OCTAVE

WHITE PAPER

Top 3 processes to automate to improve quality management



With today's growing focus on digital transformation, organizations are starting to see firsthand how automation benefits quality. Market leaders have found that automating key processes improves efficiency by:

- Minimizing errors that increase defects and quality costs
- Freeing up resources from manual quality tracking for more strategic priorities
- Improving collaboration security and effectiveness compared with email, spreadsheets and server drives

Quality professionals recognize that streamlining processes can deliver significant returns, but many are unsure where or how to start. With dozens or even hundreds of processes, automating them all can seem overwhelming. In fact, research shows that while a majority of companies want to automate critical quality processes, less than half of them have actually made the leap.

Simplicity

The biggest concern among organizations surveyed. Most companies say that if they're going to automate quality processes, the technology infrastructure and process needs to be effective without adding complexity.

If these issues sound familiar, this white paper will help you by exploring:

- The three most important quality functions to automate for process excellence
- Strategies for streamlining your quality process so you can turn insight into action
- Tips for choosing a flexible software platform that supports creative problem-solving

Best practice tips

Integrating corrective action with other areas streamlines the quality process, minimizing duplicate data while improving visibility and control. Processes to connect with corrective action include:

Change management
Resolving problems may require updating processes or documents. Make sure you can initiate change management activities directly from the corrective action.

Audits
You should be able to automatically assign corrective actions from the audit record. Linking corrective actions to audit findings keeps problems from falling through the cracks while building a traceable compliance history.

Employee training
Integrating corrective action with employee training lets you see where training contributes to problems and assign new training as needed.

Critical process #1

Corrective action

Building traceability and control into your corrective action processes is essential to compliance with regulatory requirements and standards, including many ISO standards.

Filter corrective actions by risk

A robust quality management system (QMS) lets you integrate risk management into any process. Filtering corrective actions by risk lets you prioritize action by potential impact, rather than just managing requests in chronological order. This ensures you address high-risk events first and make risk-based thinking a cornerstone of your corrective action process.

Customize action plans

Action plans need clear steps that include root cause analysis and implementing new controls to prevent recurrence, as well as identifying staff responsible for each task. Automated reminders keep your action plan on track, so you spend less time waiting, resolve problems faster and minimize negative impacts.

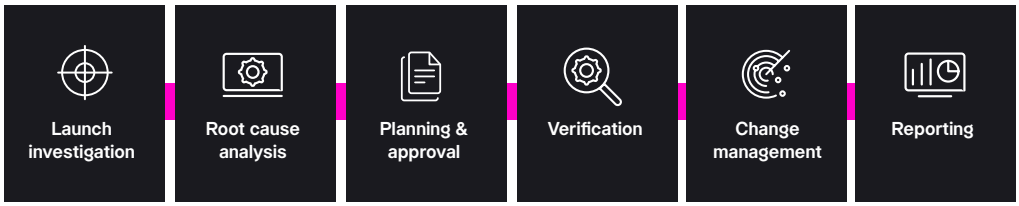
Measure effectiveness

A closed-loop corrective action process includes a final risk assessment to verify effectiveness. If the corrective action hasn't reduced risk to acceptable levels, you need to start over again.

Improve visibility and reporting

Your corrective action process should provide a traceable record of problems from start to finish. An automated corrective action system pulls compliance history, action items and related quality data into reports to help you spot trends and make better decisions. Connecting the QMS to other areas of the business also helps you see the bigger picture so you can identify other risks and improvement opportunities.

Corrective action workflow



Best practice tips

When it comes to document control, workflow is everything. Invest time in creating automated workflows for different document types, since not all documents will follow the same process.

Create workflows keeping other applications such as change management and employee training in mind to streamline operations.

Use delegation rules to keep documents moving when people are away from work, with escalation rules to notify supervisors of missed deadlines.

Critical process #2

Document control

Similar to corrective action, effective document control is central to many regulations and standards. Considering that a single versioning error can cost your company millions of dollars, keeping key documents and processes organized is a must.

An automated document control system provides a centralized location for managing the creation, approval, distribution and archiving of documents such as:

- Manuals
- Procedures
- Job descriptions
- Specifications

A flexible document control system improves efficiency and maintains organization by helping you:

Create document workflows

Automating document control lets you create document workflows that fit your unique business needs. Within workflows, you should be able to customize deadlines, responsible parties, permissions and the order in which people receive documents.

