

ISO 9001:2000 - Management Review Q&A

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Earlier this year, when I wrote an article titled *ISO 9001:2000 – Your Management Review*, I hadn't realized how much interest there was on the subject of Management Reviews, as required by the ISO 9001:2000 standard. As a result, I'm following up on this earlier article with a simple Question and Answer (Q&A) session, which is based on the questions I'm most frequently asked:

Q1: *Is a Management Review a formal meeting?*

A1: A management review is appropriately named, as it's an opportunity for top management of an organization to review the performance of their organization's management system. It's more than just a meeting however, as a management review includes the collection, analysis and review of performance data, and any decisions and actions related to the results.

Q2: *Can a management review be held remotely?*

A2: With the technology that is currently available, there's no reason that telephone and web conferencing shouldn't be considered. Portions of the review can be performed remotely when it is not possible or cost effective to meet in person. Data can be collected and analyzed electronically, and the results communicated by email or other means.

Q3: *Our organization is quite large and geographically dispersed. How can we perform a single management review?*

A3: There's actually nothing in the standard that requires only one management review be performed. For a large organization, this review can be performed at individual levels (or locations) and then consolidated into a final review that is performed by executive management of the organization.

Q4: *This is our first management review and we don't have much information to report. Can we still hold a management review?*

A4: You have information to report; the problem is that you just don't have much data. This in itself is noteworthy, and should also be considered as an opportunity for improving the effectiveness of your quality management system under section 5.6.3 of the ISO 9001:2000 standard (Review Output).

Q5: *What is the required interval for management reviews?*

A5: The ISO 9001 standard doesn't specify any specific time frame, other than requiring these reviews to be performed at planned intervals. For a "new" program, I would recommend at least quarterly, and then adjusting the duration to possibly six months or even on an annual basis if this meets the needs of the organization. Personally, I would never go longer than a 12 mo. interval between reviews.

Q6: *Prior to implementing ISO 9001:2000, our organization held monthly meetings to review the performance of our organization. While these meetings wouldn't meet the requirements of the ISO 9001 standard, they were of considerable value to us. Will this need to be changed?*

A6: The answer is no. There's no reason to change what you're already doing, particularly if it works well for you. I would keep minutes for these meetings however, and use these as a source of review input for when the organization does hold a formal management review.

Q7: Section 5.4.1. of the ISO 9001:2000 standard requires that Quality Objectives are established at relevant functions and levels within the organization. Is the Management Review an appropriate time to address this?

A7: I personally recommend this. The management review is an ideal time to address your organization's performance towards meeting existing objectives, and for determining new or revised objectives for the upcoming review period.

Q8: *What types of records do we need to maintain?*

A8: You'll need to retain records that demonstrate the requirements of the ISO 9001 standard have been met. This should include, as applicable, meeting minutes (dates, attendees, location, agenda, etc.), objective evidence used as part of this review, and any decisions and actions that result (including responsibilities and timelines).

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