Global quality trends report 2020

350+ quality professionals share their challenges, plans and working styles

Our software reduces compliance burden associated with regulations and standards such as:

ISO GXP QUALITY SYSTEMS FDA 21 CFR Part 11 MHRA Regulating Medicines and Medical Devices

Quality management in 2020

40%
still use paper-based quality systems

67%
are male

25%
were promoted in the past year

31%
have implemented an electronic quality software system in the past 2 years

26%
have been in the industry for 20 years or more

57%
leverage technology to make their lives easier

50%
are members of a professional body

33%
don't have the resources they need

75%
are satisfied with their pay

Contents

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1. A new decade of quality

Kate Armitage

Compliance Director

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The 2020 global quality trends report is our biggest and most representative yet.

This year, 372 quality professionals from 41 countries shared their experiences, opinions, plans and day-to-day challenges in our Global Quality Survey.

And a lot's changed since our first report back in 2015.

This report digests and summarises the insights of our survey respondents as we enter a new decade of quality.

We hope you find it useful.

2. Executive summary

What's happened in the past 12 months?

Quality workers are generally happy with their ability to **maintain** a baseline of quality in their organisations. Unlocking the full potential of their teams to **improve** quality and apply it as a competitive weapon stands out as the main challenge to solve in the new decade.

Lots of things have improved in quality departments over the past year.

Confidence in internal policies, leadership communication and audit preparedness are all at the highest ever. Quality professionals are generally motivated and feel sufficiently valued and supported.

But improving quality with a mature, proactive QMS, rather than simply controlling and assuring quality, remains elusive.
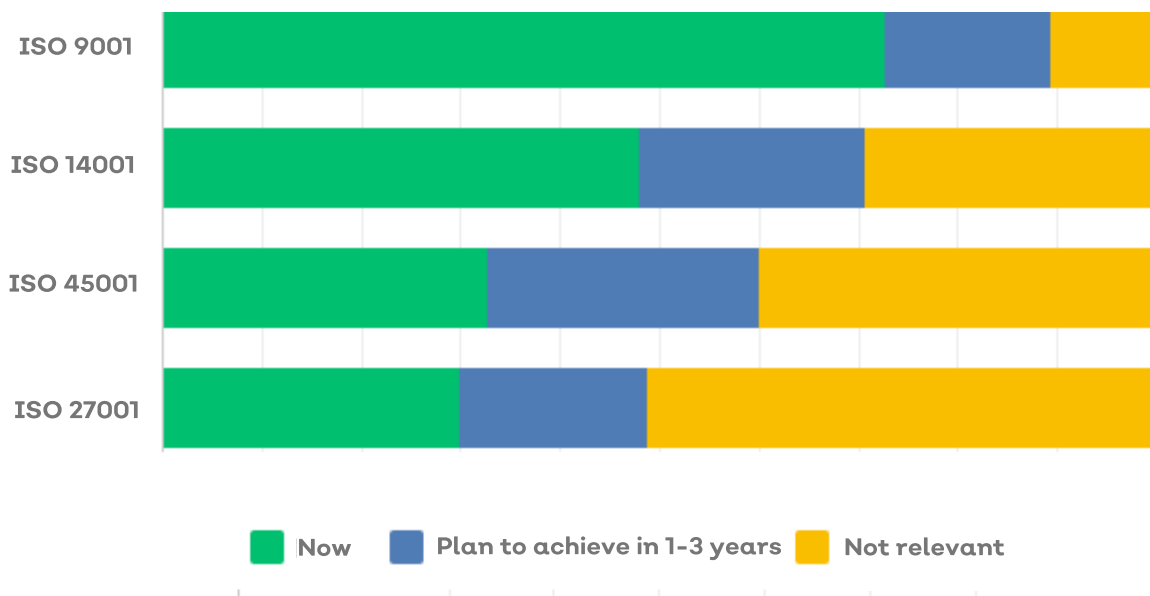
82% of respondents agreed that the importance of quality was effectively communicated from the top down. 66% felt supported with the resources they needed to do their jobs. 64% are effectively managing risks, opportunities and issues.

