

Management Review Report

Viamed

Role: Marketing Controller

Report Date: 14 May 2026

Index

- 1. Marketing Controller (ID #13)
- 2. **Conclusion / Executive Summary**

Task Completion History - Colour Key

Colour coding in the 'Days to Complete' column reflects performance, not formal sign-off status (some auto-issue tasks never receive formal investigation sign-off).

Green	Completed in 14 days or less (good)
Yellow	Completed in 15 - 60 days (acceptable)
Orange	Completed in over 60 days (slow)
Red	Outstanding - not yet completed (age shown)

Role: Marketing Controller (ID #13)

Reports To: Director 3 (Steve) ? Managing Director ? Share Holder

Assigned Employees: Steve Nixon, Steve Nixon, Steve Nixon, Steve Nixon

Processes Assigned: 27 (13 active, 14 responsibility-only)

Role Risk Indicators - Marketing Controller

- 13 linked processes
- 2 overdue rolling tasks/audits
- 3 processes with only one trained user
- 1 processes missing measurable objective
- 6 processes with no audit configured

Dependency / Single-Point-of-Failure Risk

- Catrin Hird linked to 92% (12 of 13) of role processes - single point of failure risk
- 3 process(es) have only 1 trained employee - no backup coverage

Process ID #8056 — Add Calendar To Order

Last Reviewed: 28 Jul 2025 by Helen Lamb

Process Maturity (4 of 6 - 67%)

Measure	Status
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Management Review

Viamed - Marketing Controller

Has Risk Assessment	Yes
Has Audit	No
Has Measurable Objective	Yes
Has Backup Staff	No
Reviewed <12 Months	Yes
Recent Completion Evidence	Yes

Risk Assessment

Risk Item	Notes / Value	Last Updated
Input to the Process	calendar and sales orders	Helen Lamb 29 Dec 2023
Outputs to the Process	Calendars sent to customers	Helen Lamb 29 Dec 2023
Risks to the Process	customers don't receive Calendars	Helen Lamb 29 Dec 2023
Steps to Minimise Process Risks	system adding	Helen Lamb 29 Dec 2023
Scope / Definition of Process / Objective	Add calendar to order	Helen Lamb 29 Dec 2023
Likelihood of Risk (1-5)	1.Improbable	Helen Lamb 29 Dec 2023
Severity of Risk (1-5)	1.Negligible	Helen Lamb 29 Dec 2023
Measurable Objective	Calendar being added to order	Helen Lamb 29 Dec 2023
Training Method Required	hands on	Helen Lamb 29 Dec 2023
Verification / Effectiveness	regular issues and additions to system to make sure calendars are getting added.	Helen Lamb 29 Dec 2023
Covid / Pandemic Notes	This not affected by covid or national or international issue	Helen Lamb 29 Dec 2023
Risk / Benefit Report	No Action	Helen Lamb 28 Jul 2025
HSE Implications	No health and safety implications	Helen Lamb 28 Jul 2025
Calculated Risk Code	No Action (Frequency=1, Severity=1)	

Interested Parties

- Internal Systems
- Customer

Linked Companies

- Viamed

Trained Staff (1)

- Catrin Hird (trained by Helen Lamb)

Associated Documents

- Audit 16 Sales and Marketing Viamed (Doc ID: 159461)
- Audit 16 Sales and Marketing VST (Doc ID: 159463)
- VOP 25 Sales and Marketing (Doc ID: 31100)

Rolling Task #347

Subject: Add calendar to order

Target User: Catrin Hird

Recurrence: 12 Month(s) 0 Week(s) 0 Day(s)

Notes:

System Generated

Task Completion History (Last 2 Years, Max 20 Items)

ID	Subject	Created	Completed	Days to Complete	Investigated By
381300	Add calendar to order (347)	20 Nov 2025	22 Dec 2025	32 days	Catrin Hird
347420	Add calendar to order (347)	20 Nov 2024	21 Nov 2024	1 day	Catrin Hird

Management Review

Viamed - Marketing Controller

Process ID #8024 — Discontinue/Supersede Stock

Last Reviewed: 28 Jul 2025 by Helen Lamb

Process Maturity (6 of 6 - 100%)

Measure	Status
Has Risk Assessment	Yes
Has Audit	Yes
Has Measurable Objective	Yes
Has Backup Staff	Yes
Reviewed <12 Months	Yes
Recent Completion Evidence	Yes

Risk Assessment

Risk Item	Notes / Value	Last Updated
Input to the Process	Stock to be discontinued list Stock control	Helen Lamb 10 Mar 2023
Outputs to the Process	Stock is correctly flagged in Intrastats	Helen Lamb 10 Mar 2023
Risks to the Process	that customers will order stock we no longer have	Helen Lamb 10 Mar 2023
Steps to Minimise Process Risks	regular reviews	Helen Lamb 10 Mar 2023
Scope / Definition of Process / Objective	This is a review of old stock that is being sold and then when stock runs out it will be withdrawn from sale.	Helen Lamb 10 Mar 2023
Likelihood of Risk (1-5)	1.Improbable	Helen Lamb 10 Mar 2023
Severity of Risk (1-5)	1.Negligible	Helen Lamb 10 Mar 2023
Measurable Objective	Stock to be discontinued list has been checked and reviewed as per the rolling issue	Helen Lamb 10 Mar 2023
Training Method Required	Hands on by experienced members of staff	Helen Lamb 10 Mar 2023
Verification / Effectiveness	List has no zeros in it	Helen Lamb 10 Mar 2023
Covid / Pandemic Notes	This process is not affected by Covid 19 or other extreme national or international circumstance / crisis.	Helen Lamb 10 Mar 2023
Risk / Benefit Report	No Action	Helen Lamb 28 Jul 2025
HSE Implications	No health and safety implications	Helen Lamb 28 Jul 2025
Calculated Risk Code	No Action (Frequency=1, Severity=1)	

Linked ISO Sections

- Quality Management System Route Map to Documents and Procedures Viamed Ltd ISO13485:2016: 7.5.8
- Quality Management System Route Map to Documents and Procedures Viamed Ltd ISO13485:2016: 8.3
- Quality Management System Route Map to Documents and Procedures VST Ltd ISO9001:2015+A1: 8.2.3
- Quality Management System Route Map to Documents and Procedures VST Ltd ISO9001:2015+A1: 8.5.2

Interested Parties

- Internal Systems
- VST OEM Customers
- Customer

Linked Companies

- Viamed
- VST
- Vandagraph

Trained Staff (3)

- Derek Lamb (trained by Helen Lamb)

Management Review

Viamed - Marketing Controller

- Catrin Hird (trained by Derek Lamb)
- Michael Lamb (trained by Helen Lamb)

Associated Documents

- Audit 07 Handling and Storage Viamed (Doc ID: 184932)
- Audit 07 Handling and Storage VST (Doc ID: 159441)
- VOP 07 Stock Control, Handling, Control of Labelling, Storage, Movement (Doc ID: 137933)

Rolling Task #971

Subject: Discontinue/Supersede Stock Once Depleted

Target User: Catrin Hird

Recurrence: 0 Month(s) 1 Week(s) 0 Day(s)

Notes:

System Generated

Review Stock - Stock Analysis - Stock to be Discontinued to see if any stock has been sold and customers can now purchase the superseded item.

