

Halderstone



Training module

Auditing Customer Requirements & Communication Management

Evaluate whether customer requirements are defined, agreed, controlled and traceable from commitment through delivery in an ISO 9001 QMS



Do requirement reviews exist but delivery still diverges?

Overview

Customer focus in ISO 9001 depends on organisations reliably determining requirements, confirming what is agreed, and controlling changes as delivery progresses. When these controls are weak, gaps emerge between what sales commits, what operations delivers, and what customers experience.

This module develops the capability to audit customer and requirements management using practical evidence trails and failure-pattern recognition. Participants first review how requirement determination, review, and change handling are expected to function in ISO 9001. They then learn how auditors test requirement completeness, review discipline, change control, and feedback signals to judge whether requirement management credibly supports delivery.



Target audience

- Aspiring auditors who want to audit quality management systems against ISO 9001 following best practices
- Practising ISO 9001 auditors who want to strengthen their audit knowledge, judgement, and effectiveness

Is this module for you?

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

- audit how customer and requirement management is practiced in delivery.
- seek to judge traceability from requirements to delivered outcomes.
- want to improve how you audit requirement determination and change handling.
- need to test whether gaps reflect control weaknesses or execution drift.
- expect to strengthen audit conclusions on requirement management effectiveness.

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

- prefer to define, negotiate, or structure customer requirements yourself.
- are looking for methods to manage contracts or customer communications.
- focus primarily on improving delivery performance or customer satisfaction.
- do not intend to audit customer and requirement management processes.

Learning outcomes

Key outcomes

- Assess whether customer requirements are clearly determined and agreed before commitments are made
- Test requirement review practices to judge whether delivery risks are identified and controlled
- Trace requirements from agreement through delivery and acceptance using defensible audit evidence

Additional capabilities

- Evaluate change handling controls across the customer requirement lifecycle
- Use customer feedback and complaints as audit evidence for requirement gaps
- Select meaningful sampling targets when auditing customer and requirement management
- Formulate defensible audit conclusions on requirement management effectiveness

Agenda

Customer and requirements management in ISO 9001

How requirement determination, review, confirmation, and change handling function within ISO 9001 and why failures commonly occur at the sales–delivery interface

Effective auditing of customer and requirements management

How auditors judge whether requirement management provides a reliable baseline for delivery rather than relying on informal assumptions

Requirement determination and completeness

How to evaluate whether customer, statutory, regulatory, and internal requirements are clearly captured and translated into delivery-ready expectations

Requirement review before commitment

How auditors test feasibility checks, capability considerations, and alignment between quotes, orders, specifications, and delivery expectations

Requirement change control across the lifecycle

How to evaluate whether requirement changes are identified, assessed, approved, communicated, and implemented before they affect delivery

Requirement-to-delivery traceability

How to follow evidence trails from agreements to delivery outcomes and identify patterns such as concessions, undocumented changes, or workaround behaviour

Customer feedback and complaints as audit evidence

How auditors interpret feedback, complaints, and escalation signals as indicators of requirement management weaknesses

Case-based audit simulation

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

Included materials

Learning materials

- Slide deck
- Participant workbook

Templates & tools

- Audit interview planning tool
- Documented information checklist
- Sampling tool
- Audit analysis worksheets
- Failure pattern library
- Supporting AI prompt set

Confirmation

- Confirmation of participation

Preparation guidance

Assumed background

This module assumes participants can perform basic audit activities and apply evidence-based judgement.

Helpful background includes:

- General understanding of ISO 9001 terminology and management system structures
- Ability to follow audit trails across sales, delivery, and customer support activities
- Basic familiarity with how organisations document customer commitments and delivery records

Preparatory modules

Foundation (depending on background)

Useful if you are new to the underlying concepts

- Audit Principles

Supporting (optional)

Helpful but not required to participate effectively

- Auditing Operational Control

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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