Yet only 28% agreed that their quality team was being used to its full potential. Only 27% rated their QMS maturity as high. And 40% are still reliant on paper.

Perhaps most significantly, quality professionals are dedicating most of their working days to manual quality control and assurance activities - with only around an hour a day left over for quality improvement.

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3. Priorities, tools and QMS maturity

HSE management systems are the top target

Standard	Now	Plan to achieve in 1-3 years	Not relevant
ISO 9001			
ISO 14001			
ISO 45001			
ISO 27001			

Legend: ■ Now ■ Plan to achieve in 1-3 years ■ Not relevant

In last year's report, ISO 45001 ranked as the top priority for businesses to achieve within the next 3 years. That remains the case in 2020.

But the second-most popular standard target, ISO 27001, has been overtaken by ISO 14001 - suggesting that businesses have shifted towards holistic health, safety and environment management systems as operational goals.

Despite the launch of the GDPR and 19% of respondents still aiming for ISO 27001 accreditation, the significance of information security hasn't been widely recognised. 51% of respondents said ISO 27001 wasn't relevant to their business.

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Increasing support from leadership

Since the launch of Annex SL's Clause 5, quality practitioners have been increasingly happy with the commitment of their business leaders to the quality agenda.

82% now feel that the importance of quality is effectively communicated from the boardroom. 47% are now reporting directly to the CEO, quality director or entire board.

Last year, 45% felt they had the resources they needed to perform their role. This year, 67% agreed.

Kate Armitage

Compliance Director

Qualsys

"I was surprised by the fact that half our respondents didn't think ISO 27001 was relevant to their business.

The security of the information you process is of critical importance to any organisation. If you really don't want to get accredited, it's still definitely worth getting hold of ISO 27002, which provides best practice guidance, explains information security controls in far more detail and is a good stepping stone to GDPR compliance.

The importance of ISO 14001 and 45001 in quality plans is no surprise though. Organisations are increasingly coming under pressure to ensure and demonstrate that they take health, safety and the environment seriously.
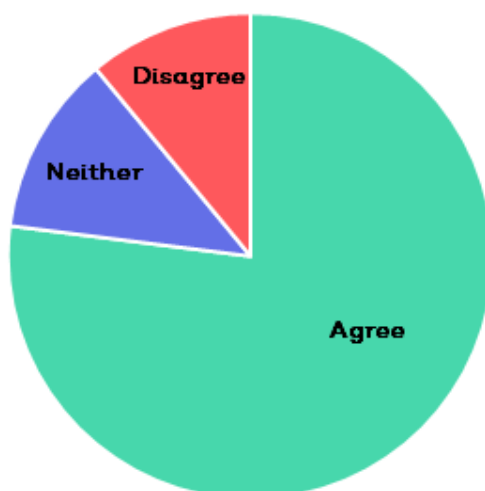
And the strong support shown by business leaders to quality is great news and represents a significant continued shift from our 2017 results!"

