

Halderstone



Training module

Management Review

Conduct effective management reviews with structured inputs, clear decisions and audit-ready evidence



Do your management review sessions feel more like a standard-imposed duty than a strategic steering instrument?

Overview

Many organizations conduct management reviews as routine, slide-heavy status updates, often resulting in weak decisions and poor follow-through.

This module addresses these challenges by providing a structured approach to transform management reviews into effective decision-making forums. Participants will learn the fundamentals of planning, conducting, and documenting management reviews using integrated inputs and decision-focused outputs. The focus is on structuring relevant inputs, facilitating focused discussions, and capturing outputs that ensure leadership direction is clear and actions are traceable, thereby enhancing the strategic value of management reviews.



Target audience

- Management system implementers and coordinators
- Executives and department heads accountable for management system performance
- Those responsible for processes, policies, assets, risks, and controls related to a management system
- Auditors seeking insights into management-side best practice (not audit technique)
- Management consultants working with management system design, governance, or improvement

Is this module for you?

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

- participate in or prepare management reviews.
- experience management reviews as reporting sessions rather than decisions.
- struggle with unfocused discussions and weak follow-through.
- need clearer inputs, decisions, and documented outputs.
- want management review to actively steer the system.

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

- already run structured, decision-focused management reviews that lead to action.
- have no mandate or interest in shaping management review inputs or outputs.
- need KPI design, monitoring setup, or performance analysis methods.
- are looking for audit execution or facilitation skills.

Learning outcomes



Key outcomes

- Plan and prepare for management reviews to ensure relevant inputs and a clear agenda
- Conduct effective management review meetings that foster focused discussions and decision-making
- Document management review outputs to ensure leadership direction is visible and actions are traceable

Additional capabilities

- Integrate diverse inputs (e.g., performance data, audit results, risk assessments) into a coherent review process
- Distinguish between effective management reviews and mere reporting exercises
- Establish a cadence for management reviews that supports continuous improvement and strategic alignment

Agenda

Management review as a governance routine

How management review serves as a governance routine across ISO-style management systems, clarifies leadership accountability, and anchors system-owner responsibilities

Designing the review structure and cadence

How to design a review structure and cadence that fit the organisation's operating rhythm, and define roles, participants, and decision rights for effective reviews

Integrating inputs from existing system processes

How to consolidate inputs from performance, audit, nonconformities and corrective actions, risk and opportunity status, incidents and complaints, resources, and change, and make them comparable and usable for leadership discussion

Turning inputs into decision-ready information

How to move from data dumps to concise narratives that highlight implications, trade-offs, and options, and prepare executive-friendly summaries without hiding uncertainty or issues

Running an effective management review meeting

How to maintain agenda discipline and timeboxing, keep discussions at the right level, and handle derailments, defensiveness, and excessive detail

Capturing outputs and evidence

How to document decisions on improvement priorities, resource needs, system changes, and follow-up, and define what audit-ready evidence looks like for management review without teaching audit techniques

Follow-through and integration

How to assign owners, timeframes, checkpoints, and escalation paths for actions, and connect management review outputs to existing governance and improvement routines

Case-based workshop

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

Included materials



Learning materials

- Slide deck
- Participant workbook

Templates & tools

- Management review process
- Input and output checklist
- Standard management review agenda
- Management review decision register
- Example management review record

Confirmation

- Confirmation of participation

Preparation guidance

Assumed background

Participants should be comfortable with basic management system concepts and organisational roles. Helpful background includes:

No standard- or clause-specific knowledge is required.

- How performance results, audits, incidents, and improvement actions are typically reported internally
- Basic understanding of leadership responsibilities and governance routines

Preparatory modules

Foundation (depending on background)

Useful if you are new to the underlying concepts

- System Leadership
- Objectives & Performance Management

Supporting (optional)

Helpful but not required to participate effectively

- System Framing
- Governance Design

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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