Step 1 — Read the Manager's Implementation Guide

Before opening any other file, read the Manager's Implementation Guide. It explains what the toolkit replaces, who should own each document, and how to deploy everything within 30 days. It is the fastest route to a working risk and opportunity management system.

- File: Risk_Toolkit_Managers_Implementation_Guide.pdf
- Folder: 02 Reference Guides
- Time to read: approximately 20 minutes

Step 2 — Open the Complete File Reference Below

The table below lists every file in the toolkit. Work through it from top to bottom on your first deployment. Return to it whenever you need to find the right document for a specific task.

File	Folder	What it is for
Risk_Toolkit_Start_Here.pdf	01 Get Started	This document. Every file in the toolkit, its purpose, the recommended reading sequence by role, and the quick-start checklist.
Risk_Toolkit_Managers_Implementation_Guide.pdf	02 Reference Guides	Read first. 30-day deployment plan, ownership table, and 90-day audit checklist.
Risk_Management_Review_Pack.pptx	02 Reference Guides	10-slide management review template covering the ISO 9001:2026 Clause 9.3.2 (g) and (h) inputs. Paste dashboard screenshots into placeholder areas before each review.
P0611-01_Risks_and_Opportunities.docx	03 Procedure	The documented ISO 9001:2026 Clause 6.1 procedure: risk management process (identification, assessment, appetite, review, monitoring, escalation), opportunity management process, and climate change considerations. Customise the company name and role titles before issuing.
F0611-02_Opportunity_Evaluation_Form.docx	04 Forms	Use to capture and evaluate an opportunity (Clause 6.1.3): concept data, benefits to customer and company, evaluator comments, and disposition (proceed/re-evaluate/decline). Record the outcome in F0611-01.
F0611-01_Risk_and_Opportunity_Register.xlsx	05 Tools	Primary risk and opportunity register — 33 columns (A–AG) with pre- and post-control scoring, exposure indicators, mitigation plans and review dates. Delete the 27 sample rows before use. Customise the Process Name dropdown list (rows 89–106) to match your processes.
D0611-01_Risk_and_Opportunity_Dashboard.html	06 Dashboard	Interactive HTML dashboard. Double-click to open in your browser. Upload the F0611-01 register (.xlsx) to populate the R&O Metrics (16 charts), Gantt Timeline, and R&O Register tabs.
G0611-01_Risk_and_Opportunity_Dashboard_Guide.pdf	07 User Guides	Guide to the Risk & Opportunity Dashboard — all four tabs, the upload process, and every chart:

SAMPLE

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- Brief the team using T0611-01 Register Training and T0611-02 Dashboard Training — 30 minutes covers both.
- Hold your first risk identification workshop and enter the real risks and opportunities into F0611-01 with pre-control scores, owners, and review dates.

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