SKEDMIA

ISO 44001:2017

Collaborative business relationship management systems — Requirements and framework

GUIDE

Document Master List

Controlled list of every document supplied in the ISO 44001:2017 kit, with its revision status and owner.

Document control

Document number	GDE-02	**Revision**	0
Document title	Document Master List	**Issue date**	[Date]
Document owner	Management Representative	**Next review**	[Date]
Management system	Collaborative Business Relationship Management System	**Classification**	Internal
Standard clauses	7.5	**Status**	For approval

	Name	Position	Signature / Date
Prepared by	[Name]	[Position]	
Reviewed by	[Name]	[Position]	
Approved by	[Name]	[Position]	

Rev.	Date	Description of change	Author
0	[Date]	First issue.	[Name]

Before you issue this document

Replace every highlighted placeholder such as [Organisation Name] with your own details, delete any clause that does not apply to your scope, and have the document approved by the roles named above. Record the approval in the revision history — an auditor will ask who approved it and when.

This master list records every document in the ISO 44001:2017 Complete Documentation Kit. It is the register required by the standard's documented-information clause: when [Organisation Name] adopts the kit, update the revision and issue-date columns as each document is approved, and add any document created locally.

How to use this list

Keep one controlled copy. Every time a document is revised, raise its revision number here and on the document's own cover page. An auditor will normally ask for this list first and sample from it.

Doc. No	Document title	Clause(s)	Owner
00 Read Me First			
GDE-01	Kit Guide and Implementation Roadmap	4.1, 5.1, 6, 8, 9, 10.2	Senior Executive Responsible
01 Manual			
MAN-01	Collaborative Business Relationship Management System Manual	4.1, 4.2, 4.3, 4.4, 5.1, 5.2, 5.3.1, 6.1, 6.2, 7.1, 7.2, 7.3, 7.4, 7.5, 8.1, 9.1.1, 9.2, 9.3, 10.1, 10.2	Senior Executive Responsible
MAN-02	Scope and Boundaries of the Collaborative Business Relationship Management System	4.3, 4.4	Senior Executive Responsible
MAN-03	Value Creation and Value Analysis Framework	4.5, 8.2.5, 8.7.2, 8.7.3	Top Management
MAN-04	Organizational Governance Structure and Terms of Reference	5.3.2, 5.1	Top Management
MAN-05	Joint Governance Charter and Joint Management Team Terms of Reference	8.6.2, 8.8.3	Senior Executive Responsible
02 Policies			
POL-01	Collaborative Business Relationship Management System Policy	5.2	Top Management
03 Procedures			
PRO-01	Context of the Organisation and Stakeholders	4.1, 4.2	Senior Executive Responsible
PRO-02	Risks and Opportunities	6.1	Senior Executive Responsible
PRO-03	Objectives and Planning to Achieve Them	6.2	Senior Executive Responsible
PRO-04	Competence, Training and Awareness	7.2, 7.3	Competence and Learning Manager
PRO-05	Competence and Collaborative Behaviour Framework	7.2, 8.2.7, 8.3.3, 8.6.7	Competence and Learning Manager
PRO-06	Communication	7.4	Senior Executive Responsible

Doc. No	Document title	Clause(s)	Owner
PRO-07	Control of Documented Information	7.5	Senior Executive Responsible
PRO-08	Operational Planning and Control	8.1	Collaboration Manager
PRO-09	Stages 1 and 2 — Operational Awareness and Knowledge Procedure	8.2, 8.3	Collaboration Manager
PRO-10	Stages 3 and 4 — Internal Assessment and Partner Selection Procedure	8.4, 8.5	Head of Procurement
PRO-11	Stages 5 and 6 — Working Together and Value Creation Procedure	8.6, 8.7	Collaboration Manager
PRO-12	Stages 7 and 8 — Staying Together and Exit Strategy Activation Procedure	8.8, 8.9	Collaboration Manager
PRO-13	Knowledge and Intellectual Property Management Procedure	8.3.4, 8.6.3	Collaboration Manager
PRO-14	Monitoring, Measurement, Analysis and Evaluation	9.1.1	Senior Executive Responsible
PRO-15	Internal Audit	9.2	Lead Internal Auditor
PRO-16	Management Review	9.3	Top Management
PRO-17	Nonconformity, Corrective Action and Continual Improvement	10.1, 10.2	Senior Executive Responsible
PRO-18	Joint Issue Resolution Procedure and Issue Log	8.6.8, 8.8.8	Collaboration Manager
04 Forms, Registers & Templates			
FRM-01	Context and Issues Analysis	4.1	Senior Executive Responsible
FRM-02	Roles, Responsibilities and Authorities Matrix	5.3.1, 5.1	Top Management
FRM-03	Senior Executive Responsible Appointment, Terms of Reference and Oversight Record	5.3.3, 8.2.2, 8.4.5, 8.8.2	Top Management
FRM-04	Competence Matrix and Training Record	7.2	Competence and Learning Manager
FRM-05	Behaviour and Trust Indicator Survey and Results Log	8.8.4	Collaboration Manager
FRM-06	Communication Log and Suggestion Form	7.4	Senior Executive Responsible
FRM-07	Management of Change Request	8.1, 6.1	Collaboration Manager
FRM-08	Initial and Supply Chain Risk Assessment Form	8.2.8, 8.3.5, 8.3.6	Head of Procurement
FRM-09	Collaboration Strategy and Business Case	8.3.2, 8.3.7	Senior Executive Responsible