Stock, Stock to be Discontinued

Rolling Audit #1211

Subject: Discontinue/Supersede Stock

Target User: Michael Lamb

Recurrence: 12 Month(s) 0 Week(s) 0 Day(s)

Notes:

System Generated Task To be Completed

Check task has been completed

Task Completion History (Last 2 Years, Max 20 Items)

ID	Subject	Created	Completed	Days to Complete	Investigated By
397158	Discontinue/Supersede Stock Once Depleted (971)	13 May 2026	13 May 2026	0 days	Catrin Hird
396794	Discontinue/Supersede Stock (1211)	08 May 2026		Outstanding (6 days)	Michael Lamb
396577	Discontinue/Supersede Stock Once Depleted (971)	06 May 2026	07 May 2026	1 day	Catrin Hird
395932	Discontinue/Supersede Stock Once Depleted (971)	29 Apr 2026	29 Apr 2026	0 days	Catrin Hird
395252	Discontinue/Supersede Stock Once Depleted (971)	22 Apr 2026	23 Apr 2026	1 day	Catrin Hird
394653	Discontinue/Supersede Stock Once Depleted (971)	15 Apr 2026	15 Apr 2026	0 days	Catrin Hird
393905	Discontinue/Supersede Stock Once Depleted (971)	08 Apr 2026	08 Apr 2026	0 days	Catrin Hird
393314	Discontinue/Supersede Stock Once Depleted (971)	01 Apr 2026	01 Apr 2026	0 days	Catrin Hird
392768	Discontinue/Supersede Stock Once Depleted (971)	25 Mar 2026	25 Mar 2026	0 days	Catrin Hird
392007	Discontinue/Supersede Stock Once Depleted (971)	18 Mar 2026	19 Mar 2026	1 day	Catrin Hird

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Viamed - Marketing Controller

391437	ede Stock Once Depleted (971) Discontinue/Supers	11 Mar 2026	12 Mar 2026	1 day	Catrin Hird
390766	ede Stock Once Depleted (971) Discontinue/Supers	04 Mar 2026	04 Mar 2026	0 days	Catrin Hird
389997	ede Stock Once Depleted (971) Discontinue/Supers	25 Feb 2026	25 Feb 2026	0 days	Catrin Hird
389251	ede Stock Once Depleted (971) Discontinue/Supers	18 Feb 2026	18 Feb 2026	0 days	Catrin Hird
388583	ede Stock Once Depleted (971) Discontinue/Supers	11 Feb 2026	12 Feb 2026	1 day	Catrin Hird
387770	ede Stock Once Depleted (971) Discontinue/Supers	04 Feb 2026	04 Feb 2026	0 days	Catrin Hird
387144	ede Stock Once Depleted (971) Discontinue/Supers	28 Jan 2026	28 Jan 2026	0 days	Catrin Hird
386451	ede Stock Once Depleted (971) Discontinue/Supers	21 Jan 2026	21 Jan 2026	0 days	Catrin Hird
385876	ede Stock Once Depleted (971) Discontinue/Supers	14 Jan 2026	15 Jan 2026	1 day	Catrin Hird
385236	ede Stock Once Depleted (971) Discontinue/Supers	07 Jan 2026	08 Jan 2026	1 day	Catrin Hird

Process ID #8110 — Marketing Controller Review

Last Reviewed: 14 May 2026 by Derek Lamb

Process Maturity (3 of 6 - 50%)

Measure	Status
Has Risk Assessment	Yes
Has Audit	No
Has Measurable Objective	No
Has Backup Staff	No
Reviewed <12 Months	Yes
Recent Completion Evidence	Yes

Risk Assessment

Risk Item	Notes / Value	Last Updated
Input to the Process		
Outputs to the Process		
Risks to the Process		
Steps to Minimise Process Risks		
Scope / Definition of Process / Objective	New Process as of 14 / 05 / 2026.Roles Titles Processes and Procedures ADMIN ViamedEnd column of Marketing Controller Responsibilitys ReviewPrint to PDF,	Derek Lamb 14 May 2026

Likelihood of Risk (1-5)

Severity of Risk (1-5)

Management Review

Viamed - Marketing Controller

Measurable Objective
Training Method Required
Verification / Effectiveness
Covid / Pandemic Notes
Risk / Benefit Report
HSE Implications
Calculated Risk Code

NEEDS SETTING (Frequency=0,
Severity=0)

Linked ISO Sections

- Quality Management System Route Map to Documents and Procedures Viamed Ltd ISO13485:2016: 8.2.5
- Quality Management System Route Map to Documents and Procedures Viamed Ltd ISO13485:2016: 8.5

Interested Parties

- ISO Auditing Bodies
- Internal Systems

Linked Companies

- Viamed

Trained Staff (1)

- Derek Lamb (trained by Derek Lamb)

Associated Documents

- management reviews - Roles Reviews (Doc ID: 220072)

Rolling Task #1331

Subject: Marketing Controller Review

Target User: Derek Lamb

Recurrence: 1 Month(s) 0 Week(s) 0 Day(s)

Notes:

System Generated Task To be Completed
Roles Titles Processes and Procedures ADMIN Viamed
End column of Marketing Controller Responsibilitys Review
Print to PDF,

Task Completion History (Last 2 Years, Max 20 Items)

ID	Subject	Created	Completed	Days to Complete	Investigated By
397366	Marketing Controller Review (1331)	14 May 2026		Outstanding (0 days)	Derek Lamb

Process ID #8095 — Medica Pallet - Return Contents To Stock/exhibition

Last Reviewed: 28 Jul 2025 by Helen Lamb

Process Maturity (6 of 6 - 100%)

Measure	Status
Has Risk Assessment	Yes
Has Audit	Yes
Has Measurable Objective	Yes
Has Backup Staff	Yes

Management Review

Viamed - Marketing Controller

Reviewed <12 Months Yes
Recent Completion Evidence Yes

Risk Assessment

Risk Item	Notes / Value	Last Updated
Input to the Process	medica exhibition pallet of things and stock taken	Helen Lamb 21 May 2025
Outputs to the Process	returned pallet to empty stock etc in correct places	Helen Lamb 21 May 2025
Risks to the Process	that the pallet is not emptiedstock goes to the wrong location	Helen Lamb 21 May 2025
Steps to Minimise Process Risks	regular issues	Helen Lamb 21 May 2025
Scope / Definition of Process / Objective	Medica Pallet - Return contents to stock/exhibitionTo make sure the pallet is unpacked and put away on its return	Helen Lamb 21 May 2025
Likelihood of Risk (1-5)	1.Improbable	Helen Lamb 21 May 2025
Severity of Risk (1-5)	1.Negligible	Helen Lamb 21 May 2025
Measurable Objective	Medica pallet returned from Medica is unpacked and scanned back to the correct location	Helen Lamb 21 May 2025
Training Method Required	Hands on from experienced members of staff	Helen Lamb 21 May 2025
Verification / Effectiveness	regular review issues	Helen Lamb 21 May 2025
Covid / Pandemic Notes	could be affected by covid or other national or international problems	Helen Lamb 21 May 2025
Risk / Benefit Report	No Action	Helen Lamb 28 Jul 2025
HSE Implications	Caution when lifting and reaching no other health and safety implications	Helen Lamb 28 Jul 2025
Calculated Risk Code	No Action (Frequency=1, Severity=1)	

Linked ISO Sections

- Quality Management System Route Map to Documents and Procedures Viamed Ltd ISO13485:2016: 7.5.8

Interested Parties

- Staff
- Internal Systems

Linked Companies

- Viamed

Trained Staff (3)

- Robert Connor (trained by Helen Lamb)
- Catherine Spence (trained by Helen Lamb)
- Catrin Hird (trained by Derek Lamb)

Associated Documents

- Audit 16 Sales and Marketing Viamed (Doc ID: 159461)
- VOP 25 Sales and Marketing (Doc ID: 31100)

Rolling Task #1294

Subject: Medica Pallet - Return Contents To Stock/exhibition

Target User: Robert Connor

Recurrence: 12 Month(s) 0 Week(s) 0 Day(s)

Notes:

System GeneratedTask To be Completed

Management Review

Viamed - Marketing Controller

Please empty the Medica Pallet and put the stock etc back in to stock on the exhibition shelf or stock shelf.

