

# CWC

**CrossWind** | Consulting

## **CWC Consultant Induction**

November 2021

### Overview

As a new member of staff, it is important for us to highlight some key areas, to help you familiarise yourself with CWC and meet certain legal requirements. The induction is focussed very much on getting you on-boarded into CWC, with training being the next stage. The areas covered in this induction include:

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- Overview
- Employee Handbook & Policies
- Physical Equipment and Online Provision
- Communication
- Health & Safety, First Aid & Fire
- Absence
- Security & Cyber
- Confidentiality
- Intellectual Property

**Sales** – for the main drivers on new and continuing client projects, contact:

**Gordon Kilpatrick**      **Managing Partner** [gordon.kilpatrick@cwcc.co.uk](mailto:gordon.kilpatrick@cwcc.co.uk)

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**During Engagement** - an Engagement Partner will support you and this will usually be either Gordon Kilpatrick or Lisa Whiffen:

**Lisa Whiffen**              **Managing Partner** [lisa.whiffen@cwcc.co.uk](mailto:lisa.whiffen@cwcc.co.uk)

**Legal and HR** - for more detailed questions on the terms of your engagement, on/off-boarding, screening and online portals, contact:

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**Finance** - should you have a more technical question on PAYE, or financial matters, then contact:

**Emma Free**              **Business Manager:** [emma.free@cwcc.co.uk](mailto:emma.free@cwcc.co.uk)

**Rosie May**               **Finance Manger:** [rosie.may@cwcc.co.uk](mailto:rosie.may@cwcc.co.uk)

**Welcome to CWC** - you will find a reasonable amount of information about CWC from our website ([www.cwc.co.uk](http://www.cwc.co.uk)), but we have also put together a 'Welcome to CWC' information pack, which provides some background information on the company, on what we do and our approach to being an employer. Please take a moment to read through this document, to better understand our background and perspective.

**Working for CWC** – we have also prepared a 'Working for CWC' information pack detailing popular topics on being employed by CWC, to include pay arrangements, pensions, key contract terms, as well as an overview of our handbook and policies, screening and training. Whilst we are always happy to answer your questions, you may find the answers in this pack.

**Set Up & Access Information for Consultants** – in this document you will find practical information relating to setting yourself up on and accessing CWC's systems, to include re-setting passwords.

**Job Description** - your job role and responsibilities within the client project will be explained by the project lead, or such person as they may delegate.

**Client site** – you will not operate from CWC premises, but will work from the client site/s, and/or your home location, as indicated in your contract.

**Client site Keys & Codes** – any relevant key and door/gate code will be provided by our client directly and you may be required to formally identify yourself with identification documentation.

**Proof of Identity, address and payroll documentation** – these will have been dealt with during the pre-engagement screening and on-boarding process, but any changes may need to be accompanied with proof.

During the course of your engagement with us you will have access to our employee handbook which lists policies and processes and expectations that may apply to you during the course of your employment. We may, from time to time, require you to carry out actions in relation to those policies, where appropriate to do so.

### Handbook

CWC consider themselves to be thoughtful and flexible employers. We acknowledge that the law requires us to have certain written policies in place and it is also appropriate to have other additional policies for certainty and given the nature of work we are involved with. CWC also wish to create a safe and secure working environment for its staff and create positive working relations.

The Employee Handbook has been broken down into separate parts. The Handbook itself explains more about CWC's approach as an employer and sets out standard terms relating to your contractual engagement with CWC, with the policies contained in a separate document.

### Policies

The policies are grouped according to type, to help you find what you are looking for. Our policies include health & safety, data, security and confidentiality, fraud & financial crime, reporting, grievances & disciplinary, time off, sickness, family leave and so forth.

Whilst we would always encourage a member of staff to speak with us informally about any matter that concerns them, or they would like further information about, you may want to simply look at the policy, or to discretely read our policy first.

You are always welcome to raise or discuss any matter with us on an informal basis and this, in many cases, is likely to be the most effective method. There will be times when the nature of the subject matter may require a more formal process and this is often reflected in the wording of the policy.

You are responsible for familiarising yourself with our policies, and any relevant policies of our clients.

### Software

When you join CWC, you will be provided with a CWC email address and Microsoft 365 Business Basic account which includes web and mobile versions of Word, Excel and PowerPoint. It also gives you access to Teams and OneDrive.

We have an agreed office style and templates, should the occasion arise where you need to follow them. Our preferred font is Calibri.

