



CUSTOMER WEBINAR

HOW TO PREPARE FOR AND DRIVE SUCCESSFUL AUDITS WITH GREENLIGHT GURU

THURSDAY, JUNE 17TH, 2021 @ 11:00 AM EST

AGENDA

- How to start preparing for your next audit
- Using Greenlight Guru during an audit
- Best practices for on-site or virtual audits and inspections
- Audit success stories and lessons learned from Greenlight Guru users themselves
- Q&A

Prepare for your next audit and **ensure success** by hearing from other GG customers on how they leveraged the solution to **pass FDA, ISO, MDSAP, and other notified body audits.**

TODAY'S PRESENTERS:

Quality Gurus:



Taylor Brown
Senior Medical Device Guru



Sara Adams
Medical Device Guru

Customer Panel:



DAMINI AGARWAL

Director of Product Development,
Infinite Biomedical Technologies



infinite
biomedical technologies



VEENA SOMAREDDY

Co-Founder, Neuro Rehab VR



NEURO REHAB VR





**MORRIS
SHERWOOD**

Quality & Regulatory Expert,
Zyris Dental



**GENNADY
UTKIN**

Quality Assurance Analyst,
Zyris Dental



QUICK POLL

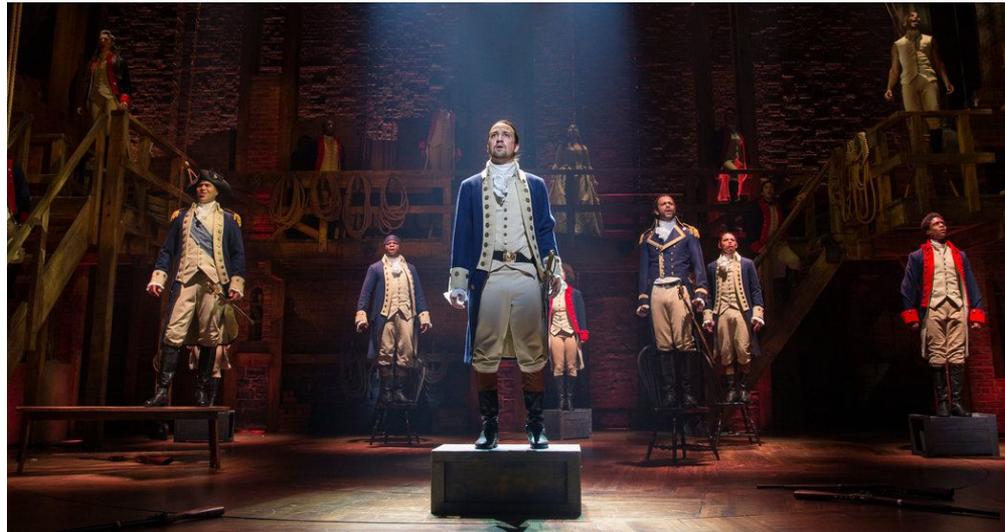
1. Have you already undergone an audit using Greenlight Guru?

2. What type of audit is next for your organization?

3 WAYS TO **PREPARE FOR AN AUDIT**

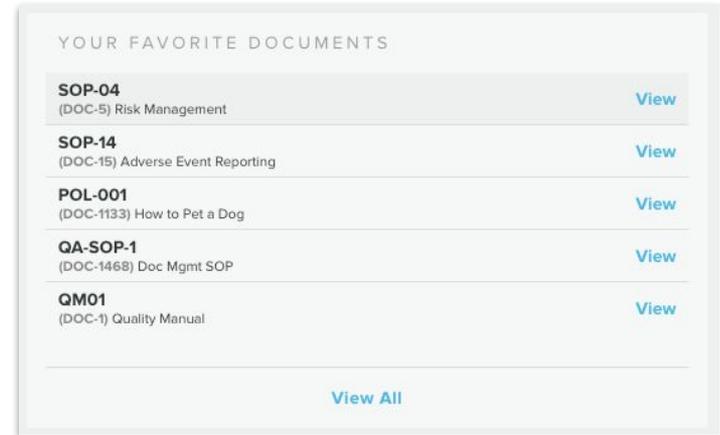
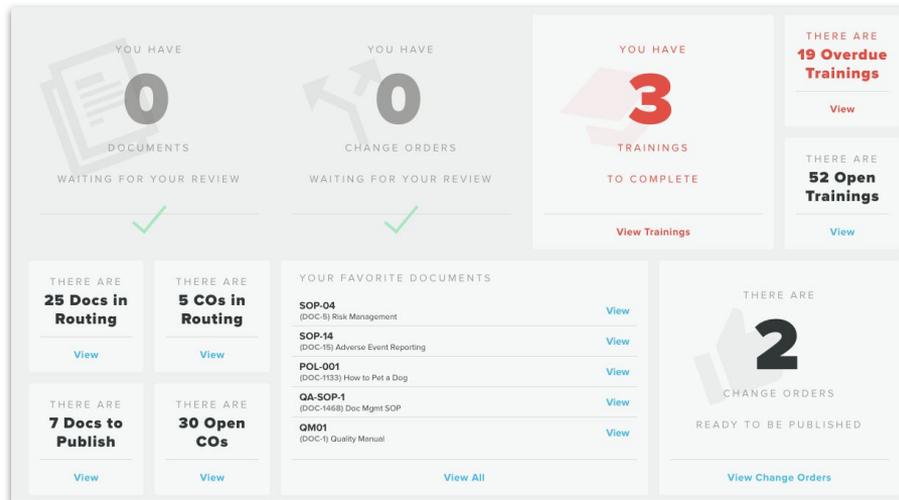
GEMBA / PERFORM A DRY RUN

