

MeetingBooster and ISO 9001 Standards



MeetingBooster is an enterprise meeting management solution that helps organizations maintain the seven principals of ISO compliancy. This document is intended to provide a brief overview of how MeetingBooster assists with the compliancy of the International Standards Organization (ISO).

MeetingBooster helps compliance officers by offering a solution that streamlines the meeting process, control documents within that process and manage tasks. It's no secret that all compliance programs require meetings and trainings to be recorded. All programs require extensive document control systems including making sure all relevant parties have access to information, controlling the versions of the documents, maintaining security of the documents, and storing records. These are crucial steps to maintain to ensure an audit will progress smoothly and eliminate the number of CARs. MeetingBooster allows compliance personnel to create agendas, run meetings more effectively, include all relevant evidence and archive all tasks and minutes. This will greatly reduce the amount of time recreating data and searching for relevant paperwork within an audit. These benefits compound when you are a member of management, responsible for several programs in multiple departments. Performance process reviews are easily extracted and reviewed utilizing the meeting analytics within MeetingBooster. These features coupled with an advanced permission and task system make MeetingBooster an end-to-end solution for any organization.

International Standards Organization (ISO) Overview

ISO has seven principles which work together to create standard business practices

- Principle 1 – Customer focus
- Principle 2 – Leadership
- Principle 3 – Engagement of people
- Principle 4 – Process approach
- Principle 5 – Improvement
- Principle 6 – Evidence-based decision making
- Principle 7 – Relationship management

The seven principles are applied throughout the 8 sections:

Section 1: Scope

Section 2: Normative Reference

Section 3: Terms and Definitions

Section 4: Quality Management System

Section 5: Management Responsibility

Section 6: Resource Management

Section 7: Product Realization

Section 8: Measurement, Analysis and Improvement

Where MeetingBooster is Applicable

Here is a breakdown of the specific ISO 9001 sections where MeetingBooster helps compliance managers:

Section 4: Quality Management Systems

Section 4.1, D - Ensure the availability of resources and information necessary to support the operation and monitoring of these processes.

Section 4.2.1, D - Quality Management system documentation shall include: documents, including records, determined by the organization to be necessary to ensure the effective planning, operation and control of its processes

Section 4.2.3 Control of Documents - Documents required by the quality management system shall be controlled. Records are a special type of document and shall be controlled according to the requirements given in 4.2.4. A documented procedure shall be established to define the controls needed:

- A) Approve documents for adequacy prior to issue.
- B) Review and update as necessary and re-approve documents
- C) Ensure that changes and current revision status of documents are identified
- D) Ensure that relevant versions of applicable documents are available at point of use
- E) Ensure documents remain legible and readily identifiable
- G) Prevent the unintended use of obsolete documents

Section 4.2.4 - The organization shall establish a documented procedure to define the controls needed for the identification, protection, retrieval, retention and disposal of records.

How MeetingBooster Helps

When implementing procedures in an organization, meetings play an important role in reviewing and continue improving the processes. MeetingBooster provides a clear and concise three-step meeting procedure that handles all documents (agenda, notes and minutes) and associated tasks. As stated in section 4, all documents must be identified, protected and retrieved. MeetingBooster securely and automatically archives documents eliminating human errors. MeetingBooster provides a customizable permission system, audit logs and data encryption to protect documents. The solution provides an approval process of agenda and minutes and allows the organization to custom label documents. This ensures changes and current revision status are identified. The on-premise hosting option and synchronization to active directory offers extra security and integration to existing IT solutions.

Within MeetingBooster documents and contents can easily be retrieved using the search feature. Contents and threads of discussions are extracted from various documents and consolidated into a new document. The software allows you to effectively overview and handle meeting series or committees. The permission system ensures that only the appropriate employees access the documents they have been granted access to.

MeetingBooster provides an effective structure to execute meetings and securely archives procedures making it easier to meet regulatory compliance and audits.

Key Features:

- Automatic and secure archiving of documents
- Approval process of agenda and minutes
- Clear and concise three-step meeting process
- Customizable documents labeling system
- Instantly access and search documents
- Customizable permission system
- On-premise hosting option
- Encrypted data transfer
- Use templates to ensure mandatory topics are covered

Section 5: Management Responsibility

5.1 - Management Commitment - Top management shall provide evidence of its commitment to the development and implementation of the quality management system and continually improving its effectiveness by conducting management reviews and ensuring the availability of resources.

