

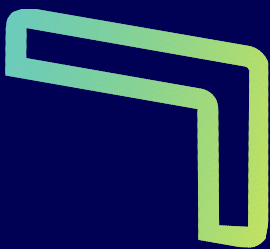


DOCUMENTATION LEVEL:
2 | CAPABILITIES
What are our core practices

PEOPLE AND CULTURE

Learning Strategy Process

Book of Learning Strategy



Critical
Techworks

CTW-2020-PCS-00069

INDEX

LEARNING DEFINITION AND PURPOSE	3
TIME TO LEARN AND THE 70:20:10 FRAMEWORK	4
INDIVIDUAL AND ORGANISATIONAL DEVELOPMENT	6
LEARNING METHODOLOGIES	8
MANDATORY TRAININGS	10
LEARNING RESOURCES	11
SUPPORT	12
ANNEX I INDIVIDUAL DEVELOPMENT: HOW TO USE YOUR INDIVIDUAL BUDGET?	14

Learning Definition and Purpose

We believe that growth and development are the cornerstone of what we do as a company and that learning is an important tool to help individuals and the organization to achieve their goals.

Enabling the development of our people is one of our primary responsibilities. It is also the steppingstone that supports our business priorities.

Our main purpose is to build a learning-for-all culture, in which people are encouraged and inspired to continue learning new skills along the way.

It is a responsibility that we assume towards our people: creating learning opportunities, providing the methodologies and tools to support development in a continuous way, as well as promoting the time to do so.

It is also our understanding that this responsibility should be shared between the organization and the people: it is also up to each one of us to cultivate a growth mindset, as well as to seize every learning opportunity.

Time to Learn and the 70:20:10 Framework

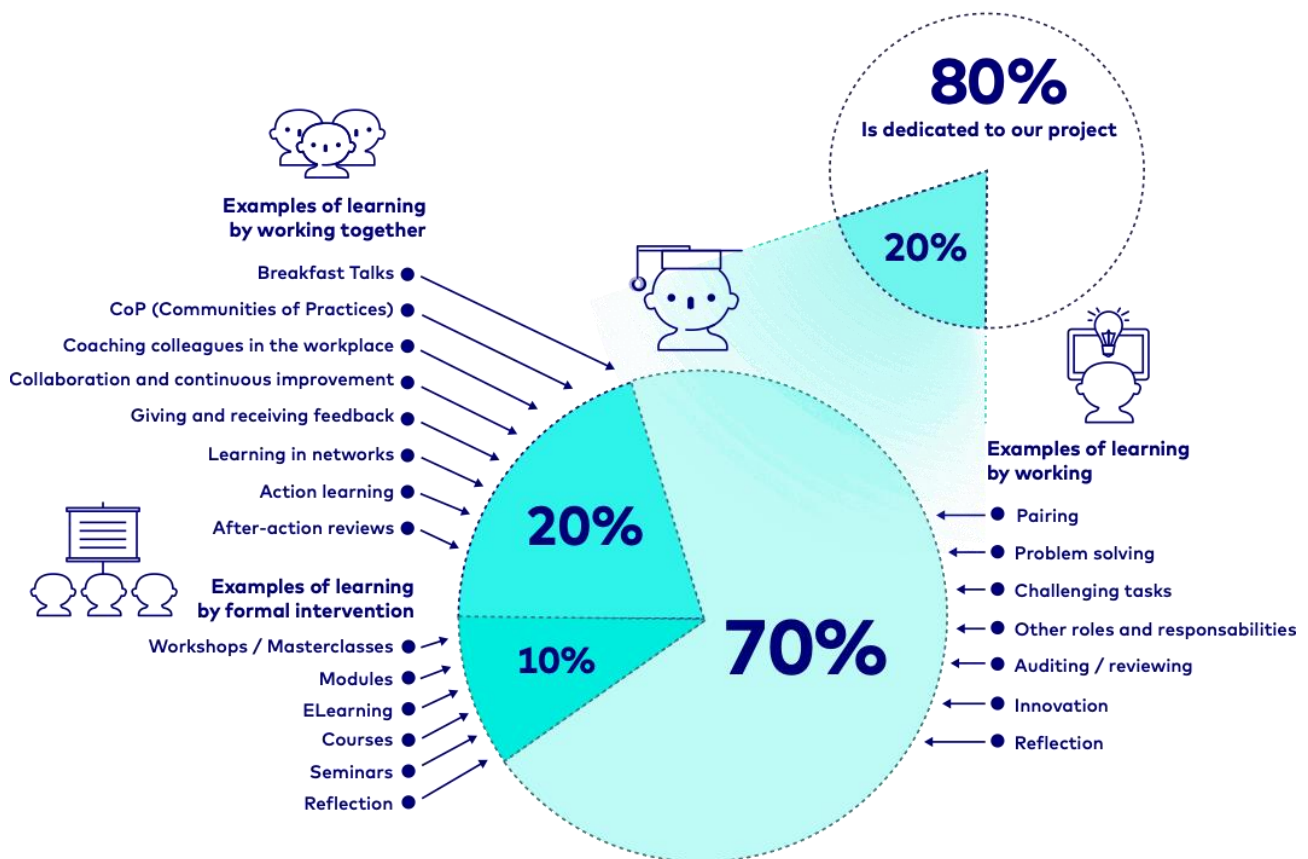
At Critical TechWorks (CTW) we believe that our time should be invested wisely. We have clear in our minds that the gross part of our journey is dedicated to our project (80%), but we also believe that **20% of the time** should be invested in learning and development.