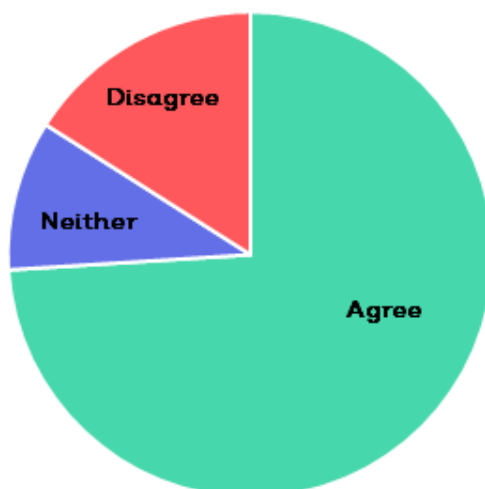Qualsys

High confidence

"I am confident when we are audited that everything is there and ready."
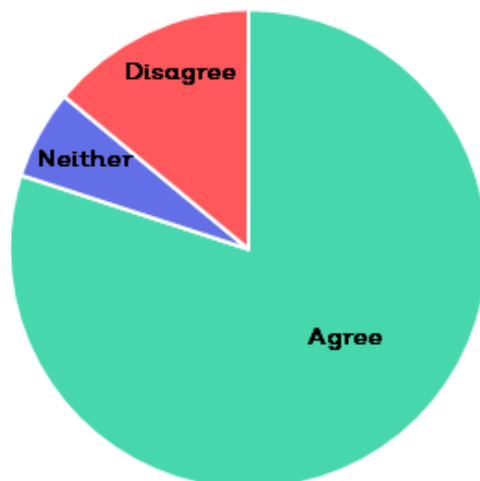
"Our policies are fit for purpose."

"I feel valued and have the training I need to be confident in my role."

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But QMS maturity continues to fall...

Perception of overall QMS maturity has fallen for the fourth year in a row. Only 27% felt they worked for an organisation with a highly mature QMS.

In tandem, the percentage of quality professionals ranking their QMS maturity as low has increased every year, hitting 20% in this year's survey.

40% of respondents still rely on paper-based quality management - with 90% of the average working day spent on manual QA and QC activity.

How would you rate the maturity of your quality management system?
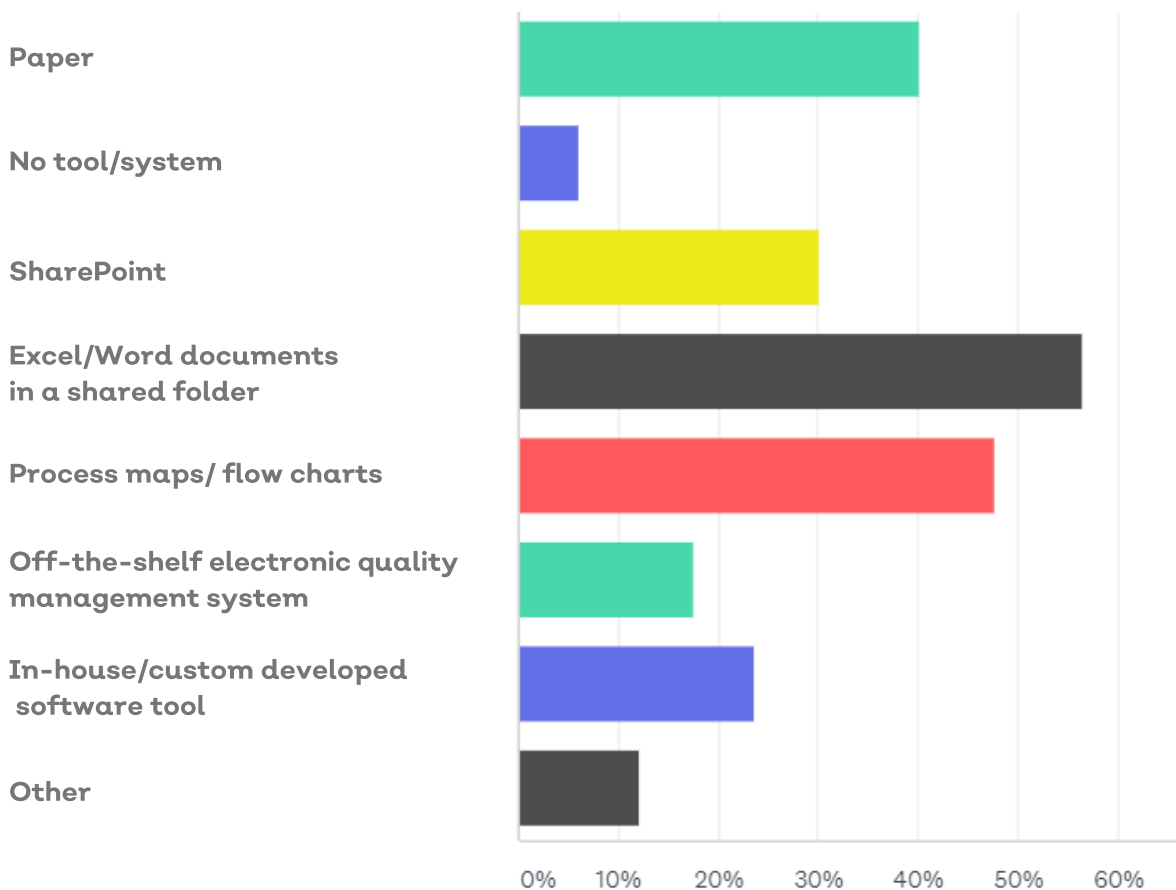

