



## MANAGEMENT SYSTEM DEVELOPMENT PROJECT CHECKLIST

QMII has shared this checklist with organizations developing their management systems since 1986. It continues to describe the actions critical to successful system development projects.

1.	Make a senior person responsible for your management system. <i>This person will report direct to the CEO and receive the needed training.</i>	
2.	Form a Task Force and consider need/role of an advisor. <i>Select no more than five personnel from a cross section of grades and functions.</i>	
3.	Identify stakeholders, risks, purpose and scope of the system. <i>Results of "Gap Analysis" are revealed by action 9 making an upfront audit unnecessary.</i>	
4.	Publish Mission, Policy, Objectives and the Action Plan. <i>Mission and policy by the CEO, Objectives by VPs &amp; Plan from Task Force.</i>	
5.	Develop leaders to create and sustain employee awareness. <i>All leaders &amp; Task Force must learn so they understand and can explain.</i>	
6.	Define organizational structure and responsibilities. <i>Keep this up to date with names &amp; job titles as a formal document.</i>	
7.	Involve employees in developing and improving the system. <i>By awareness sessions, flowcharting, team reviews and experience feedback.</i>	
8.	Decide on the document coding procedure. <i>Use this from day one of developing system documentation.</i>	
9.	Analyze and flowchart key processes showing all interfaces. <i>Start with the core process (from needs to cash) to determine the key processes.</i>	
10.	Code all forms in line with agreed coding procedure. <i>Every form should belong to a process, remove redundant forms.</i>	
11.	Correlate all forms to flowcharts. <i>Every form should have a place, if not check completeness of flowchart.</i>	
12.	Review flowcharts for accuracy. <i>By "accuracy" we mean what actually happens!</i>	
13.	Develop and use the flowcharts as the document procedures. <i>Flowcharted procedures always include their process objective(s).</i>	
14.	Review, reconcile, approve and issue as-is procedures. <i>Involve everyone and do not ignore comments. Process owners may approve.</i>	
15.	Prepare new procedures and train staff to implement them. <i>The new processes needed are determined during action 9.</i>	
16.	Approve and issue new procedures and obtain customer feedback. <i>Drive improvements via the process for obtaining information from data.</i>	
17.	Describe your overall system in your management system manual. <i>Keep the manual slim and simple for every employee, suppliers and customers.</i>	
18.	Launch the system and respond quickly to revision requests. <i>Throw a party you deserve it! Invite continual improvement.</i>	
19.	Audit and improve your system to raise value and reduce avoidable costs. <i>Your trained audit team will come from action 15. Cover suppliers too.</i>	
20.	Conduct preassessment at least two months before the Registrar. <i>Use a registered lead auditor and ensure all corrective action records are up to date.</i>	

## Some Important Notes to the System Developer's Action Planning Checklist

- A. Successful users of management system standards never implement the standard. They understand how their organization works as a system. Then they ensure the organizational management system makes full use of the natural system that actually runs the organization.
- B. Project managers use this checklist to evaluate the completeness of their system development plan. It includes all the actions necessary for developing a process-based management system so it can be used to manage risk, add value and prevent loss while conforming to the relevant ISO management system standards.
- C. Alumni from QMII's [lead auditor training](#) have the knowledge necessary to lead this approach. As questions arise along the way, QMII Alumni are welcome to contact QMII to receive free email and phone support for life.
- D. Most organizations' as-is processes comprise 80% to 95% of their management systems. The brand new, but necessary, processes comprise 5% to 20% of each management system. Some as-is process require additional controls.
- E. New processes and controls are necessary for the management system to improve itself and to conform to the adopted system standard. This approach focuses the organization's investment in the essential new processes and controls to become a living part of a management system that delivers assurance of requirements being fulfilled.
- F. Important parts of effective management systems remain undocumented. These parts include leadership, shared respect for each other, care about requirements and teams monitoring their processes for their effectiveness and needed improvements.
- G. Actions 1 thru 20 can take from 6 to 18 months for an organization to mark them as completed, depending on the extent of formalized management system, the workload and the strength of management commitment to requirements.

QMII sustains the progress and enthusiasm necessary for successful projects to develop, simplify and improve management systems.

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