Any problems speak to Catrin or Ryan

Rolling Audit #1295

Subject: Medica Pallet - Return Contents To Stock/exhibition

Target User: Catrin Hird

Recurrence: 12 Month(s) 0 Week(s) 0 Day(s)

Notes:

System Generated Task To be Completed

Check its being completed

Task Completion History (Last 2 Years, Max 20 Items)

ID	Subject	Created	Completed	Days to Complete	Investigated By
383472	Medica Pallet - Return Contents To Stock/exhibition (1295)	15 Dec 2025	12 Jan 2026	28 days	Robert Connor
382216	Medica Pallet - Return Contents To Stock/exhibition (1294)	01 Dec 2025	12 Jan 2026	42 days	Robert Connor

Process ID #8076 — Medica Review

Last Reviewed: 28 Jul 2025 by Helen Lamb

Process Maturity (5 of 6 - 83%)

Measure	Status
Has Risk Assessment	Yes
Has Audit	No
Has Measurable Objective	Yes
Has Backup Staff	Yes
Reviewed <12 Months	Yes
Recent Completion Evidence	Yes

Risk Assessment

Risk Item	Notes / Value	Last Updated
Input to the Process	Medica Exhibition Sales orders received referencing Medica Customers at Medica	Helen Lamb 02 May 2024
Outputs to the Process	Sales and Sales Leads	Helen Lamb 02 May 2024
Risks to the Process	That we are going to a Medical show and no sales result from it. Task used to review the viability of the exhibition Sales coming in may not reference Medica	Helen Lamb 02 May 2024
Steps to Minimise Process Risks	reviews and reports from Intrastats	Helen Lamb 02 May 2024
Scope / Definition of Process / Objective	Review the results from the previous medica	Derek Lamb 21 Feb 2024
Likelihood of Risk (1-5)	2.Remote	Helen Lamb 02 May 2024
Severity of Risk (1-5)	1.Negligible	Helen Lamb 02 May 2024
Measurable Objective	Sales recorded as from previous Medica Sales leads logged in CRM Discussion with Export sales manager	Helen Lamb 02 May 2024
Training Method Required	Hands on from experience members of	Helen Lamb 02 May 2024

Management Review

Viamed - Marketing Controller

Verification / Effectiveness	staff	
Covid / Pandemic Notes	Regular reviews and monitoring	Helen Lamb 02 May 2024
	This is affected by covid or national or international issue	Helen Lamb 02 May 2024
Risk / Benefit Report	No Action	Helen Lamb 28 Jul 2025
HSE Implications	No health and safety implications	Helen Lamb 28 Jul 2025
Calculated Risk Code	No Action (Frequency=2, Severity=1)	

Linked ISO Sections

- Quality Management System Route Map to Documents and Procedures Viamed Ltd ISO13485:2016: 5.2

Interested Parties

- Customer

Linked Companies

- Viamed

Trained Staff (3)

- Catrin Hird (trained by Derek Lamb)
- Derek Lamb (trained by Derek Lamb)
- Steve Nixon (trained by Helen Lamb)

Associated Documents

- Audit 22 Post Market Surveillance Viamed (Doc ID: 186382)
- Audit 22 Post Market Surveillance VST (Doc ID: 159385)
- VOP 25 Sales and Marketing (Doc ID: 31100)

Rolling Task #1238

Subject: Medica Review

Target User: Catrin Hird

Recurrence: 12 Month(s) 0 Week(s) 0 Day(s)

Notes:

System Generated

Task To be Completed

Review Medica Mailing List from last year, generate report to show sales of the included company/contacts. Have they start buying or increased current purchasing patterns?

Include full costings from last years Medica including stand and accommodation as well for reference..

Task Completion History (Last 2 Years, Max 20 Items)

ID	Subject	Created	Completed	Days to Complete	Investigated By
371498	Medica Review (1238)	01 Aug 2025	14 Aug 2025	13 days	Derek Lamb
336888	Medica Review (1238)	01 Aug 2024	04 Dec 2024	125 days	Steve Nixon

Process ID #8094 — Meeting With DL

Last Reviewed: 28 Jul 2025 by Helen Lamb

Process Maturity (5 of 6 - 83%)

Measure	Status
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Management Review

Viamed - Marketing Controller

Has Risk Assessment	Yes
Has Audit	No
Has Measurable Objective	Yes
Has Backup Staff	Yes
Reviewed <12 Months	Yes
Recent Completion Evidence	Yes

Risk Assessment

Risk Item	Notes / Value	Last Updated
Input to the Process	Meeting With DL	Helen Lamb 07 Jul 2025
Outputs to the Process	Issues	Helen Lamb 07 Jul 2025
Risks to the Process	we might miss a issue	Helen Lamb 07 Jul 2025
Steps to Minimise Process Risks	regular reviews	Helen Lamb 07 Jul 2025
Scope / Definition of Process / Objective	Just a heading to enable a rolling Task for Issues to link to a Meeting With DL	Derek Lamb 16 May 2025
Likelihood of Risk (1-5)	1.Improbable	Helen Lamb 07 Jul 2025
Severity of Risk (1-5)	1.Negligible	Helen Lamb 07 Jul 2025
Measurable Objective	The issues that is generated from this task	Helen Lamb 07 Jul 2025
Training Method Required	Hands on with experience members of staff	Helen Lamb 07 Jul 2025
Verification / Effectiveness	regular reviews	Helen Lamb 07 Jul 2025
Covid / Pandemic Notes	Not affected by covid or other national or inter national crisis	Helen Lamb 07 Jul 2025
Risk / Benefit Report	No Action	Helen Lamb 28 Jul 2025
HSE Implications	No health and safety implications	Helen Lamb 28 Jul 2025
Calculated Risk Code	No Action (Frequency=1, Severity=1)	

Linked ISO Sections

- Quality Management System Route Map to Documents and Procedures Viamed Ltd ISO13485:2016: 5.1

Interested Parties

- Internal Systems

Linked Companies

- Viamed

Trained Staff (2)

- Catrin Hird (trained by Derek Lamb)
- Derek Lamb (trained by Derek Lamb)

Associated Documents

- Audit 18 Management Review Viamed (Doc ID: 159471)
- VOP 13 Process Monitoring, System Reviews, Audits, Management Reviews Analysis Data PMS Post Market (Doc ID: 210961)

Rolling Task #1293

Subject: Derek Meeting With Catrin

Target User: Derek Lamb

Recurrence: 0 Month(s) 1 Week(s) 0 Day(s)

Notes:

System GeneratedTask To be Completed

Task Completion History (Last 2 Years, Max 20 Items)

ID	Subject	Created	Completed	Days to Complete	Investigated By
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Management Review

Viamed - Marketing Controller

397034	Derek Meeting With Catrin (1293)	12 May 2026	14 May 2026	2 days	Derek Lamb
396406	Derek Meeting With Catrin (1293)	05 May 2026	07 May 2026	2 days	Derek Lamb
395785	Derek Meeting With Catrin (1293)	28 Apr 2026	30 Apr 2026	2 days	Derek Lamb
395145	Derek Meeting With Catrin (1293)	21 Apr 2026	22 Apr 2026	1 day	Derek Lamb
394524	Derek Meeting With Catrin (1293)	14 Apr 2026	16 Apr 2026	2 days	Derek Lamb
393737	Blank Intrastats 2026 Order Checking Temp Page Review	07 Apr 2026		Outstanding (37 days)	Derek Lamb
393704	Derek Meeting With Catrin (1293)	07 Apr 2026	16 Apr 2026	9 days	Derek Lamb
393497	Blank Intrastats 2026 Mailshot Admin Page Update	02 Apr 2026		Outstanding (42 days)	Derek Lamb
393198	Derek Meeting With Catrin (1293)	31 Mar 2026	02 Apr 2026	2 days	Derek Lamb
392955	Blank Intrastats 2026 Issue Flagging	26 Mar 2026	14 May 2026	49 days	Derek Lamb
392650	Derek Meeting With Catrin (1293)	24 Mar 2026	02 Apr 2026	9 days	Derek Lamb
392043	Blank Intrastats 2026 Exclusive Rules: Showing on price page	18 Mar 2026		Outstanding (57 days)	Derek Lamb
391892	Derek Meeting With Catrin (1293)	17 Mar 2026	19 Mar 2026	2 days	Derek Lamb
391593	Blank Intrastats 2026 Vandagraph: Warehouse Requests	12 Mar 2026		Outstanding (63 days)	Derek Lamb
391591	Blank Intrastats 2026 Active List: Vi amed/Vandagraph Stock	12 Mar 2026		Outstanding (63 days)	Derek Lamb
391495	Blank Intrastats 2026 Order Processing: Due Dates	11 Mar 2026		Outstanding (64 days)	Derek Lamb
391295	Derek Meeting With Catrin (1293)	10 Mar 2026	19 Mar 2026	9 days	Derek Lamb
390921	Blank Intrastats 2026 CRM: Sales Lead Linking to Old System	05 Mar 2026	14 May 2026	70 days	Derek Lamb
390616	Derek Meeting With Catrin (1293)	03 Mar 2026	05 Mar 2026	2 days	Derek Lamb
390079	Blank Intrastats 2026 "Today's Stuff" Issues List: Incorrect User	25 Feb 2026		Outstanding (78 days)	Derek Lamb

