Management Review Tool - Year ()

The inputs required for the management review process must be clearly defined in the form of an agenda for each meeting. Based upon the frequency and topics to be addressed, use the filter the 'Month' Columns E8 to P8 by selecting **only** the '\' from the filter drop-down menu.

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

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 '\s' in the programme below.

Managei	ment Review Agenda Filter									
ISO 9001 & ISO 14001	Description of Requirement	Management Review Input (Organization 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 management	Customer requirements, statutory, standard and regulatory requirements								
9.3.2b	system (Clause 4.1), changes to internal/external requirements, e.g., policies,	Market-related factors, technology, research, development, and competitor performance								
9.3.2b	processes, environmental aspects, compliance obligation, procedures, methods,	Operational structure changes								
9.3.2b	instructions, contracts, regulation, legislation, that impact the EQMS:	Financial, social or environmental conditions which may impact the organization								
9.3.2c	Information on the performance and effectiveness of the EQMS (Clause 4.4), including	ng 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		Environmental Complaints								
9.3.2c2	The extent to which the EQMS objectives have been met (Clause 6.2), the status of	Analysis and action plan if target is not met, or the trend is negative								
9.3.2c2	planned versus actual achievement and the relevance of the EQMS policy (Clause	Ensure the objectives are part of KPIs								
9.3.2c2	5.2):	Ensure that targets are properly assigned for the KPIs								
	Process performance and conformity of products and services (Clauses 4.4, 8.6 &	On-time delivery								
	8.7):	Cost of quality								
9.3.2c3	,	Supplier performance								
9.3.2c3		Corporate goals and objectives								
	Nonconformities and the status of corrective actions (Clause 10.2), e.g., analysis of	NCR/CAR Log								
	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								
9.3.2c4 9.3.2c5	Analysis of appropriate data (Clause 9.1.3) arising from monitoring and	KPIs								
	measurement (Clause 9.1.1) in order to evaluate trends in:									
9.3.2c5 9.3.2c5	measurement (Clause 3.1.1) in order to evaluate trends in.	Inspection and test results and environmental monitoring results Customer satisfaction and perception								
9.3.2c5 9.3.2c5		Product conformance								
9.3.2c5		Process performance								
9.3.2c5		Product and process characteristics								
9.3.2c5		Supplier performance								
	Audit results (Clause 9.2), e.g., achievement of the audit programme, areas of good	Internal EQMS audits								
9.3.2c6	practice, fulfilment of compliance obligations, 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								

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Management Review Tool - Year ()

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.

This part of the Management Review Tool.xlsx 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.

gement Review Act	ion Log			
Decision	Action	Assigned to	Planned Start Date	Planne Finish D
			03-May-23	03-Jul-2
			11-May-23	10-Jul-
			17-May-23	17-Jul-
			23-May-23	24-Jul-
			30-May-23	30-Jul-
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							Week 1					Week 2								Week 3							
Management Review Action Tracker												c	+								M T W T F S S						
Duration (Days)	Activity	Indicator	Actual Date	Days Overdue	Reviewed by	Evidence of close-out	33		03-May-23		05-May-23								13-May-23			16-May-23			_		21-May-23
44	100	7	04-Jul-23	1																							
43	75	→	09-Jul-23	-1																							
44	50	\Rightarrow	20-Jul-23	3																							
45	25	21	17-Jul-23	-7																							
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