

# ► Planning Your Certification

## Planning your certification

There are many ways to design, develop and implement effective management systems. Telarc staff are exposed to many types of organisations and industries. We have found that many of the best system implementations are managed as a project. One technique that is particularly useful to manage the project is to plan the critical steps over an expected time and regularly review performance against the plan. The plan should be modified as the project unfolds and as you learn from the experience. Here is a plan with some suggested steps that you may find useful:

### Project plan example

Plan		
1	Launch project	•
2	Establish project team	•
3	Identify resources	•
4	Request Telarc Services	•
Do		
5	Set your parameters	•
6	Document system	• • • •
7	Train staff	•
8	Telarc readiness visit	•
9	Undertake internal audits	• • • •
Check		
10	Management reviews	• • • •
11	Telarc document review	•
Act		
12	Implement any changes	•
13	Telarc audit	•
14	Telarc certification	•

Please note: We have not attempted to quantify the time scale because of the many variables that can apply to each project.

### Project Plan

**1.** Project launch. The benefits of a formal project launch to all employees cannot be overstated. It gets everyone involved, motivated and ready to face the challenge of the changes ahead.

A project launch is management's opportunity to share the organisational vision with the people who will make it happen. It is an opportunity to create a sense of contribution and ownership, to clarify direction and objectives, and to create consistency in thinking amongst all members of staff.

**2.** Project team. Many organisations set up a project team, led by top management, to steer the project and ensure its success. This team demonstrates on-going commitment from managers; serves as a steering group to drive the changes and ensure people are achieving their time frames and actions. Usually this team acts as facilitator, helps coach with process development and provides resources where necessary.

**3.** Identify resources. Among the resources you will need to complete the project are people to document the organisational processes. The natural choice is to use the people who actually work with the processes every day.

Organisations that use staff to document their own processes and procedures usually enjoy greater staff ownership of their systems and an enhanced ability to identify improvement opportunities. These organisations usually find system implementation easier.

**4.** Request Telarc services as early on in your project as possible. It allows you to call on our experience that may help you avoid surprises or pitfalls.

**5.** Set parameters. Many organisations set working parameters before getting too involved in system development. These parameters provide the framework for the project including how you will describe your processes, the structure of your manual(s) and the scope of the system, among others.

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**6.** Documenting the system can take much time and effort and should be carefully planned. The project team usually needs to monitor the progress of documenting processes to ensure that time frames are kept.

**7.** Training staff in the operation of management systems is an essential part of ensuring that the system is properly implemented. Training programmes can be instrumental in building and maintaining enhanced morale and productivity. The training of staff demonstrates an organisation's commitment to growth and development.

**8.** Telarc readiness visits prior to the assessment can provide valuable input to your systems improvement project. Pre-assessment visits give you a chance to understand what is required to develop your management system to meet the standard's requirements and what is involved in the certification process. Through these visits you'll meet your assessor and you can prepare for your assessment together.

**9.** Internal audits by your staff are a powerful way to check that the system is working for you as it should. It is a positive way of getting staff involved in the monitoring of their own processes. It allows you to identify areas for improvement and provides a framework for developing audit expertise in-house. Internal audit records assist us to assess the effectiveness of your system.

**10.** Management reviews of the system, to ensure its suitability and effectiveness, are a requirement of some standards. Reviews are also useful because they provide the opportunity to revisit objectives, actions and time frames to ensure that they are realistic and appropriate to your organisation.

**11.** Telarc Document Review will ensure that your documentation covers all the requirements of your chosen standard as appropriate to your business. These reviews can be combined with a pre-assessment visit at your premises or our offices as you choose.

**12.** Implement changes. The outcome of our Document Review is a constructive report that makes recommendations and highlights any areas of your system that should be changed to bring it into line with the standards.

**13.** Telarc assessment. The initial assessment by Telarc takes place once your manuals have been assessed and are in line with the standard's requirements. You will receive a constructive report that outlines the audit's findings. Included will be any additional areas of focus for your organisation to comply with the standard.

**14.** Telarc certificate. Once you comply with the standard, your organisation will be offered a Telarc certificate of registration.

*Please note: The advice given above is provided as a guide only. To retain independence and to ensure objectivity and impartiality of registration, we do not provide a consultancy service. How you tackle your project and what steps you actually take is best determined by you.*

Put simply, our job is to provide advice, guidance and interpretations of the standards as appropriate to your organisation. We provide recognition that your system complies with your chosen standard and we will provide all the support and help we can to assist you complete your project.

### Helpful tips

- Recognise that standards are outcome-oriented; they tell you what to do, but not how to do it. They represent a common sense management system expressed within a non-prescriptive framework. Looked at this way, you will find it relatively straightforward to design a system that suits your business and complies with the standards.
- Establish a project team that has full support from the Chief Executive and all people. This will help to ensure that the team has the authority and the resources necessary to design, document and implement the system effectively.

- Communicate with everyone in the business, and co-ordinate the project with them. The project cannot succeed unless all people are fully involved and clearly understand what is being done, and why. A formal project launch is a good way to introduce everyone to the concept.
- Recognise that elements of your management system may already be in place. It may just be a matter of pulling them together into a documented system to meet the requirements of the standard. On the other hand, you may take the opportunity to redesign some or all of your business processes. The extent of planned redesign is an important decision to make at the beginning of the process.
- Expect improvement opportunities to emerge as your project progresses. You will need to judge whether, when, and how these opportunities should be exploited.
- It is a good idea to get Telarc involved early on in your project.
- It allows you to call on our experience, which may help you to avoid unnecessary effort, surprises or pitfalls.
- Remember that standards only state the minimum requirements.
- Many organisations find it beneficial to exceed the standard requirements.
- It is possible to integrate your management systems such as quality, environment, food safety, health and safety. You are also able to enhance your system by utilising other codes applicable to your organisation or industry.

### Beginning the Telarc certification process

In the first instance, call the Telarc Customer Service Centre. We need to learn about the outcomes you expect to achieve. We can then help you integrate our services into your plans.

Then complete a Request for Telarc Services form and return it to us, with your application fee (if applicable). If you prefer, you can telephone or facsimile us with your details. We will take your instructions and confirm our services to you.

From that point on, a Telarc team will be assigned to provide all the help you need as you begin the rewarding journey towards management system certification with Telarc.

### ISO Guides

Additional value can be obtained from Guides to ISO standards produced by the organisation for Standardization (ISO) as part of the ISO 9000 and ISO 14000 series of standards.

#### ISO 9000 series

ISO 9000: 2000 Quality management systems – Fundamentals and vocabulary

ISO 9004:2009 Managing for the sustained success of an organisation – A quality management approach.

#### ISO 14000 series

ISO 14004: Environmental management systems – General guidelines on principles, systems and supporting techniques

ISO 14010: Guidelines for environmental auditing – General principles of environmental auditing

ISO 14011: Guidelines for environmental auditing – Auditing environmental management systems.

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### Training courses

Telarc Training and Improvement Solutions provides training courses in a wide range of management systems, including:

- ISO 9001 Quality
- ISO 14001 Environmental
- Q-Base Code
- Occupational Health and Safety
- Food safety

To receive the course calendars, or for information on specific courses, please contact our Customer Service Centre or visit our website [www.telarc.org](http://www.telarc.org)

### Information visits

You may call on Telarc to help get you started. An assessor experienced in your industry will visit and review your circumstances and explain the certification process. Email us on [admin@telarc.org](mailto:admin@telarc.org) or phone 0800 004 004.

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