

TRAINING, HANDOVER, AND CAPABILITY BUILDING FOR CLOUD AND RESEARCH SYSTEMS BY GLOBAL INITIATIVE

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1. Service overview

Global Initiative provides training, handover, and capability building for cloud based platforms and research systems operating in public sector and regulated environments. The service focuses on enabling client teams to operate, assure, and evolve complex systems with confidence through structured knowledge transfer, practical training, and controlled transition of responsibility.

The service is designed for organisations that need to take ownership following delivery, supplier change, internal restructure, or growth in operational maturity. Global Initiative works collaboratively with technical, research, and operational stakeholders to establish clear service boundaries, governance, and working practices, then delivers hands on training and documentation tailored to the client's environment and skills.

Training, Handover, and Capability Building is delivered as cloud support and technical advisory services. It can be provided as a standalone engagement or alongside related cloud support, delivery, or operational services. Onboarding is typically structured using discovery and definition phases to confirm objectives, risks, and transition approach before training delivery begins.

2. Service scope

The Training, Handover, and Capability Building service provides structured support to help organisations build internal capability to manage cloud and research systems.

In scope activities include capability assessment, training needs analysis, development of training plans, delivery of workshops and practical sessions, and creation or refinement of operational documentation. Training may cover operational monitoring, incident management, change control, deployment practices, environment management, access control, backup and recovery procedures, and service reporting, aligned to the client's governance model.

The service supports handover for cloud platforms, data services, and research systems, including environments operating under higher assurance requirements. Where relevant, Global Initiative can support patterns such as Trusted Research Environments and federated data approaches, helping teams understand operational and governance implications.

Capability building is delivered through a combination of documentation, walkthroughs, paired working, shadowing, and supported transition periods. Where clients are building or expanding internal teams, the service can also include role definition support, contribution to job specifications, interview support, and onboarding plans, as agreed.

The service supports public cloud, private cloud, and hybrid environments, including systems operating within regulated or restricted network contexts. All work is delivered in support of client owned infrastructure and third party cloud services.

Unless otherwise agreed, data is hosted and processed in the UK.

3. Case Studies

1 Oxford University: capability building and transition from prototype to spin out for a CBT application

Global Initiative supported Oxford University to develop and mature a digital cognitive behavioural therapy application from early prototype through feasibility work and longitudinal studies. The work required careful progression from exploratory technical development into reliable delivery practices, ensuring operational readiness and continuity as the programme evolved.



As the initiative progressed towards commercialisation, Global Initiative provided structured handover and capability building to support a transition from university programme to spin out company. This included operational documentation, environment and deployment guidance, access and governance setup, and training to enable the new organisation to take ownership of the systems and delivery processes.

Global Initiative supported recruitment and onboarding of a Chief Technology Officer, including contribution to role definition, interview support, and structured onboarding. We then supported the CTO in establishing an effective development and DevOps capability, including team formation, working practices, and operational readiness.

This engagement demonstrates Global Initiative's ability to build internal capability and enable sustainable technical ownership, supporting transition from research led innovation into operational delivery.

2 Major academic institution: large scale digital platform rebuild and transition to in house operations

Global Initiative supported a major academic institution to rebuild its online presence and underlying digital platform, including redesign of the supporting cloud infrastructure, environments, and operational controls. The work involved modernising a complex, high visibility estate and establishing a more resilient, maintainable foundation for ongoing change.

Following delivery, Global Initiative identified a significant capability gap that would have created operational risk and supplier dependency once the project concluded. To address this, we provided a structured handover and capability building programme covering operational readiness, environment and deployment workflows, monitoring and incident handling, access and governance, and change control. This was supported by tailored documentation and runbooks designed for day to day use.

To ensure sustainability, Global Initiative supported the institution to recruit and onboard a new internal team member to take ownership of platform operations. We provided structured onboarding, mentoring, and a supported transition period to embed working practices and transfer operational knowledge, enabling a controlled move to in house management and a successful transition away from supplier reliance.

This engagement demonstrates Global Initiative's ability to deliver complex platform transitions and build internal capability, reducing operational risk and enabling long term ownership in high assurance environments.

