10 tips for more effective management reviews.

Many companies conduct annual management reviews as a management tool within their implemented management system. Unfortunately, however, companies are not fully utilizing this tool's potential. The following 10 tips provide inspiration for more effective management reviews.

As part of a management review, the relevant data and information from the organization are examined to analyze the performance of the management system and identify potential for improvement. Or, to put it simply, we take a step back from the day-to-day work to gain an overview of where the organization is headed.
A management review is usually required by the management system standard, such as ISO 9001, ISO 22000, FSSC 22000, IFS, etc. This review should be conducted at least once a year. It is a summary of monthly or quarterly reports.

About 30 years ago, I had the opportunity to introduce ISO 9001 in a medium-sized food factory. This is where I learned about and appreciated management review. What I liked from the very first moment:

- I see what was accomplished in the past year and can be proud of the progress. This can also be the occasion for rewards or a group celebration.
- The focus on continuous improvement is increased.
- A good management review improves the cohesion of the leadership team.

Since then, I've conducted many management reviews, and they've always been a great help in driving continuous improvement. Unfortunately, in the last few years of my career as a lead auditor for a GFSI standard , I've seen that many companies aren't utilizing this tool's full potential.

Here are 10 tips to get more out of your management review:

1. **Adhere to the standard:**
   Each standard has specific requirements for the management review, which must be addressed. Deviations often occur in audits because the company hasn't studied the standard thoroughly, and certain aspects of the standard are missing from the management review. Examples include changes to the organization and context, resource considerations, etc.

2. **Working in a team:**
   Typically, all responsible parties contribute their share of the content. Unfortunately, I still occasionally see lone wolves documenting the entire management review independently. These lone wolves fail to secure ownership of the management system to the relevant responsible parties.

3. **Keep to time:**
   If the management review is only conducted once a year, it should begin in early January and be completed by the end of February at the latest, so that the objectives can be addressed throughout the year. If the review isn't conducted until June, this is very difficult.

4. **Keep it clear and short:**
   Reading the assessment doesn't have to be tedious. This means clear data sets, simple explanations, and not too many details; summary tables or charts are often sufficient. Reference to other reports if necessary. Consider adding details in appendices.

5. **Keep it trendy:**
   The larger context should be identified. Therefore, don't just document data from the previous year. Instead, look at the data as a multi-year trend, especially with regard to indicators and key performance indicators (KPIs) .

6. **Keep it graphic:**
   A picture is worth a hundred words. Therefore, try to use meaningful graphics. A traffic light graphic has been a good example: green = goal achieved, orange = goal not quite achieved, red = goal not achieved. For each red color, an action must be documented. This helps focus. The following applies to all graphics: Graphics must be self-explanatory. Graphics should be helpful in conveying the information. If this isn't the case, cancel and find another format.

7. **Act in focus**
   Every now and then, I encounter a management review in companies that resembles a fine book keeping. While you know where you stand, you don't know how you can improve. This means that the Deming cycle only implements the "Plan," "Do," and "Check" steps, not the "Act" steps.
   When results are poor, i.e., when the graphic appears orange or red, the causes of the poor results must be identified and measures/goals derived. Without measures, the company will not make progress. The elephant doesn't have to be eaten all at once, but rather piece by piece. This means it's important to divide the tasks in digestible bits and start with the first step.

8. **Keep SMART in a targeted manner:**
   Phrases like "Something needs to be done here" or "No measures planned" when dealing with poor results don't help move the company forward. Clear measures or goals are needed. Goals must be formulated SMART* (Specific, Measurable, Achievable = Attainable, Realistic, Time-bound). The clearer the goals, the more likely they are to be achieved.
   It may be possible to find the same causes for different deviations, so that these can be bundled into one measure.

9. **Keep it structured:**
   Whether documented in a presentation or report format, the assessment must be enjoyable to read. Structuring plays a key role in this. Furthermore, with multiple standards implemented, the question arises as to whether the various management assessments can be integrated into a single management assessment.

10. **Stay focused:**
    The past is only used in management reviews to determine clear paths for the future. However, the company cannot remain stuck in the past. A management review must result in a clear action plan with goals for the next year. Only then can we focus on continuous improvement.

With this in mind, I wish you every success for the next management review in 2025.

Dr. John C. Brunner