regarding the accreditation and the process involved. The support continued during the preparation of my submission through the 'Experienced Professional' route, and during the submission itself through to the subsequent interview. For me, this demonstrates our organisational commitment to the Chartered Management Consultant designation and the pursuit of professional excellence in all that we do.

Mark Grewcock
Managing Consultant

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Commitment to diversity and inclusion

11 **We respect and embrace diversity and inclusion and understand the importance and positive benefit of people from different backgrounds working for our companies and our clients**

As mentioned, our people are our most important asset and we draw strength from the range of experience and diversity of backgrounds within the company, and in the client teams we work with. Our differences as people engender creativity and innovation, and studies have shown that more diverse and inclusive workforces make better decisions, leading to better outcomes for both clients and the company. This resonates strongly with us as a business and we are committed to ensuring that we do all we can going forward to champion equity, diversity and inclusivity both in, and out of the work place.

We wholeheartedly embrace individuals from non-traditional backgrounds, recognising that excellence thrives beyond the conventional pathways of college and university. In our team, we are proud to include individuals who have excelled on unique trajectories, bringing diverse perspectives and exceptional achievements that enrich our collective journey. we also offer a pragmatic policy that allows staff to work from home when it is reasonable to do so, e.g. due to medical appointments, urgent personal commitments, or simply because the nature of the work will benefit from concentrated time at home. The company has the IT Infrastructure to accommodate remote working and endorses this flexibility where it is appropriate.

At Mason Advisory, everyone has a seat at the table. Inclusivity to us means creating a company environment that welcomes and values participation from all our unique employees; each person bringing different perspectives, ideas, and experience to the mix. To do so, our processes, systems and offerings must also be equitable, and this is something we challenge ourselves to achieve each day.

Inclusion stands as a cornerstone within our business strategy spanning 2021 to 2025. This encompasses not only safeguarding protected characteristics but also nurturing diversity of social mobility and educational backgrounds. In active collaboration with the National Centre for Diversity (NCfD), along with achieving the 'Investors in Diversity' silver award, we were also recognised through the NCfD for our Inclusive People culture winning a Top 100 Inclusive workplaces UK award.

We've made strides in fostering a more diverse leadership team, where three talented women now stand alongside our male colleagues. This achievement marks a pivotal shift from our prior male-dominated setup. Additionally, our consultant demographic has seen a remarkable transformation, with women now comprising a quarter of our team, a marked departure from our initial launch phase.

While we celebrate these advancements, we acknowledge that there's still much ground to cover.

Presently, our leadership composition doesn't yet mirror the rich ethnic diversity emblematic of our wider company. Moreover, we are aware of the gap in our data to measure the true representation of individuals with disabilities and other minority groups within our consulting team. Despite this sensitive subject, work is underway to encourage the sharing and reporting of D&I data.

Our commitment to change is steadfast. Our Head of People & Talent, addressing disparities head-on but also re-evaluating our operational framework to embrace more inclusive work practices.

We have pledged to recruit a diverse workforce. That includes D&I training for the whole team with a special focus on leaders and recruiters in working with recruitment partners to identify diverse talent pools; fostering diverse Early career talent through our Academy; benchmarking ourselves against industry data; and targeting under-represented groups with appropriate measures (e.g. since early 2021 we have targeted women with simple measures such as modifying language in job adverts).

As mentioned, our people are our most important asset and we draw strength from the range of experience and diversity of backgrounds within the company, and in the client teams we work with. Our differences as people engender creativity and innovation, and studies have shown that more diverse and inclusive workforces make better decisions, leading to better outcomes for both clients and the company. This resonates strongly with us as a business and we are committed to ensuring that we do all we can going forward to champion equity, diversity and inclusivity both in, and out of the work place.



Commitment to diversity and inclusion

Mason Advisory embraces flexible working practices. There is no 'one size fits all' approach when it comes to accommodating a diverse workforce and working patterns. We empower our employees to work in an agile way based on personal and client delivery needs. These are often informal arrangements without the need for fixed procedure as we take an outcome-based approach to work and trust our people to do the right thing. For example, many of our staff work non-standard hours which can be made flexible as needed to facilitate home and life commitments. All employees can work from home, and though we have offices, will continue to be supported to do so. One of our Managing Consultants (MC) is father to two young children and he will work later in the day to allow himself to take on dad duties in the morning and gets to spend quality time with his kids when they are awake. This works for him and for us and his promotion to MC now includes line management; he is a diligent, hugely popular employee with clients and colleagues, great at offering suggestions for new processes, the first to volunteer for our CSR initiatives, and rarely without a smile as he contributes to meetings and feedback sessions.