We advocate that the **20% timeframe** should be used according to the **70:20:10 framework**, which means that **70 percent** of learning takes place **on the job** within the product and team, the remaining **20 percent happens through interaction and collaboration**, and **10 percent** through **formal-learning interventions**, such as classroom training and digital curricula:

- You should plan your time ahead, considering that most of the **learning will happen on the job**, within the team/project – analyse areas that you need to improve, or tasks that you are not entirely comfortable with (stretching outside the comfort zone is crucial for growth) and invest your time in it. For example, you can do an Inside Project or a Pairing (see more in Learning Methodologies)
- **Collaboration and interactions** are key: Interactions and conversations, whether within your team, with other teams or other Units, will play a huge part on how much you can learn. Participating in Communities of Practice (CoP), meet-ups, Breakfast Talks, tribes, and other similar events are examples about how you can learn. Zen-Projects are also a great opportunity to learn while collaborating with others (see more in Learning Methodologies).
- The remaining 10 percent of the time should be invested in more **formal learning interventions**, such as classroom trainings and digital curricula. There are plenty of options that can be used, such as: online licenses, internal workshops available on the Growth & Development Tool (G&D), participating in conferences or attending training classes organized to address organizational learning needs.

Despite the framework applied or the time invested, you need to have in mind that your openness, commitment, and mindset have a significant impact on your own growth as well as in the organization competitiveness.

At CTW, you're the owner of your learning and development path, and with such **autonomy** it also comes **responsibility**. It is important that you discuss with your team the time that you need to dedicate to your learning and development plan.



Individual and Organisational Development

To keep up with the demands of everyday business, as well as prepare ourselves for the future, we believe that each one of us is responsible to seize the opportunity to invest in learning and development, from a professional and personal perspective.

With that in mind, we consider two main streams of learning and development: Individual & Organisational. Both streams can be related, or they can be complementary.

From an **organisational** perspective, we, as a company, are responsible for building a workforce of lifelong learners, and for providing the means and the tools to respond to short and medium-term core and strategic business needs, but also for thinking ahead and preparing for the future.

As so, and aligned with our business strategy and our projects, there are organizational learning needs, technical or nontechnical, that are identified by Chief Technical Titan (Titans) and Head of Interactions (HOIs).

For these identified needs, there is a dedicated organisational budget, managed by the Purpose Team.

What is the process for organisational needs?

- For technical needs, Titans will identify these needs from their Units. They will then aggregate and consolidate the information from all units in Trends & Futuring. The information on the training needs will be addressed by the Purpose Team.
- For nontechnical needs, HOIs will identify these needs from their units. They will then aggregate and consolidate the information from all units in Interactions. The information on the training needs will be addressed by the Purpose Team.

If you are identified for an organisational training, be aware that your attendance is mandatory. If we are requesting your presence, it's because we understand that the action in question is fundamental for your professional growth and organisation development.

As an organization, it's our responsibility to create learning opportunities and provide the necessary tools to facilitate this process. Our internal Growth & Development Tool (G&D) is an integral part of our learning strategy, where you can find our organizational offer and where you have the autonomy to enrol in the learning events that are aligned with your growth and development plan and your interests.

To cultivate a learning-for-all culture, and to promote a responsible use of the G&D while improving the learning and user experience, we would like to bring your **attention to the following:**

- **Join/Unjoin a Training**

If you are unable to attend a training session, whether mandatory or non-mandatory, you must "Unjoin" on G&D at least 3 days before the event. If this is not possible, you

must inform Hearts team in advance with a justification for your absence, up to 5 days after the event.

