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Session #: G1

Date: Friday, October 18, 2019

Time: 9:45 – 10:30

Speaker Name: Diana Baldi

Session Title: Part 1: Revitalize Your Audit Program Using Engaging Audit Reporting Practices

Session Summary: Many audit closing meetings and management reviews are boring. ISO-speak has limited understanding across the workforce. It is no wonder management seems unengaged. This session will present visual and written summary options for reporting audit results that tell a story and engage leadership. Imagine how powerful looking across quality, environmental and health and safety management systems could be if the views were balanced. This session will also touch upon audit program management to acquire reliable data to support the visual report styles.

Session Abstract: The way audit results are reported impacts the overall perception of the management system and affects (+/-) the level of engagement across the workforce and within leadership. By attending this session, participants will learn helpful insights for communicating audit results in meaningful ways. The workshop will provide an overview of common problems, underlying challenges, tips for success, and case study examples that demonstrate a range of audit reporting styles. In the longer session, the participants will have an opportunity to test their skills to develop 1-2 slides to summarize a test case.

Using simple spreadsheet formats and pivot tables, extensive text can become informative charts that inform and motivate leadership. Visuals help focus attention on rewarding success and directing action to make improvements, as appropriate.

An underlying challenge for generating robust audit reports is understanding the reliability of the auditor evaluations. Communicating this feedback to leadership effectively can help ensure proper resources are allocated to the audit program. This session will include examples of criteria-based visuals that communicate the strengths and weaknesses of the internal audit program.

In reviewing hundreds of audit programs and thousands of audit reports, it became quite evident that the common text-based reporting of audit results disillusioned leadership. Turning that same information into criteria-based visuals can dramatically increase understanding and engagement of leadership. Once this step is taken, it then becomes evident that a similar visual and criteria-based evaluation process is needed to assess the competencies of the auditors. Taken together, these enhancements in visualizing can dramatically improve your internal audit program.

Speaker Bio: Diana Baldi works across 5 management system standards (ISO 9001, ISO 14001, ISO 45001, ISO 17025 and Responsible Care). She has completed audits of USEPA contractors, internal and supplier audits for global chemical companies, and provides consulting and training in management systems and auditing. She has performed audits for 5 registrars, 2 accrediting bodies, and many clients. Diana has also trained thousands of auditors and mentored many to enhance their auditing skills. One of her strengths is engaging leadership through candid feedback via robust yet simple reporting styles

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Session #: G2

Date: Friday, October 18, 2019

Time: 10:45 – 11:30

Speaker Name: Diana Baldi

Session Title: Part 2: Interactive Session!! Revitalize Your Audit Program Using Engaging Audit Reporting Practices

Session Summary: Many audit closing meetings and management reviews are boring. ISO-speak has limited understanding across the workforce. It is no wonder management seems unengaged. This session will present visual and written summary options for reporting audit results that tell a story and engage leadership. Imagine how powerful looking across quality, environmental and health and safety management systems could be if the views were balanced. This session will also touch upon audit program management to acquire reliable data to support the visual report styles.

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Session #: G3

Date: Friday, October 18, 2019

Time: 1:45 – 2:30

Speaker Name: Karen Bolen

Session Title: Standardizing Product Development Process for Innovative Products

Session Summary: Research suggests that standardizing process in product development that is aligned with ISO 9001 quality management standards often results in improvements in quality and production efficiencies. Organizations that manufacture products with low variability in high volumes reap substantial benefits from standardized processes based on best practices and quality standards. Standardizing process in organizations that produce highly variable or innovative products in low volumes is more difficult. Research and development (R&D) organizations who produce proof-of-concepts or prototypes often find the costs of standardizing processes for short-term projects with one-off quantities can outweigh the benefits. Defining repeatable steps for R&D projects that solve unique problems with vague requirements using inventive methods that are unproven in production is challenging.

This session will describe approaches used to define quality management processes that standardize product design and development for innovative products. Guidance for performing audits in innovation processes and procedures will also be provided.

Session Abstract: Research suggests that standardizing product development process that is aligned with ISO 9001 quality management standards often results in improvements in quality and production efficiencies. Organizations that manufacture products with low variability in high volumes reap substantial benefits from standardized processes that are based on best practices and quality standards. Standardizing process in organizations that produce highly variable or innovative products in low volumes is more difficult. In particular, research and development (R&D) organizations who produce proof-of-concepts or prototypes often find the costs of standardizing processes for short-term projects with one-off quantities of many different product offerings can outweigh the benefits. Defining repeatable steps for R&D projects that solve unique problems with vague requirements using inventive methods that are unproven in the production environment is challenging. Further, assessing the effectiveness of meeting requirements for pure research studies with hypothesized applications may take years to fully comprehend. Critics of federally funded R&D studies that are deemed wasteful may fail to understand the potentially impactful innovation that could result from the scientific findings (see Golden Goose Awards <https://www.goldengooseaward.org/>). However, increased costs in resources and technology as well as greater focus on meeting government and industry client expectations more fully, motivate R & D providers to consider repeatable process for product development.

ISO 9001's customer-focused process approach to consistent product development is sometimes adopted by R & D organizations to facilitate operational improvements and product quality. Once process is established, R&D organizations may seek ISO 9001 quality management certifications to satisfy requirements by commercial and industrial customers for ISO 9001 certification and to qualify for major procurements.

This session will describe the objectives and strategies used in determining work product development processes that resulted in the successful ISO 9001 certification of the quality management system for an applied research and development organization. The discussion will describe the definition of a flexible yet repeatable process framework that focuses on maximizing work product quality in an applied research and development environment. As a result, the organization has been able to maintain almost perfect on-time deliveries of contractual work with a very low rate of unbillable expenses while overall project workloads have doubled in two years. Other benefits include an organizational culture focused on quality, an improved usability of project resources, and greater utilization of organizational knowledge.

Tips and lessons learned from internal audits of innovation processes and practices are discussed, including auditing in a non-manufacturing environment with few common forms and work instructions and little or no production scrap or rework. Practical guidance regarding non-conforming work product, as well as informal versus formal control of project artifacts and change management will also be addressed.

Speaker Bio: Karen Bolen is the Quality Assurance Manager for the Electronic Systems (ELSYS) Laboratory at Georgia Tech Research Institute. Karen has a Bachelor of Science in Business Administration from the University of Tulsa, a Master of Science (MS) in System Engineering from Southern Polytechnic State University, and a MS in Quality Assurance from Kennesaw State University. She has led the quality improvement program in ELSYS since 2014, including the initiative that resulted in the laboratory's first ISO 9001 certification of its quality management system (QMS) in 2016, and the transition to ISO 9001:2015 standard certification in 2018.

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Session #: G4

Date: Friday, October 18, 2019

Time: 2:45 – 3:30

Speaker Name: TBD

Session Title: Session Title: TBD