Legend: ■ 2017 ■ 2018 ■ 2019 ■ 2020

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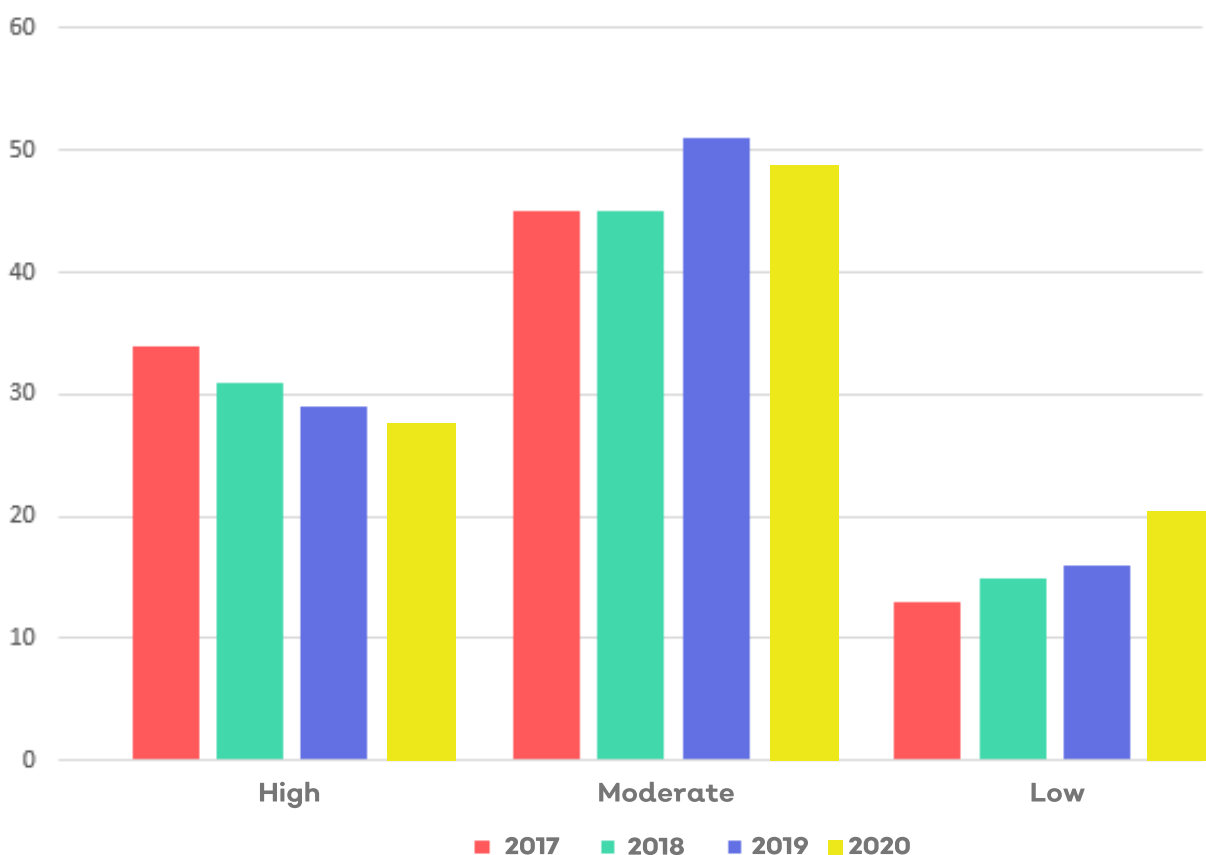
… and quality departments keep getting proportionally smaller

52% of respondents said their organisation had grown in the past 12 months. But only 35% reported growth in the quality department. 13% of quality departments shrank.

