

5 Steps to Ace your next ISO Management Review*

1

Establish the Logistics just like you would for a Board Meeting

Determine date and location at a comfortable space such as a small banquet room at a nice resort or restaurant. Highly recommend Management Reviews to be held every 6 months and 3 months in advance of surveillance audit. Plan on a minimum of 4-hour for an effective management review. Send invite to who is required to be at the meeting. Entice their presence and in how valued the Management System. Have a note taker with our Agenda format. (sample here) But this meeting does not need to be boring 😊

2

Leadership involvement. Successful involvement demonstrates the leadership's commitment and customer focus. Ensure the results reflects the importance of the Management System (s). Most Registrars view the Management review results first off and when done spectacularly they gauge where their focus will be during the audits.

3

ISO Expertise. As the Lead facilitator, demonstrate your knowledge of what the applicable Standards intent is, due to the Presenter being the conduit to the Leadership. If you do not have highly experienced ISO experts inhouse consider contracting with experts to assist your team. MSI has resources to arm your knowledge base and supplement with consulting.

4

Data Collection. Start early and pin-point where data is for the data and trends that are required to be presented. As best as possible, automate this process so data collection and analyzing is not super time consuming. Assign personnel to perform the data collection so the preparation effort is shared. Be sure that conclusions are presented in the presentation and possible follow-up actions. MSI has a Management Review Kit. (see sample)

5

Communicate. Identify key slides that would be extracted to be posted to convey how the company is performing to the Management System's expectations. Employees should be able to speak about these. A clear communication plan around the Management System's results is critical to ensure your entire organization understands the direction, values, objectives and commitment.