



Training & Competency Automation

Quotation

Fixed price **£3,950** (capped at £4,500, confirmed at Discovery)

Prepared for **McConnell**

Prepared by **Lewis Enright Limited**

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Overview

This quotation covers the automation of training and competency management for McConnell, delivered as a bespoke application hosted on your own mcconnell.co.uk domain. It automates certificate handling, expiry tracking and training compliance, reducing the manual workload for HR, the SHEQ team and the training co-ordinator. It is built so that, should you proceed with the wider H&S system, it can be incorporated as the first module without rework.

How it works

At present a single certificate is handled several times by different people. The process is reduced to one step, with the remaining work performed automatically.

1. **A certificate is uploaded once** (a PDF or a photo).
2. **The completion date is read automatically** and the expiry calculated from the course's validity period.
3. **The training matrix updates automatically** - competency, expiry and compliance, with no re-keying.
4. **The co-ordinator receives a clear booking list** - who needs what and by when, including cost and CITB recoverable, with reminders before any certificate lapses.

Where the effort is reduced

- **HR.** Removes the manual filing and copying of certificates between folders. Confidential records remain restricted; only the certificate is shared with compliance.
- **SHEQ team.** Replaces the spreadsheet with a reliable compliance record that is maintained automatically, removing manual upkeep and the risk of errors.
- **Training co-ordinator.** Removes manual chasing and re-keying. Actions are presented as a clear list of what to book, for whom and by when.

Scope of works

Delivered fixed-price in clear phases you approve as we go. Discovery is on us, and the build lands in around three weeks.

Phase	What you get
0. Discovery & design (on us)	We map the certificate flow with HR, Diane and IT, agree the course validity rules, and confirm exactly how it should work.
1. Foundation	The application set up on a McConnell domain, with secure Microsoft 365 sign-in and the database behind it, and embedded into the SHEQ site on your SharePoint intranet via an SPFx web part.
2. Training matrix & dashboards	Live competency at a glance, automatic expiry, and a clear "what to book, for whom, and by when" view with the cost and CITB recoverable.
3. Automated certificate handling	On upload, the completion date is read automatically, the expiry is calculated, the matrix is updated and renewal reminders are scheduled, without manual data entry.

Phase	What you get
4. Migration, testing & go-live	Migration of your existing training data, testing with the team, and training for Diane.

Investment

Fixed price: £3,950 for the project. Discovery is provided at no charge. The fixed price is confirmed at Discovery and will not exceed £4,500. Delivered fixed-price in defined phases you approve as we proceed, and completed in approximately three weeks. The platform is owned by McConnell, with no per-seat licensing.

Included: all five phases set out above, hosted on your own domain; integration into the SHEQ site on your SharePoint intranet via an SPFx web part; migration of your existing training data; training for Diane and the team, with documentation; and running costs after build limited to hosting and a small per-certificate charge for the automated reader.

What we need from you

1. A short discovery call to confirm how certificates get into Mango and the SharePoint structure HR use for new-starter documents and certificates.
2. A subdomain to point at the app (for example training.mcconnell.co.uk).
3. Microsoft 365 admin consent so staff sign in with their existing accounts.

Next step

Discovery is provided at no charge. Once we have reviewed your certificate process, we will confirm the fixed price and timeline the same day. A working demonstration is available for reference at any time.

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