Org Framework – Operational Forms & Templates

# 1. Client Intake Form

Purpose: Capture client requests with scope, contact, and context

Compliance: ISO 9001 – Clause 8.2

Fields:

* • Client Organization Name
* • Client Contact Person
* • Email / Phone
* • Request Title
* • Description of Request / Problem Statement
* • Desired Outcome / Goal
* • Preferred Timeline / Urgency
* • File Upload (RFP / SOW / Supporting Docs)
* • Confidentiality Agreement Attached? [Yes/No]
* • Notes or Special Instructions

# 2. Offer Matching & Assignment Form

Purpose: Route request to the appropriate module and offer

Compliance: ISO 9001 – Clause 8.3

Fields:

* • Intake Form ID
* • Assigned Org Module: [Service/Product/Research/Modernization]
* • Assigned Offer ID / Name
* • Admin Comments on Offer Selection
* • Assigned Team Lead
* • Offer Start Date
* • Priority Level: [High/Medium/Low]
* • Upload Offer SOP / Flow
* • Attach Offer Mapping Sheet (if available)
* • Comments

# 3. Process Execution Tracker

Purpose: Operational form for execution tracking

Compliance: ISO 9001 – Clause 8.5.1

Fields:

* • Offer ID
* • Procedure Name
* • Step ID
* • Step Description
* • Responsible Person
* • Resources Used
* • Start Date
* • Completion Date
* • Notes / Observations
* • File Upload (code, diagrams, logs, output)

# 4. Result Validation & UAT Form

Purpose: Capture QA and user acceptance data

Compliance: ISO 9001 – Clause 8.6 & 9.1

Fields:

* • Offer/Procedure ID
* • Step ID
* • Raw Result Summary
* • Validation Performed By
* • Validation Outcome: [Pass/Fail/Needs Rework]
* • Comments from Validator
* • UAT Test Run Date
* • Client Tester
* • UAT Result: [Accepted / Needs Change]
* • Attach Logs, Screenshots, UAT Sheet

# 5. Operations Deployment Form

Purpose: Final handover and monitoring kickoff

Compliance: ISO 9001 – Clause 10.2

Fields:

* • Offer/Project ID
* • Deployment Date
* • Environment Details
* • Deployed By
* • Monitoring Setup Confirmed? [Y/N]
* • Maintenance Plan Attached? [Y/N]
* • Contact for Support
* • Link to UAT Report
* • Link to Final Artifacts
* • Notes / Incidents (if any)

# 6. Benefit Realization Form

Purpose: Quantify outcomes and value realized

Compliance: ISO 9001 – Clause 9.1.3

Fields:

* • Offer ID
* • Client Name
* • Deliverable Summary
* • Benefit Type: [Cost Saving / Time Saving / Quality / Compliance]
* • Quantified Value (if any)
* • Client Feedback / ROI Notes
* • Reference KPI (if available)
* • Internal Reviewer Comments
* • Attach Client Testimonial / Metrics Sheet
* • Value Realized (Tangible / Intangible)

# 7. ISO 9001 Traceability Form

Purpose: Ensure each clause is covered per delivery

Compliance: Global Traceability + Audit

Fields:

* • Offer ID / Project Name
* • Clause 8.2 – Client Requirements Documented? [Y/N]
* • Clause 8.3 – Design Review Complete? [Y/N]
* • Clause 8.5.1 – Process Steps Defined? [Y/N]
* • Clause 8.6 – Product Validated Internally? [Y/N]
* • Clause 9.1 – Monitoring Results Logged? [Y/N]
* • Clause 10.2 – Corrective Action Recorded? [Y/N]
* • Linked Logs/Forms/Folders
* • Auditor Name
* • Compliance Notes / Risk Flagged