VERJE
HUMAN RESOURCES
PEOPLE MATTERS

Company Name
Date training plan developed
Review date
Responsible officer

Training Plan Template

This plan may be used for individual employees, groups, teams or the whole organisation.

Company mission – provide accounting and advisory services to any size business.
Company vision – to become a leader in service delivery across the state, ensuring our clients thrive.

Purpose - Who is this plan for and what is it intended to achieve. This may be best addressed once the analysis of training requirements takes place.

Discussions in relation to skills and development are to be undertaken with employees as part of performance assessment. Employee ambitions and interests must also be considered.

Example accounting firm:

Company purpose (what work do we do)	What skills and qualifications do we need to achieve this? (basis of assessment, such as legal requirements, certification requirements etc, refer to job descriptions for details)	Who has these skills and knowledge?	Who needs to develop these skills and knowledge?	How can this be achieved? Institutions that offer training, other employees who can mentor and train, online training	Timeline/ date to achieve this?
Provide tax advisory services to small business client & provide tax advisory services to	Commerce/law degree	Millie	Lucy	Already enrolled, needs time off to finish degree.	2023
		Oskar	Edna	Qualified but not practicing. Requires mentoring.	February 2023 – allocate mentor

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medium and large business clients				Allocate a manager to mentor	
		Howard	Georgina	Already enrolled, needs time off to finish degree.	2023
Customer service	Knowledge and expertise in our services, how we want our clients case managed. Reception skills Scheduling skills		Kimberley	Alison, Office Manager, to develop a manual and train Kimberley in our services	Start January 2023
Administration/ case management	Excellent communication skills Understanding of accounting principles	Alison		Director to continue mentoring Alison and work with her on developing the practice further.	