

Audit plan

Choose criteria and evidence before interviewing.

01 / USE THE EXAMPLE

See what a useful entry contains

Every row below is illustrative. It shows the level of specificity that makes a record useful: a real event, an accountable role, evidence and a later decision.

02 / MAKE IT YOURS

Replace before use

Download the editable CSV, delete the example rows, then enter your own case. Check requirements and privacy before adding sensitive details. Review the record with the people doing the work.

WORKED EXAMPLE · FICTIONAL SCENARIO

Example status	Process	Why selected	Criteria	Sample	Auditor role	Planned date	Evidence to examine	Follow-up
ILLUSTRATIVE	Customer order review	Recent complaints	Current procedure and customer terms	Five recent orders	Independent quality lead	2026-10-14	Order changes, approvals, delivery records	Review findings 2026-10-28
ILLUSTRATIVE	Supplier onboarding	New critical supplier	Approved supplier criteria	Three recent approvals	Operations auditor	2026-10-21	Due diligence and performance review	Check action effectiveness in November
ILLUSTRATIVE	Training competence	New equipment	Role competence criteria	Two operators	Independent team lead	2026-11-04	Observation and competence record	Confirm safe task performance

How to review it

Ask whether an owner can show a dated example, explain the decision and demonstrate that an action changed the result. A completed template alone does not establish conformity with any standard.