ISOPILOT · CONSULTANT GRADE 2026 · EN

Partner / White Label Manual

Partner / White Label - ISOPILOT Consultant Grade 2026

Governance · Normative Coverage · Evidence · Controlled Documents · Senior Review

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01

Role objective

This manual describes the updated ISOPILOT operating workflow, including STEP54 Consultant Grade capabilities.

- Manage authorized customers while preserving tenant separation and accountability.
- Guide customers through STEP54 without presenting readiness as certification.
- Use Partner/WordPress workspace as an operating channel while ISOPILOT remains authoritative.
- Ensure branding and commercial communication do not alter methodological safeguards.

Accountability principle

Effective permissions depend on role, tenant, plan and entitlement. The platform supports work but does not replace decisions, approvals or third-party certification.

02

Daily operating workflow

Work always starts from the correct source and ends with review and traceability.

- Open the project and review priorities, deadlines and Coverage Dashboard status.
- Work on data, evidence, risk, audit, documents or CAPA in the authoritative module.
- Do not turn missing or proposed information into facts.
- Close with review, rationale and audit trail when required.

03

STEP54 · Consultant Grade Document Engine

The workflow moves document production from a template model to a governed requirement-data-evidence-document system. In this release, the Consultant Grade Expert Pack is operational for ISO 9001 projects.

Stage	Function	Operational result
54A	Normative matrix	Clause -> document -> evidence -> input -> applicability
54B	Minimum data	Requests only what is missing and reuses existing tenant sources
54C	Blueprint	Designs the document before drafting
54D	Drafting + Senior Review	Governed grounding; 90/100 review threshold
54E	Coverage Dashboard	Separates documentary coverage from implementation evidence
54F	Impact Analysis	Finds what changed and regenerates only impacted documents

Core rule: a document must describe how the specific organization operates and addresses requirements, using only confirmed or declared data and making open points explicit.

04

Responsibilities in STEP54

The following activities are the most relevant for this role.

- Partners may follow 54A-F for assigned customers according to entitlements and permissions.
- Applicability, approval and validation decisions remain auditable in the customer tenant.
- White Label does not turn AI output into a professional opinion or attestation.
- Evidence remains in the ISOPILOT repository and should not be duplicated in WordPress.

05

Coverage, evidence and Senior Review

ISOPILOT deliberately separates document presence from implementation evidence.

Information states

- CONFIRMED - supported by a verified source.
- DECLARED - provided by the organization through assessment.
- PROPOSED - consulting choice awaiting approval.
- MISSING - required information is not available.

Senior Review

Review evaluates requirement coverage, organization specificity, sources, roles, controls, records, cross-document consistency and absence of unsupported facts. STEP54D uses a 90/100 threshold; below threshold the document remains a draft for review.

06

Quick checklist

Before considering an activity complete, verify:

- Is the data confirmed/declared or clearly marked for validation?
- Is the requirement applicable or is N/A justified?
- Does the document describe real roles, operations, controls and records?
- Is documentary coverage separated from implementation evidence?
- If something changed, was Impact Analysis run?

Support

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