Introduction

Meeting Date:	Meeting Title:
Purpose: To evaluate overall QMS effectiveness and to enable evidence-based decision-making and the establishment of actions to achieve desired results. Actions arising from the management review are noted on the Action Items page of this checklist. Each Manager should prepare a report to be circulated prior to the meeting, which summarizes the organization's performance. Forward minutes of the management review meeting to those on the distribution list and those with actions.	
Required Attendance: Representation at the review includes Top management, functional management, line management, process owners, process champions, lead process users, and action owners.	

Agenda

Copy the agenda items from your filtered list in the Management Review Tool.xlsx below:

9.3	Description of Requirement	Management Review Input
9.3.2a	Status of actions from previous meeting (open/closed) from previous meeting(s), ageing profile of open actions:	Management review action log
9.3.2a		Minutes from previous management review meeting
9.3.2b	Changes in external and internal issues that are relevant to the quality management system (Clause 4.1), changes to internal/external requirements, e.g., policies, processes, the relevance climate change, procedures, methods, instructions, contracts, regulation, legislation, that impact the QMS:	Customer requirements, statutory, standard and regulatory requirements
9.3.2b		Market-related factors, technology, research, development, and competitor performance
9.3.2b		Operational structure changes
9.3.2b		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), e.g., interviews, questionnaires and surveys, report cards, indicators, ratings, complaints and compliments arising from:	Customer complaints
9.3.2c1		Customer plant visits
9.3.2c1		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 of planned versus actual achievement and the relevance of the quality policy (Clause 5.2):	Analysis and action plan if target is not met, or the trend is negative
9.3.2c2		Ensure the quality objectives are part of KPIs
9.3.2c2		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 & 8.7):	On-time delivery
9.3.2c3		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 nonconformity by type, process, area, root cause, etc.:	NCR/CAR Log
9.3.2c4		Emergency situations or incidents
9.3.2c4		Customer complaint log
9.3.2c4		Management review action items list
9.3.2f	Opportunities for improvement (Clause 10.1), corrective action plans, good practice, best practice, potential innovation, etc.:	Recommendations for improvement
9.3.2f		Customer related requirements
9.3.2f		Resource needs

Endeavour Technical Limited © 2024. All rights reserved

Attendees

Minimum representation at the management review includes Top management, functional management, line management, process owners, process champions, lead process users, and action owners appropriate to the meeting agenda.

Absent with apologies

_____

Minutes written by _____ Review approved by _____

Management personnel present:

Attended By	Position	Signature

The absent managers will receive minutes of the review meeting and, after reviewing the minutes, may submit their input and comments to the Managing Director and/or Quality Manager.

Endeavour Technical Limited © 2024. All rights reserved

Management Review Inputs

The results of the analysis and evaluation (Clause 9.1.3) should be made available to the Top management for their review in order to evaluate any identifiable characteristics or trends that could potentially lead to a nonconformity occurring.

1 Status of actions from the previous meeting

Prior Action Items Review:
• Management review action log; • Actions from the previous meeting (open/closed).
Prior Meeting Minutes Review:
• Minutes from previous management review meeting; • Age profile of open actions, e.g., 3 months, 6 months, greater than 1 year.

Decision/Action: ☐ **None**	**Person Responsible:**	**Deadline:**

2 Changes in external and internal issues

Discussion:
Changes to internal/external requirements, e.g., policies, processes, procedures, methods, instructions, contracts, regulation, legislation, that impact the QMS: • Changes to requirements to which the organization subscribes, such as customer requirements, statutory and regulatory requirements, the relevance of climate change, and ISO 9001 requirements; • Market-related factors such as technology, research and development, and competitor performance; • Operational structure changes, new business expansion, planned system upgrades; • Other factors which may impact the organization such as financial, social or environmental conditions.
Conclusion:

Decision/Action: ☐ **None**	**Person Responsible:**	**Deadline:**

Endeavour Technical Limited © 2024. All rights reserved