12 We recruit and retain people from a diverse talent pool and strive to build cultures where difference is valued, respected and celebrated at all levels. Furthermore, we are committed to developing diverse future leaders and ensuring their progression in the industry

We have established a great company culture and are ranked as a Great Place to Work™ (GPTW) in the medium sized business, we aim to continue nurturing this inclusive environment to attract, retain, and develop the best talent.

We understand how our employees' needs are as varied as those of our clients. This is reflected in the flexibility we offer in working hours and work locations, our staff development initiatives, and the ways we communicate to each and every member of the team. Everybody's opinion is respected, and these are actively sought from our employees through our Employee Council, be it contributing to Company policy, providing valuable feedback for new and current initiatives or updating employees regarding change initiatives. The Employee Council representatives encourage anonymity to safeguard views, and to further promote inclusivity and trust.

Mason Advisory is committed to best practice in recruitment and selection. We ensure that all recruitment and selection is

effective, fair, and complies with our Recruitment Policy and Mason Advisory is committed to best practice in recruitment and selection. We ensure that all recruitment and selection is effective, fair, and complies with our Recruitment Policy and Equality Policy contained within our Staff Handbook. Virtual interviews and inductions that began as temporary measure until everything returned to 'normal', have proven to be incredibly successful, and we took the opportunity to reshape our onboarding process because of it. Virtual interviews have helped to cast a much wider net in our search for new team members; especially for candidates who for a variety of personal and professional reasons, may have otherwise struggled to make it to our offices in Manchester or London.

When meeting prospective new employees, the first interview focuses on values and culture, and we will assess the candidates against them to ensure that they are a good fit. We are a team - we look for people who can demonstrate that they have worked collaboratively and can operate positively in team environments. This can be demonstrated through career experience and personal activities, and an academic route to us is not a pre-requisite. For example, one of our recruits was able to demonstrate outstanding team commitment through his experience as an officer in the Royal Signals; while another was able to provide examples of charity endurance events undertaken with friends and colleagues (and even completed these again once working for us).

Our commitment to excellence fundamentally means that we look for people who care about what they do and want to do their best. This isn't just about people who can do a job well; it's about people who regard their work as more than a job, and who want to create something special with their colleagues. Examples of the attitude we look for include a consultant who was keen to return to the quality and commitment of a start-up company, after his previous employer had been acquired by a large multinational; and a consultant who laid out a very clear vision for how he would like to market a growing part of the business. This demonstrated a desire to take an innovative and active role in building a quality business.

We seek individuals who are passionate about their life choices, career development and the impact they can offer company and clients alike. It is core to this value that people work hard but are also able to have fun and enjoy the company of their colleagues.



Commitment to diversity and inclusion

This is largely judged on how people present themselves, connect with others and their personality, which is why we ensure there are multiple rounds of interviews with different interviewers at each stage. We also try and make sure that if someone is being added to a small team (e.g., our Enabling Functions) that at least one representative from that team is involved in the process. We also wish to work with people who care about our impact on society. This can often be demonstrated through examples of charitable works, initiatives started at previous companies, and their understanding of Corporate Social Responsibility schemes.

Our primary objective during the recruitment process is to ensure the selection exercise is based on merit, against objective criteria that avoids bias, and to achieve this we ensure that short-listing is performed by more than one person. Vacancies are advertised to a diverse section of the labour market to ensure we reach as broad a pool of talent as possible, using a trusted specialist recruitment partner to assist with this process. Actions have included using a language insights tool to ensure job adverts are inclusive and a targeted recruitment drive stipulating that at least one in two CVs are from female and ethnically-diverse candidates. This is reflective of the overall talent pool within consultancy as revealed by the MCA's Diversity report.

For us, it is the rigour and quality of the selection tools that separates the applicants, not prejudice or assumptions. Once they are a member of the team, this alignment to values through process continues. Our CDPR will assess staff on both what someone achieves, but also how they achieve it in line with our values.

