Creating a Quality Plan: The Template for Success

*Presented by John Tooley owner of Advanced Energy*

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This webinar will supply you with a fully written Quality Plan (QP) that you can download and edit to represent your company’s needs. We will discuss how a QP will improve the overall quality of your company and is a statement of your company quality philosophy. The QP we will discuss is a plan that directs our focus to what we want rather than what we don’t want. We will go over each written section for the ease of your use. Think of a QP as a letter from the company to management and leadership on how we will ensure customer satisfaction through delivering products they want, on time and within budget.

What you’ll learn during this webinar:

1. Why you need a QP
2. Why ISO 9000 says a QP is part of Quality Management
3. The two levels of Quality Planning

Click here to view the recorded webinar!
Click here to complete the survey and receive (1) CEU for completing the recorded webinar!

This webinar will feature:

**John Tooley** is a Senior Building Science Consultant with Advanced Energy. John joined Advanced Energy in 1996 and is now responsible for business development with the organization’s Applied Building Science team. Regarded as a pioneer in the world of energy efficiency, and with over 31 years of experience, Tooley trains builders and contractors throughout the United States and frequently gives keynote addresses at national conferences.
Quality Management Plan

______________________________ Your Company name

______________________________ Address

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Template
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Introduction to Our Quality Management Plan

This plan will improve overall quality\(^1\) for our company. It is a statement of our company philosophy. This plan directs our focus to what we want rather than what we don’t want. We want to make it clear that mistakes that become defects are caused more by poor processes\(^2\) than the people doing the work.

Focusing on our personal interactions will give us what we want. Guiding principles must begin with our interactions and collaborations. Why? Because superior relationships will secure a lasting place where doing defect free work is possible.

Our company will benefit from these concepts. Implementation of this Quality Management Plan will lead to:

- Improved employee self-esteem, pride and satisfaction
- Reduced mistakes developing into a defect
- Less waste\(^3\)
- Customer\(^4\) success\(^5\) and satisfaction
- Reduced expenses
- Increased profit
- Improved quality
- Loyalty\(^6\) of customers, funders, employee

This plan was written specifically using proven quality concepts. One of the main principles of this plan is to involve our trained employees. It will help them to develop their own processes to prevent mistakes from becoming defects. It will also ensure work is done effectively; meeting objectives and requirements, and efficiently by measuring resources used versus return on our investment. This structured, proactive approach gives ownership of the entire process and resulting quality to our employees and is much more successful and less expensive than trying to inspect quality at the end with third-party inspections and audits. Secondly, principles of quality in this plan are designed to ensure reduction of our operation expenses and increase our profit.

Almost without exception, our workers want to do a good job and this will be a way to help them excel. Willing employees managing a poor process will only result in defective work, waste, liability and discouraged workers. However, utilizing processes that make defect free work possible will result in increased profits and satisfied and loyal customers. When a capable work process is coupled with a fertile workplace that blames a poor or missing process more than fellow workers, results are maximized.

The continuous improvement and preventive\(^7\) nature of this plan, and each process, will improve over the years, as there is more input and thought from our employees.

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\(^1\) **Quality:** Doing agreed upon requirements and standards
\(^2\) **Process:** A series of actions or steps taken to achieve an objective or desired outcome
\(^3\) **Waste:** Anything that consumes resources and does not add value to the end product
\(^4\) **Customer:** An organization or person that receives a product from another organization and includes consumer, program, client, end user, retailer, beneficiary and purchaser.
\(^5\) **Success:** The achievement of something desired, planned, or attempted
\(^6\) **Loyalty:** A behavior or state of being faithful to commitments, obligations or principles; steadfast in allegiance or duty
\(^7\) **Preventive:** Designed to keep something undesirable from occurring
Quality Management Plan

This Quality Management Plan is what we will follow to implement quality at all levels of our company.

The intention for our company is to reduce waste and consistently produce quality work, for each and every customer, every time. To accomplish this consistent, repeatable, quality of work we will follow this quality plan and everyone will have to participate.

This Quality Management Plan will begin with guiding principles for our company’s success. We will start with these guiding principles.

