Using the Management Review Tool

Programme

Arrange the '✓' marks in Columns A8 to L8 to match your desired review frequency.

Refer to the management review inputs listed in Column P when deciding the review frequency.

Agenda

The agenda in Column P comprises the standard's management review inputs from Clause 9.3.

Use the filter in the 'Month' Row A7 to L7 by selecting only the '✓' from the filter drop-down menu.

This filtered list is now shows the inputs that are required for the current management review meeting.

Select the filtered management input list from Columns N, O and P, copy and paste into the Management Review Minutes.docx file.

Distribute management review agenda to the attendees 1-week before the meeting.

Action Log

The outputs of the previous management meeting (action items) become inputs to the next meeting.

The management review should decide if any corrective action is required and where and when it is necessary.

Observations, conclusions, and recommendations for further necessary action from the review must be recorded.

If any corrective action must be taken, Top management should follow up to ensure that the action was effectively implemented.

Gantt Chart

This part of the Management Review Tool comprises a basic Gantt Chart that illustrates the work needed to close out review actions over a period of time with schedule bars that visualize duration.

Dashboard

Ensure schedules are being met and objectives are being achieved by using the following charts and graphs:

1. Late action days
2. Incomplete v complete actions
3. Action status summary
4. Action owners

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Management Review Programme 2024

Using a risk-based approach to managing the flow of review information, your organization should operate multiple, regular review levels, whereby; more critical review inputs that are likely to affect the customer or business are reviewed and actioned more frequency as denoted by the '✓' in the programme below.

Arrange the '✓' marks in Columns A8 to L8 to match your desired review frequency.

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
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Management Review Agenda

The inputs required for the management review process must be clearly defined in the form of an agenda for each meeting. Use the filter in the 'Month' Row A7 to L7 by selecting **only** the '✓' from the filter drop-down menu.

This will filter the agenda and input list in Column P to show only those management review inputs that are relevant to the current review meeting. Select the filtered input items from Column N, O and P, copy and paste into the Management Review Minutes. Distribute to the attendees 1-week before the meeting.

Clause 9.3	Description of Requirement	Management Review Input (Organizational Equivalent)
9.3.2a	Status of actions from previous meeting (open/closed) from previous meeting(s),	Management review action log
9.3.2a	ageing profile of open actions:	Minutes from previous management review meeting
9.3.2b	Changes in external and internal issues that are relevant to the quality	Customer requirements, statutory, standard and regulatory requirements
9.3.2b	management system (Clause 4.1), changes to internal/external requirements, e.g.,	Market-related factors, technology, research, development, and competitor performance
9.3.2b	policies, processes, the relevance climate change, procedures, methods,	Operational structure changes