### Hardware

Some clients require consultants to use client equipment on their project work (which is strictly for use on your CWC work with that specific client), whilst others may require you to use your own hardware. In all circumstances it is essential that client information is not saved to your own personal hard drive. If using your own laptop for client work, ensure that all work is saved to either the client cloud or your CWC OneDrive account.

When any equipment is provided, you must follow CWC's clients' procedures and guidance for the receipt, use, care and return of that equipment.

- You are responsible for the care of your equipment, which includes keeping it physically safe, protected by a password when left unattended, charged and updated when required.
- You are responsible for reporting any problems with your equipment to CWC's client.
- You are not expected to incur any costs in relation to your allocated equipment.
- Any loss or theft should be reported immediately.

### Online Provision by CWC

- Timesheet Portal – you will be given an account to use timesheet portal (TSP) which is used to record time and request/monitor annual leave. Upon receiving access to this system you will be sent further training, "how to" guides and information.
- Consultant Portal – the consultant portal contains documentation, templates, information about events and reading material. To join this site please go to [cwc.co.uk](http://cwc.co.uk) and sign up for an account using your [cwc.co.uk](http://cwc.co.uk) email address.
- MyePayWindow - you will receive electronic payslips (including P60s, P45s etc) directly from 'ePaywindow'. An invitation will be sent to you through your personal email address and access will remain in place for three months after you leave CWC. It is your responsibility to download copies to file.

We recognise that we do not work from the same location or on the same projects, which can make sharing information and general interaction less frequent and more planned out.

### Email

You will be given a CWC email and this should be used for work communications, unless using the client's email address, where appropriate to do so and in accordance with their relevant policies.

### Video-Conferencing

This can be used to communicate with each other and details of the types available should be confirmed when you are formally on-boarded.

### Portal

Our online consultant portal contains documents and information you may need to access or be aware of. You must use your CWC email address to log-in, after the initial registration.

### Townhalls

From time-to-time CWC may organize Townhalls for CWC to inform our consultants of any changes to our product offerings or to discuss trends in the consultancy world. Details of such events will be displaced on the Consultant Portal.

### Social Gatherings

We also try to get everyone physically together for drinks (usually with some nibbles!) across the year, which has always proven to be useful and enjoyable events. Please note that due to the current Covid-19 crisis we have cancelled all physical events. At this time, we are strictly following Government guidelines and will act in accordance with this.

You need to complete any client induction processes, to include practical details such as Health & Safety, Fire and First Aid.

### Health & Safety

- You should identify the H&S Officer and relevant H&S risk assessment findings including identified hazards
- Your duty & responsibilities as an employee:
  - Take care of your own and others H&S, and co-operate with/help us/our client comply with H&S legislation
  - Follow instructions for the safe use of equipment and any H&S training/information
  - Report any H&S concerns, including situations that present a serious and imminent risk and any other failings identified in your H&S arrangements
  - Familiarise yourself with location of first aid, fire escape plan and any H&S information made available
  - Aim to leave your desk for around 10 minutes every hour to increase circulation and stimulation
  - Be mindful of good workstation practice (home/office), and report any issues to your H&S officer

### Fire Safety

- You should be aware of all relevant fire risk assessment findings, including identified hazards
- You should be aware of the emergency procedures, including how to raise an alarm, when to evacuate and call emergency services, the location of fire exits and assembly point and the electricity trip switch
- Basic training, including the use of fire equipment can be provided
- Your duty & responsibilities as an employee include: use equipment properly, report any concerns about fire safety and act responsibly with office equipment and safety equipment

### First Aid

- You should identify the First Aider and location of the first aid box and basic first aid treatments



You will be working between our client site/s and your own home or office.

- When at the client site, you must familiarise yourself with their relevant policies, training and personnel.
- When working from home you should be as aware of any potential risks to yourself or the company as you would if you were in the workplace. As an employer, we may require evidence of any at home arrangements.