Doc. No	Document title	Clause(s)	Owner
FRM-10	Collaborative Capability, SWOT and Maturity Assessment	8.4.2, 8.4.3, 8.4.4	Senior Executive Responsible
FRM-11	Partner Selection Criteria and Evaluation Scoring Matrix	8.4.6, 8.5.2, 8.5.3, 8.5.8	Head of Procurement
FRM-12	Internal Audit Plan and Report	9.2	Lead Internal Auditor
FRM-13	Management Review Minutes and Actions	9.3	Top Management
FRM-14	Exit Evaluation Report	9.1.2, 8.9.4	Senior Executive Responsible
FRM-15	Document Change Request	7.5	Senior Executive Responsible
04 Forms, Registers & Templates			
REG-01	Stakeholders and Requirements Register	4.2	Senior Executive Responsible
REG-02	Risk and Opportunity Register	6.1	Senior Executive Responsible
REG-03	Collaborative Relationship Identification, Prioritisation and Portfolio Register	6.3.1, 6.3.2, 8.2.6	Senior Executive Responsible
REG-04	Joint Risk Register	8.6.4, 8.3.6	Collaboration Manager
REG-05	Objectives and Action Plan Tracker	6.2	Senior Executive Responsible
REG-06	Joint Objectives and Performance Measurement Framework	8.5.6, 8.6.6, 8.8.6, 8.8.7	Collaboration Manager
REG-07	Record of Collaborative Competencies	7.5.4, 7.2	Competence and Learning Manager
REG-08	Nonconformity and Corrective Action Register	10.1	Senior Executive Responsible
REG-09	Lessons Learned Register	8.7.4, 8.9.4, 8.9.5	Collaboration Manager
05 Plans & Programmes			
PLN-01	Corporate Relationship Management Plan	7.5.5, 4.4	Senior Executive Responsible
PLN-02	Relationship Management Plan Template	8.2.9, 8.4.7, 8.5.9, 8.6.11, 8.7.5, 8.8.10, 8.9.6	Collaboration Manager
PLN-03	CBRMS Implementation Plan	4.1, 6, 8, 9	Senior Executive Responsible
PLN-04	Joint Exit Strategy and Disengagement Plan	8.5.7, 8.6.9, 8.8.9, 8.9.2, 8.9.3	Senior Executive Responsible

Doc. No	Document title	Clause(s)	Owner
PLN-05	Annual Internal Audit Programme	9.2	Lead Internal Auditor
PLN-06	Competence and Training Plan	7.2, 7.3	Competence and Learning Manager
PLN-07	Communication Plan	7.4	Senior Executive Responsible
06 Checklists			
CHK-01	ISO 44001:2017 Gap Analysis Checklist	—	Senior Executive Responsible
CHK-02	Internal Audit Checklist	9.2	Lead Internal Auditor
CHK-03	Certification Readiness Checklist	—	Senior Executive Responsible
07 Internal Auditor Training Pack			
TRN-01	Internal Auditor Participant Handbook	9.2	Senior Executive Responsible
TRN-02	Trainer's Guide	9.2	Senior Executive Responsible
TRN-03	Presentation Slides Outline	9.2	Senior Executive Responsible
TRN-04	Exercises and Case Studies	9.2	Senior Executive Responsible
TRN-05	Examination	9.2	Senior Executive Responsible
TRN-06	Examination Answer Key and Marking Scheme	9.2	Senior Executive Responsible
TRN-07	Course Forms	9.2	Senior Executive Responsible
TRN-08	Certificate of Training Template	9.2	Senior Executive Responsible

Revision status

Record the approved revision of each document as it is issued. Rows are pre-filled at revision 0 (first issue).