5.4.2, B) Quality Management System Planning - Top management shall ensure that quality objectives, including those needed to meet the requirements for products, are established at relevant functions and levels within the organization. The quality objectives shall be measurable and consistent with the quality policy. Top management shall ensure the integrity of the quality management system is maintained when changes to the system are planned and implemented.

5.5.2 - Management Representative - Top management shall appoint a member who has the responsibility and authority to ensure processes are established, implemented and maintained, reporting to top management on the performance of the quality management system and any need for improvement.

5.5.3 - Internal Communication - Top management shall ensure appropriate communication processes are established within the organization and that communication regarding the effectiveness of the QMA is taking place.

5.6.1 Management Review - General - Records from management reviews shall be maintained.

How MeetingBooster Helps

Meeting Booster is designed to drive accountability, streamline meeting procedures and align management goals.

MeetingBooster assists in developing a quality management system by a clearly defined process of meeting activity. The solution allows you to conduct and maintain management reviews by providing meeting analytics and process performance reviews.

Records from the reviews are automatically archived and maintained according to the standards in section 5. Documents can be grouped in meeting series making it easy to review if mandatory meetings have taken place.

The software's task system allows management to overview progress and status of tasks agreed upon in review meetings. Tasks reminders and integration to Outlook's task list help drive accountability.

MeetingBooster enables management to review performance across departments, committees and projects within one central database.

Key Features:

- Meeting analytics provides evidence that meetings took place
- Process performance reviews
- Accountability reports for departments, committees and projects
- Customizable task system to align with company task policies
- No policy change needed to implement MeetingBooster

6. Resource Management

6.2.2E - Competence, Training and Awareness - The organization must train employees and maintain appropriate records of education, training, skills and experience

How MeetingBooster Helps

MeetingBooster enables an organization to track employee attendance for training sessions. Agendas for training are clear and concise, thereby enhancing preparation for training sessions. The tasks system will drive accountability and archive documents securely without human errors as described under section 4.

Key Features:

- Effectively track employee's training attendance across the entire organization
- Easily create training agendas
- Automatically archive training minutes
- Task system to drive accountability

8.2.2 Internal Audits - Records or audits must be maintained

8.2.3 Monitoring and Measurement of Processes - The organization shall apply suitable methods for monitoring and, where applicable, measuring the QMS processes.

8.4 Analysis of Data - The organization shall determine, collect and analyze appropriate data to demonstrate the suitability and effectiveness of the QMS and to evaluate where continual improvement of the effectiveness of the QMS can be made. This shall include data generated as a result of monitoring and measuring and from other relevant sources.

8.5.1 - Continual Improvement - The organizations shall improve the effectiveness of the QMS

How MeetingBooster Helps

MeetingBooster will help with the preparation of internal audit meetings, by facilitating a collaborative environment for creating the agenda and gathering evidence documents during the pre-audit stage. This will ease frustrations and the amount of emails and waiting time, making the audit more effective.

MeetingBooster's analytics and archiving system help an organization determine, collect and analyze processes. Analytics and evidence gathering can be performed across departments and audit logs files can determine if mandatory meetings took place.

During the audit, CARs can be assigned through the tasks system. The task system allows the monitoring and measuring of the processes, and provides overviews of individual's CARs and project's CARs. The task system eliminates excel files traditionally used for tracking and synchronize with Outlooks task list for easy adoption. Task reminders and editing options can be configured to be aligned with the company's practices.

Key Features:

- Simplify pre-audits checklists
- Collaborate on agendas and attach evidence files
- Instantly capture notes during the audit and assign CARs or PARs
- Task management system to follow up on CARs and PARs
- Automatically archive audit tasks and minutes
- Outlook tasks and meeting integration
- Review audit documents across departments in one place
- Meeting analytics to review progress and accountability
- Audit logs to monitor if mandatory meetings took place
- No downtime as documentation and tasks are always accessible in one central data location.

Conclusion

In this article, we have illustrated how MeetingBooster can define a concise meeting process and automatically archive meeting documents. Documents are securely archived and accessible with other security features such as audit logs. MeetingBooster provides several process performance reports and analytics that help managers review performances across departments. Lastly, we explained how the solution optimizes the internal auditing process and handles the tracking of CARs. In short, MeetingBooster is a valuable tool to assist with accreditation.



