

ISO 9001 Internal Audit Planner

How-to guide: what the workbook does, how to use it and what every number means.

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ISO 9001 Internal Audit Planner

Plan the internal audit programme, record each audit's checklist and findings, and see completion, conformance by clause and overdue corrective actions.

For: Quality managers, management representatives and internal auditors running an ISO 9001 (or IATF 16949, AS9100, ISO 13485) internal audit programme.

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Quick start

1. On Setup, set the status date, your targets and the time per question, then replace the example processes (with owners), auditors and finding grades.
2. On Audit Programme, list the year's audits: process, lead auditor, planned date and the number of questions planned.
3. During each audit, add a row per question on Audit Checklist: clause, question, evidence seen and the result; give each finding an owner.
4. Mark the audit Done with its actual date, and type the closed date when each finding's action is verified.
5. Move the status date forward and open the Dashboard for completion, conformance by clause and overdue actions.

What is in the workbook

Start Here	Read this first: what the workbook does and how to use it.
Setup	Status date, targets, time standard, and the process, auditor, finding grade and clause lists.
Audit Programme	One row per planned audit: process, lead auditor, dates and status. Questions, findings and hours are calculated.
Audit Checklist	One row per question asked: clause, question, evidence and result. Findings carry an owner, a due date and a closed date.
Dashboard	Programme completion, conformance by clause, findings by process and the corrective actions still open.
Method	How every number is calculated, with assumptions, limits and sources.
Verify	Self-check: the workbook's formulas recomputed on fixed inputs against an independent reference.

What each number means

Quantity	How it is calculated	Units
Questions asked, Major NC, Minor NC, OFI	Checklist rows for the audit, and those with each result (COUNTIFS).	count

Quantity	How it is calculated	Units
Est. hours	Questions planned x minutes per question / 60 x (1 + allowance): the Internal Audit Planning Time calculator's formula.	h
Due status (audit)	Done: Complete. Cancelled: Cancelled. Otherwise Overdue after the planned date, Due soon within the window, else OK.	-
Finding	1 when the result is on the Grades list (Major NC, Minor NC, OFI).	0/1
Response due	Audit date (from the programme) + the grade's response days.	date
Open, action status	Open = a finding without a closed date. Status: Complete when closed; Overdue after the response due date; Due soon within the window; otherwise OK.	-
Closed on time	Yes when closed on or before the response due date.	-
Audits done to date	Audits done with a planned date up to the status date / audits (not cancelled) with a planned date up to the status date.	%
Questions conforming	Questions with result Conforms / questions audited (all rows except Not audited); by clause section on the radar.	%
Findings closed	Findings closed / findings raised: the Nonconformance Clearance Ratio calculator's ratio.	%
Audit hours to do	Sum of the estimated hours of planned and postponed audits.	h

Assumptions, limitations, sources and the self-check (the Verify sheet, which recomputes the workbook's formulas on fixed test inputs) are in the workbook. The last page shows the Dashboard with the example data for Wexford Components, a fictional business.

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Engineering estimates for planning and improvement work. Verify the results against your own process, data and standards before you rely on them.

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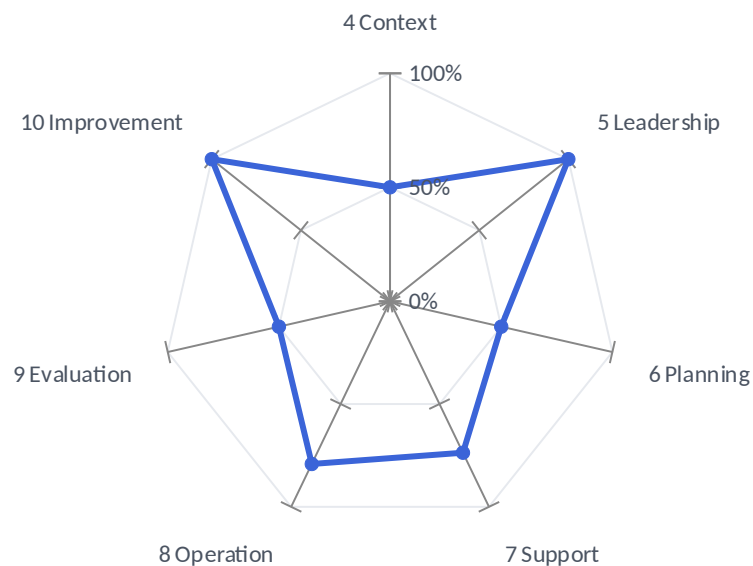
Programme completion, conformance by clause, findings by process and the corrective actions still open.

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Status date 9 Oct 2026: 14 audits on the programme, 54 questions asked, 14 findings.

AUDITS DONE TO DATE	OPEN FINDINGS	ACTIONS OVERDUE	QUESTIONS CONFORMING
90.0%	6	4	74.1%
Target 90.0%	NCs and OFIs not yet closed	Limit 0	Of all questions audited
On target		Above target	

Conformance by clause section



Findings by process