**Guiding Principle #1:** Process fails more than people. Therefore, when there is a mistake that results in a defect we will respect, honor and hold blame free our fellow workers or management. We will blame the absence of a process or that the process we have needs improvement. We will identify the cause of each defect and work diligently to prevent its occurrence in the future.

**Guiding Principle #2:** Process converts our input into output. We will create or improve our processes that will convert our materials, tools, equipment, and labor into products or services that meet the desired value our customers’ demands; while being efficient and ensuring that the resources we use will also result in value that is affordable to our customers.

**Guiding Principle #3:** Quality is doing agreed upon requirements and standards. Requirements are born from value. Value is defined by what the program and customers want. Without either we do not exist. We will follow all program and company requirements to produce products or services that meet values and objectives set forth by homeowners and programs we serve.

**Simple Work Plan Flow Chart:** We will follow a flow plan that follows the steps below.

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8 **Implement**: To put into practical effect; carry out
9 **Waste**: Anything that consumes resources and does not add value to the end product
10 **Guiding Principles**: Are those principles that are considered essential for company behavior. They focus on interactions and values.
11 **Needs**: Are features that a customer requires in order to have their wants satisfied. Needs are also those features that the customer(s) may require for a more healthy, safe, durable, comfortable, energy efficient or environmentally responsible home.
12 **Diligent**: Constant in effort to accomplish something; attentive and persistent in doing anything
13 **Agreed Upon Requirements**: Are requirements that define quality and agreement is imperative across the entire company.
14 **Requirement**: Those necessities which pertain to features and characteristics of a product, service, or process which are required to fulfill a given want, need or objective.
Each step in the Sample Work Plan will be explained below.

**Wants and Needs:** We will document the desires (wants\textsuperscript{15}) of our customers and will make them the focus of our delivery. Success means not only that our products; services and processes fulfill their function but also that the function is what the customer wants. We depend on our customer’s loyalty. Therefore we will focus on understanding current and future customer needs, meeting customer requirements and strive to exceed customer expectations. We will consider customer satisfaction intrinsic\textsuperscript{16} to success and will not settle for less than 100% customer satisfaction.

**Statement of Requirements:** We will focus our work to align with all company and program requirements, standards, policies and objectives (hereafter, referred to as requirements). It is imperative we understand the various program requirements we work with and then follow processes to ensure quality work is done. We will identify where our company skill sets are capable of catching mistakes and preventing defects in order to match requirements. Wherever we are not capable, management will insure our company will receive training, materials and tools that will ensure quality work. A copy of requirements will be kept on file in our office, with version date for control. Requirement changes will be documented, communicated and trained within the next working day on all health and safety issues and all others within 10 working days of receipt of the change.

**Requirement Training:** Our people are our greatest asset and we will provide them with the proper training, tools and support needed to achieve consistently high quality work. The training will focus on all requirements, standards, company policies, and processes used to make sure that each are met. Training will be done by qualified team members as management’s designated trainers in the field.

- We will train or obtain training for our employees so they will have a solid understanding of requirements
- We will use experienced employees, supervisors, trainers or designated workers to accomplish all training
- We will standardize our work by the use of Critical Detail\textsuperscript{17} Sheets while training our employees in the field. Field training will allow production to continue and will give our employees firsthand experience, efficiently learning each task
- We will develop a process flow chart for each segment of each job in order to help training and job execution using Job Instruction Breakdown (JIB)\textsuperscript{18} forms
- We will fill out Field Quality checklists on every job task

**Work Plan:** We will create work plans for every job so that all of our work will be standardized; having everyone involved doing the right task the right way – the first time and every time. Using standardized work, everyone will do a task the same way. We will ensure repeatable and consistent work throughout all our work processes.

Our standardized work plans will include processes that:

- Everyone involved in our work process will know the work flow and can easily pick up where someone left off
- Allow fewer chances of allowing a mistake to become a defect or missing something if all work is done the same way
- Everyone will use the same forms, are trained the same way and follow the process the same way

**Quality Tools:** In order to accomplish standardized work our Company will use all quality forms, tools, materials, and methods supplied by management on all jobs.