As in previous years, quality team growth has failed to keep pace with organisational expansion, increasing QMS scope without a corresponding boost in headcount support.

This trend correlates with the drop in QMS maturity. Access to resources has increased, but apparently not at a sufficient level to unlock the full potential of quality departments.

How is quality being managed?

Paper

No tool/system

SharePoint

Excel/Word documents in a shared folder

Process maps/ flow charts

Off-the-shelf electronic quality management system

In-house/custom developed software tool

Other

0% 10% 20% 30% 40% 50% 60%

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Richard Green

Managing Director

Kingsford Consultancy Services

"One explanation for this year-on-year drop in perceived maturity is a corresponding increase in awareness amongst those owning and operating these systems of what 'good' looks like.

As their understanding of what these systems can deliver increases, they begin to identify deficiencies with their own systems which they had previously failed to see.

In practice it's entirely possible for the overall size of the quality team to be reduced, whilst the impact of the team is increased. This could be achieved by employing fewer but more experienced personnel, or by swapping out individuals for an IT system to manage routine admin tasks.

Only 28% feeling their team is unlocking its full potential is woefully low and begs the question as to why.

Is it that top management don't trust the quality team to do more, or is it that top management fail to understand the additional potential that exists?

More than likely it is the latter, and it is therefore incumbent on quality team leaders to alert top management to their capacity to offer the business more."

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4. Job satisfaction

Pay and promotion
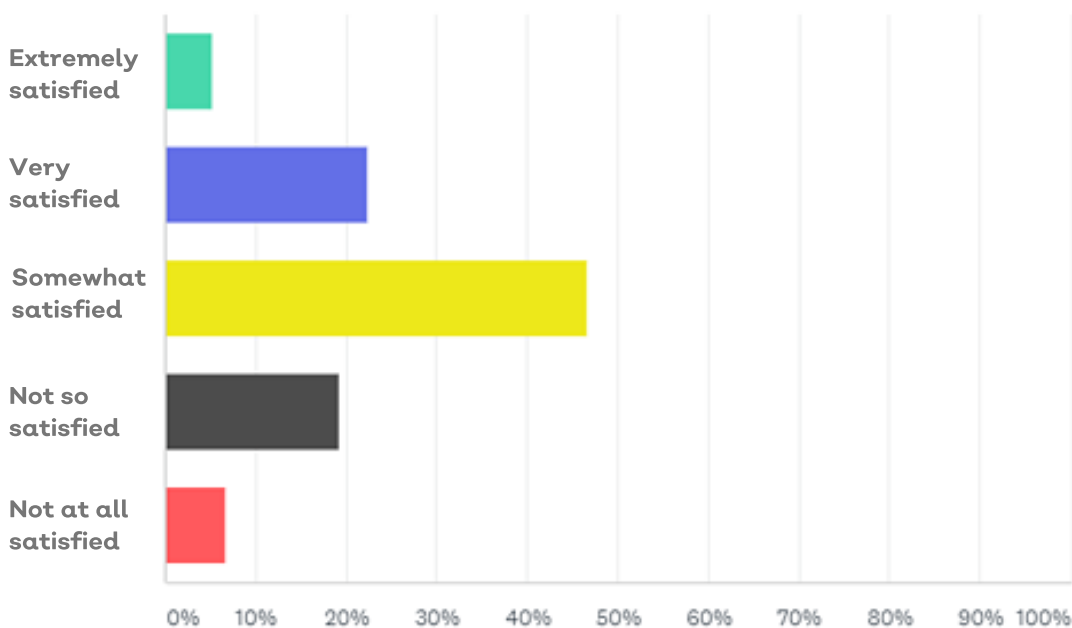
About a quarter of respondents were dissatisfied with their salary. Just under half felt their pay was about right and were 'somewhat satisfied'.

