

Halderstone



Training module

Service Provision Control

Control service delivery under defined conditions, including acceptance and release, customer property, and operational changes



**Is your service delivery
reliant on informal
execution, leaving gaps in
control and traceability?**

Overview

As service complexity grows, informal working practices lead to inconsistent quality, unmanaged customer property and untraceable changes.

This training module explains how to design delivery conditions and controls that translate customer and regulatory requirements into daily operations. Participants learn to handle customer property responsibly, set acceptance and release points for services, control changes systematically and deal with nonconforming outputs. The emphasis is on practical control of service provision rather than re-teaching design or contract management.



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...

- operate ISO 9001 in a service-based organisation.
- rely on people, handovers, and real-time execution to deliver quality.
- struggle with inconsistent service delivery across teams, sites, or partners.
- need clear acceptance, release, and completion evidence for services.
- want service control that works in practice without over-documenting.

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

- focus primarily on product manufacturing or production control.
- are looking to design or redesign services end-to-end (service design & development).
- already run stable, consistently controlled service operations with clear acceptance and change controls.
- want generic service management or ITSM frameworks rather than ISO 9001 execution control.

Learning outcomes



Key outcomes

- Interpret ISO 9001 expectations for controlled service provision and distinguish them from design activities
- Translate service requirements into delivery controls that specify how, when and by whom tasks are performed
- Handle customer property with defined responsibilities and evidence

Additional capabilities

- Establish acceptance and release points with appropriate evidence
- Apply change control to services without disrupting delivery continuity
- Implement nonconforming output procedures that allow recovery and learning

Agenda

ISO 9001 view of controlled service provision

How ISO 9001 defines control in service delivery through conditions, criteria, competence, resources, and evidence, and why service failures typically arise from weak handovers, tacit work, and last-minute changes

Translating service requirements into operational controls

How to translate service promises and agreed requirements into practical delivery conditions, including tools, environments, roles, and instructions, while defining control points that support reliability without turning service work into bureaucracy

Customer property in service delivery

How to identify and manage customer property in service contexts, including equipment, data, credentials, intellectual property, premises access, and materials, and apply practical controls for protection, traceability, incident handling, and communication

Acceptance, release, and service completion evidence

How to define acceptance criteria, sign-off patterns, and a clear definition of done for services, and determine what service completion evidence to retain, where it lives, and who owns it

Nonconforming service outputs

How to handle nonconforming service outputs through containment, correction, concessions, and customer communication, and document outcomes in a way that cleanly interfaces with corrective action without duplicating improvement systems

Control of changes during service delivery

How to recognise operational change triggers such as scope shifts, resource substitutions, or tooling changes, and apply change approval and impact awareness to maintain service integrity during delivery

Externally provided services within delivery

How to control delivery activities that rely on subcontractors, platforms, or shared service chains by defining clear requirements, verification expectations, and handover evidence at service interfaces

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

- Service provision control pack
- Acceptance & release checklist
- Operational change record template
- Nonconforming service output record template
- Checklist for integration of externally provided services

Confirmation

- Confirmation of participation

Preparation guidance



Assumed background

This module assumes general familiarity with management system implementation and basic process thinking. It does not assume prior ISO clause knowledge.

Helpful background includes:

- Understanding of process ownership, handovers, and basic service delivery workflows
- Familiarity with documented information concepts (where operational records live and why they matter)
- Basic understanding of improvement concepts (nonconformance vs. corrective action)

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



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