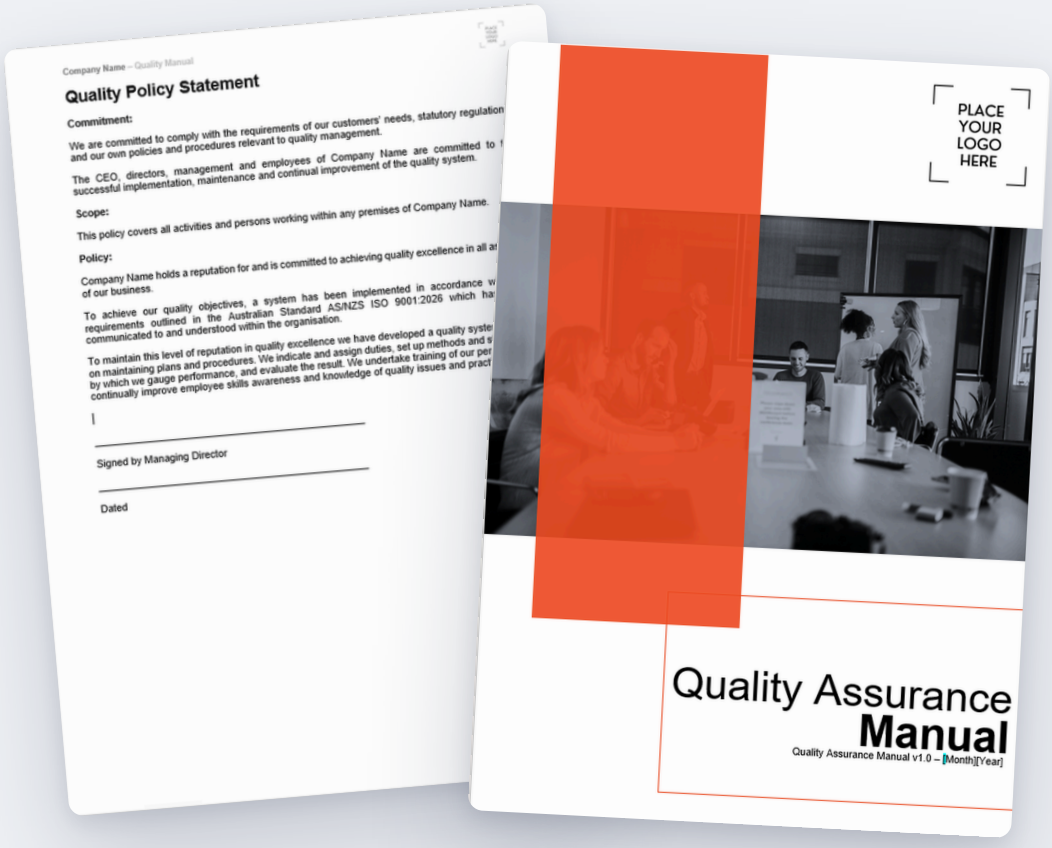
EVERYTHING OHS

IMPLEMENTATION GUIDE

SET UP YOUR QMS. BUILD QUALITY IN.

A step-by-step guide to personalising your Quality Management System manual, with screenshots of every section you need to change, and how to run it day to day.



Before you start, have these handy

- Your business name, logo, phone number and website
- A clear picture of your products, services and main processes
- Your organisational chart
- The person who'll lead your QMS, and their manager's backing

START HERE

HOW YOUR QMS FITS TOGETHER

Your Quality Management System (QMS) manual sets out how your business makes sure its products and services meet customer requirements, every time, and keeps getting better.

It's aligned to ISO 9001:2026, the current edition of the international quality standard. The manual describes what you do. The procedures in the appendix explain how. The forms and registers are your records that it's happening.

Your manual is a strong starting point, not the finished product.

For an auditor, a customer or your own team, the QMS has to describe how *your* business actually works. Read every section and change anything that doesn't match.

WHAT'S INSIDE YOUR MANUAL

1 The Quality Manual, sections 1 to 10

Your organisation and its context, leadership and the Quality Policy, planning, support, operations, performance evaluation and improvement. These follow the structure of ISO 9001.

2 Procedures

Objectives, training, document hierarchy, document and data control, records, non-conformance, audits and management review.