Process ID #7809 — Pro-Active Marketing

Management Review

Viamed - Marketing Controller

Last Reviewed: 28 Jul 2025 by Helen Lamb

Process Maturity (6 of 6 - 100%)

Measure	Status
Has Risk Assessment	Yes
Has Audit	Yes
Has Measurable Objective	Yes
Has Backup Staff	Yes
Reviewed <12 Months	Yes
Recent Completion Evidence	Yes

Risk Assessment

Risk Item	Notes / Value	Last Updated
Input to the Process	Information from Intrastats, customer and suppliers. Research done.	Derek Lamb 30 Aug 2017
Outputs to the Process	Marketing strategies that preempt trends in current and future markets.	Derek Lamb 30 Aug 2017
Risks to the Process	That we will target an incorrect area or push a product that is not taken up.	Derek Lamb 30 Aug 2017
Steps to Minimise Process Risks	Research and verifying information. Consultation with other staff and advisers.	Derek Lamb 30 Aug 2017
Scope / Definition of Process / Objective	Analyzing Existing product , sales trends, plan strategy.	Derek Lamb 06 Jun 2017
Likelihood of Risk (1-5)	2.Remote	Derek Lamb 30 Aug 2017
Severity of Risk (1-5)	2.Minor	Derek Lamb 30 Aug 2017
Measurable Objective	Check rolling issues are completed within terms.	Helen Lamb 22 Jul 2019
Training Method Required	Hands on Learning from experienced staff	Helen Lamb 01 Oct 2019
Verification / Effectiveness	This task is verified for effectiveness during internal rolling audit issues.	Derek Lamb 23 Oct 2020
Covid / Pandemic Notes	For Management Review	Helen Lamb 23 Oct 2020
Risk / Benefit Report	No Action	Helen Lamb 28 Jul 2025
HSE Implications	No health and safety implications	Helen Lamb 28 Jul 2025
Calculated Risk Code	No Action (Frequency=2, Severity=2)	

Linked ISO Sections

- Quality Management System Route Map to Documents and Procedures Viamed Ltd ISO9001:2015: 4.1
- Quality Management System Route Map to Documents and Procedures Viamed Ltd ISO9001:2015: 4.4.1
- Quality Management System Route Map to Documents and Procedures Viamed Ltd ISO9001:2015: 6.1.2
- Quality Management System Route Map to Documents and Procedures VST Ltd ISO9001:2015+A1: 6.1.2

Interested Parties

- Internal Systems
- Customer

Trained Staff (4)

- Steve Nixon (trained by Helen Lamb)
- Catrin Hird (trained by Helen Lamb)
- Derek Lamb (trained by Derek Lamb)
- Katie Evans (trained by Derek Lamb)

Associated Documents

- Audit 16 Sales and Marketing (Doc ID: 22078)
- Audit 22 Post Market Surveillance Viamed (Doc ID: 186382)
- Audit 22 Post Market Surveillance VST (Doc ID: 159385)
- VOP 25 Sales and Marketing (Doc ID: 31100)

Management Review

Viamed - Marketing Controller

Rolling Task #671

Subject: Pro-Active Marketing

Target User: Catrin Hird

Recurrence: 3 Month(s) 0 Week(s) 0 Day(s)

Notes:

System Generated

Task To be Completed.

New Rolling Task to produce a report (maybe same as johns)

Subject to be Covered

Proactive Marketing Previous 3 months

Proactive Market Plan/Strategy for Next 3 Months Schedule

Rolling Audit #672

Subject: Pro-Active Marketing

Target User: Steve Nixon

Recurrence: 3 Month(s) 0 Week(s) 0 Day(s)

Notes:

System Generated*** AUDIT / Review *** Enure the Task is being Completed

New Rolling Task to produce a report (maybe same as johns)

Subject to be Covered

Proactive Marketing Previous 3 months

Proactive Market Plan/Strategy for Next 3 Months Schedule

Task Completion History (Last 2 Years, Max 20 Items)

ID	Subject	Created	Completed	Days to Complete	Investigated By
392131	Pro-Active Marketing (672)	19 Mar 2026		Outstanding (56 days)	Steve Nixon
390468	Pro-Active Marketing (671)	02 Mar 2026	16 Mar 2026	14 days	Catrin Hird
383939	Pro-Active Marketing (672)	19 Dec 2025	26 Feb 2026	69 days	Steve Nixon
382173	Pro-Active Marketing (671)	01 Dec 2025	22 Dec 2025	21 days	Catrin Hird
375750	Pro-Active Marketing (672)	19 Sep 2025	26 Feb 2026	160 days	Steve Nixon
374020	Pro-Active Marketing (671)	01 Sep 2025	12 Sep 2025	11 days	Catrin Hird
367519	Pro-Active Marketing (672)	19 Jun 2025	12 Sep 2025	85 days	Steve Nixon
365823	Pro-Active Marketing (671)	02 Jun 2025	19 Jun 2025	17 days	Catrin Hird

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358985	Pro-Active Marketing (672)	19 Mar 2025	25 Mar 2025	6 days	Steve Nixon
357126	Pro-Active Marketing (671)	03 Mar 2025	07 Mar 2025	4 days	Catrin Hird
350163	Pro-Active Marketing (672)	19 Dec 2024	25 Mar 2025	96 days	Steve Nixon
348426	Pro-Active Marketing (671)	02 Dec 2024	04 Dec 2024	2 days	Catrin Hird
341409	Pro-Active Marketing (672)	19 Sep 2024	11 Nov 2024	53 days	Steve Nixon
339729	Pro-Active Marketing (671)	02 Sep 2024	05 Sep 2024	3 days	Catrin Hird
332810	Pro-Active Marketing (672)	19 Jun 2024	11 Nov 2024	145 days	Steve Nixon
331234	Pro-Active Marketing (671)	03 Jun 2024	06 Jun 2024	3 days	Catrin Hird

Process ID #6894 — Product Cross References

Last Reviewed: 28 Jul 2025 by Helen Lamb

Process Maturity (6 of 6 - 100%)

Measure	Status
Has Risk Assessment	Yes
Has Audit	Yes
Has Measurable Objective	Yes
Has Backup Staff	Yes
Reviewed <12 Months	Yes
Recent Completion Evidence	Yes

Risk Assessment

Risk Item	Notes / Value	Last Updated
Input to the Process	The Internet, Competitor Websites etc.	Derek Lamb 12 Jun 2017
Outputs to the Process	List of new additions to be added, and ultimately upto date cross reference guides.	Derek Lamb 12 Jun 2017
Risks to the Process	Out of date databases linking products to equipment	Derek Lamb 18 Oct 2017
Steps to Minimise Process Risks	Rolling issue to start the research project.	Derek Lamb 12 Jun 2017
Scope / Definition of Process / Objective	Maintenance and research of cross reference tables	Derek Lamb 06 Jun 2017
Likelihood of Risk (1-5)	3.Occasional	Derek Lamb 26 Oct 2020
Severity of Risk (1-5)	1.Negligible	Derek Lamb 12 Jun 2017
Measurable Objective	Date of last upload or review	Helen Lamb 17 Apr 2018
Training Method Required	Hands on Learning from experienced staff	Helen Lamb 01 Oct 2019
Verification / Effectiveness	This task is verified for effectiveness during internal rolling audit issues.	Derek Lamb 23 Oct 2020
Covid / Pandemic Notes	This process is not affected by Covid 19 or other extreme national or international circumstance / crisis.	Helen Lamb 23 Oct 2020
Risk / Benefit Report	No Action	Helen Lamb 28 Jul 2025
HSE Implications	No health and safety implications	Helen Lamb 28 Jul 2025
Calculated Risk Code	No Action (Frequency=3, Severity=1)	