### Health & Safety, and Fire

When working from home you should -

- Carry out a basic H&S and Fire risk assessments identifying potential dangers to you or the company and if relevant share your risk assessment findings, including identified hazards with the dedicated H&S officer at CWC
- Be aware of your fire exits in case of emergency
- Take care of your own health and safety and that of others
- Co-operate with us and our client to help us comply with health and safety legislation
- Follow any instructions or health and safety training and rules provided
- Report any health and safety concerns, including any work situations that present a serious and imminent risk and any other failings identified in your health and safety arrangements
- You should be aware of the emergency procedures, including how to raise an alarm, when to evacuate and call emergency services, the location of fire exits and assembly point and the electricity trip switch

**Work Station Assessment** should be carried out and you will find an assessment form on the Consultant Portal

**First Aid** - you should have access to first aid resources, which needs only be a basic first aid box at home, and be comfortable addressing basic first aid treatments

Generally, you should follow our relevant absence policies and guides, copies of which can be found on the CWC Portal and we would strongly recommend you familiarise yourself.

CWC's annual leave entitlement is set at 28 days including 8 bank holidays (pro rata where an employee joins or leaves during a calendar year). As your employer we have a responsibility to ensure you take your annual leave and it is right that you take a break from work to relax and restore yourself. You will continue to receive your normal salary whenever you utilise your holiday entitlement.

**Holiday Year** - Our Holiday Year runs from January to December (unless agreed otherwise). You are required to take your annual entitlement in the same year in which it accrues and we cannot transfer any annual leave entitlement between Holiday Years (save where permitted by statute). If you do not take all your holiday entitlement within the Holiday Year in which it arises, you will lose those untaken days.

If you have a fixed term contract (which is a contract with a specified end date), then your contract might cross over more than one Holiday Year. In this situation, your annual leave entitlement will be calculated according to the contract period in which falls in each relevant Holiday Year and we cannot transfer annual leave entitlement between the Holiday Years.

If you have not taken all your leave entitlement by the end of the fixed term contract, and we do not renew your contract, you will receive any outstanding leave entitlement with your final pay. If we renew your contract, any outstanding leave will fall into the new contract (subject to it being in the same Holiday Year and any agreement made to the contrary).

**Managing Leave** - As responsible employers, we endeavour to ensure our employees take their holiday each Holiday Year. There may also be business reasons for requiring you to take holiday, such as our client Statements of Work having holiday built in or a maximum number of working days. As your employer, we can serve notice on you to take specified holiday dates, provided our notice is twice as long as the period we require you to take.

**Client Approval** - You will be expected to speak with your client line manager to obtain their approval of the annual leave dates you wish to take. This is to ensure the delivery of our services are not compromised by you taking leave and is also to ensure they are aware of your annual leave. If you are unsure as to who to ask, please contact us at [compliance@cwco.uk](mailto:compliance@cwco.uk).

**Matched Holidays** - Our client Statements of Work (SOW) are for a fixed period of time. Some have a maximum number of working days within that period, which allow for you to take the holiday you accrue in this period. Often you will have a fixed term contract to match the dates in the SOW. This arrangement means that you will be required to take your holiday during the SOW period, even if the SOW / your contract is extended.

**Client Furlough** - Some clients require consultants to cease work during certain periods of the year. Commonly at Christmas, but sometimes during the summer months (Client Furlough). You will be required to take part of your annual leave entitlement during any Client Furlough that falls within the term of your contract.

**Planned Absences** - As an employee you must inform us in advance of your planned absences and have them approved. This does not need to be done for Bank Holidays, where you are expected to take the day as part of your Bank Holiday entitlement. We manage an absence planner within Timesheet Portal and the annual leave booking process is set out in our Annual Leave – Timesheet Portal Guide, which you will find on the Consultant Portal. Please note, any arrangements you make are at your risk until we have confirmed approval and please also refer to our Holidays Policy.

**Unplanned Absences** - It is also important for us to be aware of, and track, unplanned absences, at the time and not in retrospect:

- All unplanned absences should be notified to both your client line manager and CWC's back office at [compliance@cwcc.co.uk](mailto:compliance@cwcc.co.uk) at the start of the day of your absence, with your best estimate of a return to work date.
- If your unplanned absence continues beyond your stated return date, you must email us again with your best estimate of your revised return date, repeating this process until you actually return to work.
- You must notify CWC's back office at [compliance@cwcc.co.uk](mailto:compliance@cwcc.co.uk) immediately on your return to work.
- Depending on the nature of your absence, you may be required to provide additional information or undertake additional steps.

Please also refer to our Sickness Absence Policy and any additional instructions.

**Cancelled Absences** - We are not obliged to agree any changes to your approved annual leave dates if, say, you change your mind or your personal plans change. Whilst we would try to accommodate changes, it might be that we cannot due to adjustments on the client Statement of Work or the work patterns of others. You should seek our prior written approval if you wish to cancel your approved leave. Failure to obtain our approval could result in you having to take the date/s approved as part of your annual leave.