3 Forms and registers

Objectives Matrix, training records, Records Control Matrix, Corrective Action Report, Audit Schedule, Audit Record and Management Review minutes.

4 Org chart and workflow

Your organisational chart and a workflow diagram showing how your processes connect.

5 Blue highlights

Text highlighted in blue marks the parts that need your business's details or a decision from you.

YOUR ROADMAP

SEVEN STEPS TO A WORKING QMS

Don't just fill in the blanks. Read each section and edit anything that doesn't match how your business runs. If we personalised parts of your manual from your questionnaire, those sections still need checking. They won't capture every detail of your processes.

WEEK 1 REVIEW

1. **Choose your QMS lead and read the manual**
   Get familiar with every section, procedure and form, and note the gaps

2. **Add your business details**
   Logo, business name, contact details, org chart and where documents are stored

WEEKS 2 TO 3 CUSTOMISE

3. **Describe your business and scope**
   Sections 4.1, 4.3 and 8.1

4. **Set out customer requirements and design**
   Sections 8.2 and 8.3

5. **Set objectives and map your workflow**
   Objectives Matrix and Workflow Diagram

WEEKS 3 TO 6 IMPLEMENT, THEN KEEP IT RUNNING

6. **Sign the policy and put the system to work**
   Policy, document storage, training and records

7. **Monitor, audit and improve**
   Objectives, internal audits, management reviews and corrective actions

STEP 1

CHOOSE YOUR QMS LEAD AND READ THE MANUAL

Someone has to own the system. Pick your QMS lead, then read the whole manual before changing anything.

APPOINT YOUR QMS LEAD

Your managing director appoints someone to oversee implementation and coordinate updates across the business. In a small business this is often the owner or operations manager.

- Works through this guide and makes sure each step is finished
- Coordinates updates with the people who run each process
- Looks after document control, records and the audit schedule

READ IT END TO END

- Read every section, procedure and form so you know what's there.
- Think about how each part relates to your business.
- Note any sections that need more detail, or don't apply.
- Mark up the blue highlights you'll need information for.

Top management stays accountable.

ISO 9001 expects leaders to take accountability for the QMS. Your lead runs it day to day, but the managing director signs the policy and leads the management reviews.

WHO DOES WHAT

Managing Director	Overall accountability. Signs the Quality Policy and leads management reviews.
QMS lead / Quality Manager	Oversees implementation, document control and internal audits.
Managers and supervisors	Run operational controls, subcontractors and workflows in their area.
Admin	Maintains document control, training records and forms.
All workers	Follow QMS procedures and suggest improvements.

STEP 2

ADD YOUR BUSINESS DETAILS

Open the manual in Microsoft Word. These details appear on the cover, in the header and in a few places through the manual.

Ordered personalisation? If we've already added your details, check them carefully and correct anything that isn't right.

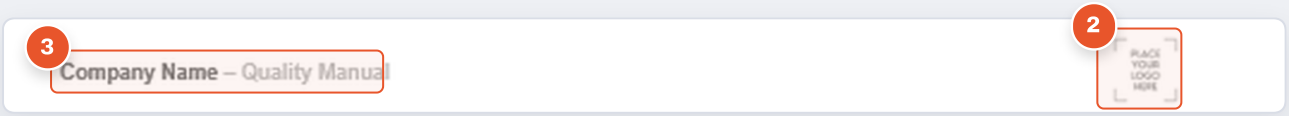


The manual cover

1 Add your logo to the cover
Right-click the "Place your logo here" image and choose *Change Picture › From a File*.

2 Update the header
Double-click the header at the top of any inside page, swap the small logo the same way, then double-click the page body to close it. It changes on every page.

3 Replace "Company Name" everywhere
Press Ctrl + H, find *Company Name* and choose *Replace All* with your business name. Skim a few pages to check it reads well.



The header on every inside page

4 Contact details in section 8.2
Replace *[PHONE NUMBER]* and *[WEBSITE URL]* with how customers reach you.

5 Where your documents live
In the Document and Data Control procedure, replace *[system name or shared drive]* with where you keep controlled documents.