- **G&D Events Confirmation**

At the end of each event (24 hours later – after notification) you must confirm your participation on G&D. Otherwise, you will be considered absent.

As an approach to create accountability, if you don't comply with the previous terms, **CTW reserves the right to deduct 100€ from your individual budget**, for each event you miss. If you don't have enough budget for this deduction, CTW will deduct the amount you have available at the time.

To foster **Individual Development**, and because we acknowledge that there is no one size fits all, we believe that you are the owner of your development path and you should set your own pace. To help you succeed, the organisation allocates an Individual Budget.

The Individual Budget (600€ per year– please refer to the exceptions in the next page) will be autonomously managed by you and should be used to answer your learning and development needs, with no need for approval. **However, the budget should be used aligned with what you've defined in your Growth & Development Plan or whenever an individual gap is identified together with your Hol or Titan and it is not covered by an organisational training.**

What is the process for individual needs?

- After completing your self-analysis, and establishing your goals, or after identifying an individual gap in the expectations/needs of your role together with your Hol or Titan, make sure you also create your plan in the [G&D](#)–Mastery Plan;
- You should start looking for options to address your learning needs;
- Make sure you check all internal options (with no extra cost from your individual budget), that can be used to develop your skills: Inside Project, Pairing, Zen Project, Internal Workshops and Masterclasses, My Best Self Tribes, Communities of Practice, CTW's Library, etc.
- If you do not find any internal option that meets your needs, it is time to think about other options: are you looking for a specific training class? An online license? Or perhaps a one-to-one language class? Do a market research, talk with potential providers, and make sure the offer meets your goal.
- After that, and if you have decided to move forward, you can directly submit your Reimbursement Request through Coverflex Platform (more details in Annex 1);
- Examples of what you can do with your individual budget: workshops, conferences, monthly or annual licenses (Pluralsight, O'Reilly, IDF, Udemy, etc.), technical books, university education programs, etc.

Exceptions:

- Individual budget only applicable to workers with a fixed-term or permanent contracts.
- Interns and outsourcers should address specific training needs with their HOI and Titan.
- In admission year, the individual budget will be proportional to the worked months, starting in the following month after admission date.
- If you are identified for an organizational training, and if do not attend or do not inform ahead of your unavailability, **CTW reserves the right to deduct the amount of 100€**, for each event you miss, from your individual budget.

Individual Budget is allocated annually, and it must be used in the same year – it won't be carried over to the next year. E.g., 2024 individual budget must be used in trainings and events that happen exclusively in 2024.

Learning Methodologies

We acknowledge that there are different methodologies that can be used when it comes to creating learning and development opportunities.

The **Mastery Process** is a key resource to help you define your growth and development plan. You should use the Growth & Development Plan and the Mastery Plan to record your intentions, progress, and achievements. The tool and the records help you, from time to time, to assess, rethink and improve your plan.

Inside Projects

We should consider that our daily activities have a solid research and development foundation that requires thinking and discovering. Learning should be a continuous activity, part of the daily project activities.

How?

- As part of learning on-the-job, you can allocate time within the team to solve existing problems or to address future project needs, or improvements (e.g. Spikes).
- Make sure that the time for that is included in the team planning.
- *Make it happen: there's no need to register it, since aligned with your team.*

Pairing

Pairing implies to spend some time with a "Pairing Buddy" - the time that both of you define and are comfortable with - and work side by side with the purpose to learn a new technology, to test/acquire knowledge about a project in a different area, or to learn non-technical skills from a specific role (for instance, learn more about the Product Visionary role).

How?

- Create your Pairing Plan: What do you want to learn? Do you know someone that could be your "Pairing Buddy"? Or could your HOI (Head of Interactions) and/or Titan (Chief Technical Titan) help you identify someone?
- Define together with the "Pairing Buddy" the goals, times and duration of the pairing.
- *Make it happen: there's no need to register it, since aligned with your team and HOI.*

Zen Project

A Zen Project can be of any kind (innovation, technical, social, etc.), but it must provide an opportunity to learn something new!

You can create a project from scratch or join one of the ongoing projects that are accepting new elements. We do not expect any outcome from a Zen Project besides the learning experience. Creating internal tools or other assets is not desirable because it removes focus from experimentation and learning, and also brings the need to continually support the asset, which is not the intention.

How?

