



**So You Have Bought Qualtrax, Now What?**

# **WHITE PAPER**

by: Juliann Poff and  
Deanna Felton



## Let's Get Started!

The shining faces of sales are now long gone and the reality of what you have just agreed to has set in. You open Qualtrax and it is waiting for you and your team to configure it into the best compliance management system ever!

But never fear...as I always state during my demonstrations of Qualtrax, we are here to be your partners in compliance! Your assigned services team member will walk you through your installation and implementation process to get you off on the right foot with Qualtrax.

But, like in any project, it takes both parties and a plan to be successful. I had a consultant tell me one time that "we could build your quality system for you, but in the end, it is your system and your processes and your organization." It is a partnership between your organization and Qualtrax to ensure that your implementation of Qualtrax is successful. We want you to be able to enjoy the success in the future for the work that is needed today for your implementation.

With careful planning and preparation, you can be amongst the greatest organizations that utilize Qualtrax to manage their documents, processes and training for their quality and regulatory compliance. You will be able to realize the time and money saved to be able to work on proactive items for your organization rather than just pushing paper.

As you will see in the group of esteemed references who helped contribute to this paper, managing Qualtrax is not their full-time job. They are also running laboratories, being criminalists, operations directors, process improvement analysts, etc. They have other job responsibilities to perform and managing their organizations' quality efforts are a piece of that. We want to be able to make you and your organization as efficient as possible so that you can concentrate on the important responsibilities that your organization is responsible for.

The Top 10 success factors for any successful software implementation as compiled from Standish Group's Chaos Report 2014 Project Smart are listed here.

## What Others Recommend

We interviewed a cross section of our customer base to incorporate their voice in providing you the best guideline to getting your Qualtrax system up and running quickly. Their feedback aligns with the top 10 success points.



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Top 10 Success Factors	Checklist for Qualtrax Implementation Success
User Involvement	<ul style="list-style-type: none"> <li>✓ Clearly communicate the company's support of the project, clear expectations of usage and a "go live" date.</li> <li>✓ Primary users of Qualtrax (editors\approvers) should be given a formal (&gt;1 hour) in person training before they are expected to use Qualtrax.</li> <li>✓ Set a dedicated group of people to manage Qualtrax. Either have one person responsible for everything (if that's possible), or divide it up based on items. Identify and involve these people from day one of the implementation of their part. Have one person responsible for all procedures, one for training, one for workflows, etc.</li> </ul>
Executive Management Support	<ul style="list-style-type: none"> <li>✓ Senior management should show support for the application to ensure usage is seen as an expectation and to give users ownership.</li> <li>✓ Have your upper management attend the opening of your training. This will help to ensure buy-in at all levels.</li> </ul>
Clear Statement of Requirements	<ul style="list-style-type: none"> <li>✓ Prepare the functional requirements of what you are trying to accomplish with an electronic compliance management software. For example, "The system should manage document revisions including printing the revision number in the footer." "The system should provide an approval hierarchy and maintain a history of approvals."</li> <li>✓ Read and understand the document control requirements of the compliance being pursued. Then understand and implement the features of Qualtrax that will help you achieve the compliance requirements.</li> <li>✓ Determine based on your priorities and requirements which elements of the product meet your needs. Then choose to focus on implementing one component of the product at a time.</li> <li>✓ Set a cut-off date to prevent running parallel systems. As a result, you will have several cut-off dates as things get transitioned over, but have that all detailed in your plan.</li> </ul>
Proper Planning	<ul style="list-style-type: none"> <li>✓ Reach out to other organizations or make sure you attend the User Conference to learn what worked and what didn't work from our customers. Learn what their plan for roll out was and use that to help build your plan.</li> <li>✓ As part of your initial planning identify risks that you may encounter and consider the mitigating actions. One example of a risk that you need to prepare for is that your staff may not adopt new software for storing their documents. You can help to combat any staff resistance by ensuring your executive management supports this implementation and sets expectations during training.</li> <li>✓ By having a plan, you can prevent "paralyzed perfectionism". Everyone wants their implementation to be perfect. They start evaluating all they want to do yet do not prioritize their goals. Then for fear of doing something incorrectly or they are overwhelmed with the task at hand, they end up doing nothing.</li> <li>✓ Have your documents (SOP's, WI's, etc.) as up to date as possible. However, don't stress that all of your documents have to be perfect before bringing them in to Qualtrax. Qualtrax does have tools to help set-up headers and footers in documents, but making sure your processes are up-to-date, will help make this transition easier.</li> <li>✓ Create document templates with header/footer information for all types of documents (e.g., page x of x, Document ID#, revision date, etc.). Have the templates with macros defined and ready before the onsite training.</li> <li>✓ Build a test system to review product upgrades, for internal training, and to be used to test out scenarios outside of the production system. Your team can feel comfortable working in the test system knowing that they are not going to "break" anything.</li> <li>✓ Ensure the client tools are set up and ready for use by end users prior to the on-site training.</li> </ul>