We support professional development and encourage the whole team to gain the qualifications they need whether it is a Consultant wanting to achieve the ChMC or a Finance team member gaining their ACCA in accountancy. Ongoing learning is also encouraged across the business from offering a library of educational resources, and informative monthly internal briefings presented by staff, to providing bespoke EDI training for our People Leaders so that they understand what diversity and inclusion encompasses within a business context, and the role that they play as Leaders.

Our approach to staff learning and development recognises people have different needs depending on where they are in their career, and that their priorities outside work differ too. We have found that regular discourse with people as

individuals is essential for us to understand what they need to perform at their best, and this is done both on a structured level with managers during one-to-ones and appraisals, and informally during chats with colleagues, in forums, workshops and team meetings. The journey starts from the moment a new employee joins the company with a full induction programme that ensures new hires receive information relevant for them to be effective as quickly as possible.

13 We support industry efforts to improve progress on diversity and inclusion, implementing best practice and monitoring the diversity of the consultancy sector workforce over time. This includes encouraging the collection of data to assess the effectiveness of D&I policies and participating in the MCA annual report

Increasing the scale of our organisation as part of our growth strategy will help us expand our reach in the market and sustain credibility as an industry leader, but equally important is the focus on promoting diversity and inclusion, and the progress we have yet to make. As a more mature business, we have formally committed to focusing on diversity and inclusion including the collection, analysis and sharing of data. It is embedded as a pillar of our new strategy, and we are instigating a D&I programme of work.

Our Head of People and Talent is on the MCA D&I working group and along with encouraging all our team to contribute to the MCA Annual Report, we are making use of the Toolkit it has created to help guide our initiatives.

We signed up to the Race at work Charter in 2021 and its seven 'Calls to Action' below, committing to ensuring ethnic minority employees are represented at all levels in the organisation.

1. Appoint an Executive Sponsor for race.
2. Capture ethnicity data and publicise progress.
3. Commit at board level to zero tolerance of harassment and bullying.
4. Make clear that supporting equality in the workplace is the responsibility of all leaders and managers.



5. Take action that supports ethnic minority career progression.
6. Support race inclusion allies in the workplace.
7. Include BAME and other ethnically diverse-led enterprise.

Results of our GPtW people survey, indicated that employees agree that people are treated fairly regardless of gender, race or sexual orientation and that can be themselves working at Mason Advisory. This is heartening but we will be taking this further in the coming year by capturing and publicising data for greater transparency and accountability. Our leadership team understand that visibly supporting equity in the workplace is our responsibility and having diversity at the forefront of our agenda is integral to our values and future success.

Training and recruitment - We have pledged to recruit a diverse workforce. Every year we deliver bespoke D&I training for the entire workforce, developed by our consultants in collaboration with the People and Talent team, to share both technical D&I training to staff but also to share lived experiences to bring the training to life. As a result of this training, we now have four internal D&I Practitioners/Champions who are the voice of our staff from a D&I perspective. We are collaborating with recruitment partners to identify diverse talent pools and benchmarking ourselves against industry data.

Women's Network Forum & Coaching - Our Internal Women's Network Forum is dedicated to supporting and empowering our female staff. It provides a space for women to connect, share experiences, and access resources for personal and professional development. The forum aims to foster a supportive community, promote gender equality, and encourage career growth through various initiatives, including networking events, mentorship opportunities, and skill-building workshops.

As part of our Women's Network Forum we have partnered with [Angie McQuillin](#), a Leadership Confidence and Assertiveness Coach, to deliver a series of four group coaching sessions for our staff as part of our Women's forum. These sessions, focus on topics, tools, and initiatives designed to enable career advancement for women in the workplace.

Session 1: Communication - COMPLETED

- Assertiveness
- Holding boundaries
- Dealing with conflict
- Holding difficult conversations
- Addressing passive aggressiveness

Session 2: Values - COMPLETED

- Understanding our own values and their impact
- Recognising others' reactions and our responses

Session 3: Old Belief Patterns

- Understanding how upbringing and societal expectations shape beliefs
- Strategies to overcome limiting belief systems

Session 4: Beating Imposter Syndrome

- Recognising imposter syndrome
- Techniques to overcome it.

We are committed to fostering an inclusive and supportive environment where our female staff can thrive. Through our Women's Network Forum and coaching sessions, we aim to provide the tools and support necessary for their continued growth and success.

