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 consultancy approach makes full use of the **alphaZ** documents package which is available online at **isomanaged.com/alphazdocuments** and includes comprehensive documentation including management system frameworks to support the setup and implementation process.

For Remote Consultancy to be effective it is important that prior to commencement all necessary and relevant information and documentation is compiled and supplied so that management systems developed are relevant and reflect the actual current processes within the organisation.

Stage 1 - Gather Information

A shared folder will be setup and shared (usually we use Dropbox for this) and all relevant files should be added to the *'Files-for-Review'* folder within the shared folder:

Ref. Using-Dropbox Guidance document for guidance on using Dropbox.

Note – Using the shared folder ensures all file transfers are made using secure file encryption for information security and files supplied will be treated confidentially.

Relevant files 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 shared folder.

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 will be used at this stage to keep a track of what needs done and who is responsible.

It is important that all files included within the IMS folder are either updated, merged with existing files or archived if not required.

Guidance and assistance with completion of all tasks will be provided as required.

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 checks to ensure that everything is fully implemented and correct and this can be done as part of the internal audit process. Internal audit checklists will be provided to complete a comprehensive audit of the management systems and all relevant ISO clauses. These internal audits should be documented with any issues or actions still required identified and also logged to ensure actioned. Once everything has been completed and evidence prepared the company is ready for the ISO certification audit.

Ongoing Support

Additional support can be arranged and we also offer an ongoing subscription with support service to ensure everything is kept up to date.

Telecommunication systems to support remote consultancy

There are various options available to assist with communications from simply making a phone call to your preferred mobile or landline contact number to full video-conferencing with everyone in your team.

Zoom Virtual Meetings

A virtual meeting room can also be setup for meetings which makes use of **Zoom** video conferencing software that allows multiple users to simultaneously connect to the virtual meeting room. Connection can be made using audio only, video and audio and includes other options for file and screen-sharing to assist with reviewing of files or other documentation.
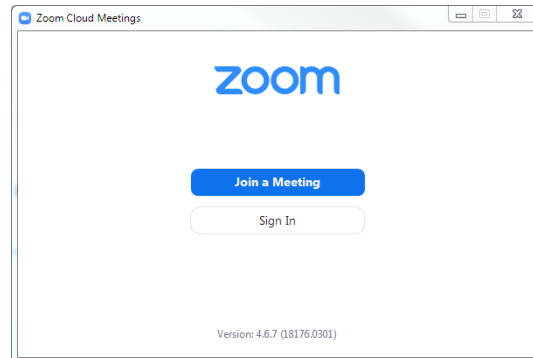
The meeting room can be accessed by any type of device by simply clicking on the supplied link and alternatively allows connection by dialling in using the supplied landline number.

Note : when using the zoom link you will be prompted to install zoom and it is recommended that the application is installed to improve performance but it is also possible to just connect using a web browser or to dial in to the from a landline or mobile using the supplied number.

Dropbox Paper Virtual Meeting Space

As well as real-time video conferencing we can also setup a virtual meeting space for asynchronous discussion using **Dropbox Paper** which also allows tasks to be assigned to different users and files to be shared and reviewed and all users to comment and discuss.

Other applications such as **WhatsApp, Teams, Skype** or **FaceTime** can also be used for video calling or text communication if preferred.

Security - all the file sharing and communications systems we use are fully encrypted and secure. **We will not ask you to email files or share files using any non-encrypted technologies.**