

# 5 Steps to a Decision-Ready Management Review\*

1

## **Run It Like a Board Meeting**

Protect the time. Book a room away from daily operations, or a video call with cameras on. We recommend reviews every six months, with one about three months before your surveillance audit. Block at least half a day. Invite the people who own the data and the decisions. Assign a note-taker who works from a set agenda. Make it worth attending — this meeting doesn't need to be dull. 😊

2

**Put Leadership in the Chair.** Top management leads the review — not the quality manager presenting to an empty room. When leaders ask the questions and make the calls, the record shows real commitment and customer focus. Auditors often read the management review record early. A strong one sets the tone for everything that follows.

3

**Bring the Expertise.** The facilitator translates what the standard intends into what leadership needs to decide. If that depth isn't in-house yet, bring in an expert for the first few cycles. Your team builds the skill — and the review stays defensible while they do.

4

**Cover Every Required Input and Intro paragraph .** Start data collection early. Assign owners so the work is shared, and automate trend reporting where you can. Under ISO 9001:2026, every input is mandatory — including changes in interested-party needs, and the effectiveness of risk actions and opportunity actions, reviewed separately. Every input leads to a conclusion. Every conclusion leads to a decision — with an owner and a date.

5

**Communicate the Results.** Pull the key slides and share them across the organization. Employees should be able to say how the system is performing and where it's headed. That turns the review from a compliance event into direction everyone can act on.

*\*Works for any ISO management system. Want the agenda, input pack, and minutes already built? [See the Management Review Toolkits →](#)*

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