Training Process

PHX016

Contents

Purpose

This process establishes the responsibility for identifying, providing, and recording training and certification for new and existing employees along with the continuous improvement of work-related skills within Phoenix Software.

Scope

This process applies to all employees and to every department. Every effort is made to promote continuous improvement in work skill levels throughout the company to ensure that relevant knowledge is gained and that the company is technically compliant.

Responsibilities

It is the responsibility of departmental managers to identify training needs through probation reviews, monthly one to ones and personal development plans. The employee equally has responsibility to highlight areas of further development.

Should an employee leave within 6 months of undertaking training courses all funds are to be repaid. Should the training have taken place between 6 and 12 months, costs in excess of £2000 are to be repaid.

Probationary period should be completed prior to any training or exams costing over £200 unless approved by a director.

Procedure

- All new employees are assigned an on-boarding plan in the Learning Management System that is relevant to their role and department
- All new employees are assigned online security training by Service Desk
- New employees have an introductory call with the Training & Development Manager who demonstrates how to navigate the Learning Management System and discusses any additional requirements.
- The Training & Development Manager meets with new employees after 3 months to review progress of the online training and discuss any training or development needs
- All on-boarding training is managed by the Learning Management System and should be completed prior to probation review
- All managers attend leadership coaching workshops provided by our partner and cover 12 standard modules
- All sales employees receive sales engagement training, provided by our partner
- Regular one to ones with managers take to review and discuss any training requirements

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Please treat this information as private and confidential.

Internal Training

If training is performed in-house, a record of the training is added to the employee's record detailing the training received and the date it was carried out. Wherever possible, training is scheduled or delivered using the Learning Management System and attendance is recorded. Line managers are notified in the LMS if any training is overdue.
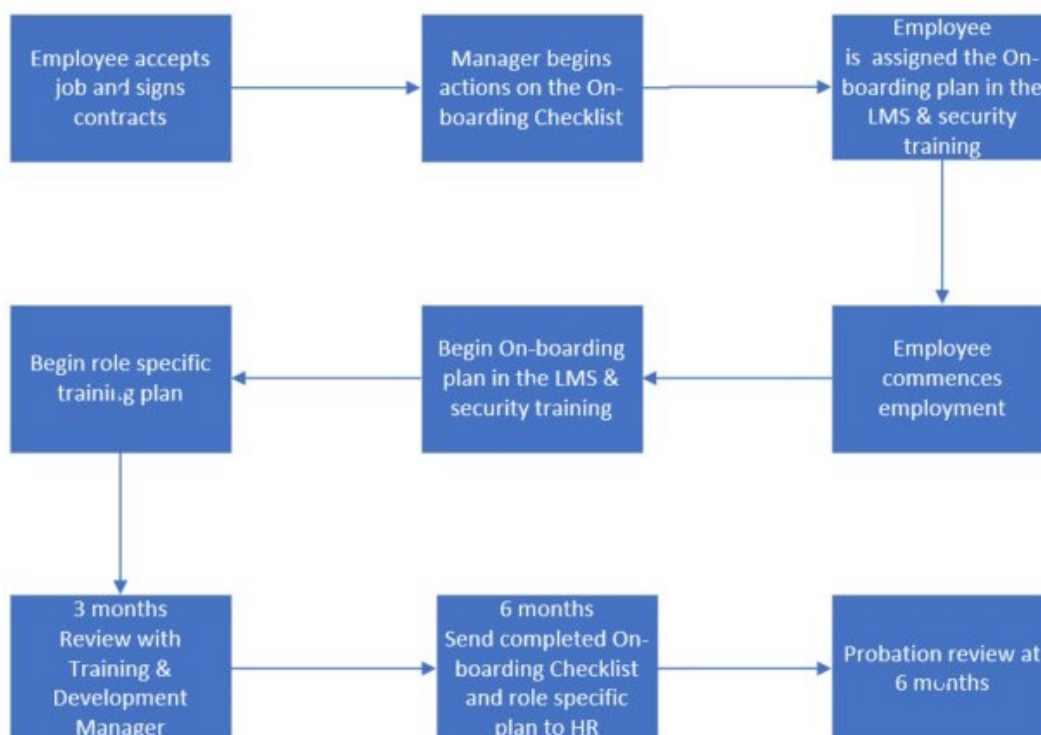
External Training

If the training is performed by an external agency, a copy of the training certificate (if relevant) or details of the training are added to the employee's record in the Learning Management System.

Training Records

Training records are created and stored by the Senior Administration department and the Training & Development Manager in the Learning Management System. A list is recorded electronically, and hard copies of any relevant certification are kept for each employee. When training is completed an assessment of competencies is carried out where possible.

Phoenix On-boarding Process

```
Employee accepts          Manager begins           Employee
job and signs       →     actions on the On-  →    is assigned the On-
contracts                 boarding Checklist        boarding plan in the
                                                    LMS & security
                                                    training
                                                        ↓
Begin role specific  ←    Begin On-boarding    ←   Employee
training plan             plan in the LMS &         commences
                          security training         employment
    ↓
3 months                  6 months
Review with               Send completed On-        Probation review at
Training &          →     boarding Checklist   →    6 months
Development               and role specific
Manager                   plan to HR
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Version Control

Author	Version	Date	Description
QMS	1.0	01/05/2016	Original Document
QMS	1.0	30/12/2017	Annual review – no changes
QMS	1.0	30/12/2018	Annual review – no changes
QMS	1.0	05/12/2019	Annual review – no changes
Emma Taylor	1.0	11/11/2020	Annual review – no changes
Emma Taylor	2.0	22/11/2021	Changes following annual review
Emma Taylor	3.0	07/11/2022	Changes following annual review

Document Approval

Name	Version	Date	Position
Sam Mudd	1.0	01/05/2016	Managing Director
Sam Mudd	1.0	30/12/2017	Managing Director
Sam Mudd	1.0	30/12/2018	Managing Director
Sam Mudd	1.0	05/12/2019	Managing Director
Sam Mudd	1.0	11/11/2020	Managing Director
Sam Mudd	2.0	22/11/2021	Managing Director
Clare Metcalfe	3.0	07/11/2022	Operations Director

Signed: *Clare Metcalfe* Clare Metcalfe, Operations Director

Dated: 07/11/2022