Linked ISO Sections

- Quality Management System Route Map to Documents and Procedures Viamed Ltd ISO9001:2015: 4.4.1

Management Review

Viamed - Marketing Controller

Interested Parties

- Customer
- Internal Systems
- VST OEM Customers
- VST OEM Customers

Linked Companies

- Viamed
- Vandagraph

Trained Staff (2)

- Catrin Hird (trained by Derek Lamb)
- Steve Nixon (trained by Derek Lamb)

Associated Documents

- Audit 09 Goods Inward and Product Identity Viamed (Doc ID: 166168)
- Audit 09 Goods Inward and Product Identity VST (Doc ID: 166164)
- ISIFU Creating a New Cross Reference Guide (Doc ID: 152792)
- VOP 25 Sales and Marketing (Doc ID: 31100)

Rolling Task #673

Subject: Product Cross References

Target User: Catrin Hird

Recurrence: 1 Month(s) 0 Week(s) 0 Day(s)

Notes:

System Generated Task To be Completed

Research Competitors online see if our Cross Reference Guides need additions

Rolling Audit #674

Subject: Product Cross References

Target User: Steve Nixon

Recurrence: 3 Month(s) 0 Week(s) 0 Day(s)

Notes:

System Generated*** AUDIT *** Enure the Task is being Completed

Research Competitors online see if our Cross Reference Guides need additions

Task Completion History (Last 2 Years, Max 20 Items)

ID	Subject	Created	Completed	Days to Complete	Investigated By
394992	Product Cross References (673)	20 Apr 2026	30 Apr 2026	10 days	Catrin Hird
392898	Product Cross References (674)	26 Mar 2026		Outstanding (49 days)	Steve Nixon
392132	Product Cross References (673)	19 Mar 2026		Outstanding (56 days)	Steve Nixon
389451	Product Cross References (673)	19 Feb 2026	19 Feb 2026	0 days	Catrin Hird
386242	Product Cross References (673)	19 Jan 2026	26 Feb 2026	38 days	Steve Nixon
384328	Product Cross References (674)	26 Dec 2025	26 Feb 2026	62 days	Steve Nixon
383940	Product Cross References (673)	19 Dec 2025	29 Dec 2025	10 days	Catrin Hird

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Viamed - Marketing Controller

381230	Product Cross References (673)	19 Nov 2025	20 Nov 2025	1 day	Catrin Hird
378516	Product Cross References (673)	20 Oct 2025	24 Oct 2025	4 days	Catrin Hird
376376	Product Cross References (674)	26 Sep 2025	26 Feb 2026	153 days	Steve Nixon
375751	Product Cross References (673)	19 Sep 2025	25 Sep 2025	6 days	Catrin Hird
373064	Product Cross References (673)	19 Aug 2025	12 Sep 2025	24 days	Catrin Hird
370295	Product Cross References (673)	21 Jul 2025	24 Jul 2025	3 days	Catrin Hird
368118	Product Cross References (674)	26 Jun 2025	31 Jul 2025	35 days	Steve Nixon
367520	Product Cross References (673)	19 Jun 2025	12 Sep 2025	85 days	Steve Nixon
364638	Product Cross References (673)	19 May 2025	31 Jul 2025	73 days	Derek Lamb
362075	Product Cross References (673)	21 Apr 2025	24 Apr 2025	3 days	Catrin Hird
359646	Product Cross References (674)	26 Mar 2025	31 Jul 2025	127 days	Steve Nixon
358986	Product Cross References (673)	19 Mar 2025	25 Mar 2025	6 days	Catrin Hird
356000	Product Cross References (673)	19 Feb 2025	20 Feb 2025	1 day	Catrin Hird

Process ID #8068 — Request Feedback From Unique Customer For 2 Months Prior

Last Reviewed: 28 Jul 2025 by Helen Lamb

Process Maturity (4 of 6 - 67%)

Measure	Status
Has Risk Assessment	Yes
Has Audit	No
Has Measurable Objective	Yes
Has Backup Staff	No
Reviewed <12 Months	Yes
Recent Completion Evidence	Yes

Risk Assessment

Risk Item	Notes / Value	Last Updated
Input to the Process	CRMfeedback from customers	Helen Lamb 03 Jan 2024
Outputs to the Process	feedback received	Helen Lamb 03 Jan 2024
Risks to the Process	that we miss asking for feedbackthat customers don't send feedback	Helen Lamb 03 Jan 2024
Steps to Minimise Process Risks	regular reviewsregular communications with customers	Helen Lamb 03 Jan 2024
Scope / Definition of Process / Objective	Request Feedback from Unique Customer for 2 months prior -EyeMaxFlowsensors	Helen Lamb 03 Jan 2024
Likelihood of Risk (1-5)	1.Improbable	Helen Lamb 03 Jan 2024
Severity of Risk (1-5)	1.Negligible	Helen Lamb 03 Jan 2024
Measurable Objective	Feedback is Request from Unique Customer for 2 months prior -EyeMaxFlowsensors	Helen Lamb 03 Jan 2024
Training Method Required	Hands on	Helen Lamb 03 Jan 2024
Verification / Effectiveness	This task is verified for effectiveness during internal rolling audit issues. Also	Helen Lamb 03 Jan 2024

Management Review

Viamed - Marketing Controller

Covid / Pandemic Notes	during feedback reviews. This process is affected by Covid 19 or other extreme national or international circumstance / crisis.	Helen Lamb 03 Jan 2024
Risk / Benefit Report	No Action	Helen Lamb 28 Jul 2025
HSE Implications	No health and safety implications	Helen Lamb 28 Jul 2025
Calculated Risk Code	No Action (Frequency=1, Severity=1)	

Interested Parties

- Internal Systems
- Customer
- VST OEM Customers

Linked Companies

- Viamed
- VST

Trained Staff (1)

- Catrin Hird (trained by Helen Lamb)

Associated Documents

- Audit 16 Sales and Marketing Viamed (Doc ID: 159461)
- Audit 16 Sales and Marketing VST (Doc ID: 159463)
- VOP 19 Feedback Customer Complaints Vigilance and Notifications Viamed Ltd (Doc ID: 132118)

Task Completion History (Last 2 Years, Max 20 Items)

ID	Subject	Created	Completed	Days to Complete	Investigated By
390513	Request Feedback from Unique Customer for 2 months prior (1227)	02 Mar 2026	04 Mar 2026	2 days	Catrin Hird
387515	Request Feedback from Unique Customer for 2 months prior (1227)	02 Feb 2026	12 Feb 2026	10 days	Catrin Hird
384766	Request Feedback from Unique Customer for 2 months prior (1227)	02 Jan 2026	28 Jan 2026	26 days	Catrin Hird
382358	Request Feedback from Unique Customer for 2 months prior (1227)	02 Dec 2025	16 Dec 2025	14 days	Catrin Hird
379725	Request Feedback from Unique Customer for 2 months prior (1227)	03 Nov 2025	24 Feb 2026	113 days	Steve Nixon
376852	Request Feedback from Unique Customer for 2 months prior (1227)	02 Oct 2025	09 Oct 2025	7 days	Catrin Hird
374211	Request Feedback from Unique	02 Sep 2025	11 Sep 2025	9 days	Catrin Hird

