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ISO 14001:2026

Management Review Tracker — Training

F0930-01_Management_Review_Tracker.xlsx · G0930-01_Management_Review_Tracker_User_Guide.docx

How to plan, conduct and track management reviews — Clause 9.3 from risk-based programme through agenda to action tracking and Gantt

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Overview

Why management review matters — what the tracker produces and how it proves Clause 9.3 is real governance, not just a minute-taking exercise

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How to Run a Review — Three Core Steps

Every management review cycle moves through three sequential steps. The most common failure mode is skipping step 3 (action log refresh) — prior decisions drift, and the next review starts blind to what was committed last time.

1. Plan — Filter the agenda and distribute 1 week prior

Apply the filter in Row 7 for the current month — select only ✓ from the dropdown. Copy the filtered rows (Cols N, O, P) into the Management Review Minutes template. Distribute to attendees 1 week before the meeting. One-week notice is not a convention — it's the minimum time attendees need to prepare input data.

2. Conduct — Walk the agenda, capture decisions in Minutes

Work through each filtered input in the Minutes template. Every input must produce either: a confirmation (no action), a decision (recorded with rationale), or an action (logged in the Action Log). "No action this period" is a legitimate outcome — a meeting with zero actions recorded is not. Top Management attendance mandatory.

3. Track — Log actions, assign owners, set dates

Within 48 hours of the meeting, populate the Action Log for every committed action. Next available Ref (MRA22, MRA23, …). Decision and Action captured verbatim from Minutes. Assigned to: named individual (from dropdown). Planned Start and Finish dates. Status: Open. Progress: 0. Minutes link for traceability.

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Reading a Row — MRA10 In-Progress Worked Example

MRA10 — an In-progress action at 90% complete. Shows the full row flow from decision through ownership to progress tracking, plus the Gantt rendering of duration and progress bars.

Decision — Captured from Minutes, linked in Col F

Ref: MRA10. Decision captures the Top Management rationale — why this matters and what outcome is sought. Action captures the specific deliverable — what, by when, to what standard. Both must be written verbatim from the Minutes; paraphrasing loses the nuance that drives the action's eventual acceptance criteria.

Ownership — Name 10, 5-day planned duration

Assigned To: Name 10 (from dropdown; owner names editable in the Data Validation range). Planned Start Date: Day 46155; Planned Finish Date: Day 46159 — a 5-day window. The Minutes Link column references the source management review minutes file, allowing any reviewer to trace the action back to its committing meeting in seconds.

Progress — 90% complete, In-progress status

Action Progress: 0.9 (90%). Action Status: In-progress. The Gantt renders the planned 5-day purple duration bar overlaid with a green bar covering 90% of its length — visually showing near-completion. If the action slips past the Planned Finish Date before reaching 100%, orange slippage cells appear to the right of the purple bar.

Close-out — Transition to Closed at 100%, re-verify

When Progress reaches 100% and the action is verified effective, Status moves to Closed. Closed actions stay in the Log as evidence — they are Clause 9.3.2(a) input for the next review. "Effective" is the key word: MRA10 is not Closed just because it was done, but because its intended outcome was achieved and can be demonstrated.

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The Four Action Lifecycle States

Action Status (Action Log, Col I) tracks where each action sits in its lifecycle. Six dropdown values group into four logical states — three forward-progress states plus one set of terminal exceptions. Each state carries a defined expectation for what happens next.

- **Open — Initial state, awaiting owner action.** Committed at management review, captured in the Action Log within 48 hours, not yet started. Progress 0%. The target transition is to In-progress by the Planned Start Date. An action that remains Open past its Planned Start Date is a slippage flag — surfaces on the Dashboard's Late Action Days chart.
- **In-progress — Owner is actively delivering.** Work has started; Progress % is updated by the owner as milestones are met. Gantt shows green overlay on the purple duration bar. Most of the Log should be in this state most of the time — it's the productive working state. If nothing is In-progress, either the programme is too slow or nothing is being delivered.
- **Closed — Completed, verified effective.** Progress at 100%, outcome verified, no further activity required. The row remains in the Log permanently as Clause 9.3.2(a) evidence for all subsequent reviews. Closed ≠ deleted. A healthy Log has a growing tail of Closed actions — they are the visible evidence that the review cycle produces outcomes, not just agenda items.
- **Approved / Rejected / Cancelled — Early decisions.** Approved: decision made but specific action postponed pending resources. Rejected: decision reversed at subsequent review (with documented rationale). Cancelled: circumstances changed, action no longer relevant. All three are terminal — row stays in the Log as decision evidence. Together these three should be rare (< 10% of the Log).

Open past Planned Start Date is a Dashboard flag

Stale Open actions populate the Late Action Days chart and surface at the next review — the Log chases itself.