9.3.2b	instructions, contracts, regulation, legislation, that impact the QMS:	Financial, social, safety or environmental conditions which may impact the organization
9.3.2c	Information on the performance and effectiveness of the QMS (Clause 4.4), including trends in:	
9.3.2c1	Customer satisfaction and feedback from relevant interested parties (Clause 9.1.2),	Customer complaints
9.3.2c1	e.g., interviews, questionnaires and surveys, report cards, indicators, ratings,	Customer plant visits
9.3.2c1	complaints and compliments arising from:	Customer correspondence
9.3.2c1		Customer satisfaction surveys
9.3.2c1		Employee satisfaction surveys
9.3.2c1		Employee suggestions
9.3.2c1		Supplier audits
9.3.2c1		Complaints
9.3.2c2	The extent to which the quality objectives have been met (Clause 6.2), the status	Analysis and action plan if target is not met, or the trend is negative
9.3.2c2	of planned versus actual achievement and the relevance of the quality policy	Ensure the quality objectives are part of KPIs
9.3.2c2	(Clause 5.2):	Ensure that targets are properly assigned for the KPIs
9.3.2c3	Process performance and conformity of products and services (Clauses 4.4, 8.6 &	On-time delivery
9.3.2c3	8.7):	Cost of quality
9.3.2c3		Supplier performance
9.3.2c3		Corporate goals and objectives
9.3.2c4	Nonconformities and the status of corrective actions (Clause 10.2), e.g., analysis of	NCR/CAR Log
9.3.2c4	nonconformity by type, process, area, root cause, etc.:	Emergency situations or incidents
9.3.2c4		Customer complaint log
9.3.2c4		Management review action items list
9.3.2c5	Analysis of appropriate data (Clause 9.1.3) arising from monitoring and	KPIs
9.3.2c5	measurement (Clause 9.1.1) in order to evaluate trends in:	Inspection and test results and monitoring results
9.3.2c5		Customer satisfaction and perception
9.3.2c5		Product conformance
9.3.2c5		Process performance
9.3.2c5		Product and process characteristics
9.3.2c5		Supplier performance
9.3.2c6	Audit results (Clause 9.2), e.g., achievement of the audit programme, areas of	Interna audits
9.3.2c6	good practice, fulfilment of legal requirements, evaluation of compliance,	Process and product audits
9.3.2c6	nonconformity profile (number, type, process, area, significance), status of	Customer audits
9.3.2c6	corrective action, audit close out, external audit findings:	Registrar audits
9.3.2c6		Internal audit schedule
9.3.2c6		Opportunities for improvement
9.3.2c7	Performance of external providers (Clause 8.4), e.g., dashboards, scorecards,	Minutes and action items from previous supplier review
9.3.2c7	performance indicators, performance trends, right first time, on time delivery,	Supplier product quality issues
9.3.2c7	escapes to the customer, complaint profile, returns/rejections:	Supplier on-time delivery performance
9.3.2c7		Status of supplier corrective action requests
9.3.2c7		Supplier ratings
9.3.2c7		Best/worst suppliers
9.3.2d	Adequacy of resources (Clause 7.1), including people (number, roles, competency	Manpower (Clause 7.1.2)
9.3.2d	etc.), infrastructure (buildings, equipment, systems, transport etc.), working	Infrastructure (Clause 7.1.3)
9.3.2d	environment (physical and human factors, monitoring and measuring equipment	Work environment (Clause 7.1.4)
9.3.2d	(availability, fit for purpose, maintained):	Monitoring and measuring resources/instruments (Clause 7.1.5)
9.3.2d		Organizational knowledge (Clause 7.1.6)
9.3.2d		Competence (Clause 7.2)
9.3.2d		Awareness (Clause 7.3)
9.3.2d		Communication (Clause 7.4) & Consultation (5.4)
9.3.2d		Documented information, its control and retention (Clause 7.5)