And the remainder were 'very' or 'extremely' satisfied with their pay.

25% had had a promotion in the past year- a relatively high proportion which ranks quality as one of the most fluid and meritocratic 21st-century disciplines.

Perhaps as a combination of these factors, quality also ranks highly for 'stickiness', with 52% of respondents being in a quality role for a decade or more - and half of those for two decades or more.

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Challenges and frustrations

We asked our respondents to name the most challenging part of their role. The top 6 most common responses were:

1. Paperwork and administration
2. Reporting, reporting, reporting just for the sake of it
3. Lack of resources
4. Lack of interest in quality – from leadership to bottom floor
5. External audits
6. Being ignored

We also asked what our respondents would change in their day-to-day if they could. The most common responses were:

1. Remove useless meetings
2. Secure more resources
3. More time with customers
4. Implementation of reporting software
5. No more admin
6. More budget for our department
7. Prioritising workload and managing change

"No resources"

"Lack of centralised reporting"

"Being the post office and organising everything by email"

"Endless admin!"

"Lack of time"

"Immature IT systems"

"Convincing the business to use appropriate tools"

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Alexander Woods

Policy Manager

Chartered Quality Institute

"Challenges are obviously persisting and organisations must invest in quality for it to mature.
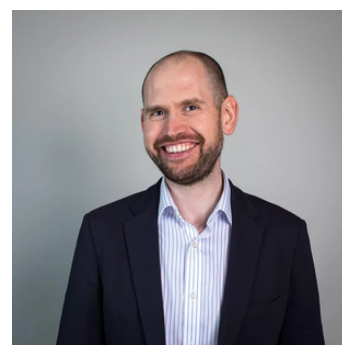
The CQI's recent Corporate Partner roundtable did reveal some positives: product, project and service quality is getting higher on corporate agendas. One of our participants said 'we're turning a corner on quality and it's back on the radar for many organisations'.

But in an age of digital transformation, quality functions who are relying on manual and paper-based systems are going to struggle to remain competitive in a challenging business environment, and will struggle to remain relevant and deliver value to their organisation and its stakeholders."

"Some of these challenges look familiar to me. They're echoed on a daily basis by the potential customers I speak to. The key requirement for any member of a project team looking to overcome these problems with software is ease of use.

The more people using the system and experiencing the benefits, the more responsibility for quality improvement is shared among the business.

Alex Swan

Senior Business Development Manager

Qualsys

That's how a quality culture is built, which translates into improved business practices and ultimately a more profitable operation."

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5. Quality technology report

Electronic quality management systems on the rise...

19% of businesses are now using an off-the-shelf electronic system to manage quality: double the rate of 5 years ago.

31% of respondents had implemented an electronic quality management system within the past 2 years.

In response to the core challenges and frustrations of the role, another 30% said it was either 'likely' or 'very likely' that they would implement an electronic quality system in the next 2 years. And 87% agreed that software and technology was now important for the quality role.

... but quality IT spend lagging behind other departments

The average business allocates 3-4% of its total annual budget on IT.

But quality departments typically saw a smaller share of this IT spend than other areas of the business. Infrastructure, cyber security and CRM, ERP and BPM software systems took up the majority of IT budgets in 2019.

The typical spend on a quality IT project also lagged behind other departments: sales and marketing software cost the average business £200,000 per year and financial software £150,000, with around £78,000 invested in a typical quality software project.

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Quality KPIs and metrics

The most common KPIs and metrics tracked by our respondents were:

1. Cost of poor quality (COPQ)
2. Customer satisfaction: complaints, returns and feedback
3. NCR closure time/outstanding %
4. OTIF deliveries
5. Supplier metrics: RPPM, CARs/SCARs
6. Right-first-time %
7. Defect/fault volume
8. Scrap/rework/FPY

As such, quality practitioners are much more likely to leverage systems that streamline, simplify and centralise how these metrics are tracked and managed.

