

# Small team QMS readiness plan

Use this learning and self-review worksheet to examine one process, its owner, and the evidence behind it. It is not an audit, certification assessment, or guarantee of compliance.

## 01 Set your direction

Process or workflow to review

Review window

Reference, procedure, or public learning source and date checked

## 02 Describe the process and one evidence gap

Pick a manageable scope. Use document titles or sanitized references, never client records or confidential details.

Expected result and how the work happens

Available evidence and what is missing

## 03 Check before you act

- ☐ The process has a named owner and a clear expected result.
- ☐ The team can find the current instructions or agreed method.
- ☐ I can identify a record or measure that shows what happened.
- ☐ I separated observed facts from items that still need checking.

One priority gap and a small change to test

Start small: choose one recurring process, walk through one example, and note where work or records become inconsistent.

# Your next three actions

Write a specific step, give it an owner and due date, and decide what evidence will show it is done. Keep sources and references short and public-safe.

## 1 Map the process, owner, and expected result

**Owner****Due date****Completion evidence or source reference**

## 2 Close one instruction, evidence, or consistency gap

**Owner****Due date****Completion evidence or source reference**

## 3 Test the change and compare the result

**Owner****Due date****Completion evidence or source reference**

## 04 Review and decide

**Review date****What evidence shows the change helped or needs revision?**☐ Done☐ Adjust the plan☐ Verify or follow up**My next improvement or question for a service conversation**

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Blank planning worksheet. Fill locally; do not enter confidential information. Download before editing; PDF viewer support varies.