**Adjusting Working Hours** - There may be times when you are asked by our client to work at the weekend, or you want to take a few hours out of the day and make up the time outside office hours. If the adjustment has come at the clients' request, we will require this to be in writing and we may need to obtain additional confirmation from the clients' procurement department (or equivalent contact), to ensure that the adjustment is agreed and we can still charge for your time.

You should not unilaterally adjust your hours to avoid taking time off as holiday, unless with the prior written approval of both CWC and our client. Any agreement to 'make up' time is not standard procedure and should not be seen as setting a precedent. This does not apply to short absences of around an hour, which can be easily adjusted into your working day.

With moveable equipment and online provision, you must understand Security and Cyber Threats and how to act.

- Clean desk policy – ensure any private or confidential information is tidied away or handled discretely. This relates to your physical desk at the office and home, as well as your desktop, when your screen can be viewed by others.
- Paper documents – only print when necessary, make sure all pages are collected and be aware it is your responsibility to ensure these are stored and disposed of correctly.
- Information – store virtual information correctly on your One Drive and the correct SharePoint if appropriate, securely and use encryption if necessary.
- Access – be mindful of virtual or physical sharing of information and do not give access to external parties unless you are specifically authorised by a senior member of staff.
- Unsolicited communications – do not give any information, passwords or data to any parties who do not have authorisation even if the person is persuasive. If you are unsure about the intent of a person who asks for information or do not know the person, do not give out any information and report to HR.
- Phishing – if it doesn't sound right, it probably isn't. Phishing attacks are not always easy to spot. Be aware of the signs, such as an email addressed from a colleague from a non-work email, contact HR if you aren't sure and never click on a link if you think it may be suspicious.
- Malware – if you don't trust the sender, or the origin of a USB or link do not use/open. Report it to HR immediately.

Confidentiality is vital for maintaining our business and clients, both in terms of business etiquette and to meet legal responsibilities. During your employment with us you are likely to have access to sensitive information, some of which is critical to our businesses which we don't want made public or shared within our various companies. This can include personal information on staff, passwords and passcodes, details on finances, strategies, consultants and clients. Some clients do not even want to be identified as a client, as they guard their confidentiality that highly.

### Our Information

We have a Confidentiality Policy and take the issues of confidentiality and any breaches very seriously. You should understand what constitutes confidential information and what you can / can't do, both during and after your employment with us.

- You will be expected to specifically agree to our guidance and expectations regarding confidentiality, either in your offer letter, or a separate Confidentiality Agreement.
- There may be occasions when you will come across confidential information or documents relating to third party companies or individuals with which either we, and/or our clients, are connected or involved with. This information should also be handled with the same principles of confidentiality.

### Our Client Information

- Our relationship with our clients are governed by Framework / Master Services Agreements, which includes our client's expectations on confidentiality. If your work with us involves our clients' confidential information, you should familiarise yourself with their position on confidentiality, both during and after the engagement.
- You will be expected to specifically agree to our client's guidance and expectations regarding confidentiality and you may be asked to sign a specific Confidentiality Agreement in relation to particular clients.

### Our Information

Intellectual property is something from your mind; an intangible asset. It is something you have created or bought, which can have more than one owner and belong to people or businesses. It can include trade secrets, inventions, designs, software, concepts, symbols, formulas, names and images. In the UK we commonly think of copyrights, patents, trademarks and trade secrets. The law recognizes the need to economically protect information and encourage creation, innovation and technological progress. Protections can vary globally and are often time limited.

### Our Intellectual Property

- When working for us, the intellectual property in your work belongs to us.
- The duty of confidentiality you owe to us will include our intellectual property and extends to our clients and any other third parties we or our clients work with.
- We may from time to time take steps to identify risks to, or ways to improve the protection of, our intellectual property. This might include requiring you to signing your agreement to codes of conduct, or confidentiality / non-disclosure agreements. We might also restrict access to stored information or conduct interviews with staff.

### Our Clients' Intellectual Property

Our contractual arrangements with our clients usually include a provision that the intellectual property in the work we are carrying out for them, will belong to them.

Any work you carry out for our clients will include an obligation to keep their intellectual property confidential.

### Your Intellectual Property

If you believe you should retain, or keep separate, any intellectual property in the work you are carrying out for us, you need to speak with our Managing Partners and have this recognised formally in writing.