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Management Review Action Log

The outputs of the previous management meeting (action items) become inputs to the next meeting. The management review should decide if any corrective action is required and where and when it is necessary. Observations, conclusions, and recommendations for further necessary action from the review must be recorded. If any corrective action must be taken, Top management should follow up to ensure that the action was effectively implemented.

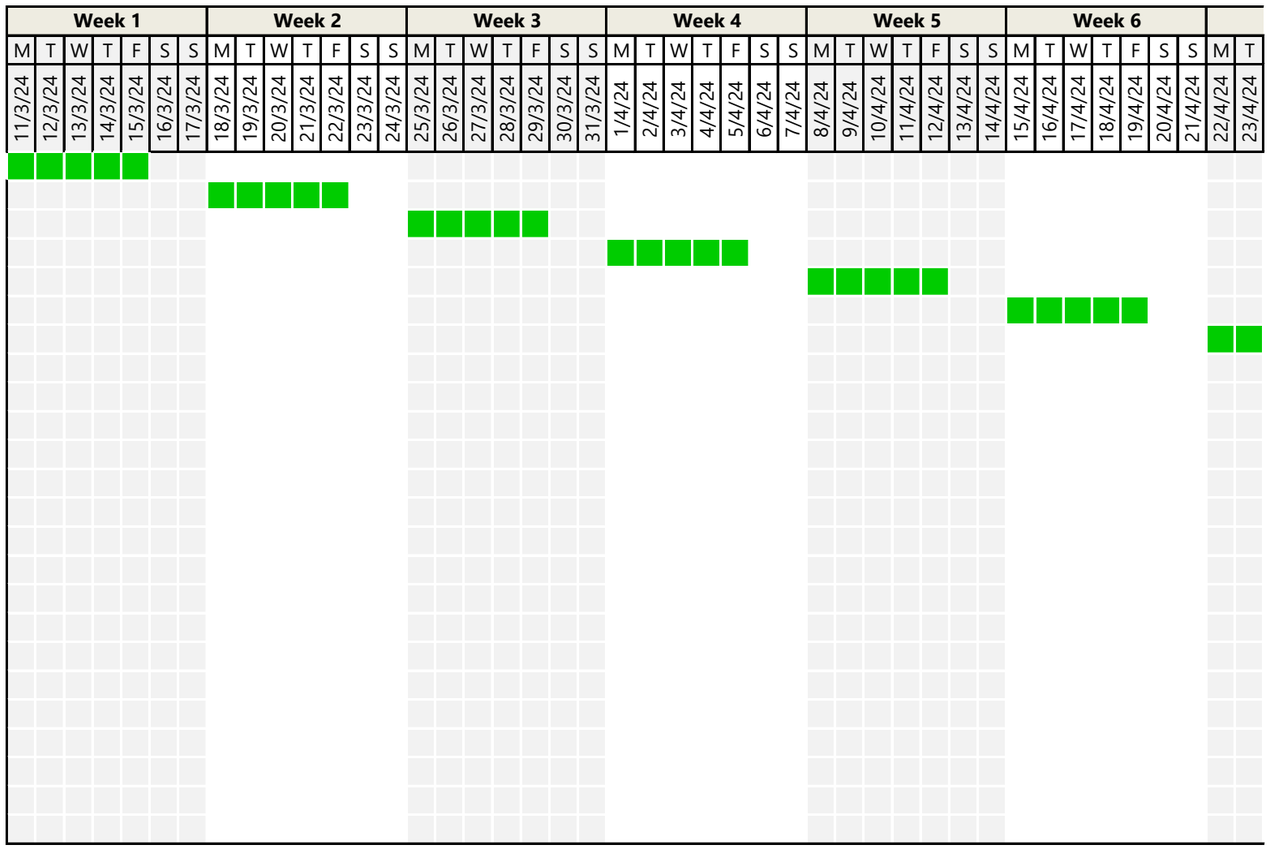
Ref.	Decision	Action	Assigned to	Planned Start Date	Management Review Minutes Link	Planned Finish Date	Action Progress	Action Status
MRA1			Name 1	11-Mar-24		15-Mar-24	100%	Closed
MRA2			Name 2	18-Mar-24		22-Mar-24	100%	Closed
MRA3			Name 3	25-Mar-24		29-Mar-24	100%	Closed
MRA4			Name 4	01-Apr-24		05-Apr-24	100%	Closed
MRA5			Name 5	08-Apr-24		12-Apr-24	100%	Closed
MRA6			Name 6	15-Apr-24		19-Apr-24	100%	Closed
MRA7			Name 7	22-Apr-24		26-Apr-24	100%	Closed
MRA8			Name 8	29-Apr-24		03-May-24	95%	In-progress
MRA9			Name 9	06-May-24		10-May-24	90%	In-progress
MRA10			Name 10	13-May-24		17-May-24	90%	In-progress
MRA11			Name 1	15-May-24		23-May-24	95%	In-progress
MRA12			Name 2	27-May-24		31-May-24	0%	Open
MRA13			Name 1	03-Jun-24		07-Jun-24	0%	Open
MRA14			Name 2	10-Jun-24		14-Jun-24	0%	Open
MRA15			Name 3	17-Jun-24		21-Jun-24	0%	Open
MRA16			Name 4	24-Jun-24		28-Jun-24	0%	Open
MRA17			Name 5	01-Jul-24		05-Jul-24	0%	Open
MRA18			Name 6	08-Jul-24		12-Jul-24	0%	Approved
MRA19			Name 7	15-Jul-24		19-Jul-24	0%	Rejected
MRA20			Name 8	22-Jul-24		26-Jul-24	0%	Cancelled
MRA21			Name 9	29-Jul-24		02-Aug-24	0%	Open
MRA22			Name 10	05-Aug-24		09-Aug-24	0%	Open
MRA23			Name 1	12-Aug-24		16-Aug-24	0%	Open
MRA24			Name 2	19-Aug-24		23-Aug-24	0%	Open

Gantt Chart (2024)

This part of the Management Review Tool comprises a basic Gantt Chart that illustrates the work needed to close out review actions

