State	Definition	Trigger to leave	Visible in
On-Track	Performance is on or ahead of the planned trajectory (Variance % ≥ ~75% by Q3).	Variance % deteriorating, or sustained below-trajectory readings.	Dashboard green ring.
At-Risk	Performance is behind plan but recoverable within the cycle. Triggers a **documented recovery action** in F0620-07.	Recovery action successful (→ On-Track) or failure (→ Off-Track).	Dashboard amber ring; F0620-07 entry.
Off-Track	Performance is significantly behind, off-track, or worsening. **Triggers escalation to the Sponsor** and a F0620-07 entry.	Recovery successful (→ At-Risk → On-Track) or year-end (→ Closed-Not-Achieved).	Dashboard red ring; F0620-07 entry; Management review.
Closed-Achieved	At year-end, the target was met. **F0620-05 Objective Review & Closure Form** completed.	Terminal state.	Year-end summary; archive.
Closed-Not-Achieved	At year-end, the target was not met. F0620-05 closure form completed with outcome rationale.	Terminal state — may trigger a new objective in the next cycle.	Year-end summary; archive.

7.2 How variance feeds the lifecycle state

The Variance % column (R) is the auto-calculated **progress toward the target** as a proportion of the gap between baseline and target. The formula is:

```
=IFERROR(IF(OR(O="",P="",Q=""), "", IF(P=O, IF(Q>=P,1,0), (Q-O)/(P-O))), "")
```

Reading the result: **0%** means current value is still at baseline (no progress); **50%** means halfway from baseline to target; **100%** means target achieved; **>100%** means exceeded target; **<0%** means moving away from target (worsening).

Lifecycle state transitions read the variance against the planned trajectory. As a rule of thumb:

- **On-Track:** variance progress at least matches the time-elapsed proportion (e.g., ≥ 25% by end of Q1, ≥ 50% by end of Q2).
- **At-Risk:** variance is 10–25 percentage points behind the time-elapsed trajectory.
- **Off-Track:** variance is more than 25 percentage points behind, or is moving in the wrong direction.

7.3 Escalation triggers

> **Sustained At-Risk over two consecutive review periods, or any Off-Track event**, must be reviewed at the next management review with a corrective action proposal. The escalation is recorded in **F0620-07**

SAMPLE

Endeavour Technical Limited © 2026. All rights reserved

Column	Field	Value
L	Sponsor	Operations Director
M	KPI	CX-04 Avg First Response (h)
N	Data Source	F0850-12 Customer Complaint Log, monthly average
O	Baseline	**7.2 hours** (cycle start, January 2026)
P	Target	**≤ 4.0 hours**
Q	Current value	*(updated monthly — starts at 7.2, expected trajectory through 5.5, 4.8, 4.0)*
R	Variance %	*(auto-calculated as the proportion of progress baseline→20→target)*
S	Lifecycle state	Proposed → Approved (at Dec 2025 MR) → Active (1 Jan 2026)
AB	Programme ref.	F0620-02_FY26 row 04 (resourcing: +1.0 FTE complaint-handling staff in Q1)
AC	Cascade row	F0620-03_FY26 row 04 (parent: OBJ-STR-2026-02 Customer Excellence)

13.2 Mid-cycle scenario — an At-Risk event

By the end of Q2 (June 2026), the current value is **5.4 hours** — the variance calculates as `(5.4 − 7.2)/(4.0 − 7.2) = 0.5625`, i.e., **56% progress to target**. The trajectory is on plan.

In Q3 (September 2026), a resourcing change causes the value to drift back to **5.9 hours** — variance drops to **41% progress**, against an expected ~75% at this stage. The Quality Manager transitions the lifecycle state from On-Track to **At-Risk**.

> **At-Risk triggers F0620-07.** A new row is created in F0620-07 Off-Track Escalation Log: Obj ID OBJ-FUN-2026-04; date flagged 2026-09-30; reason *"resourcing reduction in Q3 due to concurrent project; complaint backlog rebuilt to 38"*; recovery action *"temporary reallocation of 0.5 FTE from training to complaint handling for Q4; backlog burn-down plan with weekly milestone tracking"*; recovery owner Customer Services Manager; target recovery date 2026-12-15.

13.3 Recovery and closure

Q4 tracking shows recovery: October value **4.7**, November **4.3**, December **3.9**. At year-end review (15 January 2027), **OBJ-FUN-2026-04** closes with disposition **Closed-Achieved** — the final variance is `(3.9 − 7.2)/(4.0 − 7.2) = 103%`, slightly exceeding the target.

The closure flow:

- **Final Q4 F0620-05 QBR Pack** reports the recovery and the projected Closed-Achieved disposition for management-review acknowledgement; lessons-learned text *"objectives requiring sustained resourcing should carry an explicit resource-protection clause in F0620-02"* is captured in the pack's forward-look section.

SAMPLE

Endeavour Technical Limited © 2026. All rights reserved