Management Review

Viamed - Marketing Controller

371686	Customer for 2 months prior (1227) Request Feedback from Unique	04 Aug 2025	04 Sep 2025	31 days	Catrin Hird
368623	Customer for 2 months prior (1227) Request Feedback from Unique	02 Jul 2025	03 Jul 2025	1 day	Catrin Hird
365866	Customer for 2 months prior (1227) Request Feedback from Unique	02 Jun 2025	19 Jun 2025	17 days	Catrin Hird
363128	Customer for 2 months prior (1227) Request Feedback from Unique	02 May 2025	04 Jun 2025	33 days	Derek Lamb
360353	Customer for 2 months prior (1227) Request Feedback from Unique	02 Apr 2025	08 Apr 2025	6 days	Catrin Hird
357175	Customer for 2 months prior (1227) Request Feedback from Unique	03 Mar 2025	06 Mar 2025	3 days	Catrin Hird
354396	Customer for 2 months prior (1227) Request Feedback from Unique	03 Feb 2025	18 Feb 2025	15 days	Catrin Hird
351007	Customer for 2 months prior (1227) Request Feedback from Unique	02 Jan 2025	23 Jan 2025	21 days	Catrin Hird
348468	Customer for 2 months prior (1227) Request Feedback from Unique	02 Dec 2024	04 Dec 2024	2 days	Catrin Hird
345762	Customer for 2 months prior (1227) Request Feedback from Unique	04 Nov 2024	04 Nov 2024	0 days	Catrin Hird
342607	Customer for 2 months prior (1227) Request Feedback from Unique	02 Oct 2024	07 May 2025	217 days	Derek Lamb
339775	Customer for 2 months prior (1227) Request Feedback from Unique	02 Sep 2024	03 Sep 2024	1 day	Catrin Hird

Management Review

Viamed - Marketing Controller

337000	Request Feedback from Unique Customer for 2 months prior (1227)	02 Aug 2024	19 Aug 2024	17 days	Catrin Hird
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Process ID #7810 — Research Activities

Last Reviewed: 28 Jul 2025 by Helen Lamb

Process Maturity (6 of 6 - 100%)

Measure	Status
Has Risk Assessment	Yes
Has Audit	Yes
Has Measurable Objective	Yes
Has Backup Staff	Yes
Reviewed <12 Months	Yes
Recent Completion Evidence	Yes

Risk Assessment

Risk Item	Notes / Value	Last Updated
Input to the Process	Intrastats and internet. Visiting suppliers and users.	Derek Lamb 30 Aug 2017
Outputs to the Process	Up to date information and reports. New ideas.	Derek Lamb 30 Aug 2017
Risks to the Process	That the data is incorrect or out of date. Investigations are not thorough.	Derek Lamb 30 Aug 2017
Steps to Minimise Process Risks	Double check sources and review facts and data.	Derek Lamb 30 Aug 2017
Scope / Definition of Process / Objective	Investigating products and applications, existing and potential products.	Derek Lamb 06 Jun 2017
Likelihood of Risk (1-5)	3.Occasional	Derek Lamb 30 Aug 2017
Severity of Risk (1-5)	1.Negligible	Derek Lamb 30 Aug 2017
Measurable Objective	Check rolling issues are completed within terms.	Helen Lamb 22 Jul 2019
Training Method Required	Hands on Learning from experienced staff	Helen Lamb 01 Oct 2019
Verification / Effectiveness	This task is verified for effectiveness during internal rolling audit issues.	Derek Lamb 23 Oct 2020
Covid / Pandemic Notes	This process is affected by Covid 19 or other extreme national or international circumstance / crisis and this will flag up when the person responsible for the job completes the issue, it will then be reviewed at the final completion of this task. It will be the job of the person who finally completes the task, to implement a new task, update the task should any problems occur or make the decision that the task can be put on hold while the crisis is occurring.	Helen Lamb 23 Oct 2020
Risk / Benefit Report	No Action	Helen Lamb 28 Jul 2025
HSE Implications	No health and safety implications	Helen Lamb 28 Jul 2025
Calculated Risk Code	No Action (Frequency=3, Severity=1)	

Linked ISO Sections

- Quality Management System Route Map to Documents and Procedures Viamed Ltd ISO9001:2015: 4.4.1
- Quality Management System Route Map to Documents and Procedures Viamed Ltd ISO9001:2015: 8.3
- Quality Management System Route Map to Documents and Procedures VST Ltd ISO9001:2015+A1: 8.3

Management Review

Viamed - Marketing Controller

Interested Parties

- Supplier
- Customer
- Internal Systems
- Physical Sites
- MHRA
- Government E.G. HMRC
- Competitors
- VST OEM Customers

Trained Staff (3)

- Derek Lamb (trained by Helen Lamb)
- Steve Nixon (trained by Helen Lamb)
- Catrin Hird (trained by Derek Lamb)

Associated Documents

- Audit 16 Sales and Marketing (Doc ID: 22078)
- Audit 22 Post Market Surveillance Viamed (Doc ID: 186382)
- Audit 22 Post Market Surveillance VST (Doc ID: 159385)
- VOP 25 Sales and Marketing (Doc ID: 31100)

Rolling Task #675

Subject: Research Activities

Target User: Catrin Hird

Recurrence: 1 Month(s) 0 Week(s) 0 Day(s)

Notes:

System Generated

Task To be Completed.

Take Next Product in Line - (List to be created),

Review our activities, research if there are other possible ways to market the product range,

Include in the research if possible, prices of competitor products.

Rolling Audit #676

Subject: Research Activities

Target User: Steve Nixon

Recurrence: 3 Month(s) 0 Week(s) 0 Day(s)

Notes:

System Generated

*** AUDIT *** Ensure the Task is being Completed

Take Next Product in Line - (List to be created),

Review our activities, research if there are other possible ways to market the product range,

Include in the research if possible, prices of competitor products.

Management Review

Viamed - Marketing Controller

Task Completion History (Last 2 Years, Max 20 Items)

ID	Subject	Created	Completed	Days to Complete	Investigated By
395629	Research Activities (675)	27 Apr 2026	30 Apr 2026	3 days	Catrin Hird
393543	Research Activities (676)	03 Apr 2026		Outstanding (41 days)	Steve Nixon
392899	Research Activities (675)	26 Mar 2026	26 Mar 2026	0 days	Catrin Hird
390122	Research Activities (675)	26 Feb 2026	26 Feb 2026	0 days	Catrin Hird
386857	Research Activities (675)	26 Jan 2026	29 Jan 2026	3 days	Catrin Hird
384964	Research Activities (676)	05 Jan 2026	26 Feb 2026	52 days	Steve Nixon
384329	Research Activities (675)	26 Dec 2025	02 Jan 2026	7 days	Catrin Hird
381832	Research Activities (675)	26 Nov 2025	27 Nov 2025	1 day	Catrin Hird
379069	Research Activities (675)	27 Oct 2025	30 Oct 2025	3 days	Catrin Hird
377030	Research Activities (676)	03 Oct 2025	26 Feb 2026	146 days	Steve Nixon
376377	Research Activities (675)	26 Sep 2025	02 Oct 2025	6 days	Catrin Hird
373553	Research Activities (675)	26 Aug 2025	12 Sep 2025	17 days	Catrin Hird
370958	Research Activities (675)	28 Jul 2025	31 Jul 2025	3 days	Catrin Hird
368750	Research Activities (676)	03 Jul 2025	12 Sep 2025	71 days	Steve Nixon
368119	Research Activities (675)	26 Jun 2025	26 Jun 2025	0 days	Catrin Hird
365272	Research Activities (675)	26 May 2025	29 May 2025	3 days	Catrin Hird
362649	Research Activities (675)	28 Apr 2025	02 May 2025	4 days	Catrin Hird
360509	Research Activities (676)	03 Apr 2025	12 Sep 2025	162 days	Steve Nixon
359647	Research Activities (675)	26 Mar 2025	27 Mar 2025	1 day	Catrin Hird
356713	Research Activities (675)	26 Feb 2025	28 Feb 2025	2 days	Catrin Hird

Process ID #8096 — Review Contracts Advance Renewal

Last Reviewed: 28 Jul 2025 by Helen Lamb

Process Maturity (5 of 6 - 83%)