- Walk around the facility pretending to be the auditor.
- Identify changes that need to be made.



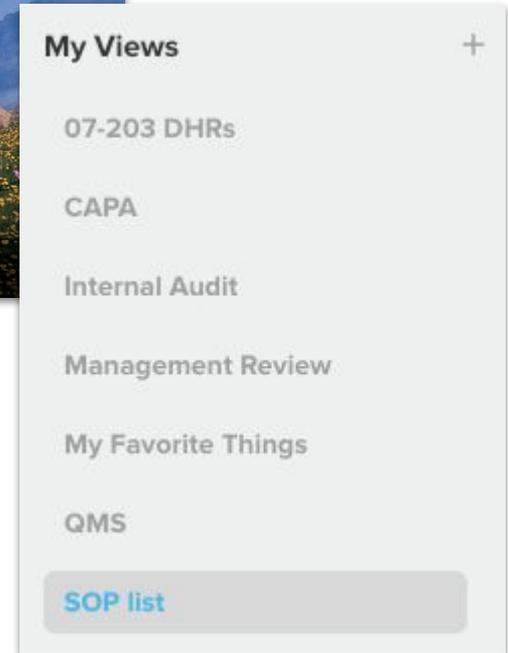
GEMBA / PERFORM A DRY RUN

- Identify best people to be interviewed.
 - Be sure people know how to find procedures
- Make sure training is up to date



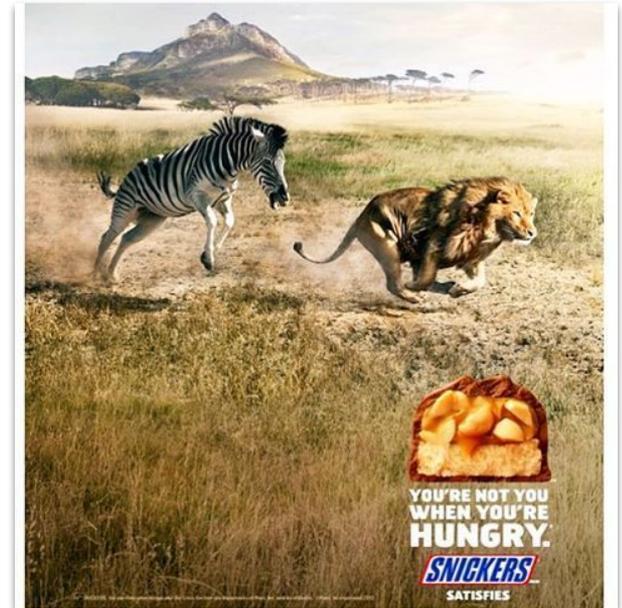
GET ORGANIZED

- Read the audit plan & identify documents
- Find your Favorite things
 - Best CAPA, Training Event, Change Order, etc.
- Set up Document Views
 - Management Review, Internal Audit, Project Documents, etc.
- Planning prior to audit will let you be quick which helps establishes trust with your auditor



ESTABLISH THE AUDIT SPACE

- Perform a tech check
 - Check Wifi
 - Check conferencing and screen sharing settings
- Set expectations for communicating with the auditor
 - How will you pass documents to the auditor?
- Set expectations for internal communication and scribes
- Audit etiquette reminders
- Make lunch plans



