OPERATIONS INSIDER

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INTEGRATED MANAGEMENT SYSTEMS QUICK START CHECKLIST

Score in ninety minutes how far your management systems have grown together.



ONE POLICY. ONE CORE. ONE AUDIT. ONE REVIEW.

START HERE

How to Use This Check

One site, ninety minutes with the people who look after quality, environment, safety and energy, twenty-five statements, one number.

01 LOOK	02 SCORE	03 ACT
Put the real records on one table: the policies, the document registers, the audit programs, the action lists and the minutes of the last management reviews of every system.	Score each statement from 0 to 4. Without a document, a register or a record you can point at, the score is 2 or lower.	Pick the weakest block and agree one action with an owner and a date before you leave.

The Scoring Scale

POINTS	MEANING
0	Not in place.
1	Exists per topic, with different rules and owners.
2	Aligned in part: same structure or same owner, still separate documents.
3	Merged for most topics and used in daily work.
4	One version for all topics, used, reviewed and improved.

> **WHY ONE SYSTEM**
>
> **A plant has one set of processes, one management team and one workforce. When every topic brings its own policy, documents, audits, objectives and review, the same work is described, checked and reported several times, and the rules start to contradict each other.**

Before You Start

- **Scope:** one site with at least two management systems, certified or not.
- **Evidence:** the records of all systems side by side. The check compares them, it does not rate one topic.
- **Tone:** you check how the systems fit together, not the people who built them. Each system was right for its time.

THE CHECK

01 One Direction

NO.	CHECK	SCORE 0 TO 4
01	One policy covers quality, environment, safety and energy, and no second policy for a single topic is displayed anywhere on site.	
02	All objectives of the management system are on one sheet with number, baseline, target, date and owner, whatever topic they belong to.	
03	One person coordinates the management system and reports to top management, and the subject specialists know which tasks stay with them.	
04	Scope, sites and the parties who expect something from the plant are described once for all topics.	
05	Top management knows what the upkeep of the management system costs per year in hours and in EUR.	

02 One Core

NO.	CHECK	SCORE 0 TO 4
06	One process landscape shows all processes, and each process description contains its quality, environmental, safety and energy points.	
07	There is one rule for the control of documents and one register of all controlled documents.	
08	Actions from audits, incidents, complaints, inspections and reviews are in one register with owner and due date.	
09	Defective product, accidents, near misses, environmental incidents and energy deviations follow one path from report to cause to action.	
10	Training needs, instructions and briefings for all topics are planned in one matrix per area.	

THE CHECK

03 Subject Building Blocks

NO.	CHECK	SCORE 0 TO 4
11	Environmental aspects, hazards, significant energy uses and quality risks are each assessed with their own method by people qualified for it.	
12	Each assessment is assigned to the process where the aspect, hazard or energy use occurs, and the process owner knows the result.	
13	One register lists the legal and other requirements for all topics, each with an owner, a check interval and the date of the last check.	
14	Changes to plant, materials, products and organization are checked once for their effects on all topics before they are released.	
15	Emergency plans cover fire, spill, accident and loss of supply in one set of documents, and drills are run together.	

04 One Audit, One Review

NO.	CHECK	SCORE 0 TO 4
16	One audit program covers all processes and all topics, with a frequency that follows risk and results.	
17	An area is visited once per audit cycle by one team, not once per topic.	
18	Every auditor is qualified for the audit method and for at least two topics, and each team covers all topics of its audit.	
19	Findings carry the topic and the process, are rated on one scale and go into the one action register.	
20	One management review looks at all topics with one agenda and ends with decisions that name owner, date and resources.	

THE CHECK

05 Run and Keep

NO.	CHECK	SCORE 0 TO 4
21	A matrix shows for every system element which topics it covers, and it is updated when a document or a requirement changes.	
22	The number of controlled documents, audit days and overdue actions is tracked as a key figure of the system itself.	
23	When a merged document is released, the old versions of all topics are withdrawn on the same day.	
24	A new topic or a new standard is added to the existing elements instead of a new system being built beside them.	
25	External audits are planned as combined audits where the certification body offers it, and the plant can show which document answers which requirement.	

Your Result

BLOCK	POINTS	OUT OF
01 One Direction		20
02 One Core		20
03 Subject Building Blocks		20
04 One Audit, One Review		20
05 Run and Keep		20
TOTAL		100

YOUR RESULT

Read the Number

The total tells you how far your systems have grown together. The weakest block tells you where to start.

TOTAL	WHAT IT MEANS	WHAT TO DO FIRST
0 to 39	Side by side. Each topic has its own policy, documents, audits and review.	Count each system and build the overlap matrix.
40 to 59	Aligned. Same structure or same people, but the documents are still separate.	Merge the action register and the document rule, then the audits.
60 to 79	Merged. One core for most elements, subject work attached to the processes.	Combine the review and the external audits, withdraw old versions.
80 to 100	Integrated. One system that carries every topic.	Hold the level. Add new topics to the existing elements.

Your Three Priorities

NO.	WHAT TO IMPROVE	FIRST ACTION	OWNER	DUE

THE RULE FOR EVERY ACTION

Owner and date, or it did not happen. Repeat the check after six months and compare the blocks, not the feeling.

Standards such as ISO 9001, ISO 14001, ISO 45001 and ISO 50001 are mentioned by name only. This document uses its own structure and its own words and reproduces no requirement. Obtain the valid editions yourself before you plan a certification.

What to Do Next

NEXT STEP	WHAT YOU GET
STARTER KIT	The guide for the first 30 days with inventory, overlap matrix, effort calculation and the first three merges, plus the workbook in Excel.
EXCELLENCE BUNDLE	The full playbook, a two-day workshop pack, six templates, the Excel system and a workshop deck. Both at operationsinsider.com.