MeetingBooster® Case Studies



Lisa Hill, ISO 9001: Lead Auditor

Wood Products Associated Industries's goal is to make FSC® Certification as easy to implement and maintain for small woodworkers as it is for large companies.

Company

Wood Products Associated Industries

Industry

Manufacturing

"In three easy steps, I have ensured the right people know what is expected of them, created a professional-looking agenda and ensured all pre-meeting tasks have been distributed. I can preview the professional-looking pdf before sending."

- Lisa Hill

Case Study - Prevent the pebbles that stop the wheels of compliance with MeetingBooster.



In the past it has been difficult and time-consuming to collect necessary pre-audit evidence and collaborate effectively with team members. My pre-meeting emails may go unanswered, leaving myself and others unprepared for the meeting.

In MeetingBooster I can easily create an agenda, clearly defining the details, agendas and tasks of the meeting. Prior to the meeting, I can assign tasks to attendees. By creating meetings with co-collaborators, the department being audited can attach any relevant documentation prior to the meeting, saving time and frustration on audit day. Once the agenda is complete, the MeetingBooster system will send a PDF agenda to all attendees with the relevant documents imbedded into the correct section of the meeting agenda. I can create an agenda from a template, saving time on subsequent audits and to ensure all topics that need to be covered, are covered. This is an excellent tool for my department compliance personnel, as we can all use the same template, ensuring all documents conform to our policies.

Agenda items are easy to add and sub agenda items can be added, moved and edited quickly and efficiently. Since I have been using MeetingBooster, I find clients are better prepared for audits because the agenda has been clearly defined and all necessary documents are in one place. MeetingBooster sets expectations and clearly defines audit requests that otherwise get lost in piles of emails. There is no telling how long I have spent looking through emails, or waiting on emails for relevant documentation!

Once the agenda is created, I can embed documents from my computer or weblink. I am not limited by the number of attachments to a meeting. I can assign pre-meeting tasks,

requesting specific information, a due date and a priority level for these tasks.

In three easy steps, I have ensured the right people know what is expected of them, created a professional-looking agenda and ensured all pre-meeting tasks have been distributed. I can preview the professional-looking pdf before sending.

The system saves time, improves accountability and ensures all audit documentation is safely stored in one place.

During the audit, I launch the meeting directly through Outlook, or launch from the MeetingBooster interface. First, check the roll call, ensuring everyone that needs to be there, is there. In the past, training and attendee records were manually recorded, leaving room for error on topics covered or attendance. Thus, the roll call is particularly helpful when scheduling trainings that can be done remotely. I can manually add anyone and verify if others have completed the pre-audit tasks before starting the meeting.

As we move through the meeting, I can add agenda items, toggling back and forth between items as necessary, adding notes and comments in each section. I can add discussion dialog, assign tasks and verify consensus items through the voting tools. I love to use the voting tool in training sessions to verify everyone understands particular policies and procedures. In the past, ensuring each attendee understood the material was hard to track. Attendees are sometimes hesitant to speak up in a group setting. Now with the voting feature I can determine who needs more training, preventing non-compliance.

Before MeetingBooster, I had three different forms to fill out for each audit, now I can assign tasks viewable by the attendee and any management that needs to view it all in one place. Furthermore, I can capture exactly what was said by whom using the MeetingBooster tools. I can view and assign tasks live while conducting the audit. I can assign CARs and closure timeline in MeetingBooster, which is sent to the appropriate attendee after the meeting.

Prior to MeetingBooster, I used email folders to store and track data. This took time to search and is a fallible system. With MeetingBooster, I can always login and track tasks status. All the tasks in MeetingBooster will be synchronized with my Outlook tasks. The system automatically synchronizes, ensuring all information is up to date.

My favorite MeetingBooster feature is the analytics. In the past I had to manually track tasks in several excel files, leaving room for incorrect data and human error. MeetingBooster enables me to export tasks to Excel if procedures require I do so. MeetingBooster compiles all tasks across the company or filters by department. Using these features, I can ensure everyone that needs to attend audits have done so, all evidence has been collected and can quickly review all open CARs and tasks I have assigned. The system saves time, improves accountability and ensures all audit documentation is safely stored in one place.

