

Halderstone



Training module

Customer Requirements & Communication

Determine, review, agree & control customer requirements and related customer communications in line with ISO 9001



Are customer requirements constantly misinterpreted or changed without agreement?

Overview

In quality management systems aligned with ISO 9001, customer focus becomes operational when organisations can reliably determine what is needed, confirm what has been agreed, and keep that agreement controlled as circumstances change. Without this, teams compensate with informal workarounds: assumptions creep in, commitments diverge across sales and delivery, and disputes appear late, making later correction expensive.

This module shows how to implement customer and requirements management as a practical interface between customer interaction and operational execution. It focuses on how requirements are captured, reviewed, confirmed, communicated, changed, and handed over. It explicitly does not teach service provision control, production control, or design & development execution; it establishes the requirement baseline and governance that those modules rely on.



Target audience

- People involved in designing, building, operating, or improving a QMS aligned with ISO 9001
- Executives and department heads accountable for the effectiveness and performance of a QMS
- Those responsible for processes, policies, IT systems, risks, and controls related to quality management
- Auditors of ISO 9001 who want to deepen their understanding of management-side best practices (not audit technique)

Is this module for you?

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

- implement, operate, or coordinate a quality management system under ISO 9001.
- work at the interface between customer interaction and operational delivery.
- struggle with unclear, informal, or changing customer requirements.
- need a controlled way to agree, record, communicate, and change requirements.
- want fewer handover issues, disputes, and late corrections.

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

- already operate a clear, consistently applied requirements management process.
- are not involved in customer requirements, order review, or change handling.
- need detailed service provision, production control, or design methods.
- are looking for sales techniques or customer relationship training.

Learning outcomes



Key outcomes

- Structure and document customer requirements so they are clear and agreed
- Conduct and evidence requirement and contract reviews that turn intent into commitments
- Confirm commitments with customers and internal teams to create a shared reference point

Additional capabilities

- Distinguish requirements management from sales, design, and change control activities
- Control requirement changes and communicate them across functions
- Set up handover expectations for order intake and contract review

Agenda

Scope and boundaries of customer and requirements management

How customer and requirements management is positioned within the management system, what belongs in this module versus delivery control and design and development, and where typical failures occur at the sales–delivery boundary

Determining requirements for products and services

How to identify and consolidate stated, implied, statutory, regulatory, and internal requirements, and translate them into usable requirements with clear acceptance criteria, constraints, and assumptions

Customer communication as a controlled interface

How to structure customer communication channels with clear responsibilities and traceability expectations, and manage commitments by distinguishing what must be formally confirmed from what can remain informal

Reviewing requirements before commitment

How to perform practical requirement reviews before acceptance, including capability, capacity, constraints, and exceptions, and handle mismatches between quotes, orders, contracts, and delivery reality

Confirming and recording agreed requirements

How to confirm agreed requirements, decide what must be documented and where it belongs, and define what “delivery-ready requirements” look like for effective handover into operations

Controlling changes to requirements

How to manage requirement changes through defined triggers, impact checks, approvals, and customer reconfirmation, and prevent uncontrolled scope creep and silent requirement drift

Customer feedback and complaints as requirement signals

How to use customer feedback and complaints to identify requirement gaps rather than delivery-only issues, and route signals through appropriate escalation paths

Technology as an enabler

How to use digital workflows to track requirement reviews, decisions, and changes, and apply AI-assisted extraction or summarisation of requirement texts and change deltas

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

- Requirement intake checklist
- Example of a customer commitment record
- Requirement change request and impact check form template
- Customer communication log template
- Feedback/complaint triage sheet
- AI prompt set for requirement management

Confirmation

- Confirmation of participation

Preparation guidance

Assumed background

Participants should be comfortable discussing elements of operational control at a practical level. Participants should be comfortable describing processes, responsibilities, and documented information at a practical level.

Helpful background includes:

- Basic understanding of process ownership and operational handovers
- Familiarity with documented information concepts (what to document, where, and why)
- Experience with customer-facing commitments (sales, bids, contracts, SLAs, statements of work)

Preparatory modules

Foundation (depending on background)

Useful if you are new to the underlying concepts

- 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



Halderstone

Halderstone by Langer & Co

Zürcherstrasse 2

CH-8852 Altendorf

Switzerland

info@halderstone.com

www.halderstone.com