- Create your Zen Project plan: What is the purpose? What results do you want to accomplish? What do you expect to learn? Who are the participants?
- The sponsor for each project must be your Titan (mandatory). The Titan should be aware of what you are trying to accomplish and help you discussing the best way to achieve your goals;
- Make sure you inform your team;
- Inform CTW Learning about the project specifics (scope, participants, start and end date – total duration);
- After that, you are ready to go: you can dedicate Friday afternoons (as part of the 20% of time) to working on this specific project;
- You can see all ongoing Zen Projects in our intranet and contact current participants, in order to get more information about, or check if it is possible to join.
- Give back: the only thing we require from you is that you share your learning with the community in a Breakfast Talk, and/or in other forums.

Learning Events

Events created with the purpose of sharing knowledge, experiences or good practices.

They can be organized by the company, to address organizational needs.

How?

- You will be invited - or you can join by yourself - to trainings classes, workshops, My Best Self Tribes, etc.

Or they can be organized by you, or by other colleagues.

How?

- Create an event plan: what is it about? What's the target group? Do you need any support from the organization?
- Create the event in G&D and share it across the organization.
- Examples: Communities of Practice (CoP), Workshops, Masterclasses, Unit events, etc.

Individual Development (Self-learning)

An individual learning plan that suits your needs and that does not depend on the company's planned events. You have the autonomy to identify learning topics that address your needs.

How?

- Prepare your Growth & Development Plan (use your Mastery Plan). If you need any guidance, your HOI and Titan can support you. You can also check our Development Roadmaps (that will be available soon);
- Use your **individual budget**;
- Give back: let's grow together, share you learning results with your team/unit/organization!
- Examples of what you can include in your individual development plan: online licenses, webinars, workshops, training classes, certifications, conferences, technical books, etc.

Mandatory Trainings

For reasons of compliance and in order to maintain CTW's mission, reputation, operational continuity, and preservation of its assets, we have a set of trainings that are mandatory to complete within the first 30 days, after joining the company. Additionally, in the CTW Compliance e-learning set, there are mandatory trainings requiring renewals to be completed within the renewal period because they represent a vital role in safeguarding our organization's future and ensuring the highest level of protection for our data, systems, and reputation.

The main goal is to create awareness in specific subjects that we understand are crucial to the way we operate as a company and you can access these trainings through G&D.

Learning Resources

There are several learning resources to support your development:

- [Growth and Development Tool](#)
- [Linkedin Learning](#)

- **Role Roadmaps**

The Role Roadmaps aim to give support and guidance to people in acquiring new competencies and in their growth. Remember there's no one size fits all and you are the owner of your development, so these roadmaps are just suggestions of possible paths.

You can find the Role Roadmaps available for several roles [here](#).

- **Internal Library**

We have our own library, both in Porto and Lisbon, full of interesting books that you can take with you for some days. You can find all the info about our library and available books [here](#).

Support

If you need any kind of support or guidance concerning your development, your main go-to-persons are your HOI and Titan.

You should also discuss learning and development topics with other colleagues that you believe can help you. And remember to always discuss with your team the time that you need to dedicate to your development.

The overall learning strategy is supported by the Purpose Team.

For any other questions, please, contact the Hearts Team through [Hearts in Motion](#).

Revision History			
Version	Date	Description	Author/Reviewer
1.0	March 2020	Published	Several contributors
2.0	April 2020	Inside Project content	Several contributors
3.0	January 2022	Redefinition of the new learning strategy	Several contributors
3.1	January 2022	Updated image of 70:20:10 framework	Several contributors
4.0	January 2022	Minor updates to the Exceptions information and Annex I	Several contributors
5.0	March 2022	Definition of the Individual Budget Management	Several contributors
5.1	April 2022	Updated Supplier Table	Several contributors
6.0	August 2022	Update to individual budget process	Sara Pereira
7.0	December 2022	Update of organisational and individual information	Several contributors
7.1	January 2023	New update on the Provider information in Annex I	Hearts Team
7.2	June 2023	Update on Organizational Training Absences	Hearts Team
7.3	January 2024	Update Learning Management Tool to Growth & Development, and typos corrections.	Quality Guardian
7.4	May 2024	Update individual budget details and typos corrections.	Hearts Team

Information Classification Level and Access List	
Classification level	Internal
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Annex I

Individual Development: How to use your individual budget?

