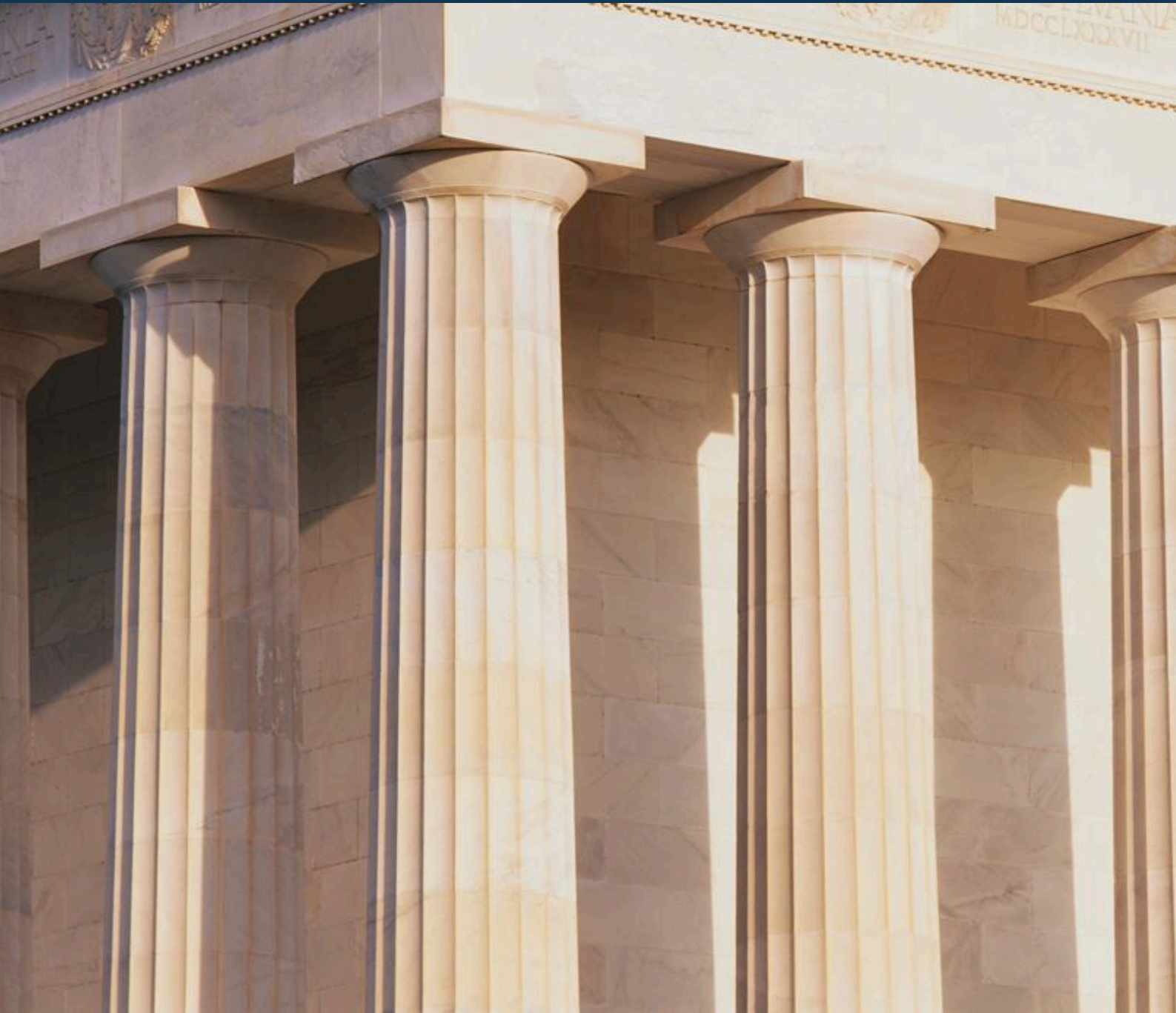


Halderstone



Training module

System Framing

Analyse organisational context, stakeholders & system boundaries to support effective management systems



Struggling to keep management system context and scope relevant and actionable?

