



Remote Consultancy Process

Introduction

Remote consultancy allows draft management systems to be prepared and provided quickly and efficiently and this approach can replace the requirement for any onsite consultancy or can be used to short-cut the initial setup followed by onsite support and training. The remote approach makes full use of the **alphaZ** documents package which is available online at az-documents.co.uk and includes comprehensive documentation to support and assist with the implementation process. For Remote Consultancy to be effective it is important that prior to commencement all necessary and relevant information and documentation is prepared and supplied so that management systems developed are relevant and reflect the actual processes within the organisation.

Stage 1 - Gather Information

A Dropbox folder will be setup and shared and all relevant files should be added to the '**Client-Supplied**' folder within the shared Dropbox folder :

`\isoassured-[company-name]-shared\Management-System\Client-Supplied\`

Ref. **Using-Dropbox** Guidance document.

Note - All files supplied will be held in a secure folder and will be treated confidentially.

Relevant items that should be supplied;

1. Existing form templates, documented procedures and policy documents.
2. Any existing management system documentation.
3. Details of any additional standards, industry guidelines or applicable legislation.
4. Any existing guidance or procedures such as work instructions, method statements, operational procedures or policy procedures.
5. Any other documents that may include relevant guidance or procedures such as employee contracts, staff handbooks or other documents.
6. Overview of products / services / operations / activities i.e. details from web site / other marketing literature.
7. Details of management structure and responsibilities i.e. organisational chart or responsibilities matrix and any job descriptions.
8. Overview of Software and other operational systems used.

It may also be necessary to complete a formal gap analysis or systems review and any checklists supplied should be completed and also added to the Client-Supplied folder in Dropbox.



Stage 2 - Prepare and Review Draft Documentation

Once all relevant documents have been supplied the draft management system documentation will be prepared and the main document for review will be the **IMS1** manual which will provide an overview of all the other documents including a filing structure and associated files. It is important that **IMS1** and all the other files supplied within the filing structure are reviewed so that all the various components are located and understood.

Stage 3 - Implementation

Once the management systems have been reviewed and updated to ensure **IMS1** is adequately reflecting the processes within the organisation there may be various implementation tasks that need to be completed. A checklist may be used at this stage to keep a track of what needs done and who is responsible or the tasks may be logged using the issues and actions register.

It is important that all files included within the supplied filing structure are either updated, merged with existing files or removed if not required. To assist with this a filing structure including the location of key files and registers has been written into the **IMS1** document and this should be updated to reflect the actual filing structure and key files used.

Stage 4 - Checking and Auditing

Once the management system documentation has been fully updated and everything has been implemented the final stage is to complete comprehensive checks that everything is completed and this can be done as part of the internal audit process. Comprehensive internal audit checklists will be provided and these have been prepared to ensure all relevant ISO clauses are covered and these internal audits should be documented with any issues or actions still required also noted and dealt with. Once everything has been completed and evidence prepared the company is ready for an external ISO certification audit.

Ongoing Support

Various resources are provided to ensure the **alphaZ** package includes everything required to plan, implement and maintain management systems and ISO compliance. There are ongoing updates to the package and a subscription can be retained to ensure ongoing access to documents and updates. In addition additional support can be arranged remotely or for onsite consultancy or training.