Manchester Digital - We have recently joined [Manchester Digital](#), and are looking for meaningful ways to support and contribute to the region's thriving tech community. We're currently exploring opportunities to get involved in Digital Her – an inspiring initiative aimed at encouraging and empowering more young women to pursue careers in digital and technology. This aligns closely with our values around diversity, inclusion, and developing future talent, and we look forward to sharing more as our involvement progresses.

Digital Blogs and podcasts - We continue to encourage our staff to write digital blogs, articles or podcasts that focus on D&I matters from their own lived experience such as Neurodivergence, Male mental health and Ethnicity and we continue to publish these on our internal intranet, and they are greatly received by colleagues, particularly those who can relate to the articles, these have a way of developing close bonds between staff and fostering a culture of Inclusivity.



14 We commit to ensuring that our firms operate in an increasingly sustainable way and strive to ensure that sustainability is considered by our clients in our work with them.

Environmental - Mason Advisory are registered with the SME Climate Hub, and have published our [Carbon Reduction Plan](#) on our website. We are committed to reducing GHG emissions to net zero no later than 2040, and a reduction of GHG emissions per employee by at least 50% in comparison to our FY22 baseline by 2030.

We have formally recognised environmental management as a strategic pillar of our organisation and embedded this consideration into our procurement practices.

We operate a 'no waste to landfill' policy and have done since 2019. Our offices also operate a recycling system that separates our paper, plastic, glass, batteries, food waste, and cans from general waste. and provide staff with re-usable cups and water bottles to avoid use of plastic bottles and take-away coffee cups. We also provide staff with re-usable cups and water bottles to avoid use of plastic bottles and take-away coffee cups.

Since 2020, we have not disposed of user equipment. Instead, we have been donating hardware to non-profit organisations and local schools to assist pupils with learning. We are supporting the charity [Manchester Young Lives](#) by providing technology. In 2024, we donated ten laptops and two mobile phones.

Sustainable working - We actively advocate for virtual and remote working practices, aligning with our commitment to fostering sustainable operations that prioritise resource efficiency and minimise environmental impact.

EV Scheme - We have Electric Vehicle Scheme that is accessible to all employees. This initiative offers a variety of benefits that contribute to sustainability and a diminished environmental impact. We understand that electric vehicles play a crucial role in advancing towards a more sustainable transportation system by substantially decreasing emissions, conserving resources, and promoting a cleaner and greener future.

Cycle to Work Scheme - We offer all staff the opportunity to participate in our Cycle to Work Scheme. This program allows staff to purchase a bike and cycling equipment tax-

free, unlocking savings of at least 25% off their high street value. What's more, they can conveniently spread the cost through monthly deductions from their salary, making it easier than ever to embrace a healthy and eco-friendly commuting option.

Volunteering - Our Marketing Manager is actively working with a number of local charities and community groups to coordinate the delivery of donated items collected in our office—helping to ease the burden on volunteers by ensuring they don't need to organise collections themselves.

In addition to item donations, we've supported several community projects through volunteering in recent years, and we're currently exploring new opportunities to get involved in 2025.

Charities - In the past three years, we have supported over thirty different charities.

For the last six years, we've run a Christmas shoebox appeal, collecting essential items for people experiencing homelessness and for residents of a local care home. In 2024, we expanded our efforts—donating essential items, gift vouchers, and toys to our sponsored charity, Manchester Young Lives.

These seasonal initiatives have now evolved into something more year-round. We're currently coordinating clothing collections and gift vouchers for several local causes, including charities supporting the homeless, survivors of domestic abuse, and a voluntary scheme run by district nurses to provide baby essentials for new mums in need.

We also support Smart Works, an employment assistance initiative, by donating work-appropriate clothing to help people feel confident and prepared for interviews.

Suppliers - We diligently assess our suppliers to prioritise the engagement of local suppliers whenever feasible. Additionally, we emphasise our staunch dedication to sustainability and communicate our anticipation for suppliers to uphold these same high standards.

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About Mason Advisory

Mason Advisory has offices in Manchester and London and employs over 100 staff, with plans to continue its expansion. We enable organisations to deliver value through digital & technology transformation, solving complex business challenges, and helping clients set strategy through the intelligent use of IT resources including architecture, cyber, data, digital, operating model and organisational design, service management, and sourcing. We operate in sectors such as financial services and insurance, legal and law, government, health and social care, emergency services, retail, FMCG, transport, and not-for-profit.

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