1. **After completing your self-analysis**, and establishing your goals, or after identifying an individual gap in the expectations/needs of your role together with your Hol or Titan, make sure you also create your plan in the [Growth & Development Tool](#) – Mastery Plan;
2. **You should start looking for options to address your learning needs**;
3. **Check all internal options** (with no extra cost from your individual budget), that can be used to develop your skills: [Inside Project](#), [Pairing](#), [Zen Project](#), [Internal Workshops and Masterclasses](#), [My Best Self Tribes](#), [Communities of Practice](#), [CTW's Library](#), etc.
4. **Do the purchase by yourself**, but first make sure:

4.1 **It is in fact a learning expense** (Training classes, workshops, webinars; Conferences; Licenses (monthly or annual, to develop hard or soft skills); Certifications; University education programs; Language classes; Technical books (to develop hard or soft skills); Specific electronic hardware for learning purposes (not consumer hardware). Items that are not exclusively used for learning purposes, are not fiscally accepted as learning expenses, and cannot be refunded through the individual learning budget (for example, platforms not exclusively used for learning purposes; travels and accommodation).

4.2 **The provider has the right information** to issue the invoice - The invoice must have CTW information:

- Critical Techworks, SA
- TAX/VAT Number: 514852046
- Address: Rua Dr. António Luís Gomes n. 10, 4000-091 Porto
- **If Portuguese provider**, you need to make sure that all data is available at the invoice: Company name, tax number, and address.
- **If non-Portuguese provider**, you need to make sure that you have an official document proving the purchase – invoice or receipt – with the provider information and also the company designation: Critical TechWorks, SA. Tax number and address are not mandatory anymore.
- Only valid documents will be accepted.

4.3 **You have enough budget available**. If you're interested in a training that has a higher cost than your current individual budget, you should align the invoice details with the provider and ask for two different invoices. The invoice you submit in Coverflex must have the value that will be reimbursed through the individual budget.

Example: If you are interested in a pos-graduation that costs 1000€ and you have a remaining individual budget of 400€ (because you have already requested a license that costed 200€), you must confirm with the provider if it

accepts two different payments, issued in two different invoices: 400,00€ to CTW, and the remain value for you.

4.4 You don't buy the same item more than once. The learning budget is individual and non-transferable, the items you purchase are for your own development. This means you cannot buy the same book twice or more than one e-reader, for example.

Taking into consideration the predicted usability period for electronic hardware, each person is allowed to buy **only one Electronic Hardware (of the same model) or e-reader device every three years** using their individual budget. After the purchase of an equipment, you must wait for three years before becoming eligible to purchase the same device. Check some examples [here](#).

4.5 Beware of the tax if it is an international provider:

- Training services are subject to income tax in Portugal, that is, whenever a non-resident company provides services to a Portuguese company, these services are considered income in Portugal and therefore have to deduct/withhold tax here. So, if it is an international provider, we have to consider that an increase of 25% of the cost of the training or license and it will be deducted from the individual budget.
- The only way to avoid being subject to this 25% tax is to have the RFI form completed and signed by the person in charge of the company and to have a certificate of residence from the company. In most cases, companies do not send this information and we have to withhold this tax.

5. Submit the Reimbursement Request through Coverflex Platform.

- Make sure you upload the invoice with the correct fiscal information and that you add the template below, in the [description area](#), in Coverflex, to your request – all fields are mandatory.
- Copy paste this template to the "Description" area in Coverflex, and fill all the requested information about your learning purchase:

Title:

Type:

Start and End Date:

Statement: *By submitting this Individual Learning request, I declare its alignment with the development plan defined in my Mastery Process, contributing to my annual learning hours.*

- You can find below a description to help you in each field, please make sure to adapt to your specific request:

Title: [Name/Title of the training, license, books, etc. If more than one training or book in the same invoice, you can put all the titles here]

Type: [Insert one of the options:

Training Class/Workshop/Webinar

License

Certification

Technical Books

Language Classes

University/Education Program

Electronic Hardware]

Start and End Date: [Insert the training's start and end date or estimated dates of usage of license, book, electronic hardware, etc. If it is an e-reader, please insert N/A.]

Statement: [Insert the following sentence: By submitting this Individual Learning request, I declare its alignment with the development plan defined in my Mastery Process, contributing to my annual learning hours.]

Please note that the total number of hours for all requests will be automatically filled in at the time of purchase approval based on the value of your invoice. Thus, the total number of hours corresponds to the value of the submitted invoice, according to the following rule: 600€ are equivalent to 60 hours of training - applicable to all requests, since January 2024.

For example, if the invoice has the amount of €300, this would be $(300 \div 100) * 10 = 30$ hours. The total number of hours for each request will be calculated at the time of approval according to this rule.

- After validation, you should receive the reimbursement, at your bank account, in 2 business days.
- No approval will be needed, but the request can be denied if you do not follow the previous steps.
- Reach out to the Coverflex support team available through chat in your webapp or send an email to coverflex.benefits@criticaltechworks.com.

**Get ready
for a journey
like no other!**



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