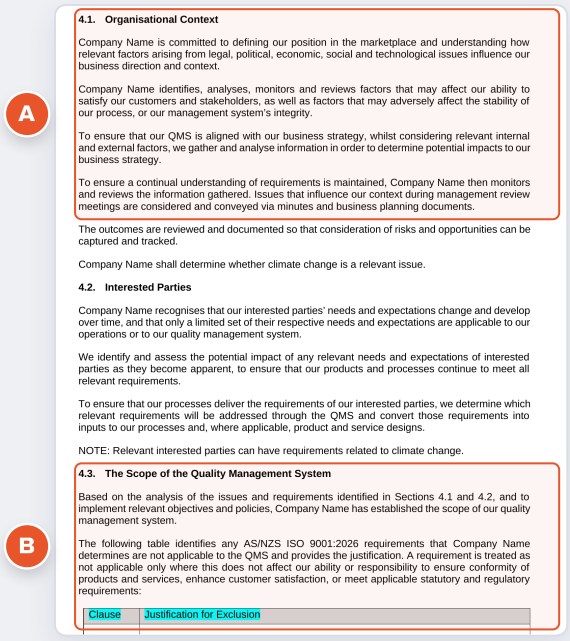
6 Your organisational chart
Replace the sample chart in Appendix 1 with your own, showing who is responsible for quality.

! Find every blue highlight
Use the Find tool to search for square brackets. Action each one, then delete the instruction and remove the highlight.

STEP 3

DESCRIBE YOUR BUSINESS AND SCOPE

These sections tell an auditor what your business does and what the QMS covers. Only you can write them accurately.



4.1. Organisational Context

Company Name is committed to defining our position in the marketplace and understanding how relevant factors arising from legal, political, economic, social and technological issues influence our business direction and context.

Company Name identifies, analyses, monitors and reviews factors that may affect our ability to satisfy our customers and stakeholders, as well as factors that may adversely affect the stability of our process, or our management system's integrity.

To ensure that our QMS is aligned with our business strategy, whilst considering relevant internal and external factors, we gather and analyse information in order to determine potential impacts to our business strategy.

To ensure a continual understanding of requirements is maintained, Company Name then monitors and reviews the information gathered. Issues that influence our context during management review meetings are considered and conveyed via minutes and business planning documents.

The outcomes are reviewed and documented so that consideration of risks and opportunities can be captured and tracked.

Company Name shall determine whether climate change is a relevant issue.

4.2. Interested Parties

Company Name recognises that our interested parties' needs and expectations change and develop over time, and that only a limited set of their respective needs and expectations are applicable to our operations or to our quality management system.

We identify and assess the potential impact of any relevant needs and expectations of interested parties as they become apparent, to ensure that our products and processes continue to meet all relevant requirements.

To ensure that our processes deliver the requirements of our interested parties, we determine which relevant requirements will be addressed through the QMS and convert those requirements into inputs to our processes and, where applicable, product and service designs.

NOTE: Relevant interested parties can have requirements related to climate change.

4.3. The Scope of the Quality Management System

Based on the analysis of the issues and requirements identified in Sections 4.1 and 4.2, and to implement relevant objectives and policies, Company Name has established the scope of our quality management system.

The following table identifies any AS/NZS ISO 9001:2026 requirements that Company Name determines are not applicable to the QMS and provides the justification. A requirement is treated as not applicable only where this does not affect our ability or responsibility to ensure conformity of products and services, enhance customer satisfaction, or meet applicable statutory and regulatory requirements:

Clause	Justification for Exclusion

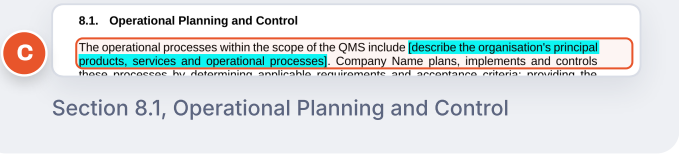
Section 4, Our Organisation

A Organisational context (4.1)

Check it reflects your market, customers, suppliers and the internal and external issues that affect your business. Decide whether climate change is relevant to you, and say so.

B Scope and exclusions (4.3)

Confirm what the QMS covers: your products, services and sites. If an ISO 9001 requirement doesn't apply, list the clause in the table with a justification. The most common is 8.3 Design and Development, for businesses that don't design products or services.



8.1. Operational Planning and Control

The operational processes within the scope of the QMS include [describe the organisation's principal products, services and operational processes]. Company Name plans, implements and controls these processes by determining applicable requirements and acceptance criteria; providing the

Section 8.1, Operational Planning and Control

C Your operations (8.1)

Replace the placeholder with your main products, services and operational processes. Check that responsibilities, resources and how you manage subcontractors match reality.