Doc. No	Rev.	Issue date	Approved by	Next review
GDE-01	0	[Date]	[Name]	[Date]
MAN-01	0	[Date]	[Name]	[Date]
MAN-02	0	[Date]	[Name]	[Date]
MAN-03	0	[Date]	[Name]	[Date]

Doc. No	Rev.	Issue date	Approved by	Next review
POL-01	0	[Date]	[Name]	[Date]
MAN-04	0	[Date]	[Name]	[Date]
PRO-01	0	[Date]	[Name]	[Date]
PRO-02	0	[Date]	[Name]	[Date]
PRO-03	0	[Date]	[Name]	[Date]
PRO-04	0	[Date]	[Name]	[Date]
PRO-05	0	[Date]	[Name]	[Date]
PRO-06	0	[Date]	[Name]	[Date]
PRO-07	0	[Date]	[Name]	[Date]
PLN-01	0	[Date]	[Name]	[Date]
PLN-02	0	[Date]	[Name]	[Date]
PRO-08	0	[Date]	[Name]	[Date]
PRO-09	0	[Date]	[Name]	[Date]
PRO-10	0	[Date]	[Name]	[Date]
PRO-11	0	[Date]	[Name]	[Date]
PRO-12	0	[Date]	[Name]	[Date]
PRO-13	0	[Date]	[Name]	[Date]
MAN-05	0	[Date]	[Name]	[Date]
PRO-14	0	[Date]	[Name]	[Date]
PRO-15	0	[Date]	[Name]	[Date]
PRO-16	0	[Date]	[Name]	[Date]
PRO-17	0	[Date]	[Name]	[Date]
PRO-18	0	[Date]	[Name]	[Date]
FRM-01	0	[Date]	[Name]	[Date]
REG-01	0	[Date]	[Name]	[Date]
FRM-02	0	[Date]	[Name]	[Date]
FRM-03	0	[Date]	[Name]	[Date]
REG-02	0	[Date]	[Name]	[Date]
REG-03	0	[Date]	[Name]	[Date]
REG-04	0	[Date]	[Name]	[Date]
REG-05	0	[Date]	[Name]	[Date]
REG-06	0	[Date]	[Name]	[Date]
FRM-04	0	[Date]	[Name]	[Date]
REG-07	0	[Date]	[Name]	[Date]
FRM-05	0	[Date]	[Name]	[Date]

Doc. No	Rev.	Issue date	Approved by	Next review
FRM-06	0	[Date]	[Name]	[Date]
FRM-07	0	[Date]	[Name]	[Date]
FRM-08	0	[Date]	[Name]	[Date]
FRM-09	0	[Date]	[Name]	[Date]
FRM-10	0	[Date]	[Name]	[Date]
FRM-11	0	[Date]	[Name]	[Date]
FRM-12	0	[Date]	[Name]	[Date]
FRM-13	0	[Date]	[Name]	[Date]
FRM-14	0	[Date]	[Name]	[Date]
REG-08	0	[Date]	[Name]	[Date]
REG-09	0	[Date]	[Name]	[Date]
FRM-15	0	[Date]	[Name]	[Date]
PLN-03	0	[Date]	[Name]	[Date]
PLN-04	0	[Date]	[Name]	[Date]
PLN-05	0	[Date]	[Name]	[Date]
PLN-06	0	[Date]	[Name]	[Date]
PLN-07	0	[Date]	[Name]	[Date]
CHK-01	0	[Date]	[Name]	[Date]
CHK-02	0	[Date]	[Name]	[Date]
CHK-03	0	[Date]	[Name]	[Date]
TRN-01	0	[Date]	[Name]	[Date]
TRN-02	0	[Date]	[Name]	[Date]
TRN-03	0	[Date]	[Name]	[Date]
TRN-04	0	[Date]	[Name]	[Date]
TRN-05	0	[Date]	[Name]	[Date]
TRN-06	0	[Date]	[Name]	[Date]
TRN-07	0	[Date]	[Name]	[Date]
TRN-08	0	[Date]	[Name]	[Date]

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ISO 44001:2017

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Clause Cross-Reference Matrix

Shows which kit document answers each clause of ISO 44001:2017 — the table certification bodies ask for at stage 1.