Overview

Many organisations document context, interested parties, and system scope once for certification and rarely revisit them. As a result, governance discussions lose focus, risks are assessed on outdated assumptions, and audits concentrate on formal completeness rather than substance.

This module addresses that gap by showing how context, expectations of interested parties, and system boundaries can be understood, reviewed, and maintained as shared organisational knowledge. Participants leave with a clear way to keep that framing aligned with how the organisation actually operates and to use it consistently in management, assurance, and improvement activities.



Target audience

- Management system implementers and coordinators
- Executives and department heads accountable for management system performance
- Those responsible for processes, policies, assets, risks, and controls related to a management system
- Auditors seeking insights into management-side best practice (not audit technique)
- Management consultants working with management system design, governance, or improvement

Is this module for you?

It is a good fit for you if you...

- are responsible for the scope or overall design of a management system.
- work with organisational context, stakeholders, or external expectations.
- struggle with unclear system boundaries or shifting assumptions over time.
- need a shared understanding of how the organisation actually operates.
- want context and scope to actively support decisions, governance, and risk management.

It may be less suitable for you if you...

- already operate a well-understood, consistently maintained system context.
- have no mandate or interest in shaping scope, boundaries, or expectations.
- need detailed operational controls or implementation procedures.
- are looking for a standard- or clause-specific walkthrough.

Learning outcomes



Key outcomes

- Evaluate and define organisational context, interested parties, and system boundaries for enhanced decision-making
- Develop strategies for maintaining the relevance and accuracy of management system context and scope information over time
- Apply structured approaches to integrate contextual understanding into ongoing management, assurance, and improvement processes

Additional capabilities

- Identify internal and external factors influencing management systems
- Systematically map interested parties and analyse their expectations
- Distinguish between information needed for implementation projects and ongoing maintenance
- Design collaborative approaches for keeping contextual knowledge current
- Use structured templates and AI-assisted tools for efficient monitoring and updates

Agenda

Why system framing matters

How context, expectations of interested parties, and scope anchor governance, risk, objectives, and improvement, and why treating them as static documentation instead of living organisational knowledge weakens the management system

Internal and external context

How to scan the internal and external environment, identify strategic factors, and connect context to risk management, performance management, and decision-making

Interested parties and expectations

How to identify interested parties and systematically map their expectations, obligations, and dependencies

Legal, regulatory, and contractual obligations

How to translate high-level legal and contractual requirements into actionable obligation registers while maintaining traceability without overengineering

Defining system boundaries and scope

How to define system boundaries and scope in a practical way, including typical pitfalls and what auditors commonly expect

Maintaining context and scope over time

How to establish ownership models and collaborative reviews, and integrate updates to context, expectations of interested parties, and scope into regular management routines

Technology as an enabler

How to use digital tools and AI-assisted methods to monitor change and summarise impact, while supporting rather than replacing professional judgement

Case-based workshop

Applying the learned concepts, methods, and approaches in a realistic case setting

Included materials



Learning materials

- Slide deck
- Participant workbook

Templates & tools

- Context analysis matrix
- Stakeholder register
- Example legal and contractual obligation register
- Scope definition checklist
- Review and update log
- AI prompt set for contextual scanning and summarisation

Confirmation

- Confirmation of participation

Preparation guidance



Assumed background

This module assumes general familiarity with management system concepts and organisational governance. No prior standard-specific knowledge is required.

Helpful background includes:

- Basic understanding of management systems and governance structures
- Familiarity with organisational roles, responsibilities, and processes

Preparatory modules

No preparatory modules are required.

Logistics



Available languages

- English
- German

Standard delivery options

- Virtual live teaching
- Blended learning (e-learning + live)

Bespoke delivery options

- On-site delivery at your place
- Content adapted to your organization



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