EXAMPLES TO GET YOU STARTED

A scope statement

"The QMS covers the manufacture and installation of commercial signage from our Gold Coast workshop and at client sites, and applies to all workers and subcontractors involved in that work."

An exclusion

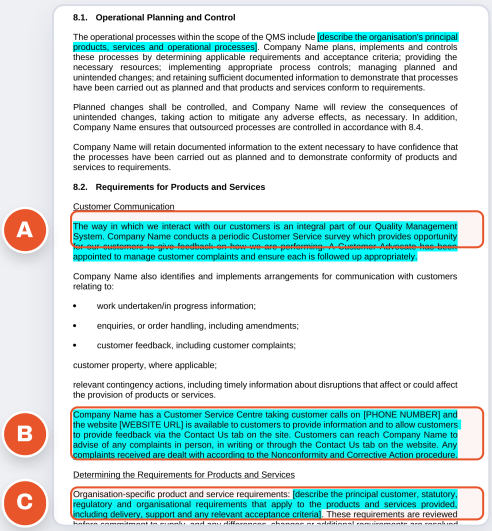
Clause: 8.3 Design and Development. **Justification:** "We manufacture and install to designs supplied by our customers and do not design products or services."

Keep exclusions honest. Only exclude a requirement if it genuinely doesn't apply and leaving it out doesn't affect your ability to deliver conforming products and services. An auditor will check.

STEP 4

SET OUT CUSTOMER REQUIREMENTS AND DESIGN

Sections 8.2 and 8.3 cover how you deal with customers and whether you design products or services.



8.1. Operational Planning and Control

The operational processes within the scope of the QMS include [describe the organisation's principal products, services and operational processes]. Company Name plans, implements and controls these processes by determining applicable requirements and acceptance criteria; providing the necessary resources; implementing appropriate process controls; managing planned and unintended changes; and retaining sufficient documented information to demonstrate that processes have been carried out as planned and that products and services conform to requirements.

Planned changes shall be controlled, and Company Name will review the consequences of unintended changes, taking action to mitigate any adverse effects, as necessary. In addition, Company Name ensures that outsourced processes are controlled in accordance with 8.4.

Company Name will retain documented information to the extent necessary to have confidence that the processes have been carried out as planned and to demonstrate conformity of products and services to requirements.

8.2. Requirements for Products and Services

Customer Communication

A

The way in which we interact with our customers is an integral part of our Quality Management System. Company Name conducts a periodic Customer Service survey which provides opportunity for our customers to give feedback on how we are performing. A Customer Advocate has been appointed to manage customer complaints and ensure each is followed up appropriately.

Company Name also identifies and implements arrangements for communication with customers relating to:

- work undertaken/in progress information;
- enquiries, or order handling, including amendments;
- customer feedback, including customer complaints;

customer property, where applicable;

relevant contingency actions, including timely information about disruptions that affect or could affect the provision of products or services.

B

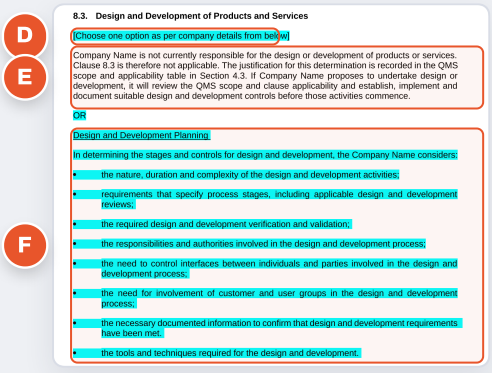
Company Name has a Customer Service Centre taking customer calls on [PHONE NUMBER] and the website [WEBSITE URL] is available to customers to provide information and to allow customers to provide feedback via the Contact Us tab on the site. Customers can reach Company Name to advise of any complaints in person, in writing or through the Contact Us tab on the website. Any complaints received are dealt with according to the Nonconformity and Corrective Action procedure.