Rob Needham

Technical Director

Qualsys

"The increased appetite for electronic quality management is a natural reaction to the huge amounts of time that quality managers are spending on manual admin work: about 80 - 90% of their typical day!

Quality is increasingly being recognised as a strategic driver and a competitive advantage, which is letting quality teams convince leadership to invest in new technology systems.

The return on investment of freeing up QA and QC timesinks to focus on quality improvement can be transformational."

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Market drivers

Businesses are turning to new quality technology for 3 primary reasons:

1. Growing complexity

Companies have more third-party relationships than ever to manage. Coupled with the breakneck change of regulatory and compliance demands, businesses are more info-heavy and risk-exposed than ever before, making optimised quality management essential.

2. Outdated, disparate and disconnected systems

Organisations are finding their home-brewed and in-house systems constructed in the past decade are failing to keep pace with dedicated quality technology vendors and providers.

Scattered and siloed Word, Excel, SharePoint and paper systems are failing to provide airtight compliance or allowing quality team potential to be fully leveraged for quality improvement.

3. Changing perceptions of quality

The latest quality regulations, including Annex SL, have tipped the scales of responsibility away from the lone quality manager. Business leaders are expected to engage with and support the quality and risk agenda - and in turn are spreading responsibility downwards to all layers of their organisations. Simple, visual, user-friendly and central quality systems for all staff to access and support are now natural business objectives.

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6. Lessons learned in the past year

"Reduce complexity wherever possible. Start by reducing your document load."

"Never take shortcuts. Use the 5S system!"

"Find a member of top management that supports you, and use them as an ally in meetings to advocate quality and safety."

"Choose your tech stack carefully."

"Your QMS should transcend from compliance to culture."

"Can't get support from board level? Talk about the monetary value of ISO standards and you'll be surprised how much more interest they give you."

"Build a system that top management understand and buy into."

"Get a good EQMS system."

"Find the handful of metrics that really benefit the business and focus on nothing else."

"Try to go electronic when you can. Paper's a hassle."

"Make quality everyone's remit."

"Think how to free up your team's admin time for value-added activities."

7. Plans and opportunities for 2020

"Speeding up our auditing
with iPads."

"Pulling multiple systems into a single,
workable system."

"Getting to a quality culture faster by
focusing on our training and onboarding
of new people."

"Only following quality objectives that
directly translate into business
objectives."

"ISO 45001!"

"Moving to SharePoint as a stepping
stone to a proper QMS."

"Rolling out QMS software to more
functions. Empowering quality leads in
different departments."

"Cutting time for simple things like
document approval and CAPAs."

"Copying our QMS over to all our sites
so we do things exactly the same way."

"Getting a new reporting tool to show
our metrics simply to the board."

"Getting ISO certificates - but making
sure actual change comes with them."

"Going deeper with our risk
environment and building a proper
risk register."

8. Methodology

Process for collecting the responses

The 2020 Global Quality Trends Survey was distributed by Qualsys in February 2020.

The survey produced 372 respondents from 41 countries. 37% of respondents were quality and compliance managers, 13% were directors, 9% were consultants or advisors, and 6% were process managers and engineers. The rest held a mixture of project manager, auditor, analyst or other specialist roles.

52% have held their roles for over ten years, 19% for 6-10 years, 17% for 2- 5 years, and 12% for 2 years or less.

The largest represented industry group was manufacturing with 30%. Healthcare and pharmaceuticals was the second-largest group with 14%. Oil, gas and power, financial, government, outsourcing, telecommunications, aerospace and media held the remainder of the respondent share.

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Access quality resources, tools and templates:

quality.eqms.co.uk/blog

Talk to us

Questions about our quality management software?

Talk to a domain expert who will show you how we can help.

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