**REVIEW OF THE TOTAL MANAGEMENT SYSTEM**

(For internal circulation on a need-to-know basis only)  
  
Items marked \* MUST be addressed to meet the requirements of ISO 9001. Other agenda items have been added to make an effective and useful business management meeting.  
  
As appropriate, items may be recorded as **"Nothing to report"** or **"No change".**

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| --- | --- | --- | --- |
| Date: |  | Time: |  |
| 1. | Attendees | | |
| 2. | Attendees | | |

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| --- | --- | --- | --- |
| Records or Minutes | | Action by | Deadline |
| 3. | Review status and effectiveness of actions from previous meetings  - <insert notes> |  |  |
| 4. | Financial performance last 3 months and year to date  - <insert notes> |  |  |
| 5. | Any changes in context, strategic direction, legal status, external issues, internal issues, etc. (form 04a [OR: 04c])  - <insert notes> |  |  |
| 6. | New contracts to start |  |  |
| 7. | Current contracts  - <insert notes> |  |  |
| 8. | Comments and any lessons learnt from recently completed contracts  - <insert notes> |  |  |
| 9. | Sales targets year to date  - <insert notes> |  |  |
| 10. | Marketing, sales, fund-seeking activities and competitors' activities  - <insert notes> |  |  |
| 11. | Any anticipated new designs, design modifications or requirements from customers, internal departments, or interested parties  - <insert notes> |  |  |
| 12. | Customer returns, credit-notes, complaints, or questionnaires. Feedback from customers and relevant interested parties. Form 15a [OR: 15b] [OR: 16]  - <insert notes> |  |  |
| 13. | Review of any new or proposed legislation relating to the product or service  - <insert notes> |  |  |
| 14. | Change of situation review, items to address and take actions on: strengths, weaknesses, opportunities, or any perceived threats and risks or opportunities.  - <insert notes as appropriate>  Strengths  Weaknesses  Opportunities  Threats [OR: See form 48]  Any risks or opportunities associated with: - Employees, competence gap, leaving, morale, etc. - Premises - Utilities and facilities - Equipment - Products or services - External providers - Manufacturing - Measuring and test - Internal handling - Transport - Security (Physical or intellectual) - Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Change of situation review continued  - <insert notes> |  |  |
| 15. | Seek additional certifications or approvals  - <insert notes> |  |  |
| 16. | Review of internal audits (forms 14 [OR: 44], 15a [OR: 15b] [OR: and 16]). Review of external audits. Any actions arising  - <insert notes> |  |  |
| 17. | Review of and changes required in the Quality Manual, Quality Policy, documented management system, other policies, etc.  - <insert notes> |  |  |
| 18. | Analysis, internal problems, process performance, monitoring and measuring, non-conformities, % of scrap, etc.  - <insert notes> |  |  |
| 19. | Review of NCRs; effectiveness of corrective actions; analysis for any trends. Refer to forms 15a [OR: 15b] [OR: and 16]  - <insert notes> |  |  |
| 20. | Performance of external providers: problems, discard, any need or justification for new  - <insert notes> |  |  |
| 21. | New designs projects, products, or developments  - <insert notes> |  |  |
| 22. | Review of any new or proposed environmental legislation  - <insert notes> |  |  |
| 23. | Any external environmental issues (emissions, discharges, waste, etc.)  - <insert notes> |  |  |
| 24. | Review of any new or proposed Health and Safety legislation  - <insert notes> |  |  |
| 25. | Accidents, near miss, any health and safety risks or issues  - <insert notes> |  |  |
| 26 | New facilities or equipment (buildings, machinery, transport, IT, etc.)  - <insert notes> |  |  |
| 27. | Work environment issues (temperature, light, noise, ergonomics, social, etc.)  - <insert notes> |  |  |
| 28. | Any knowledge/competence gaps: train, reallocate, recruit, outsource  - <insert notes> |  |  |
| 29. | Team morale; any discriminatory issues, grumbles, social activities, loyalty of employees  - <insert notes> |  |  |
| 30. | Existing objectives, opportunities for improvement, and future needs projects. Use form 05 [OR: and 05a]  - <insert notes> |  |  |
| 31. | Any other business  - <insert notes> |  |  |
| 32. | Date, time of next meeting (Approximately every 3 or 4 months)  - <insert notes> |  |  |