Determining the Requirements for Products and Services

C

Organisation-specific product and service requirements: [describe the principal customer, statutory, regulatory and organisational requirements that apply to the products and services provided, including delivery, support and any relevant acceptance criteria]. These requirements are reviewed

Section 8.2, Requirements for Products and Services



8.3. Design and Development of Products and Services

D

[Choose one option as per company details from below]

E

Company Name is not currently responsible for the design or development of products or services. Clause 8.3 is therefore not applicable. The justification for this determination is recorded in the QMS scope and applicability table in Section 4.3. If Company Name proposes to undertake design or development, it will review the QMS scope and clause applicability and establish, implement and document suitable design and development controls before those activities commence.

OR

F

Design and Development Planning

In determining the stages and controls for design and development, the Company Name considers:

- the nature, duration and complexity of the design and development activities;
- requirements that specify process stages, including applicable design and development reviews;
- the required design and development verification and validation;
- the responsibilities and authorities involved in the design and development process;
- the need to control interfaces between individuals and parties involved in the design and development process;
- the need for involvement of customer and user groups in the design and development process;
- the necessary documented information to confirm that design and development requirements have been met.
- the tools and techniques required for the design and development.

Section 8.3, Design and Development

A **How you talk to customers**

Describe how you actually collect feedback and handle complaints, for example phone calls, surveys, meetings or online reviews. Change "Customer Advocate" and "Customer Service Centre" to the roles you have.

B **How customers reach you**

Add your phone number and website, and check the ways customers can raise a complaint.

C **Your product and service requirements**

Describe the customer, legal and regulatory requirements your products or services must meet, including delivery, support and acceptance criteria.

D **Choose one option**

Section 8.3 gives you two versions. Keep the one that fits and delete the other, along with the instruction and the word OR.

E **You don't design products or services**

Keep this paragraph, and make sure 8.3 is listed as an exclusion in the 4.3 table.

F **You do design products or services**

Keep this version and check the stages, reviews, verification and records match how your design work is really done.

STEP 5

SET OBJECTIVES AND MAP YOUR WORKFLOW

Your quality objectives show what you're aiming for. Your workflow diagram shows how your processes connect.

Form 2.1 Objectives Matrix

OBJECTIVE	ACTION	RESPONSIBILITY	DATE COMMENCE	DATE COMPLETE	REVIEW DATE	Outcomes
Ensure the quality Manual is compliant with ISO9001 requirements	Review requirements against manual on an annual basis to ensure compliance					
Ensure the Quality Policy is signed and displayed on company premises	Part of workplace inspection, check the policy is displayed, signed and dated – policy to display current date (within 2 years).					

Form 2.1, Objectives Matrix

A **Replace the sample objectives**

Keep the samples that suit you and add your own. Make them SMART: specific, measurable, achievable, relevant and time-bound. For example, "Achieve 95% on-time delivery over the next 12 months."

+ **Fill in every column**

For each objective, record the action, who's responsible, the start and completion dates, when you'll review it and the outcome.

10. Workflow Diagram

[Example only: replace or adapt this workflow diagram so it accurately represents the organisation's actual process sequence and interactions.]

Process

Purchasing:
- Sourcing Suppliers
- Pricing
- Delivery Times
- Trading Terms
- Receipt of goods
- Chasing orders and monitoring back orders

→

Sales
Who are our customers and how do we find them?
- Setup Trading Terms
- Budget and Sales Chart
- Brochures
- Website

→

Customer Orders and Enquiries
- Customer enquiries
- Order Entry
- Pick
- Pack
- Dispatch
- Customer Receipt (statement sent and account paid)
- Existing Client growth report

→

Warehousing and Admin
- Min Stock Levels
- Inventory Management
- Dead and Slow-Moving Stock

→

Warehousing-Operational
- Stock Locations
- Storage
- Handling
- Isolation of faulty or other goods (customer returns or goods to be returned)
- Stock take (Chemicals and other products register)

Support Process and Forms

Finance and Admin
- References for customers

Our People
- The HR Manual details

Outsourced Services
- Computer Software

Section 10, Workflow Diagram

B **It's an example**

The diagram shows a sample business. Replace or adapt it so it shows your real process from start to finish, then delete the instruction.

