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Add management reviews to your business planning cycles to increase their value

by Michael Mills

Quality means getting what you want, but it can be hard to keep track of what you want. Fortunately, there's an app for that—management reviews.

Management reviews have been an ISO 9001 requirement since the beginning, but all too often, they're done just to make an auditor happy. But the ISO 2001:2015 requirements opened a window. By adding new topics to cover, the standard gives a chance to make management reviews part of the business planning cycle and to get the positive engagement—not just the passive toleration—of senior management.

There are many ways to make management reviews boring—over the years, I've used most of them. The key to making them engaging is to look beyond the quality management system (QMS) itself. Interested parties, for example, aren't just your customers, suppliers and regulators. They're also your competitors, industry, employees and their families, and neighborhood. Expectations aren't just defect-free products, but employees eager to come to work each morning.

As for risks and opportunities—is a competitor poaching your staff? Could a global political wrinkle drive up your costs? Will new technology make your flagship product obsolete in five years? If so, put them on the list. Each one of these might keep you from getting the results you want, so each one affects quality.

Of course, you can't ignore traditional QMS topics like audit results, product and service conformity, and external provider performance. These are written into the standard. If you need ISO 9001 certification, don't skip them. But the standard only requires them to be considered when planning and holding a review. So, know where they all stand. If an issue needs action, raise it. But don't give valuable meeting time to things that are just fine. Focus where it hurts.

When my company first implemented this approach a couple years ago, we held three meetings to set it up:

1. Brainstorm our interested parties and what they want from us.
2. Brainstorm our risks and opportunities, rate each and assign it an owner.
3. Define programs for everything we do. Mostly, we already were doing these things, but we made sure that every expectation and every risk was covered by a program. If not, we made a conscious decision to take no action on it. Every program had an owner and a way to tell success from failure (key performance indicators).

Now we meet after each quarter to review each program. We don't talk about what's going well, and we don't repeat anything that's reported elsewhere. All we check is whether it's going OK. If it is, we move on. If it isn't, we determine what to do about it. We report on assigned actions and risks, and adjourn.

We meet again a couple weeks after the fourth quarter review to check our overall setup: interested parties, expectations, risks and opportunities, and programs. We determine what worked and what didn't, and change anything that needs it.

And we do it again.

The results have been good. We get positive engagement because it's not all "quality talk"—we focus on things that visibly affect the people in the room.

We keep track of long-term issues—the ones we must address someday, but not today. After they are on the list, we don't forget them. Our year-end meeting is a time to adjust our strategy if it's not working or, in agile terms, a pivot. QP

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