

The Kick-off Phase

The Kick-off is where the Operational Hygiene Index engagement is scoped, as the first phase of the project itself, once the acquisition conversation is already settled. What gets defined here determines how targeted every phase after it can be.

Why This Matters

A generic assessment treats every facility the same way. The Kick-off exists to avoid that. It takes the scope already agreed during acquisition and sharpens it: what your facility actually looks like, what is driving the engagement, and where the risk is likely to sit, before a single questionnaire goes out or an auditor sets foot on site.

Everything that follows builds on this phase. The Questionnaire is tailored using what comes out of the Kick-off. The Audit, where one takes place, is sharpened by both. Get the Kick-off right, and the rest of the engagement stays targeted instead of generic.

What You Need to Prepare

Ahead of the session, you receive an information file from me. It sets out exactly what the session covers and how to prepare for it, so nothing is guessed at on either side. Thanks to that preparation, the conversation itself is usually done in two hours or less, covering the full project pipeline. From there, the Questionnaire phase can start gathering the details that matter most.

Beyond that, not much is needed, and nothing exhaustive. A basic overview of the facility is enough to start: general layout, main process steps, and product types. A short list of the right contacts matters more than documentation. Since operational hygiene sits at the interface between Quality Assurance, Production Planning, and Process Engineering, it helps to have someone from each of those functions available, even briefly, rather than one person speaking for all three.

If there is a specific reason the engagement is happening now, a regulatory change, a market requirement, a retrofit, a contamination incident, a certification coming up, that context is worth having ready. It shapes where the Kick-off conversation focuses first.

Standard vs. Extended Kick-off

The Kick-off comes in two forms, depending on what the rest of the engagement looks like.

Standard Kick-off — one or more remote sessions. Used where a separate on-site Audit phase follows later, or where no physical facility exists yet.

Extended Kick-off — includes an in-person, on-site component: a two-day audit, similar in structure to the one described in the Audit Guide. It takes the place of that phase rather than duplicating it later, and is used where the engagement has no separate Audit phase. Preparation includes at least one online session and a short preparatory questionnaire beforehand, so the on-site time is used efficiently rather than spent on introductions.

Which one applies depends on the use case, not on preference. It is confirmed with you before the engagement is scoped.

What Happens

What exactly gets covered depends on the use case: a new facility, a retrofit, a contamination crisis, or another scenario. In general, the session walks through the facility's current state, what is driving the engagement, and what a good outcome looks like. For an Extended Kick-off, it also includes direct, in-person observation of the areas that matter most for that driver.

This is a conversation, not an exam.

It also covers practical details, in more depth than the acquisition conversation did: I need one named contact person on your side, someone I can reach throughout the project, and we sketch a more concrete timeline, for example realistic dates for an on-site Audit.

What You Get

A Scoped Engagement

A clear definition of what the Questionnaire needs to cover, built around your facility and the reason the engagement started, not a generic set of questions. Where the Kick-off is Extended, you also receive the Audit Report from the two-day on-site audit itself, so nothing from that audit stays undocumented.

Next Steps

The Kick-off leads directly into the Questionnaire phase, where the picture gets filled in area by area. See the Questionnaire Guide for what to expect there.

Book a call to discuss your facility and how the Kick-off would be scoped for it: zeeg.me/grosseronald.