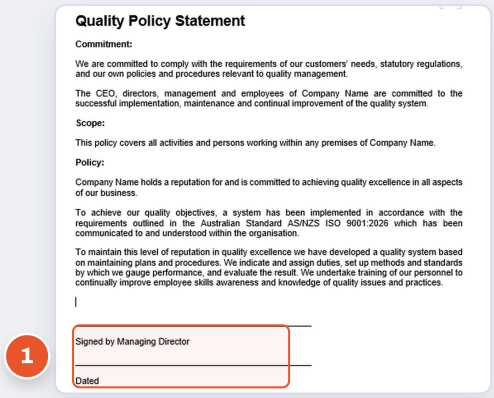
C **Show your key stages**

Include the stages that matter to you, such as sales, quoting, purchasing, production or delivery, installation, testing and handover, plus the support processes behind them.

STEP 6

SIGN THE POLICY AND PUT THE SYSTEM TO WORK

This is where the manual becomes a system: signed off, stored where people can find it, and used.



Quality Policy Statement

Commitment:

We are committed to comply with the requirements of our customers' needs, statutory regulations, and our own policies and procedures relevant to quality management.

The CEO, directors, management and employees of Company Name are committed to the successful implementation, maintenance and continual improvement of the quality system.

Scope:

This policy covers all activities and persons working within any premises of Company Name.

Policy:

Company Name holds a reputation for and is committed to achieving quality excellence in all aspects of our business.

To achieve our quality objectives, a system has been implemented in accordance with the requirements outlined in the Australian Standard AS/NZS ISO 9001:2026 which has been communicated to and understood within the organisation.

To maintain this level of reputation in quality excellence we have developed a quality system based on maintaining plans and procedures. We indicate and assign duties, set up methods and standards by which we gauge performance, and evaluate the result. We undertake training of our personnel to continually improve employee skills awareness and knowledge of quality issues and practices.

Signed by Managing Director

Dated

1

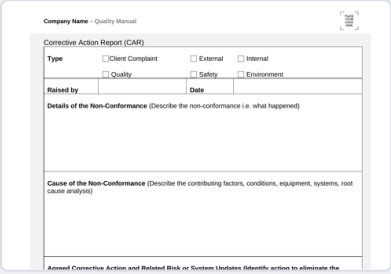
The Quality Policy Statement

1. **Sign and display your Quality Policy**
   Read it and edit anything that doesn't fit. Your managing director signs and dates it. Display it where workers and visitors will see it, and review it each year.

2. **Save and organise your documents**
   Set up a folder structure for the manual, procedures, forms and completed records, matching the Document Hierarchy and Document and Data Control procedures. Use the **Records Control Matrix** to record what you keep, where and for how long.

3. **Train your team**
   Walk workers and contractors through the QMS and their part in it. Record skills, licences and training on the training forms and records, and diarise renewals.

START RECORDING FROM DAY ONE



Company Name – Quality Manual

Corrective Action Report (CAR)

Type ☐ Client Complaint ☐ External ☐ Internal ☐ Quality ☐ Safety ☐ Environment

Raised by | Date

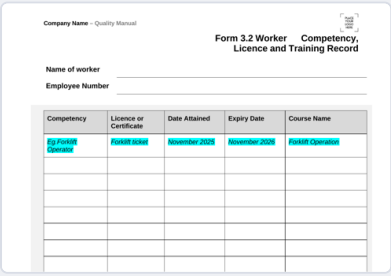
Details of the Non-Conformance (Describe the non-conformance i.e. what happened)

Cause of the Non-Conformance (Describe the contributing factors, conditions, equipment, systems, root cause analysis)

Agreed Corrective Action and Related Risk or System Updates (Identify action to eliminate the

NON-CONFORMANCES AND COMPLAINTS

When something goes wrong or a customer complains, record it on a **Corrective Action Report (CAR)**, fix the cause and track it until it's closed.



Company Name – Quality Manual

Form 3.2 Worker Competency, Licence and Training Record

Name of worker

Employee Number

Competency	Licence or Certificate	Date Attained	Expiry Date	Course Name
Eg Forklift Operator	Forklift ticket	November 2025	November 2026	Forklift Operation

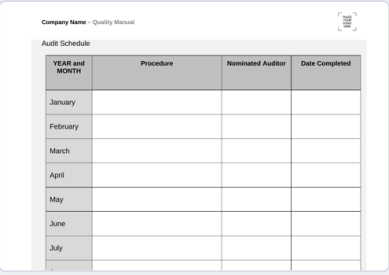
TRAINING AND COMPETENCY

Keep the **Worker Competency, Licence and Training Record** and **Training Attendance Record** up to date for every worker.

