

QSE Academy

PROCESS SHEET

QM-01 — Strategic Steering and Management Review

MetalForge Inc.

Quality Management System per ISO 9001:2015

Version 1.0 — April 2026

QSE Academy

Process Sheet QM-01 — Strategic Steering and Management Review

Process Code	QM-01
Title	Strategic Steering and Management Review
Family	Management Process
Process Owner	President
Backup	Quality Manager
ISO 9001:2015 Clauses	§§ 4.1, 4.2, 5.1, 5.2, 5.3, 6.1, 6.2, 9.1.3, 9.3, 10.3
Frequency	Annual cycle with quarterly intermediate reviews
Version / Date	V1.0 — April 2026

1. Purpose and Stakes

Process QM-01 defines MetalForge Inc.'s quality strategy and steers the entire Quality Management System. It is the umbrella process that orients, feeds, and arbitrates all other processes.

Its purpose is to:

- Set the strategic direction of the QMS in alignment with the company's vision
- Determine the relevant internal and external issues (context, § 4.1)
- Identify interested parties and their requirements (§ 4.2)
- Define the Quality Policy and measurable objectives (§§ 5.2, 6.2)
- Allocate the human, material, and financial resources required
- Monitor the overall performance of the QMS and decide on improvement actions

2. Inputs and Outputs

Inputs	Outputs
<ul style="list-style-type: none"> • Economic and market context (intelligence) • Strategic customer requirements (Tier 2 auto, aerospace) • Applicable legal and regulatory requirements • Process review feedback (all processes) • Internal and external audit results • Consolidated QMS indicators • Complaints and customer satisfaction (via QM-03) 	<ul style="list-style-type: none"> • Quality Policy signed by Management • Measurable quality objectives broken down by process • Annual strategic quality plan • Approved and allocated QMS budget • Strategic training plan • Investment decisions (equipment, software) • Management review minutes (§ 9.3) • Arbitrated corrective and preventive actions

Inputs	Outputs
<ul style="list-style-type: none"> Major nonconformities and corrective actions (via QM-02) Risk and opportunity analysis Resource review (HR, equipment, budget) 	<ul style="list-style-type: none"> Mandates given to process owners Internal communication (vision, policy, results)

3. Resources Required

Human Resources	Material Resources	Documentary Resources
<ul style="list-style-type: none"> President (owner) Quality Manager (backup, facilitator) Owners of the 8 other processes (contributors) External QMS consultant (deployment phase) External auditor (certification) 	<ul style="list-style-type: none"> Dedicated meeting room for reviews Steering tool (Excel / Power BI dashboard) Document management software for QMS docs ERP system (indicator extraction) Internal communication system 	<ul style="list-style-type: none"> Quality Manual (QM-001) Quality Policy (POL-001) Context analysis (CTX-001) Quality objectives (OBJ-001) Management review procedure (PROC-003) Process map (MAP-001)

4. Required Competencies

Function	Required Competencies	Acquisition / Maintenance
President	Strategic vision, reading QMS indicators, quality leadership, general ISO 9001 knowledge	Initial 2-day ISO 9001 training for executives + annual refresh
Quality Manager	ISO 9001 expertise, review facilitation, risk analysis, communication	ASQ CQM/OE or IRCA Lead Auditor + minimum 3 years experience
Process Owners	Mastery of their process, indicator reading, leading improvement actions	1-day internal 'process owner' training + 3-month coaching

5. Interactions with Other Processes

Related Process	Direction	Nature of Exchange
All processes	Downstream	Quality Policy, objectives, allocated resources, mandates given to owners
QM-02 Continuous Improvement	Upstream	Annual risk review, corrective actions, consolidated indicators

Related Process	Direction	Nature of Exchange
QM-03 Customer Focus	Upstream	Customer satisfaction review, major complaints
All processes	Upstream	Process review minutes, indicators, improvement proposals

6. Key Performance Indicators (KPIs)

The indicators below allow steering and measuring the performance of process QM-01. They are consolidated in the President's dashboard.

KPI	Calculation Formula	Target	Frequency	Responsible
Annual quality objectives achievement rate	Objectives met / Objectives set	≥ 85%	Annual	President
Management review completion rate	1 formal review/yr with signed minutes	100%	Annual	Quality Mgr
Completion rate of actions from management review	Actions closed / Actions decided	≥ 90%	Quarterly	Quality Mgr
Average strategic decision processing time	Decision date → Implementation date	≤ 90 days	Quarterly	President
Quality Policy awareness rate (internal audit)	Informed employees / Total headcount	≥ 95%	Annual	Quality Mgr
Interested parties coverage rate	IP with action plan / IP identified	100% critical	Annual	President + QM

7. Identified Risks and Mitigation

Analysis compliant with clause § 6.1 of the standard. Matrix revised annually at the management review.

