G0001-04

Toolkit Roadmap

User Guide

Document reference	G0001-04 Toolkit Roadmap User Guide
Version	V1.0
Standard	ISO 9001:2026 — Compliance Toolkit
File format	Microsoft Word document (.docx)
Companion file	ISO 9001 Implementation Toolkit with Dashboards (Manufacturing Edition) — 391 files across 10 folders, including 39 PDF copies
Scope	Map of the ten toolkit folders and the recommended order of use

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1. The Ten Folders

The toolkit is organized into ten folders. Read each card below to learn what is inside and how mandatory the folder is for your certification effort. **Status badges:** Mandatory = required for certification evidence; Recommended = strongly advised, especially for first-cycle implementers; Reference = useful supporting material, not directly cited by the standard.

1.0 Getting Started

Orientation material: F0001-01 File Inventory, this roadmap, G0001-05 Quick Start Checklist, G0001-06 Licence and Use Terms, G0001-07/-08 Manual and Procedure Customization Guides, the G0001-09 Getting Started deck, the G0001-10 Quality Manager's Deployment Guide, the G0001-11 ISO 9001:2015 vs 2026 Comparison Matrix and the G0001-12 ISO 9001:2026 Update Record.

Reference

2.0 Project Plan

PR000-01 29-step Implementation Plan (52-week Gantt, RACI, milestones), the 29-step guides (PR001–PR029), and the Step-07 Gap Analysis Plan and 161-question Checklist (GA002-01/-02).

Recommended

3.0 Quality Manual

M0100-01 QMS Manual — Manufacturing 2026 Edition (with clause correlation matrix), M0100-02 2026 Edition Schedule of Changes, M0100-00 editable manual diagrams and the 11 manual images (PNG).

Mandatory

4.0 Procedures

28 controlled procedures (P0410-01 to P1020-02) covering ISO 9001:2026 Clauses 4–10, each with references, clause-coverage table, roles, process, KPIs, and records.

Mandatory

5.0 Reports & Forms

97 Word forms + 14 management review packs (F-series) that generate the records cited by the procedures — from scope statement and quality policy to NCO reports, corrective action and management review minutes.

Mandatory

6.0 Tools

73 Excel registers, logs and matrices: context and interested-party registers, risk & opportunity register, objectives register, MDL, control plan, PFMEA/DFMEA, PPAP, MSA, audit programme and checklist, clause-to-evidence map, management review tool, corrective action tracker.

Mandatory

7.0 Dashboards

Five interactive HTML dashboards (risk & opportunity, NCO metrics, SPC analysis, internal audit, corrective action) that read directly from the 6.0 Excel tools.

Recommended

8.0 User Guides

30 guides: one per key Excel tool and dashboard, the Implementation Plan and Gap Analysis Plan guides, and the problem-solving methodologies guide.

Reference

9.0 Clause-by-Clause Guide

G0001-03 Manufacturing Edition Standard Guide — what ISO 9001:2026 requires, clause by clause, with manufacturing interpretation and evidence to look for.

Reference

10.0 Training

45 PowerPoint decks: clause-by-clause QMS training (T0400–T1000), auditor training (T0921-01..06), Excel-tool and dashboard training, and problem-solving (7 tools, 5-Whys, 8D).

Reference

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2. Order of Use — A→I

Tasks are sequenced so each stage produces the inputs the next stage needs. Stages C and D run partly in parallel; the plan is being populated while the gap analysis is being completed. Stages G and H also overlap: auditor training must precede the first internal audit, but topic awareness training can run alongside operations.

Stage	Name	What happens
A	**Orient**	Read the Getting Started guides (G0001-04, -05, -06, -07, -08, -10 and F0001-01 File Inventory). Run the G0001-09 Getting Started deck with the implementation team.
B	**Frame**	Run P0410-01 Context Analysis and P0434-01 QMS Scope & Process Architecture. Capture interested parties (P0420-01) in the F0410-01 and F0420-01 registers (6.0 Tools).
C	**Plan**	Open PR000-01 Implementation Plan (2.0 Project Plan), set the Project Start Date (cell C4 — must be a Monday), assign owners, and work through the PR001–PR029 step guides.
D	**Gap-analyse**	At Step 7, run the gap analysis with GA002-01 Gap Analysis Plan and the 161-question GA002-02 Gap Analysis Checklist against your current state; log every gap and its action in the checklist and carry priority gaps into F0611-01.
E	**Adopt**	Customize the M0100-01 QMS Manual and cascade approved procedures (4.0) into operations. Train teams on the procedures relevant to their role using the matching clause deck (10.0 Training).
F	**Operate**	Use the 5.0 forms and 6.0 Excel tools to capture records — receipt and inspection, control plans, customer feedback, supplier evaluation, nonconforming outputs, corrective action — and read the 7.0 dashboards for trends.
G	**Train**	Deliver Auditor Training (T0921-01..06) before any internal audit; deliver the Excel tool and dashboard decks (T0410-01 Context Register, T0611-01 Risk & Opportunity Register, etc.) to the tool owners.
H	**Audit**	Run internal audits under P0920-01 using F0920-03 Programme, F0920-05 Checklist and F0920-04 Clause-to-Evidence Map; hold the management review under P0930-01 with the fourteen Clause 9.3.2 inputs (F0930-01/-02).
I	**Certify**	Engage the certification body (PR027–PR029). The Implementation Plan, the audit programme and results, and the management review minutes are your headline evidence.

Skipping stages costs time. Each stage closes out evidence that later stages cite. Auditing without prior auditor training (Stage G before Stage H) is a routine certification-body finding; running the management review (Stage H) before the first audit cycle has produced any output is another. The order is conservative on purpose.

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