



# SHERWOOD TRAINING TRAINING MATRIX SYSTEM

## ABOUT:

This Excel-based spreadsheet is designed as a system for monitoring and tracking training across a team. It can be used in a number of occupational settings.

## WHAT IT DOES:

- 1 By recording the training completed by each member of the team, defining the courses/training programmes, refresher/recertification intervals etc, it will provide a visual reminder of when training is due and when training is out of date.
- 2 If training is within date, its due date is highlighted in **GREEN**.
- 3 Within 60 days of the due date for refresher training or recertification, the due date is highlighted in **ORANGE**. This serves as a prompt for the responsible person to book upcoming training dates for team members.
- 4 If training has not been completed or is overdue (i.e. beyond the required refresher training/recertification date, the due date is highlighted in **RED**.
- 5 There are separate tabs (sheets) for MANDATORY and DISCRETIONARY training. The MANDATORY training is 'must have' training - often required either by law, occupational guidelines or organisational policy. DISCRETIONARY training is not necessarily required but does enhance the knowledge and/skills of selected members of the team. This may be to enable them to take on a specialist role or to fulfill CPD requirements.
- 6 The ANALYSIS sheet displays a graph relating to training compliance specifically for MANDATORY training. It can be used to show the level of compliance with regard to specific training programmes and the overall level of compliance across the whole team. The graph can be copied and pasted into management reports.

## BEFORE YOU START:

- 1 **WARNING!** Before you do anything to this spreadsheet, make sure that you **SAVE AS** a suitable filename e.g. Team A Training Records. Do not alter this template. Keep it safe and unaltered so that in the event of the working copy being corrupted or the formatting lost, it can be set up again without having to purchase another copy!

## GETTING STARTED:

- 1 Enter the basic information - Surname, First Name, Start Date, Post - there are 10 rows provided in the template. If you need to add more, follow the instructions below 'ADDING A NEW PERSON TO THE TEAM'. Ensure that you do this for both the MANDATORY and DISCRETIONARY training sheets.
- 2 Now, in the first row of the spreadsheet, change the names in the yellow cells from e.g. Course 1 to the name of the course/training programme concerned e.g. Health and Safety. Continue until all of the required courses/training programmes are entered (there are spaces for 18 in total on the MANDATORY training sheet and 10 on the DISCRETIONARY training sheet).

- 3 Now enter the refresher or recertification interval for each course in the corresponding cell in row 2 for each course/training programme in YEARS.
- 4 Click on the ANALYSIS tab. At the top of the sheet, there is a box highlighted in mauve - please enter the number of courses/training programmes you have entered onto the MANDATORY training sheet and including Induction, Care Certificate and NVQ/QCF/RQF. (The number of courses you have added +3.) This is an important step to ensure that an accurate overall percentage compliance is calculated.
- 5 Now you can enter the dates that each member of the team completed the training in the corresponding cells in the Mandatory and Discretionary training sheets.
- 6 Once set up, all you need to do is add in new dates as team members complete courses/training programmes.

### **GOLDEN RULES:**

- 1 **Do not** type data (names, dates etc) into any of the **coloured cells** with the exception of the course or training programme name which can be entered into the yellow cells at the head of each column.
- 2 **Do not** enter values into OR in any way alter the row beginning "**Leave Blank**".

### **ADDING A NEW PERSON TO THE TEAM:**

- 1 To insert a new row, select the row beginning "Leave Blank" by a left click on the number of the row (on the far left hand side).
- 2 Right click over the selected row and select "Copy" from the list.
- 3 Select the row above which you wish to insert the new row by a left click on the number of the row (on the far left hand side).
- 4 Right click over the selected row and select "Insert copied cells" from the list.

### **HOW TO GET HELP:**

- 1 If you get stuck or need assistance, please feel free to contact Sherwood Training. If you purchased the 'bare bones' system (the spreadsheet only), this assistance will be limited.

**Call:** 08450 944 635

**Email:** [office@sherwoodtraining.co.uk](mailto:office@sherwoodtraining.co.uk)

© Sherwood Training Ltd 2018 - <http://sherwoodtraining.co.uk>