Today: 06-Sep-24

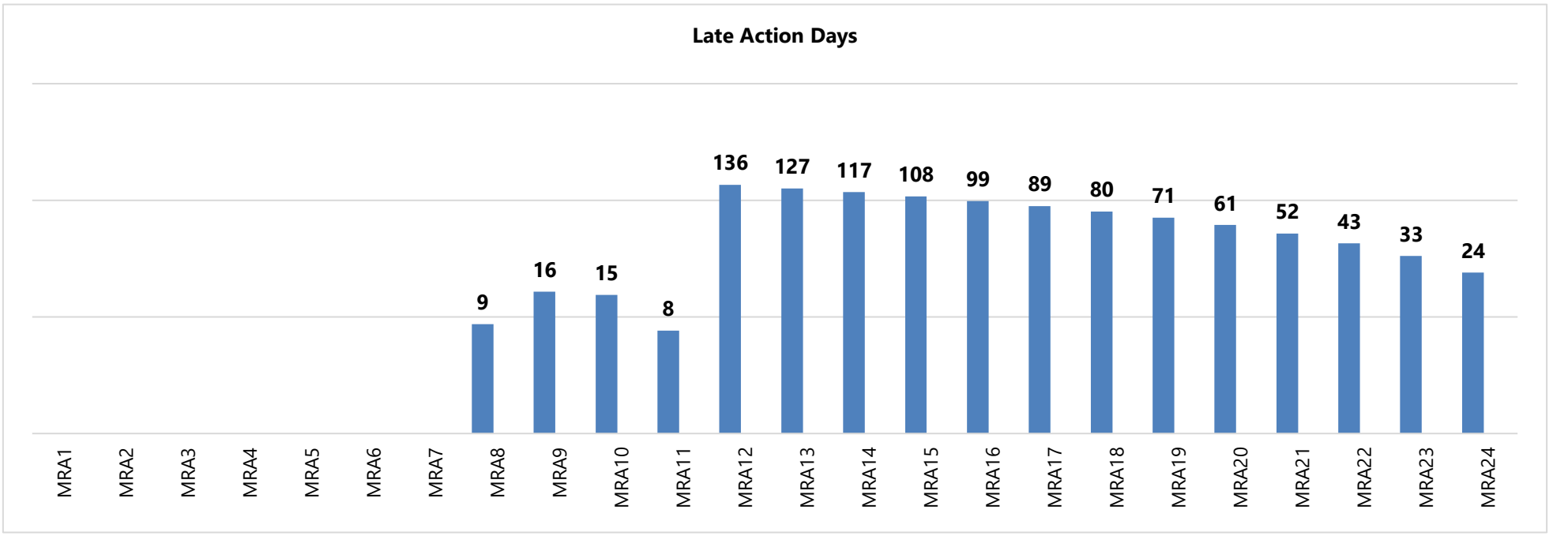
Legend: Planned Duration Progress Days Over Plan

