OCTAVE

WHITE PAPER

How to build support for a new QMS in your organization



If you're researching QMS solutions, you probably have an idea of what the right system can do for your organization. But choosing a QMS is a complex process that goes far beyond identifying problems and exploring solutions. It's a process with a huge impact on your organization's short- and long-term success.

That's why your role as Quality Champion is so important. You're the one guiding your team in prioritizing requirements, building consensus and ultimately choosing and validating your QMS solution. You need the right information at the right time to inform your decision-making.

Octave prepared this guide to help you navigate the QMS process. We've helped over 500 organizations — from startups to Fortune 500 companies — achieve success with their quality initiatives. With nearly 1 million users, we know what matters to stakeholders at every level of your organization.

As your partner in the QMS buying process, we'll help you ask the right questions, connect with relevant resources and reduce decision-making complexity at each stage of the journey.

Getting started

Quality initiatives involve staff from multiple departments. Usually, the quality leader represents the quality department, and IT (or even Quality IT) takes a very active supporting role or often a primary role in some organizations.

Depending on your QMS objectives, your cross-functional quality management system selection team may include representatives from engineering, supply chain, finance, customer service, production, environmental health and safety and purchasing. The key is to mine your organization's expertise and gain broad buy-in for the QMS selection initiative.

One of the biggest mistakes you can make is waiting to bring key stakeholders and decision-makers into the QMS buying process until it's well established. Ideally, the decision-making team is involved in formulating or at least reviewing your QMS Decision Criteria Checklist. [See Octave's guidance on how to create a robust "QMS Purchase Decision Criteria Checklist" within the Gameplan.]



Pro tip

When decision makers are brought in late in the purchase cycle, you often end up wasting valuable time repeating presentations, compiling facts and figures and altering the scope of the project in response to new information.



Pro tip

Develop tangible benefits and goals that can be measured and quantified, such as reduced CAPA resolution time, reduced time to market and lower change management costs.

As you begin your initial vendor calls you will want to reengage your key stakeholders; that way, their questions, concerns and requirements are addressed right from the start and you can proceed knowing you have their support at each critical step.

Identifying problems, needs and opportunities for improvement

A key early step in the QMS journey is to have conversations with all stakeholders in your quality initiative to identify the strengths and weaknesses in your current processes and define the objectives your organization needs to achieve.

For example, our customers use Octave solutions to:

- Increase customer satisfaction
- Streamline operational processes
- Improve supply chain quality, visibility and traceability
- Ensure regulatory compliance
- Reduce the costs of poor quality
- Enable efficient communication processes throughout the organization

You may uncover new priorities and pain points as a result of these discussions, and it may take several rounds and revisions to get everyone on the same page.

Exploring solutions

Building the case for QMS means identifying long- and short-term quality outcomes across all departments; all frontline stakeholders need to understand the value of your quality initiatives. At this stage, it's helpful to research your competitors' quality efforts and develop internal benchmarks.

The best solutions provide quick wins as well as measurable progress toward longer-term business process goals.



Pro tip

Getting buy-in from the C-suite usually depends on metrics that impact the entire organization over individual departments, such as revenue, cost-savings, market and regulatory risks. Octave can help you calculate your company's potential ROI and explain key quality metrics that clearly demonstrate the business value of the QMS to your organization's executive leadership.

Building requirements

At this point, your QMS requirements should be coming into focus. You've identified the "must have now" features as well as those you need in order to achieve your future quality goals. You may need to prioritize potential tradeoffs and evaluate the financial impact on ROI.

You'll use this information to develop a Request for Proposal (RFP) to guide your decision-making process and ensure you have consistent responses from each prospective vendor. A third-party consultation with an industry analyst firm such as Gartner, LNS or IDC, for example, may be helpful at this stage to align priorities, clarify objectives and ask for recommendations on the vendors who should receive your RFP.



Pro tip

The average timeline for QMS initiatives is nine months, although it can be shortened if your organization is prepared to move quickly. It's a good idea to familiarize yourself with your organization's purchasing cycle and establish a vendor selection deadline, a date to issue contracts and your desired go-live date.

Selecting a supplier

When you're ready to distribute your RFP, you need to compile your list of potential QMS partners. Research suppliers on review sites such as G2 Crowd, Capterra and Peer Insights, and pay special attention to industry analyst and industry influencer reports, as noted above.

Look for validation of vendor claims through case studies and references in contexts that are similar to your own. Tap your peer network for recommendations and any potential information that might disqualify a potential supplier. Don't forget to look at the vendor's media and social media presence for evidence of their industry expertise and thought leadership.

Pro tip

Consider the post-sales experience — implementation, training and customer success support — in addition to the solution's ability to deliver on your technology requirements. Ideally, your relationship with your potential QMS supplier begins long before the formal RFP process so you have an opportunity to evaluate the quality and effectiveness of the partnership before you sign a contract.

Creating consensus

Your work as a Quality Champion isn't done once you select a QMS partner; you need to create consensus in the organization beyond your immediate buying team. To do so, you need a clear vision of the pain points and business objectives your quality initiative will solve and a way to communicate that vision throughout the organization. After all, QMS is a strategic investment that can positively impact multiple divisions and roles.

Engage in conversation with other users and stakeholders so you can address any underlying concerns and resolve open issues. Tighten up your business case to recognize the needs and goals of leadership outside your purchasing team, specifically:

- ROI and financial impact for affected departments
- New product development plans and delivery cycles
- IT consolidation, data migration and analytics



- Risk mitigation
- Health and safety considerations
- Customer service and brand loyalty

Pro tip

It's helpful to have a detailed roadmap at this stage to guide discussions and help identify disconnects in your plan. Octave creates a comprehensive plan that details each proposed activity and its value, a target completion date and who is responsible for it on both Octave's and your organization's side. This ensures every objective, concern and contingency is addressed in the scope of work.



Finalizing the plan

Once all decision-makers agree to the final proposal and scope of work, you can negotiate terms and finalize your implementation plan. Build your implementation team and work plan based on your roadmap and schedule your onboarding and training.

Familiarize your full team with your goals and business objectives. Share your ROI model and keep these financial targets in mind as you begin your implementation. You will want to use the ROI business case as your yardstick to measure and report on your ongoing progress to senior management.

Pro tip

User adoption will make or break your quality initiative, so be sure super users in each department are involved in the training and implementation process. Octave can help you identify the departments and roles most critical to your project's success.

About Octave

Octave is a leader in enterprise software, turning data into decisive action and intelligence into your edge. Our software solves for and simplifies complexity, from the design and build to operations and protection of people, property and assets – for any scope, at any scale. For decades, we've partnered with customers to sharpen performance, elevate efficiency and amplify results. From factory floors to entire cities, our solutions are tuned to scale up what's possible from day one onward.

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