STEP 7

MONITOR, AUDIT AND IMPROVE

A QMS keeps working when checking and improving are built into your calendar.

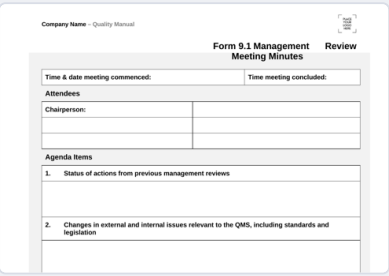

Company Name – Quality Manual

Audit Schedule

YEAR and MONTH	Procedure	Nominated Auditor	Date Completed
January			
February			
March			
April			
May			
June			
July			

SCHEDULE INTERNAL AUDITS

Fill in the **Audit Schedule** so every procedure is audited over the year, and record each audit on the **Audit Record Form**. Do at least one full internal audit a year, or engage an external auditor.


Company Name – Quality Manual

Form 9.1 Management Review Meeting Minutes

Time & date meeting commenced:	Time meeting concluded:
Attendees	
Chairperson:	
Agenda Items	
1. Status of actions from previous management reviews	
2. Changes in external and internal issues relevant to the QMS, including standards and legislation	

HOLD MANAGEMENT REVIEWS

Your managing director and managers review how the QMS is performing, using the **Management Review Meeting Minutes** as the agenda and record. Hold one at least once a year.

REGULARLY

- Record customer feedback and complaints
- Raise CARs for non-conformances
- Keep training records current

EACH QUARTER

- Check progress against your objectives
- Follow up open corrective actions
- Carry out the audits on your schedule

EVERY YEAR

- Full internal audit
- Management review meeting
- Review and re-sign the Quality Policy
- Set new objectives
- Review and update the manual

Use what you learn.

Customer feedback, audit findings and non-conformance reports are your best source of improvements. Update your processes and the manual when they show a better way.

NEXT STEP

GOING FOR ISO 9001 CERTIFICATION?

Certification is optional. Many businesses use their QMS without it. If your customers or tenders ask for it, an independent certification body audits your QMS against ISO 9001. Before that audit, you'll usually need:

1. **Around three months of records**
   Evidence the system is being used, such as completed forms, CARs and training records.

2. **A signed Quality Policy**
   Signed by your managing director and communicated to your team.

3. **Objectives and monitoring**
   Documented quality objectives, with evidence you're tracking progress.

4. **Internal audits and a management review**
   At least one completed, with any actions followed up.

Already certified to ISO 9001:2015? ISO 9001:2026 was published in September 2026. Certified businesses have until 30 September 2029 to move to the new edition. Talk to your certification body about timing.

Need a hand?

Get in touch through the Everything OHS website at workplace-safety.com.au. We can help with questions about your QMS and point you to an independent certification provider.

CHECKLIST

IS YOUR QMS READY?

- [ ] QMS lead appointed
- [ ] Whole manual, procedures and forms read
- [ ] Logo on the cover and in the header
- [ ] Company Name replaced throughout
- [ ] Phone, website and document storage filled in
- [ ] Organisational chart added
- [ ] All blue highlights actioned and removed
- [ ] Organisational context (4.1) checked
- [ ] Scope and exclusions (4.3) completed
- [ ] Operations described (8.1)
- [ ] Customer communication and requirements updated (8.2)
- [ ] Design and development option chosen (8.3)
- [ ] SMART objectives set in the Objectives Matrix
- [ ] Workflow diagram shows your real process
- [ ] Quality Policy signed and displayed
- [ ] Documents saved and organised
- [ ] Workers and contractors trained
- [ ] Records being kept from day one
- [ ] Audit schedule filled in
- [ ] First management review booked

Disclaimer: We cannot, and do not, give you legal or any other professional advice. While every reasonable effort has been made to ensure that the information we provide is comprehensive, accurate and clear, it may not cover your particular circumstances. Only you are aware of the purpose for which you intend to apply a product or service you order from us. For this reason we provide this to you on an "as is" basis, and it does not constitute legal or professional advice of any kind. If you do require personalised legal or professional advice we recommend that you consult a suitably qualified person. If you think you may have noticed any error or omission, please let us know through the Everything OHS website.