Identified Risk	Probability	Impact	Mitigation Action
Quality Policy disconnected from actual issues (display document)	Medium	High	Annual review by President + owners, cross-check with business objectives
Objectives not met due to insufficient resource allocation	Medium	High	Formal QMS budgeting at year start, quarterly reporting
Departure of the President without QMS handover (family business)	Low	Critical	Backup training, quality governance documentation

Identified Risk	Probability	Impact	Mitigation Action
Management review rushed or postponed (non-compliance with requirement)	Medium	High	Date locked 12 months in advance, standard agenda, mandatory minutes
Insufficient internal communication (staff unaware of policy)	High	Medium	Formalized communication plan (posting, intranet, team meetings)

8. Improvement Opportunities

- Strengthen Management's quality leadership through formalized governance
- Align quality strategy with the AS9100D certification ambition at 3 years
- Promote the quality approach to Tier 1 aerospace customers as a commercial differentiator
- Use the management review as a tool for internal cohesion and mobilization
- Capitalize on ISO 9001 certification to prepare future IATF 16949 certification if the automotive market intensifies

9. Critical Points to Monitor

- Consistency between the displayed Quality Policy and Management's actual arbitrations (budget, operational priorities)
- Continuous involvement of the President (demonstrated leadership, § 5.1) and not complete delegation to the Quality Manager
- Quality of the management review minutes: must cover the 15 inputs and 8 outputs required by § 9.3
- Traceability of strategic decisions and effective monitoring of their implementation
- Distribution and understanding of the Quality Policy across all employees

10. Associated Documents

QMS documents directly linked to process QM-01. Cross-referenced with the Document Master List (DML).

Code	Document	Type	Status
QM-001	Quality Manual	Manual	To create
POL-001	Quality Policy	Policy	To create

Code	Document	Type	Status
CTX-001	Context Analysis and Interested Parties	Analysis	To create
OBJ-001	Annual Quality Objectives and Action Plan	Plan	To create
SCO-001	QMS Scope Statement	Document	To create
PROC-003	Management Review Procedure	Procedure	To create
REC-MR-001	Management Review Minutes Template	Record	To create

11. Process Flowchart

The flowchart below presents the annual operational unfolding of process QM-01, from context analysis through the management review.

Flowchart QM-01 — Strategic Steering and Management Review
 MetalForge Inc. — Management Process
 Owner: Top Management • ISO 9001:2015 § 5, 6.2, 9.3

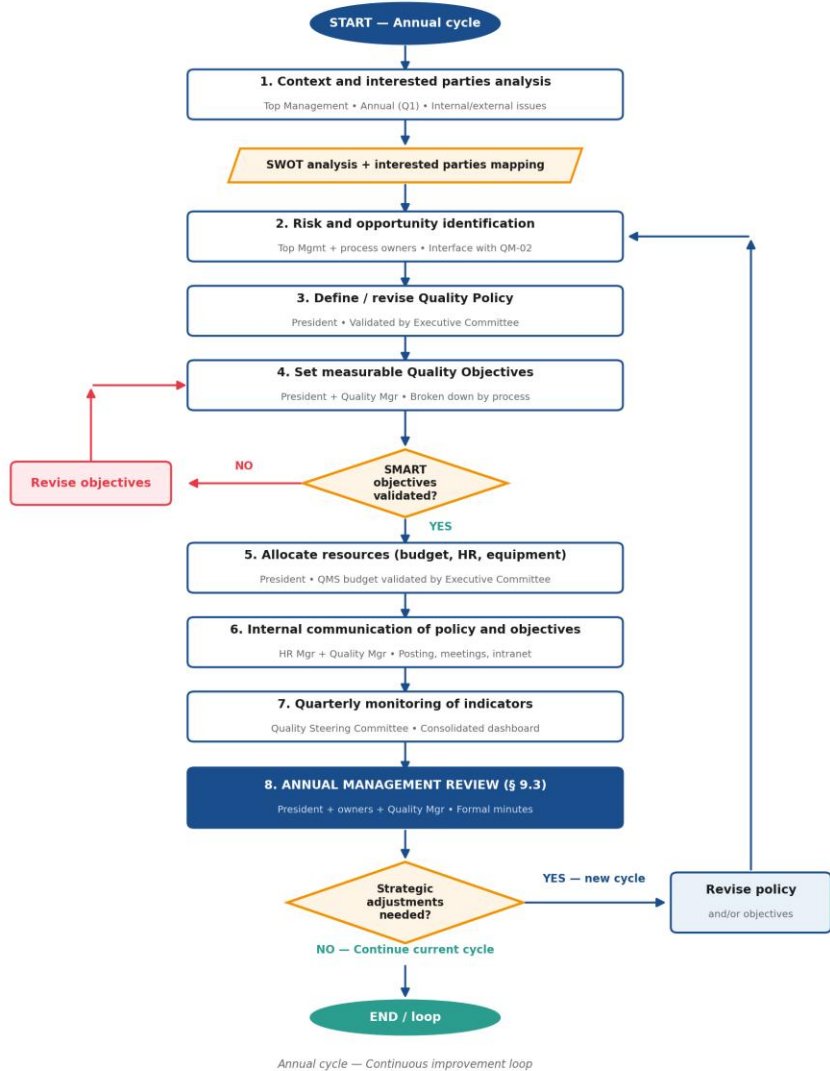


Figure — Process QM-01 Flowchart

12. Validation and Approval

Action	Name and Role	Date	Signature
Prepared by	Quality Manager	___/___/___	
Reviewed by	Quality Steering Committee	___/___/___	
Approved by	President	___/___/___	