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	<ul style="list-style-type: none"> <li>✓ Make sure someone from IT is available for the product kick-off call, installation (for on-premise only) and during the on-site training.</li> <li>✓ Define roles in your organization including which persons will be responsible for editing, approving, reviewing your documentation and responsible for steps within your workflows. Mapping out these roles with your trainer will be helpful in being successful.</li> </ul>
Realistic Expectations	<ul style="list-style-type: none"> <li>✓ Take one step at a time to your successful implementation.</li> <li>✓ Drop assumptions of how you think the software will work and instead learn what it can do for you...and then use those features to meet your needs.</li> <li>✓ Strive to have consistency and simplicity. Yes, you now have an automated system to remind employees when activities need to be completed, but it still does not make them do it. Keeping things simple and consistent will help tremendously.</li> </ul>
Smaller Project Milestones	<ul style="list-style-type: none"> <li>✓ Start simple and go from there. It is kind of like building a house, start with a foundation and build up.</li> <li>✓ Decide your most basic uses for Qualtrax and place your focus there until you have that working the way you want, then move on to the next item you want to focus on and start there. Remember to prioritize.</li> <li>✓ Train your organization in similar groups. This way you can focus on items that they would use more as it may vary from section to section or department to department.</li> </ul>
Competent Staff	<ul style="list-style-type: none"> <li>✓ Use all the tools that are provided for you to build a competent staff. The Help Guide within Qualtrax and the Support portal are great resources during your implementation process. Review existing workflow templates, look up a knowledge base article, share information on feature requests, and create a network of other Qualtrax users to share best practices.</li> <li>✓ Have 3-5 persons available for your two days of on-site training. Make sure they can be there the entire time during those two days of training. Include the Quality Manager, person who is going to be responsible for importing documents, the person helping to get the system set up, and identify someone who is familiar with your processes to help build workflows.</li> </ul>
Ownership	<ul style="list-style-type: none"> <li>✓ Define a team that owns the implementation.</li> <li>✓ It is beneficial to figure out all the Administration system options and what they do.</li> <li>✓ To build ownership, start with your linear processes with which everyone is familiar and could easily be mirrored in Qualtrax. As you became more familiar with the capabilities of Qualtrax workflows, ask your Managers and Supervisors to suggest workflow ideas.</li> </ul>
Clear Vision & Objectives	<ul style="list-style-type: none"> <li>✓ Define your goals and expectations for your "go live" date with your Qualtrax Trainer.</li> <li>✓ Set project milestones in phases for implementation and get started immediately following training. Even though your project timeline may change, have something as a guideline to start</li> <li>✓ Look at your upcoming audit schedule; decide if your team wants to implement before or after the audit.</li> <li>✓ Define your organizations Qualtrax upgrade schedule and plan.</li> <li>✓ Sign in to your system as soon as you get it installed! The most successful implementations have been the ones who have opened up Qualtrax and reviewed prior to Qualtrax showing up for their on-site training.</li> </ul>
Hard-Working, Focused Staff	<ul style="list-style-type: none"> <li>✓ When you have determined which portions of the system you want to implement first, identify which persons on your team can help the best and give them responsibility over those areas.</li> <li>✓ Have multiple people trained within Qualtrax as a succession plan should that person decide to leave your organization.</li> </ul>

By following these steps, we will be able to work together for a successful implementation of Qualtrax. We look forward to working with you and your team and making compliance management within your organization the best it can be!

# THANK YOU

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The Standish Group Report, Chaos, <http://www.projectsart.co.uk/docs/chaos-report.pdf>, Project Smart, 2014

## About the Authors

Juliann Poff has been with Qualtrax since 2004. In addition to her duties as Senior Global Sales Executive, she also serves as a member of the Internal Audit Team for their parent company CCS-Inc., sister subsidiary FoxGuard Solutions, Inc. and Qualtrax, Inc. auditing to their ISO 9001:2008 accreditation. Juliann has served as the Quality Improvement Team Administrator when rolling out the Crosby quality methodology to the organization and she has participated in and led several quality improvement teams. Previous to Qualtrax, Juliann served as the Site Coordinator and Document Control Administrator for a Fortune 500 Manufacturing company helping to manage their ISO 9001 and ISO 14001 accreditation. Juliann is an active member of her community serving in leadership roles in several community service organizations and recently graduated with her MBA. Juliann enjoys learning about the compliance industry and matching up prospects with Qualtrax to help continually improve those organizations. Quality Management Solutions.

Deanna Felton serves as Customer Relationship Manager at Qualtrax, serving in various positions within CCS-Inc. and Qualtrax since 1998. Deanna is a former high school teacher and trainer of the Qualtrax system. She holds a BS in Marketing from Radford University and a MS in Marketing Education from Virginia Tech. She assumed the role of Customer Service Manager in 2011.

## About Qualtrax

Qualtrax, Inc., a wholly owned subsidiary of CCS-Inc., provides compliance software that enables electronic document and process management. Qualtrax focuses on heavily regulated industries where compliance with standards such as ISO 17025, ASCLD/LAB, SQF, BRC, FDA 21 CFR Part 11, and others presents challenges to organizations. Qualtrax greatly simplifies document management, workflow tracking, and business and manufacturing process control. Qualtrax provides the tools needed to manage internal and external audits and ultimately enables organization to effectively manage regulatory challenges.



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