\textsuperscript{15} **Wants:** Any product or service described by a customer that they desire to have

\textsuperscript{16} **Intrinsic:** of relating to the essential nature of a thing; inherent

\textsuperscript{17} **Critical Detail:** Are training helps for supervisor to use in the field and tools designed as reminders for crew members and crew leaders. At a minimum they are pictorial installation guides, safety instructions, and material and tools lists.

\textsuperscript{18} **Job Instruction Breakdown (JIB):** A process that captures how a job must be done seizure key points that make or break a job, could injure the worker and gives reasons for all key points.
**Work:** All work will conform to the work plan and all requirements that will contribute to customer success and satisfaction.

**Check Work:** All work will be quality checked at the point where the work is done by the person doing the work. This quality check will be completed before leaving the place where the work is being done. All variation from requirements will be documented on the Quality Checklist, once documented the work will be brought into compliance with requirements and compliance will be documented on the same Quality Checklist. At the end of the work day the person doing the work and the on-site supervisor will sign and date the Quality Checklist and the supervisor will turn in the completed checklist.

All new employees will be supervised for a minimum of 5 times on new tasks. Upon completion of the Quality Checklist the supervisor will document task training completed in the employee’s personnel file. All supervisors will conduct 20% random quality checks of all work completed after task training is successfully complete.

**Conforms:** When work is found to be out of conformance with the work plan or requirements it will be evaluated for need of remedial action. Mistakes that are detected and fixed before they become defects will be evaluated for the need of a prevention plan if the mistake becomes reoccurring.

**Remedial Action:** Management will approve all remedial action, process improvement, and change in requirements, policies or methods. They will ensure all employees are notified of changes and need for further training. Management will also make sure all new materials and tools that are needed are supplied.

**Customer Success & Satisfaction Evaluation:** All work completed will be evaluated to ensure that customer’s critical success factors were accomplished and the customer is satisfied with all aspects of the job. At a minimum each customer will be evaluated at least twice.

1. The first evaluation will be conducted 24 work hours from completion of work. This evaluation will be documented using our 24 hour Satisfaction Evaluation form.
2. The second evaluation will be conducted 60 workdays from the completion of work. This evaluation will be documented using our 60 day Success Evaluation form.

All work that does not conform to customer critical success factors or satisfaction will be reported to management for remedial action.

**Quality and Pricing:** All work will be delivered at a price to our customers that is equated by our set **PRICEING STRUCTURE = OUR COST = OUR PROFIT.** We will compete by the efficiency of our company taking into consideration our customer’s investment versus their return on investment. Our customer’s return on investment will consider dollars saved, comfort, durability or environmental improvement. Whichever of these meets their success factor and satisfaction must be top priority in our consideration.

**Loyalty Leadership:** Our Company Loyalty Leadership must first begin with our relationship with our employees. Their loyalty is essential to our future. Without this we cannot expect long term loyalty from our customers and funders.

This Quality Management Plan will be considered a requirement for all management and employees of the Company. It will require 100% commitment.

Thank You for your dedication and pledge to our quality plan.

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19 **Check Work:** The examination of an entity to determine whether it conforms to prescribed requirements.

20 **Variation:** A change in condition, amount, or level, typically compared with requirements

21 **Remedial Action:** Giving or intended as a remedy or cure to a problem

22 **Critical Success Factors:** Those factors on which the achievement of specified objectives depend.
_________________________ Owner/President Signature  Date______,______

_________________________ Supervisor  Date______,______
Glossary

**Agreed Upon Requirements:** Are requirements that define quality and agreement is imperative across the entire company.

**Check Work:** The examination of an entity to determine whether it conforms to prescribed requirements.

**Commitment:** An obligation a person or organization undertakes to fulfill requirements, i.e. doing what you say you will do.

**Critical Detail:** Are training helps for supervisor to use in the field and tools designed as reminders for crew members and crew leaders. At a minimum they are pictorial installation guides, safety instructions, and material and tools lists.