Ensure accountability

Email reminders eliminate the "I was never told" excuse, moving documents through the process quickly so they can't get buried in someone's inbox.

Manage revisions

When you launch a change request, everyone in the workflow receives a notification. This enables faster change cycles and continuous improvement, with real-time updates to ensure everyone is working with the most recent version.

Integrate employee training

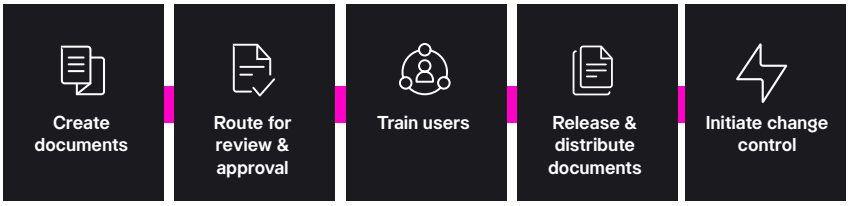
Document control doesn't work when confined to its own silo. Integrating document control with employee training helps you effectively implement changes to job roles, training materials, policies and more.

For instance, if you release a new product specification, you need to train people on the update to prevent release of non-conforming products. If you change equipment or processes, training is critical to avoiding safety incidents. By linking document changes to new training requirements, you can make sure everyone is acting on the most recent standards and procedures.

Maintain audit readiness

Centralized tracking keeps documents accessible, ensuring you can prove compliance with documentation requirements during audits and inspections (even surprise ones). Being able to produce documents quickly makes a far better impression than searching through file cabinets or referencing an out-of-date version you found on a cluttered server drive.

Document control workflow





Best practice tips

Employee training is a foundational element of any quality system, and it's especially important for organizations with a large number of employees and job roles. Other processes you'll want to integrate with employee training include:

- Corrective action to assign additional training when necessary for problem-solving
- Centralized reporting to visualize data on training effectiveness, compliance and other training-related leading indicators
- Risk management to identify high-risk training gaps that you need to prioritize for follow-up

Critical process #3

Employee training

An employee training system ensures all team members have the knowledge and skills to perform safe, high-quality work. It allows you to systematically identify training and certification requirements, manage responsibilities and build accountability into training processes.

Benefits of automation include:

Keep teams updated

An automated employee training system makes sure people receive training updates as soon as possible. Email reminders and supervisor notifications keep everyone in the loop, improving visibility while preventing adverse events associated with missed or inadequate training.

Record training and testing

With a centralized tracking system, employees and managers can easily access training records to identify gaps. Documenting post-training test results also provides a quantitative measure of training effectiveness. You can even set up your system to prevent employees without required training or certifications from working in certain areas.

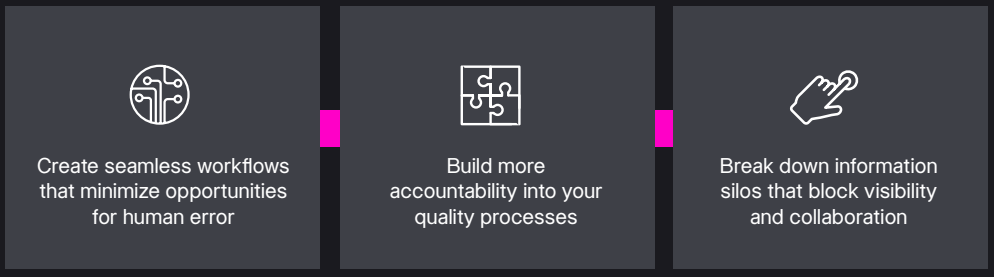
Link document control

Integration with document control lets you flag employees who haven't received training on important document changes. You may also want to hold documents for release until the people responsible for implementing changes have received the appropriate training.

Key takeaways

Optimizing your QMS means automating as many processes as possible. If you're still in the early stages of digital transformation, however, you can simplify your approach by starting with corrective action, document control and employee training.

Achieving operational excellence is simpler when you link quality processes together in an integrated QMS, allowing you to:



Integrating these three processes provides a foundation for continuous improvement and eliminates inefficiencies so you can focus on the mission-critical priorities that really matter.

Not only will you start making measurable progress towards your goals, you'll be able to use early wins to build momentum with your team around future automation initiatives. And with the right tools and people driving your QMS, there's no limit to the results you can achieve.

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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