Management Review Template

Sasa Taylor

Score	0%	Flagged items	0	Actions	1

This template serves the purpose of helping the management team prepare records of management review meetings. Please accomplish all sections of this template and note that this can be exported into a report we can use in the succeeding reviews. Lastly, this template aims to empower the management in identifying, qualifying, and finalizing corrective actions as well as continuous improvement efforts that are necessary to keep the organization's management systems in check, functioning, and aligned with our goals and objectives.

Management Review Meeting Facilitated by	Sasa Taylor

Date of Review	19.08.2022 13:40 PST

Location	Minnesota, USA (46.729553, -94.6858998)

Attendees

Auds Finkelstein - Chief Quality Officer
Trix Lagerfeld - Quality Manager
Mariel Caley - Lead Training Manager

Remember to send the minutes of this review meeting to absent members. Also, let them affix any additional comments and suggestions they might have so those can be included in the final report or review summary.

Actions

Management Review Proper / Review of the Quality Policy

Quality Policy review status

<div style="background:red;color:white">Quality Policy reviewed, revisions needed.</div>

Quality Manual.pdf

To Do | Assignee **SafetyCulture Staff** | Priority **Low** | Due **26.08.2022 13:41 PST** | Created by **SafetyCulture Staff**

Set up a separate follow-up meeting for the changes that need to be implemented for further legal review.

Management Review Proper	1 action

Review of the Quality Policy

1 action

Review the Quality Policy to see if it's still aligned with the organization's goals and objectives. Upload the Quality Manual here as needed.

Quality Policy review status

<div style="background:#c00;color:#fff;">Quality Policy reviewed, revisions needed.</div>

Quality Manual.pdf

To Do | Assignee **SafetyCulture Staff** | Priority **Low** | Due **26.08.2022 13:41 PST** | Created by S afetyCulture Staff

Set up a separate follow-up meeting for the changes that need to be implemented for further legal review.

Indicate the changes needed for the Quality Policy.

- The scope must be specified a bit deeper. Contact teams and supervisors in charge of this and review accordingly.
- Current metrics are lacking. In coordination with the Review of Quality Objectives, Data, and Goals, revise this part comprehensively.

Review of the Internal Audit Results

**What is the status of the conducted internal quality audits?
Are there any issues discovered?**

- The results of the recently conducted internal quality audits are on track with what we were expecting. Continue protocols until the next management review.
- No major issues arose, continue monitoring.

Review of the Corrective and Preventive Actions

Are there any overdue CAPAs? Any trends we need to pay attention to?

- No overdue CAPAs so far, the team is on track.
- Preventive actions bring way more beneficial results, so maximum focus on those must be prioritized. Corrective actions must still be paid attention to.

Review of Needed Resources

Equipment Resources Requirements

Equipment is sufficient and in good working condition to meet the current quality goals.

Work Environment and Infrastructure Requirements

No needed changes to the work environment and infrastructure thus far.

QMS Requirements

Refer to the specific changes needed to be done to the Quality Policy as these can affect the overall QMS requirements.

Human Resources and Employee Training Requirements

The current employee training initiatives are good, yet can be improved.

Review of Employee Training Initiatives

Apart from assessing the training initiatives in place, recommend next steps or courses of action for improvement.

- The Lead Training Manager must coordinate with the Quality Manager for improvement opportunities.
- Moving forward, quarterly training programs aligned with the QMS must be in place and strictly enforced.

Review of External Providers/Suppliers

Assess the performance of current suppliers. Raise any issues related to quality and delivery.

The overall performance of our external providers and suppliers is well and above expectations, quality- and delivery-wise. Still, continuous monitoring is a must.

Review of Subcontractors

Assess the performance of current subcontractors, if any. List any actions done or to be implemented for improvement opportunities.

We have no subcontractors this quarter so far.

Review of Quality Objectives, Data, and Goals

Review the current quality objectives outlined and discussed in the Quality Manual. As needed, revise goals and objectives to fit the organization's standards.

As the Quality Policy undergoes a few major revisions, our set of Quality Objectives, Data, and Goals must be subsequently revised for improvement.

Review of Customer Feedback

Note any unresolved customer feedback or complaint to identify corrective actions and recommended next steps.

So far, we're on track with our minimum targets for customer complaints and all of such have been

resolved in a timely manner.

Review of the Overall QMS

Note all crucial changes to the QMS and to the company that have direct or indirect impact on each other.

- The Quality Policy's scope must be specified a bit deeper. Contact teams and supervisors in charge of this and review accordingly.
- Current quality metrics are lacking. In coordination with the Review of Quality Objectives, Data, and Goals, revise the Quality Policy comprehensively.

General Recommendations for Improvement

Indicate any general recommendation we can look into toward continuously improving the QMS.

- The attendees for the regular management review sessions must always include the Chief Quality Officer, Quality Manager, and Lead Training Manager to ensure alignment.
- Extensive management reviews must be done annually, with quarterly check-ins and monthly progress reports.

List of For Follow-Ups

Based on the items discussed on the previous page, list any points needing to be addressed at the next meeting and any actions needing to be done before the next review.

1. Changes in the Quality Policy
2. Changes in the Quality Objectives, Data, and Goals
3. Changes in the Overall QMS

Sign-Off

Follow-up Meeting Date   18.11.2022

Name and Signature

Sasa Taylor
19.08.2022 12:19 PST

Appendix

Quality Manual.pdf