**Critical Success Factors:** Those factors on which the achievement of specified objectives depend.

**Customer:** An organization or person that receives a product from another organization and includes consumer, program, client, end user, retailer, beneficiary and purchaser.

**Diligent:** Constant in effort to accomplish something; attentive and persistent in doing anything

**Field Quality Checklist:** Checklists that are used by installing crews to check work at the point of work in order to catch mistakes before they become a defect.

**Guiding Principles:** Are those principles that are considered essential for company behavior. They focus on interactions and values.

**Implement:** To put into practical effect; carry out

**Intrinsic:** of relating to the essential nature of a thing; inherent

**Job Instruction Breakdown (JIB):** A process that captures how a job must be done seizes key points that make or break a job, could injure the worker and gives reasons for all key points.

**Loyalty:** A behavior or state of being faithful to commitments, obligations or principles; steadfast in allegiance or duty

**Needs:** Are features that a customer requires in order to have their wants satisfied. Needs are also those features that the customer(s) may require for a more healthy, safe, durable, comfortable, energy efficient or environmentally responsible home.

**Plan:** Provisions made achieve an objective.

**Personal Interactions:** Those interactions between management and employees that align with guiding principles.

**Preventive:** Designed to keep something undesirable from occurring

**Process:** A series of actions or steps taken to achieve an objective or desired outcome

**Quality:** Is doing agreed upon requirements

**Quality Management Plan:** The set of interconnected and managed processes that function together to achieve our quality goals.
**Quality:** Doing agreed upon requirements.

**Remedial Action:** Giving or intended as a remedy or cure to a problem

**Requirement:** Those necessities which pertain to features and characteristics of a product, service, or process which are required to fulfill a given want, need or objective

**Success:** The achievement of something desired, planned, or attempted

**Value:** Is what the customer wants and will pay for

**Variation:** A change in condition, amount, or level, typically compared with requirements

**Waste:** Anything that consumes resources and does not add value to the end product

**Wants:** Any product or service described by a customer that they desire to have
Is it mandatory that a company have a Quality Management Plan?

No, many companies operate without such a plan. However, it has been found that companies that implement a plan have better communication and quality performance where everyone in the company understands what is expected. We often have better success where what we do and how we should do it is documented and planned. Having any plan is better than have no plan.

Can my company change the plan to fit our company?

Yes, please make changes that best fit your company.

How often should a Quality Management Plan be reviewed and improved?

As the plan is rolled out there will be suggestions for improvement by all levels of the company. The Quality Management Plan supplied is a template and will require changes to best fit your company. After a review period, when the plan is implemented, it is suggested that review should take place annually. Any changes made must then be communicated to the entire company.
Quality Management Plan

Frequently Asked Questions (FAQ)

What is a Quality Management Plan?

It is a plan that dictates how a company plans to conduct effective defect free work that meets all requirements that will produce customer success and 100% customer satisfaction. It also instructs the company on how it will be efficient to the extent that a customer’s investment will yield an expected return. Return on investment can be expressed in dollars, comfort, durability or environmental improvement.

Who is the Quality Management Plan for?

A Quality Management Plan is written by the Owner, to the managers and supervisors of a company. It explains how the company will conduct itself in all business, as it pertains to quality. It does not have a number in it, stating allowable nonconformance. It also does not indicate any method of deviating from the plan. Further, it does not delegate the responsibility for evaluating the performance of this plan. This must be the carried out by the owner or delegated management person or team.

This plan should not be a plan reserved for management personnel only. It should be stated and restated and published until everyone knows, understands and believes it.

What is in this Quality Management Plan?

- Quality Management Plan has an introduction of the plan to all management and supervisors.
- The Quality Management Plan has the following sections:
  - Guiding principles for our Company’s success
  - Simple Plan Flow Chart
  - Wants and Need of Customers
  - Statement of Requirements, Codes and Standards
  - Requirement Training
  - Work Plan
  - Work
  - Conformance
  - Remedial Action
  - Customer Success & Satisfaction Evaluation
  - Quality and Pricing
  - Glossary of Terms
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