

Halderstone



Training module

Auditing Management Review

Assess whether management review credibly steers organisational priorities, risks & improvement



Does management review steer the system or only produce meeting minutes?

Overview

Management review is intended to provide leadership oversight and direction for the management system. In practice, organisations often conduct recurring meetings with standard agendas while real steering decisions occur elsewhere or follow-up actions remain weak.

This module develops the capability to audit whether management review credibly steers the system. Participants first review how management review is expected to function within management systems and then learn how auditors test input completeness, evaluate decision quality, and verify whether review outputs translate into actions and priorities.



Target audience

- Aspiring auditors who want to audit management systems following best practices
- Practising management system auditors who want to strengthen their audit knowledge, judgement, and effectiveness

Is this module for you?

It is a good fit for you if you...

- audit whether management review genuinely steers the management system.
- need to judge input completeness, decision quality, and follow-up evidence.
- assess how review outputs influence priorities, risks, and improvement actions.
- want to test alignment between review discussions and organisational performance.
- expect to strengthen audit conclusions on leadership involvement and system steering.

It may be less suitable for you if you...

- prefer to design or facilitate management review meetings.
- are looking for guidance on agendas, templates, or meeting formats.
- focus primarily on leadership coaching or improvement facilitation.
- do not intend to audit management review as part of a management system.

Learning outcomes



Key outcomes

- Assess whether management review functions as system steering rather than a routine meeting
- Test management review input completeness for relevance, timeliness, and traceability
- Judge decision quality by identifying evidence of prioritisation, trade-offs, and resourcing choices

Additional capabilities

- Triangulate review records with operational evidence to detect disconnects
- Trace review decisions through actions and follow-up evidence
- Detect common management review failure patterns and formulate defensible audit conclusions



Agenda

Foundations of management review in management systems

How management review provides leadership oversight, evaluates system performance, and steers organisational priorities

What effective auditing of management review looks like

How auditors judge whether management review functions as a real governance routine rather than a formal meeting

Testing completeness of management review inputs

How to evaluate whether relevant performance, risk, audit, and change inputs are integrated and decision-ready

Building the audit evidence trail from inputs to outcomes

How to trace review discussions, decisions, and actions across records, performance evidence, and follow-up

Detecting management review failure patterns

How auditors recognise reporting-only meetings, missing escalation, weak follow-up, and disconnected decision records

Judging credibility of management review steering

How auditors distinguish routine reporting from real system steering through decisions, prioritisation, and resourcing

Case-based audit simulation

Applying the learned concepts, methods, and approaches in a realistic case setting

Included materials



Learning materials

- Slide deck
- Participant workbook

Templates & tools

- Audit interview planning tool
- Documented information checklist
- Sampling tool
- Audit analysis worksheets
- Failure pattern library
- Supporting AI prompt set

Confirmation

- Confirmation of participation

Preparation guidance

Assumed background

This module assumes participants can perform basic audit activities and apply evidence-based judgement.

Helpful background includes:

- General understanding of management systems and organisational governance routines
- Ability to follow audit trails across meeting records, performance evidence, and action tracking
- Basic familiarity with management review documentation and organisational decision processes

Preparatory modules

Foundation (depending on background)

Useful if you are new to the underlying concepts

- Audit Principles

Supporting (optional)

Helpful but not required to participate effectively

- Audit Communication & Interviewing
- Audit Reporting & Follow-up

Logistics



Available languages

- English
- German

Standard delivery options

- Virtual live teaching
- Blended learning (e-learning + live)

Bespoke delivery options

- On-site delivery at your place
- Content adapted to your organization



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Halderstone by Langer & Co

Zürcherstrasse 2
CH-8852 Altendorf
Switzerland

info@halderstone.com
www.halderstone.com