Insert your company's name or logo.

Management Review Minutes

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:

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), ageing profile of open actions:	Management review action log
9.3.2a		Minutes from previous management review meeting
9.3.2a		Management review action items list
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 of 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	Changes in needs and expectations of interested parties that are relevant to the quality management system	Interested Parties Register
9.3.2d	Information on the performance and effectiveness of the QMS (Clause 4.4), including trends in:	
9.3.2d1	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
9.3.2d1		Emergencies or incidents
9.3.2d1		Customer complaint log
9.3.2d2	Monitoring and measurement results (Clause 9.1.3) arising from monitoring and measurement (Clause 9.1.1) in order to evaluate trends in:	KPIs
9.3.2d2		Inspection and test results and monitoring results
9.3.2d2		Product conformance
9.3.2d2		Process performance
9.3.2d2		Product and process characteristics
9.3.2d3	Audit results (Clause 9.2), e.g., achievement of the audit programme, areas of good practice, fulfilment of legal requirements, evaluation of compliance, nonconformity profile (number, type, process, area, significance), status of corrective action, audit close-out, external audit findings:	Internal audits
9.3.2d3		Process and product audits
9.3.2d3		Customer audits
9.3.2d3		Registrar audits
9.3.2d3		Internal audit schedule
9.3.2d3		Opportunities for improvement

SAMPLE

Clause 9.3	Description of Requirement	Management Review Input (Organizational Equivalent)
9.3.2g	address risks (Clause 6.1.2), e.g., risk profile, risk and opportunity register, status of open/closed actions, ageing profile of open actions, evaluation of effectiveness:	External issues
9.3.2g		Risks of disruption to the supply of conforming products and services
9.3.2g		Lessons learned
9.3.2h	Effectiveness of actions taken to address opportunities (Clause 6.1.3), e.g., risk and opportunity register status of open/closed actions, ageing profile of open actions, evaluation of effectiveness:	New products, services, markets and customers
9.3.2h		Process, technology and efficiency improvements
9.3.2h		Partnerships and external provider capability
9.3.2h		Lessons learned

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

SAMPLE

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.

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, regulations, legislation, that impact the QMS: • Changes to requirements to which the organization subscribes, such as customer requirements, statutory and regulatory requirements, and ISO 9001:2026 requirements; • Whether climate change is a relevant issue (Clause 4.1); • 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.

SAMPLE