Document control

Document number	GDE-03	**Revision**	0
Document title	Clause Cross-Reference Matrix	**Issue date**	[Date]
Document owner	Management Representative	**Next review**	[Date]
Management system	Collaborative Business Relationship Management System	**Classification**	Internal
Standard clauses	—	**Status**	For approval

	Name	Position	Signature / Date
Prepared by	[Name]	[Position]	
Reviewed by	[Name]	[Position]	
Approved by	[Name]	[Position]	

Rev.	Date	Description of change	Author
0	[Date]	First issue.	[Name]

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Use this matrix to demonstrate that every requirement of ISO 44001:2017 is addressed by documented information. Complete the final column with the evidence or record that proves the requirement is being met in practice, and take it to the stage 1 audit.

Good practice

Auditors use a matrix like this to plan their sample. A complete, honest matrix shortens stage 1 considerably; an aspirational one invites a deeper audit.

Clause	Kit document(s)	Evidence / records in use
4.1	FRM-01, GDE-01, MAN-01, PLN-03, PRO-01	
4.2	MAN-01, PRO-01, REG-01	
4.3	MAN-01, MAN-02	
4.4	MAN-01, MAN-02, PLN-01	
4.5	MAN-03	
5.1	FRM-02, GDE-01, MAN-01, MAN-04	
5.2	MAN-01, POL-01	
5.3.1	FRM-02, MAN-01	
5.3.2	MAN-04	
5.3.3	FRM-03	
6	GDE-01, PLN-03	
6.1	FRM-07, MAN-01, PRO-02, REG-02	
6.2	MAN-01, PRO-03, REG-05	
6.3.1	REG-03	
6.3.2	REG-03	
7.1	MAN-01	
7.2	FRM-04, MAN-01, PLN-06, PRO-04, PRO-05, REG-07	
7.3	MAN-01, PLN-06, PRO-04	
7.4	FRM-06, MAN-01, PLN-07, PRO-06	
7.5	FRM-15, MAN-01, PRO-07	
7.5.4	REG-07	
7.5.5	PLN-01	
8	GDE-01, PLN-03	
8.1	FRM-07, MAN-01, PRO-08	
8.2	PRO-09	
8.2.2	FRM-03	
8.2.5	MAN-03	

Clause	Kit document(s)	Evidence / records in use
8.2.6	REG-03	
8.2.7	PRO-05	
8.2.8	FRM-08	
8.2.9	PLN-02	
8.3	PRO-09	
8.3.2	FRM-09	
8.3.3	PRO-05	
8.3.4	PRO-13	
8.3.5	FRM-08	
8.3.6	FRM-08, REG-04	
8.3.7	FRM-09	
8.4	PRO-10	
8.4.2	FRM-10	
8.4.3	FRM-10	
8.4.4	FRM-10	
8.4.5	FRM-03	
8.4.6	FRM-11	
8.4.7	PLN-02	
8.5	PRO-10	
8.5.2	FRM-11	
8.5.3	FRM-11	
8.5.6	REG-06	
8.5.7	PLN-04	
8.5.8	FRM-11	
8.5.9	PLN-02	
8.6	PRO-11	
8.6.2	MAN-05	
8.6.3	PRO-13	
8.6.4	REG-04	
8.6.6	REG-06	
8.6.7	PRO-05	
8.6.8	PRO-18	
8.6.9	PLN-04	
8.6.11	PLN-02	
8.7	PRO-11	

Clause	Kit document(s)	Evidence / records in use
8.7.2	MAN-03	
8.7.3	MAN-03	
8.7.4	REG-09	
8.7.5	PLN-02	
8.8	PRO-12	
8.8.2	FRM-03	
8.8.3	MAN-05	
8.8.4	FRM-05	
8.8.6	REG-06	
8.8.7	REG-06	
8.8.8	PRO-18	
8.8.9	PLN-04	
8.8.10	PLN-02	
8.9	PRO-12	
8.9.2	PLN-04	
8.9.3	PLN-04	
8.9.4	FRM-14, REG-09	
8.9.5	REG-09	
8.9.6	PLN-02	
9	GDE-01, PLN-03	
9.1.1	MAN-01, PRO-14	
9.1.2	FRM-14	
9.2	CHK-02, FRM-12, MAN-01, PLN-05, PRO-15, TRN-01, TRN-02, TRN-03, TRN-04, TRN-05, TRN-06, TRN-07, TRN-08	
9.3	FRM-13, MAN-01, PRO-16	
10.1	MAN-01, PRO-17, REG-08	
10.2	GDE-01, MAN-01, PRO-17	

End of document · GDE-03 Clause Cross-Reference Matrix · ISO 44001:2017 Documentation Kit ·