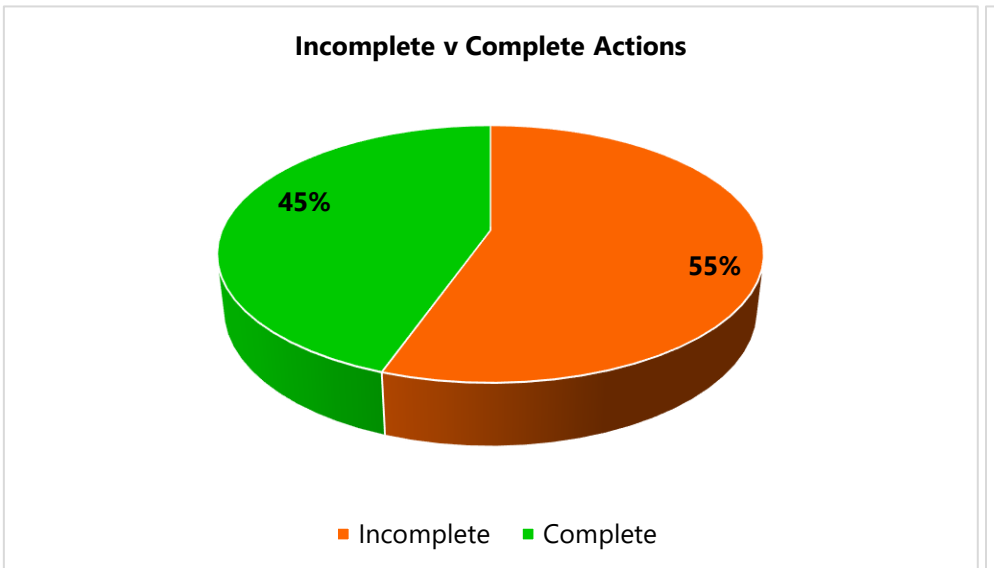


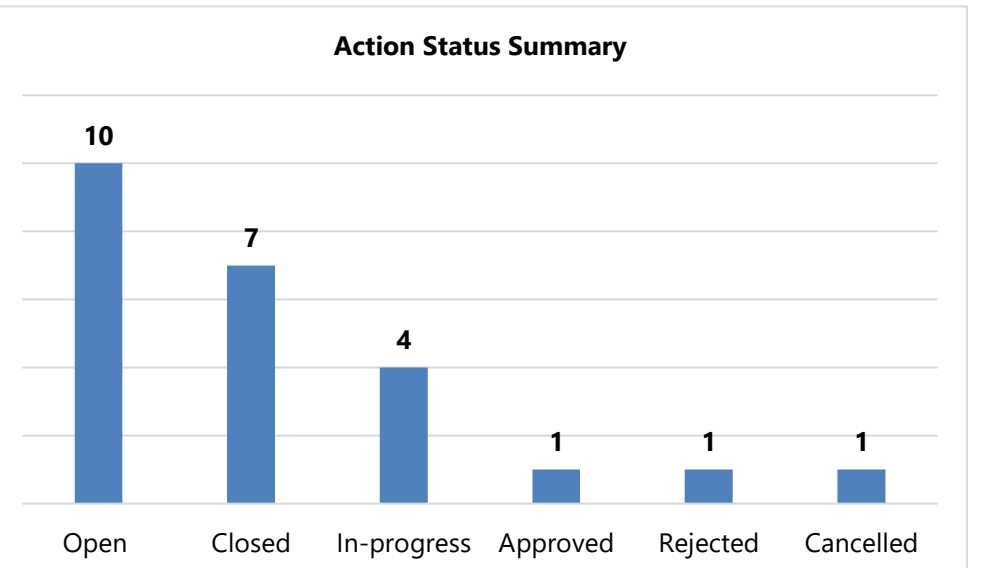
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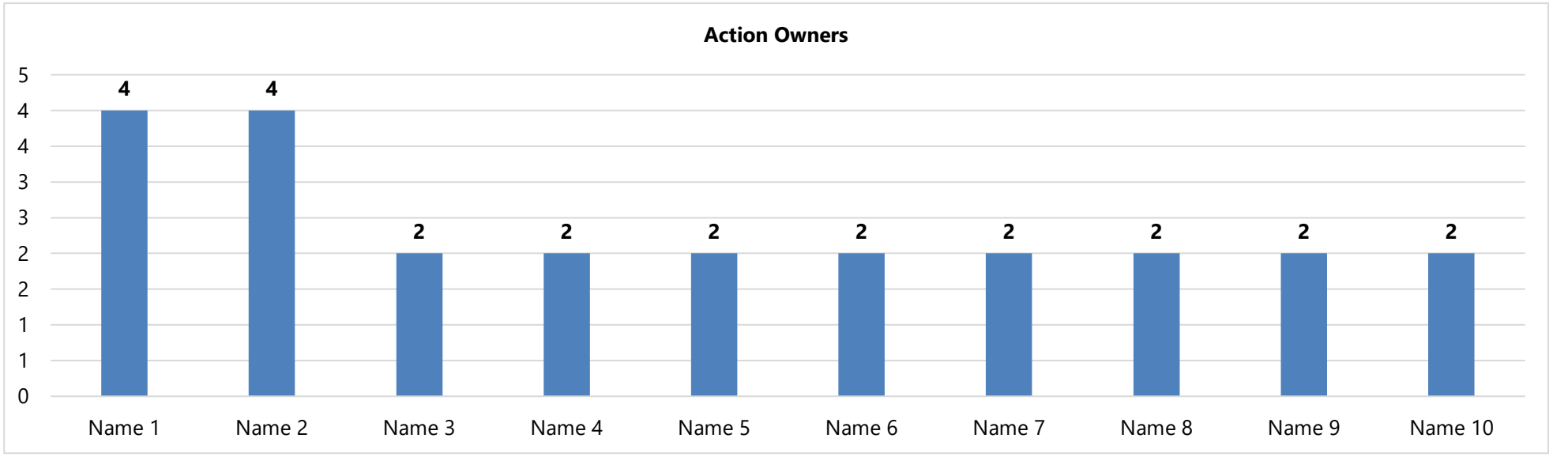
Dashboard

Ensure schedules are being met and programme objectives are being achieved.









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