Measure	Status
Has Risk Assessment	Yes
Has Audit	Yes
Has Measurable Objective	Yes
Has Backup Staff	Yes
Reviewed <12 Months	Yes
Recent Completion Evidence	No

Risk Assessment

Risk Item	Notes / Value	Last Updated
Input to the Process	Contracts Advance contracts and terms	Helen Lamb 17 Jun 2025

Management Review

Viamed - Marketing Controller

	and conditionsViamed Marketing and sales	
Outputs to the Process	increased sales	Helen Lamb 17 Jun 2025
Risks to the Process	we may be wasting our money	Helen Lamb 17 Jun 2025
Steps to Minimise Process Risks	reviews and not renewing if we do not gain from it.	Helen Lamb 17 Jun 2025
Scope / Definition of Process / Objective	To Review the Contracts Advance service we have got over the last 2 years and decide if we want to continue. THIS WILL AUTOMATICALLY RENEW IF WE DON@T CANCEL	Helen Lamb 17 Jun 2025
Likelihood of Risk (1-5)	1.Improbable	Helen Lamb 17 Jun 2025
Severity of Risk (1-5)	2.Minor	Helen Lamb 17 Jun 2025
Measurable Objective	What service we feel we have gotten and is it worth it. Regular review meetings and discussions.	Helen Lamb 17 Jun 2025
Training Method Required	From Contracts Advance and hands on with Marketing	Helen Lamb 17 Jun 2025
Verification / Effectiveness	Review the previous years and see if it has been worth while investment.	Helen Lamb 17 Jun 2025
Covid / Pandemic Notes	Not affected by this as can be done from anywhere	Helen Lamb 17 Jun 2025
Risk / Benefit Report	No Action	Helen Lamb 28 Jul 2025
HSE Implications	No health and safety implications	Helen Lamb 28 Jul 2025
Calculated Risk Code	No Action (Frequency=1, Severity=2)	

Linked ISO Sections

- Quality Management System Route Map to Documents and Procedures Viamed Ltd ISO13485:2016: 4.2

Interested Parties

- External Partners
- Internal Systems

Linked Companies

- Viamed

Trained Staff (2)

- Catrin Hird (trained by Helen Lamb)
- Helen Lamb (trained by Helen Lamb)

Associated Documents

- Audit 04 Accounts and Finance Viamed (Doc ID: 159427)
- VOP 04 Accounts, Bank, Loans, Debtors, Creditors, Accountant Processes (Doc ID: 31088)

Rolling Task #1296

Subject: Review Contracts Advance Renewal

Target User: Catrin Hird

Recurrence: 24 Month(s) 0 Week(s) 0 Day(s)

Notes:

System Generated

Task To be Completed

To discuss and see if we let it auto renew or if we cancel. It will renew if we do not cancel

Management Review

Viamed - Marketing Controller

Rolling Audit #1297

Subject: Review Contracts Advance Renewal

Target User: Helen Lamb

Recurrence: 24 Month(s) 0 Week(s) 0 Day(s)

Notes:

System Generated Task To be Completed

check its being done

Task Completion History (Last 2 Years, Max 20 Items)

No completed tasks in the last 2 years.

Process ID #8046 — Shopify Add Words

Last Reviewed: 28 Jul 2025 by Helen Lamb

Process Maturity (6 of 6 - 100%)

Measure	Status
Has Risk Assessment	Yes
Has Audit	Yes
Has Measurable Objective	Yes
Has Backup Staff	Yes
Reviewed <12 Months	Yes
Recent Completion Evidence	Yes

Risk Assessment

Risk Item	Notes / Value	Last Updated
Input to the Process	add words list	Helen Lamb 29 Dec 2023
Outputs to the Process	good advertising updated info	Helen Lamb 29 Dec 2023
Risks to the Process	items missed	Helen Lamb 29 Dec 2023
Steps to Minimise Process Risks	regular reviews	Helen Lamb 29 Dec 2023
Scope / Definition of Process / Objective	Shopify Add Words. Please log Google ad word stats.	Helen Lamb 29 Dec 2023
Likelihood of Risk (1-5)	1.Improbable	Helen Lamb 29 Dec 2023
Severity of Risk (1-5)	1.Negligible	Helen Lamb 29 Dec 2023
Measurable Objective	The add words list updated as per marketing	Helen Lamb 29 Dec 2023
Training Method Required	online and hands on	Helen Lamb 29 Dec 2023
Verification / Effectiveness	regular reviews and checking of online changes	Helen Lamb 29 Dec 2023
Covid / Pandemic Notes	Could be affected by covid or national or international issue	Helen Lamb 29 Dec 2023
Risk / Benefit Report	No Action	Helen Lamb 28 Jul 2025
HSE Implications	No health and safety implications	Helen Lamb 28 Jul 2025
Calculated Risk Code	No Action (Frequency=1, Severity=1)	

Interested Parties

- Internal Systems
- Web Shop Hosting
- Customer

Linked Companies

- Viamed

Trained Staff (2)

Management Review

Viamed - Marketing Controller

- Catrin Hird (trained by Helen Lamb)
- Derek Lamb (trained by Helen Lamb)

Associated Documents

- Audit 16 Sales and Marketing Viamed (Doc ID: 159461)
- Audit 16 Sales and Marketing VST (Doc ID: 159463)
- VOP 25 Sales and Marketing (Doc ID: 31100)

Rolling Task #278

Subject: Google Adwords

Target User: Catrin Hird

Recurrence: 1 Month(s) 0 Week(s) 0 Day(s)

Notes:

System Generated

Please log Google adword stats

Campaign - Click vs Impressions, PDF

Keywords - Click vs Cost, Filter 1 click, filter to 0 clicks, PDF

Rolling Audit #144

Subject: Shopify Adwords

Target User: Derek Lamb

Recurrence: 6 Month(s) 0 Week(s) 0 Day(s)

Notes:

System Generated

Please log add word stats.

Task Completion History (Last 2 Years, Max 20 Items)

ID	Subject	Created	Completed	Days to Complete	Investigated By
396286	Google Adwords (278)	04 May 2026	07 May 2026	3 days	Catrin Hird
393570	Google Adwords (278)	06 Apr 2026	09 Apr 2026	3 days	Catrin Hird
390727	Google Adwords (278)	04 Mar 2026	05 Mar 2026	1 day	Catrin Hird
387729	Google Adwords (278)	04 Feb 2026	05 Feb 2026	1 day	Catrin Hird
384913	Google Adwords (278)	05 Jan 2026	08 Jan 2026	3 days	Catrin Hird
384908	Shopify Adwords (144)	05 Jan 2026	08 Jan 2026	3 days	Derek Lamb
382551	Google Adwords (278)	04 Dec 2025	04 Dec 2025	0 days	Catrin Hird
379908	Google Adwords (278)	04 Nov 2025	06 Nov 2025	2 days	Catrin Hird
377119	Google Adwords (278)	06 Oct 2025	09 Oct 2025	3 days	Catrin Hird
374421	Google Adwords (278)	04 Sep 2025	04 Sep 2025	0 days	Catrin Hird
371609	Google Adwords (278)	04 Aug 2025	05 Aug 2025	1 day	Catrin Hird
368897	Google Adwords (278)	04 Jul 2025	10 Jul 2025	6 days	Catrin Hird
368717	Shopify Adwords (144)	03 Jul 2025	10 Jul 2025	7 days	Derek Lamb

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366088	Google Adwords (278)	04 Jun 2025	05 Jun 2025	1 day	Catrin Hird
363192	Google Adwords (278)	05 May 2025	08 May 2025	3 days	Catrin Hird
360606	Google Adwords (278)	04 Apr 2025	14 Apr 2025	10 days	Catrin Hird
357295	Google Adwords (278)	04 Mar 2025	07 Mar 2025	3 days	Catrin Hird
354494	Google Adwords (278)	04 Feb 2025	06 Feb 2025	2 days	Catrin Hird
351230	Google Adwords (278)	06 Jan 2025	08 Jan 2025	2 days	Catrin Hird
351076	Shopify Adwords (144)	03 Jan 2025	08 Jan 2025	5 days	Derek Lamb