DURING THE AUDIT

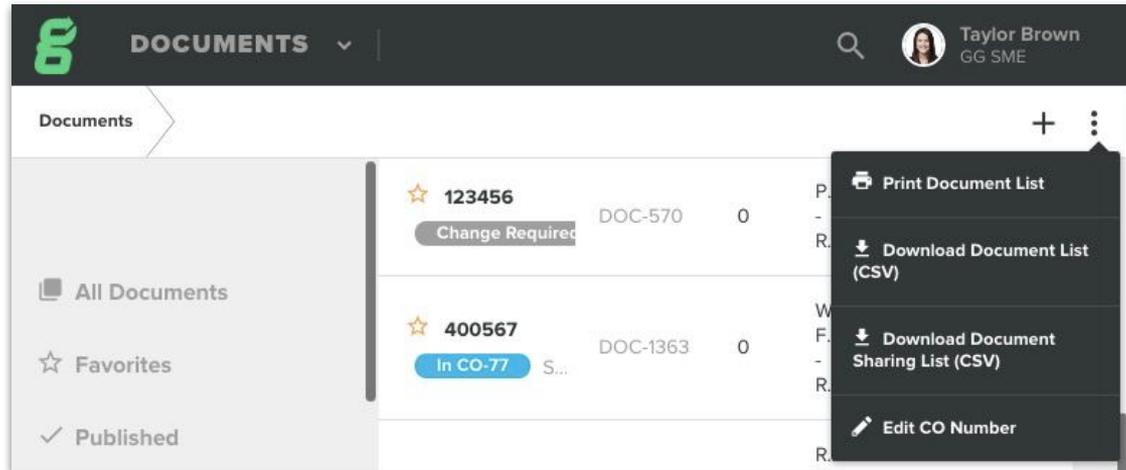
ONLY PROVIDE WHAT IS REQUESTED

- Create an auditor-only group and share documents as requested

The screenshot shows a software interface for 'MY COMPANY'. The top navigation bar includes 'MY COMPANY', 'USERS', and 'GROUPS'. A user profile for Taylor Brown (GG SME) is visible in the top right. The main content area is divided into two sections: 'Auditors' and 'Users'. The 'Auditors' section shows a group named 'Auditors (GROUP-5)' with a description 'To be shared with auditors', a status of 'Active', and an owner 'Taylor Brown'. The 'Users' section shows a table with columns for 'Name' and 'Type'. One user is listed: 'Laura Court' with email 'laura.court@greenlight.guru' and type 'Internal'. A 'Sharing' modal is open in the foreground, showing a list of users to share with. The first user is 'Auditors' with a 'View PDF' link and a count of '(1)'. The second user is 'Laura Court' with email 'laura.court@greenlight.guru'.

ONLY PROVIDE WHAT IS REQUESTED

- Review document sharing settings within the Sharing List
- Do not forget to deactivate your auditors!



The screenshot displays the Greenlight Guru interface for document management. The top navigation bar includes the Greenlight Guru logo, the word "DOCUMENTS" with a dropdown arrow, a search icon, and a user profile for Taylor Brown (GG SME). Below the navigation bar, the "Documents" section is active, showing a list of documents. A context menu is open over the document list, providing options: "Print Document List", "Download Document List (CSV)", "Download Document Sharing List (CSV)", and "Edit CO Number".

