F0930-01

Management Review Tracker

User Guide | ISO 14001:2026 | Clause 9.3

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File format	Microsoft Excel (.xlsx)
Sheet count	Structured register with guidance, scoring criteria, and worked examples
Data rows	Scalable register with dropdown validations and scoring formulas

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Element	Details
Rows 11–34 — Action bars	For each action, a contiguous block of coloured cells spanning from the Planned Start Date column to the Planned Finish Date column. The colour distinguishes planned duration from (optionally) actual progress.
"Today" marker	Cell N4 holds =TODAY(), which can be used with conditional formatting to draw a vertical today-marker on the Gantt. This lets the review reader see at a glance which actions are in-progress versus future.

Plotting an action bar. Conditional formatting on the Gantt area is what produces the bars — a cell is coloured if its column header date falls between the row's Planned Start Date (column E) and Planned Finish Date (column G). You do not type the bars in by hand; enter the start and finish dates in columns E and G of the Action Log and the bar appears automatically. If a bar does not appear, check that the start and finish dates are within the range spanned by the Gantt columns and that both are valid Excel dates (not text).

11. Action Status Values and Progress %

11.1 Action Status (Column I)

Column I must be set for every action. The six status values describe where the action stands in its administrative lifecycle:

Status	When to Use
Open	The action has been approved at a management review and logged but work has not yet started. Use from the moment the row is added until work begins.
In-progress	Work on the action is actively underway. Use from the Planned Start Date until Action Progress reaches 1.00. The majority of active log entries are typically In-progress.
Closed	The action has been completed and verified effective. Set Action Progress = 1.00 at the same time. Closed actions remain in the log as audit evidence — do not delete them.
Approved	Used where a management review decision has been taken (e.g., a proposed initiative approved) but no immediate action is required because the approval is the action. Effectively a "Closed at approval" state for decisions that do not need follow-up work.
Rejected	The proposed action was tabled but not approved at the management review. Keep the row as a record that the item was considered and declined; record the reason in the Decision column.
Cancelled	The action was approved and started but then formally abandoned — for example, because a dependency fell away or the underlying decision was revised. Distinguish from Rejected (never started) and Closed (completed as planned).

11.2 Action Progress (Column H)

The Action Progress column captures the completion percentage as a decimal fraction from 0.00 (not started) to 1.00 (complete), in 5% increments via the controlled dropdown. Typical usage:

- **0 (0%)** — the action has been logged but no work has started. Typically paired with Status = Open.
- **0.05 to 0.95** — partial progress. Update at each monthly operational meeting to keep the Dashboard current. Typically paired with Status = In-progress.
- **1 (100%)** — the action is complete. Pair with Status = Closed and record the completion date in the Notes or in F0930-02 minutes.

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- **Non-standard states** — for Approved, Rejected, or Cancelled actions, leave Progress at 0 or 1 as appropriate to the state (e.g., Approved might sit at 1 because the approval itself is the action; Cancelled typically keeps the last progress value it had when cancelled).

12. How to Plan a Review Programme — Step by Step

This sequence is performed once per year at the start of the review cycle and updated only when the planned cadence changes.

Step	Action	Where	Details
1	Decide review frequency	Off-sheet	Agree with Top Management how often the full review will meet — monthly, quarterly, or annually. A higher cadence spreads the input load; a lower cadence makes each meeting denser.
2	Decide cadence per input	Off-sheet	For each of the 61 agenda items, decide how often it will be reviewed — typical patterns are in Section 7. High-risk and fast-moving inputs tick more months; slow-moving strategic inputs tick fewer.
3	Open the Programme & Agenda sheet	Sheet	Ensure the filter is cleared and all 61 agenda rows are visible.
4	Enter the tick pattern	Cols A–L	Working row by row, place ✓ in each month column where that input will be on the agenda. Use copy-paste of the ✓ character to keep the mark consistent.
5	Check coverage by clause	Col N	Apply a filter by Clause 9.3 reference (Column N) to confirm every sub-clause has at least one input scheduled in every review period. No sub-clause may have zero-coverage across the year.
6	Balance the monthly load	Cols A–L	Count the ticks in each month column (at the bottom using =COUNTIF). Aim for roughly comparable agenda length across meetings — a month with 50 ticks will run long; rebalance by moving some items to lighter months.
7	Circulate for approval	Off-sheet	The programme is itself reviewed and approved by Top Management before the cycle begins. Record approval in the first management review of the year.

13. How to Record a Management Review Action

After each management review, the decisions and actions captured in F0930-02 minutes are transferred to the Action Log on this workbook. One row per action. Work through the columns left to right:

- Allocate the next sequential Ref (MRA1, MRA2, …) and enter it in column A.
- In column B (Decision), record the strategic decision from the minutes — the "why" behind the action.
- In column C (Action), write the specific task as an imperative. Keep to one or two lines.

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- In column D (Assigned to), select the owner from the dropdown. If the current owner is not in the list, update the Names list in cells D37:D46 first and then select.
- In columns E (Planned Start) and G (Planned Finish), enter the planned dates agreed at the review. Both are required for the Gantt bar to render.
- In column F (Minutes Link), paste a hyperlink or reference to the F0930-02 minutes document for this review.
- In column H (Action Progress), set the initial value — typically 0 for a new action. Update at each monthly operational meeting.
- In column I (Action Status), set to Open initially; update to In-progress when work starts and Closed on completion.
- Confirm the Gantt bar has rendered for the row by scrolling right on the sheet to see the bar between Planned Start and Planned Finish.

Important — close the loop to the next review. The Action Log is the primary input to Clause 9.3.2(a) ("Status of actions from previous management reviews") at the next meeting. Before each review, update every active row: refresh Action Progress, update Status where it has changed, and confirm Planned Finish Date is still realistic (extending it requires a documented reason). The updated Action Log is then tabled at the meeting.

14. Using the Dashboard for Monitoring

The Dashboard sheet provides a monitoring view over the Action Log, showing where the follow-up from previous reviews is and is not keeping up. Per the Guidance sheet, the Dashboard provides four views:

View	What it Shows & How to Use
Late action days	For each action whose Planned Finish Date has passed but Action Progress is below 1.00, the number of days it is late. A bar chart of late-action days is the fastest way to spot slippage. Any action more than 30 days late warrants re-planning; more than 90 days warrants escalation to Top Management.
Incomplete vs complete actions	A comparison of actions with Action Progress < 1.00 against those at 1.00. A healthy tracker shows steady closure over time — the complete count should rise between reviews and the incomplete count should trend down. A growing incomplete count is an early warning of capacity or commitment problems.
Action status summary	The count of actions in each of the six Status values. A well-run log shows most active items In-progress, a few Open (recently raised), a long tail of Closed (historical record), and occasional Rejected or Cancelled entries. A disproportionate Open count indicates actions being logged but not actioned.
Action owners	The count of actions per Assigned To owner. Uncovers concentration — where a single owner is accumulating more actions than they can reasonably deliver. Use at the monthly operational meeting to rebalance the load before the next management review.

The Dashboard is a 9.3.2(a) input. The Dashboard's outputs are precisely what Clause 9.3.2(a) asks the management review to consider: the status of actions from previous reviews. Circulate a dated screenshot of the Dashboard with the agenda for the next meeting, along with the filtered agenda extracted from the Programme & Agenda sheet.

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