Process ID #8062 — Vandagraph Shopify Payouts Report

Last Reviewed: 04 Sep 2025 by Catrin Hird

Process Maturity (5 of 6 - 83%)

Measure	Status
Has Risk Assessment	Yes
Has Audit	No
Has Measurable Objective	Yes
Has Backup Staff	Yes
Reviewed <12 Months	Yes
Recent Completion Evidence	Yes

Risk Assessment

Risk Item	Notes / Value	Last Updated
Input to the Process	Shopify Issues	Helen Lamb 03 Jan 2024
Outputs to the Process	monthly report update reconciled account	Helen Lamb 03 Jan 2024
Risks to the Process	that the report isn't added to the issue the wrong report has been added	Helen Lamb 03 Jan 2024
Steps to Minimise Process Risks	Regular reviews and reports	Helen Lamb 03 Jan 2024
Scope / Definition of Process / Objective	Vandagraph Shopify Payouts Report copy last months to accounts so they bank and invoices can be reconciled.	Helen Lamb 03 Jan 2024
Likelihood of Risk (1-5)	1.Improbable	Helen Lamb 03 Jan 2024
Severity of Risk (1-5)	1.Negligible	Helen Lamb 03 Jan 2024
Measurable Objective	Issue with previous months Shopify report attached, reconciled bank account	Helen Lamb 03 Jan 2024
Training Method Required	Hands on by experience staff	Helen Lamb 03 Jan 2024
Verification / Effectiveness	This task is verified for effectiveness during internal rolling audit issues.	Helen Lamb 03 Jan 2024
Covid / Pandemic Notes	This process is not affected by Covid 19 or other extreme national or international circumstance / crisis.	Helen Lamb 03 Jan 2024
Risk / Benefit Report	No Action	Helen Lamb 28 Jul 2025
HSE Implications	No health and safety implications	Helen Lamb 28 Jul 2025
Calculated Risk Code	No Action (Frequency=1, Severity=1)	

Interested Parties

- Internal Systems
- Internet Providers
- Customer

Management Review

Viamed - Marketing Controller

Linked Companies

- Vandagraph

Trained Staff (2)

- Helen Lamb (trained by Helen Lamb)
- Catrin Hird (trained by Helen Lamb)

Associated Documents

- Audit 16 Sales and Marketing Viamed (Doc ID: 159461)
- Audit 16 Sales and Marketing VST (Doc ID: 159463)
- VOP 04 Accounts, Bank, Loans, Debtors, Creditors, Accountant Processes (Doc ID: 31088)

Rolling Task #1080

Subject: Vandagraph Shopify Payouts Report

Target User: Catrin Hird

Recurrence: 1 Month(s) 0 Week(s) 0 Day(s)

Notes:

System Generated
Provide to Helen.

Task Completion History (Last 2 Years, Max 20 Items)

ID	Subject	Created	Completed	Days to Complete	Investigated By
396191	Vandagraph Shopify Payouts Report (1080)	01 May 2026		Outstanding (13 days)	Helen Lamb
393324	Vandagraph Shopify Payouts Report (1080)	01 Apr 2026	16 Apr 2026	15 days	Helen Lamb
390495	Vandagraph Shopify Payouts Report (1080)	02 Mar 2026	02 Apr 2026	31 days	Helen Lamb
387502	Vandagraph Shopify Payouts Report (1080)	02 Feb 2026	19 Feb 2026	17 days	Helen Lamb
384705	Vandagraph Shopify Payouts Report (1080)	01 Jan 2026	08 Jan 2026	7 days	Helen Lamb
382199	Vandagraph Shopify Payouts Report (1080)	01 Dec 2025	08 Jan 2026	38 days	Helen Lamb
379707	Vandagraph Shopify Payouts Report (1080)	03 Nov 2025	27 Nov 2025	24 days	Helen Lamb
376757	Vandagraph Shopify Payouts Report (1080)	01 Oct 2025	09 Oct 2025	8 days	Helen Lamb
374050	Vandagraph Shopify Payouts Report (1080)	01 Sep 2025	12 Sep 2025	11 days	Helen Lamb
371487	Vandagraph Shopify Payouts Report (1080)	01 Aug 2025	14 Aug 2025	13 days	Helen Lamb
368504	Vandagraph Shopify Payouts Report (1080)	01 Jul 2025	10 Jul 2025	9 days	Helen Lamb
365852	Vandagraph Shopify Payouts	02 Jun 2025	12 Jun 2025	10 days	Helen Lamb

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363010	Report (1080) Vandagraph Shopify Payouts Report (1080)	01 May 2025	05 Jun 2025	35 days	Helen Lamb
360206	Vandagraph Shopify Payouts Report (1080)	01 Apr 2025	14 Apr 2025	13 days	Helen Lamb
357156	Vandagraph Shopify Payouts Report (1080)	03 Mar 2025	25 Mar 2025	22 days	Helen Lamb
354383	Vandagraph Shopify Payouts Report (1080)	03 Feb 2025	13 Feb 2025	10 days	Helen Lamb
350957	Vandagraph Shopify Payouts Report (1080)	01 Jan 2025	08 Jan 2025	7 days	Helen Lamb
348455	Vandagraph Shopify Payouts Report (1080)	02 Dec 2024	12 Dec 2024	10 days	Helen Lamb
345628	Vandagraph Shopify Payouts Report (1080)	01 Nov 2024	22 Nov 2024	21 days	Helen Lamb
342463	Vandagraph Shopify Payouts Report (1080)	01 Oct 2024	10 Oct 2024	9 days	Helen Lamb

Responsibility-Only Processes (14)

These processes represent allocated responsibilities only - no rolling task or audit is required, so they are excluded from the main report metrics and conclusion.

- **#6827:** Customer or Product Feedback (last reviewed: 29 Oct 2020)
- **#6891:** Exhibitions Co-ordinator (last reviewed: 01 Oct 2018)
- **#6918:** Marketing CRM Databases. (last reviewed: 12 Jun 2017)
- **#7664:** Marketing Job Logger (last reviewed: Never)
- **#5880:** Marketing Review (last reviewed: Never)
- **#7173:** Material Generation (last reviewed: 01 Jun 2021)
- **#5886:** Monthly Report (last reviewed: 11 Sep 2023)
- **#6896:** VIAMED Sales And Marketing Medica Exhibitions post show reports (last reviewed: Never)
- **#6902:** VIAMED Sales And Marketing Promotions (last reviewed: Never)
- **#6890:** VIAMED Sales And Marketing Results achieved (last reviewed: Never)
- **#6927:** VIAMED Sales And Marketing Search Engine Positions (last reviewed: Never)
- **#6903:** VIAMED Sales And Marketing Telesales (last reviewed: Never)
- **#6919:** VIAMED Sales And Marketing UK Sales Catalogue - Updates needed (last reviewed: Never)
- **#6893:** Website content administration (last reviewed: 01 Oct 2018)

Conclusion / Executive Summary

Auto-calculated summary of findings across the report.

Coverage

- **1** roles reviewed
- **13** active processes reviewed
- **14** responsibility-only processes (excluded from metrics, listed per role)

Management Review

Viamed - Marketing Controller

Key Risks

- 2 overdue rolling task(s) / audit(s) across all roles

Overdue Reviews

- All processes reviewed within last 24 months

Dependency Warnings

- [Marketing Controller] Catrin Hird linked to 92% (12 of 13) of role processes - single point of failure risk

Missing Audits

- 6 process(es) with no audit configured (excluding responsibility-only)

Missing Measurable Objectives

- 1 process(es) missing measurable objective

Trained Staff Coverage

- 3 process(es) with only one trained user (no backup)

Process Maturity Overview

- 1 of 13 processes (8%) scored below 4 of 6 maturity checks

Per-Role Risk Indicator Summary

Role	Processes	Overdue	>24mo Review	Solo Trained	No Trained	Missing Obj	No Audit
Marketing Controller	13	2	0	3	0	1	6

End of Management Review Report - Viamed