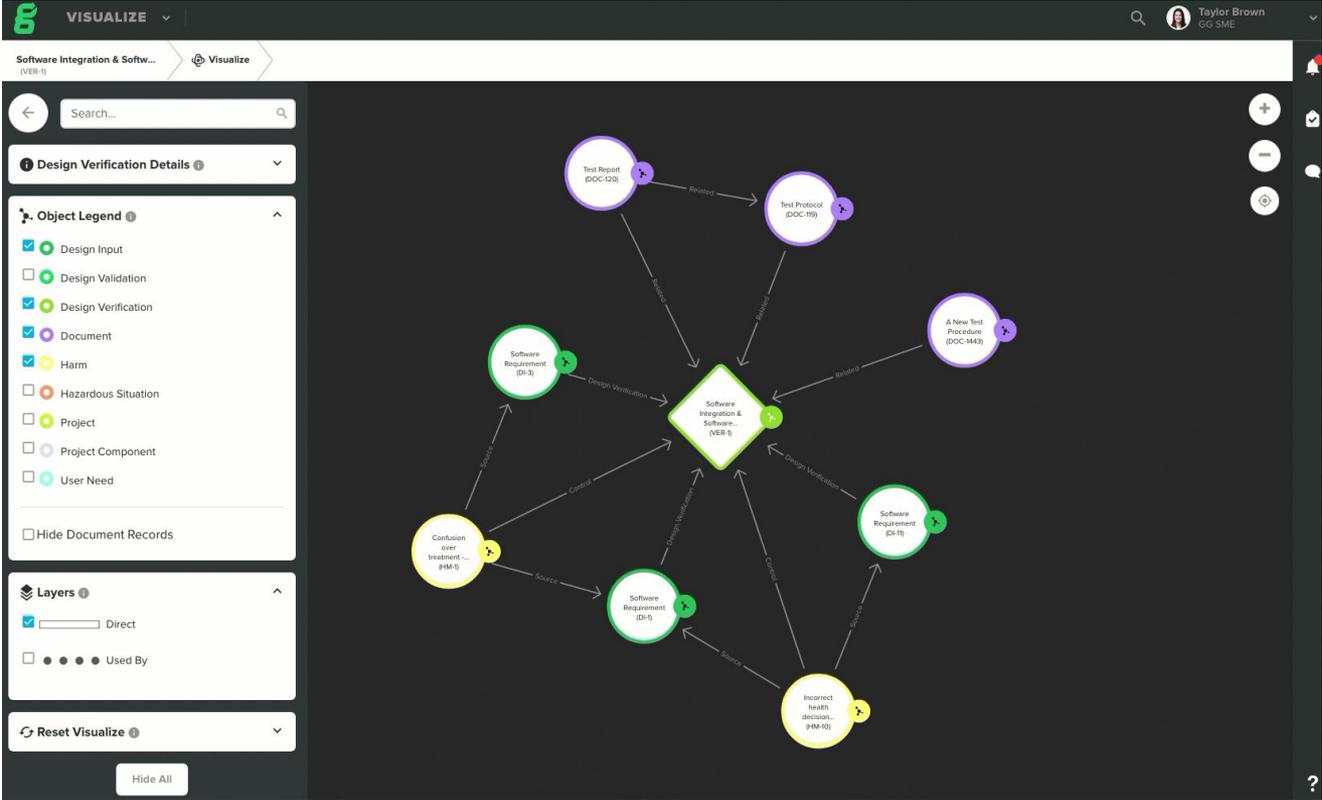
Document ID	Document Name	Count	Actions
123456	DOC-570	0	Change Required
400567	DOC-1363	0	In CO-77 S...

READ MINDS

- Ask yourself “Where will the auditor go next?”
- Anticipate the question before asked
- Use Visualize to stay steps ahead



READ MINDS



READ MINDS

- Use Global Activity History to ~~stak~~ locate your auditor

ACTIVITY HISTORY

Administration > Activity History

Global Activity History

[CLEAR ALL FILTERS](#)

User: Nathan Eckstein

Action: [Dropdown]

Workspace: [Dropdown]

Project: [Dropdown]

Start Date: [Input] End Date: [Input]

User	Action	Time	Category
Nathan Eckstein	LOGIN Successful	Mon Jun 14 2021 13:57:39 GMT-0400 (Eastern Daylight Time)	
Nathan Eckstein	LOGIN Successful	Mon Jun 14 2021 13:41:46 GMT-0400 (Eastern Daylight Time)	
Nathan Eckstein	VIEWED Change Order Artifact in CO-22 (Initial Upload Documents to GG)	Mon Jun 14 2021 13:16:41 GMT-0400 (Eastern Daylight Time)	Change Management
Nathan Eckstein	VIEWED Change Order Artifact in CO-22 (Initial Upload Documents to GG)	Mon Jun 14 2021 13:11:35 GMT-0400 (Eastern Daylight Time)	Change Management
Nathan Eckstein	VIEWED Change Order Artifact in CO-22 (Initial Upload Documents to GG)	Mon Jun 14 2021 13:10:42 GMT-0400 (Eastern Daylight Time)	Change Management
Nathan Eckstein	VIEWED (Signed) Document for Document SOP-01 (DOC-2) Ver. 1	Mon Jun 14 2021 13:10:30 GMT-0400 (Eastern Daylight Time)	Document Management
Nathan Eckstein	VIEWED Printable Capa Artifact in CAPA-2	Mon Jun 14 2021 12:56:20 GMT-0400 (Eastern Daylight Time)	Capa
Nathan Eckstein	VIEWED (Signed) Document for Document SOP-01 (DOC-2) Ver. 1	Mon Jun 14 2021 12:52:14 GMT-0400 (Eastern Daylight Time)	Document Management

Taylor Brown
GG SME

- HELP CENTER
- MY ACCOUNT
- MY SYSTEM
- MY COMPANY
- GLOBAL ACTIVITY HISTORY**
- SIGN OUT

WORDS MATTER

- Keep the conversation positive
- Answer in absolutes
- Answer by pointing auditor to your procedure
- Pull up your procedures while the auditor is reviewing so you'll be ready to “read minds.”



WORDS MATTER

- When all else fails, enjoy the silence.



CUSTOMER PANEL: **ADVICE + SUCCESS STORIES**

HEAR FROM OTHER GG USERS

Experienced in using GG for FDA, ISO, MDSAP, and other notified body audits.





Webinar recording will be sent via email and accessible via our Help Center.