G0930-01

Management Review Tool

User Guide

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1. Introduction

ISO 9001:2026 Clause 9.3 requires top management to review the QMS at planned intervals to ensure its continuing suitability, adequacy, effectiveness, and alignment with the strategic direction of the organization. Clause 9.3.2 specifies the inputs that must be considered, and Clause 9.3.3 specifies the outputs that must include decisions on opportunities for improvement, changes to the QMS, and resource needs.

The F0930-01 Management Review Tool is the operational tool for planning, conducting, and tracking management reviews and the actions arising from them. It supports both annual top-level reviews and any intermediate operational reviews the organization runs. The workbook integrates an agenda template aligned to the 14 mandatory inputs of Clause 9.3.2, an action log with Gantt-style tracking, and a status dashboard.

This guide describes the workbook structure, walks through the agenda inputs, explains the action log and Gantt logic, and provides step-by-step procedures for planning a programme and capturing actions.

2. Workbook Structure

- Guidance — instructions for the Programme, Agenda, Action Log, Gantt Chart and Dashboard.
- Programme & Agenda — two zones on one sheet. The Programme (columns A–L) is a month grid (Jan –Dec) in which ✓ marks show the months in which each agenda input is reviewed. The Agenda (columns N–P) lists the Clause 9.3.2 inputs (a) to (h), including (d)(1) to (d)(7), on 65 lines (rows 8–72), with the management review input as your organization knows it.
- Action Log & Gantt Chart — up to 24 actions (rows 11–34) in columns A–I, a Gantt chart in columns K–NV and helper calculation columns NX–OE. The drop-down lists for owners, statuses and progress are held in rows 36–57.
- Dashboard — three charts: Incomplete v Complete Actions, Action Status Summary and Action Owners.

3. Programme Zone (Columns A–L)

The Programme sets how often each management review input is considered. Each row of the month grid belongs to the agenda line in the same row of columns N–P.

Column	Header	Purpose
A–L	**Jan to Dec**	✓ = the input on this row is reviewed in that month. Delete the ✓ for months in which the input is not required.
Row 7	**Month headers**	Filter buttons. Filter a month on ✓ to show only the inputs due at that month's review.
Rows 8–72	**Agenda rows**	One row per agenda line; the clause reference, requirement, and input are in columns N–P of the same row.

4. Agenda Zone (Columns N–P) — Clause 9.3.2 Coverage

The agenda zone lists every Clause 9.3.2 input. Column N holds the clause reference (9.3.2a to 9.3.2h, with 9.3.2d1 to 9.3.2d7 for the inputs on QMS performance and effectiveness), column O the description of the requirement, and column P the management review input as your organization knows it (for example, the NCR/CAR Log or Supplier ratings). Edit column P to name your own records and reports.

To prepare an agenda, filter the month in row 7 on ✓, copy the filtered lines from columns N–P into the Management Review Minutes (F0930-02), and distribute the agenda to attendees one week before the meeting.

The 14 mandatory inputs (Clause 9.3.2):

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Column / Field	Description
(a)	Status of actions from previous management reviews.
(b)	Changes in external and internal issues relevant to the QMS.
(c)	Changes in the needs and expectations of interested parties relevant to the QMS.
(d)	Information on QMS performance and effectiveness, including: nonconformities and corrective actions, monitoring and measurement results, audit results, customer satisfaction and feedback from relevant interested parties, the extent to which quality objectives have been met, process performance and conformity of products and services, performance of external providers.
(e)	Opportunities for improvement.
(f)	Adequacy of resources.
(g)	Effectiveness of actions taken to address risks (Clause 6.1.2).
(h)	Effectiveness of actions taken to address opportunities (Clause 6.1.3).

All 14 Inputs Required Every Time
Even if there is "nothing to report" on an input, record that explicitly in the Management Review Minutes (F0930-02); auditors check that all 14 inputs were considered, not just that there was something to say about each.
A common audit finding is reviews that omit one or two inputs, often (b), (c) and (g). The agenda template prevents this if used as designed.

5. Programme — Setting Review Frequency

Clause 9.3.1 says "at planned intervals". The intervals are not prescribed; common patterns:

- **Annual top-level review (mandatory):** typically 3–4 hours, full leadership team, all 14 inputs covered. The principal Clause 9.3 review.
- **Quarterly operational reviews:** shorter, narrower attendance, focus on near-term performance and corrective actions. Useful for organizations with high change rates.
- **Triggered reviews:** held in response to specific events — major incident, significant change, audit finding, complaint cluster. Record the trigger and the inputs covered in the minutes (F0930-02).

Whichever pattern is chosen, the cycle must be capable of demonstrating Clause 9.3 coverage across 12 months. Use the ✓ grid to rotate inputs across the year (each review covers a subset; the full cycle covers all 14); annual reviews cover everything in one sitting.

6. Action Log Column Reference (Columns A–I)

Column	Header	Purpose
A	**Ref.**	Action reference (MRA1, MRA2 and so on).

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Column	Header	Purpose
B	**Decision**	The management review decision or output (Clause 9.3.3) that the action implements.
C	**Action**	What is to be done, stated so that completion can be verified.
D	**Assigned to**	Action owner, selected from the owner list (D37:D46).
E	**Planned Start Date**	Start of the action; the start of its Gantt bar.
F	**Management Review Minutes Link**	Reference or hyperlink to the F0930-02 minutes in which the action was raised.
G	**Planned Finish Date**	Planned completion date; the end of the planned duration in the Gantt chart.
H	**Action Progress**	0% to 100% in 5% steps, selected from the list in H37:H57.
I	**Action Status**	Open, In-progress, Approved, Rejected, Cancelled or Closed (see §7), selected from the list in F37:F42.

The sheet holds 24 action rows (11–34); row 35 shows the average progress across them. Replace the sample owner names (Name 1 to Name 10) in D37:D46 with your own. The counts beside the owner and status lists feed the Dashboard charts.

7. Action Status Values and Progress %

Status (column I)

Status	Description
Open	Action logged; work has not started.
In-progress	Work on the action is under way.
Approved	The action, or the resource or change it needs, has been approved by Top Management.
Rejected	The proposed action was not approved; record the reason in the minutes (F0930-02).
Cancelled	The action is no longer required; record the reason in the minutes (F0930-02).
Closed	The action is complete, and its effectiveness has been confirmed at a management review.

Progress (column H)

Select a value from 0% to 100% in 5% steps. Progress drives the Gantt chart, where the completed share of each bar is shown as Progress, and the Not Complete figure (column NX) feeds the Incomplete v Complete Actions chart.

8. Gantt Chart — How It Works

The Gantt chart (columns K–NV) plots each action as a bar from its Planned Start Date (column E) to its Planned Finish Date (column G). The calendar in row 10 starts on the Planned Start Date of the first action (cell E11) and runs day by day, with week numbers in row 8 and day letters in row 9; the Today cell (N4) shows the current date. Colours follow the legend in row 6: Planned Duration, Progress and Days Over Plan.

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