4. Key features

This service provides structured training, handover, and capability building to help client teams take ownership of cloud based platforms and research systems following delivery, transition, or supplier change. Training is tailored to the client's environment, roles, and operational maturity. Key features include:

- Structured handover from development into operational ownership, with clear transition steps and responsibilities
- Training for teams assuming responsibility for live systems, aligned to real operational roles
- Installation walkthroughs and environment familiarisation, including access, tooling, and operational controls
- Super user training covering configuration, governance, and change control processes
- Operational training covering monitoring, incident handling, escalation, and service coordination
- Basic and advanced troubleshooting training, including common failure modes and recovery steps
- Knowledge transfer covering architecture, workflows, integrations, dependencies, and operational risks
- Documentation, runbooks, and handover packs tailored to the delivered system and client context
- Train the trainer sessions to enable internal rollout and long term sustainability
- Supported transition options including shadowing, paired working, and time boxed stabilisation support where agreed
- Advisory recruitment support to help clients establish internal roles, including role definition, contribution to job specifications, interview support, and onboarding plans

5. Key benefits

Working with Global Initiative means engaging a team with almost three decades of experience delivering and supporting complex cloud platforms in public sector and regulated environments. We help clients build sustainable in house capability, reduce transition risk, and maintain continuity between delivery and live operation. Key benefits include:

- Enables teams to operate systems independently after delivery through practical training and structured handover
- Reduces operational risk during transition from build to live operation through clear ownership and documented procedures
- Builds sustainable in house capability and confidence, reducing reliance on external suppliers
- Improves continuity and resilience through shared system knowledge across multiple staff members
- Strengthens governance and operational accountability through role based training and defined processes
- Accelerates time to productivity for new hires through structured onboarding and mentoring
- Reduces long term support and consultancy dependency through train the trainer and knowledge retention approaches
- Improves incident response and troubleshooting capability through applied, scenario based training
- Supports smoother supplier change or team restructure through controlled transition planning and handover packs
- Enables controlled change and operational evolution through improved understanding of configuration and change processes

6. Service delivery model

Global Initiative delivers Training, Handover, and Capability Building using a structured, delivery-led model aligned with Agile principles and established service management practices. Engagements typically begin with discovery and definition phases to confirm scope, audiences, training objectives, operational boundaries, and transition approach.

A named Delivery Manager provides coordination and acts as the primary point of contact. Training delivery is planned around client availability and

operational needs, and may be delivered through workshops, walkthroughs, paired working, shadowing, and supported transition periods. Sessions are role-based and tailored to the client's systems, tooling, and governance model.

Training and handover outputs are produced as practical artefacts designed for day-to-day use. These may include runbooks, operating procedures, environment and access guides, troubleshooting playbooks, and structured handover packs. Where required, Global Initiative supports train the trainer delivery to enable internal rollout and long term sustainability.

Where clients are building or expanding internal capability, the service can include advisory recruitment support, including role definition, contribution to job specifications, interview support, and onboarding plans, as agreed. Recruitment support is advisory and operational and does not constitute employment agency services.

7. Security, Data, and Compliance

Security and compliance are embedded into Training, Handover, and Capability Building and treated as core delivery requirements. Global Initiative is certified to ISO/IEC 27001 and ISO 9001 and is compliant with the NHS Data Security and Protection Toolkit (DSPT). The organisation also holds Cyber Essentials certification.

Training and handover activities are delivered using a security-by-design approach. Access to client systems and environments is controlled through role-based access controls and least-privilege principles, aligned with client policies and governance requirements. Where appropriate, access is time-limited and reviewed regularly.

Any training materials and documentation are produced to reflect secure operational practices, including secure credential handling, privileged access controls, auditability expectations, and appropriate data handling. Where services involve regulated environments, restricted networks, or sensitive data, training content and delivery methods are aligned to client governance and assurance requirements.

All members of the Delivery Team are trained by the NHS in Clinical Risk Management.

8. Testing, Validation, and Assurance

Testing, validation, and assurance activities are integrated into this service to ensure training outputs are accurate, practical, and aligned to the delivered

system. Documentation and runbooks are reviewed against the live environment or agreed reference configurations to confirm correctness and suitability for operational use. All our internal methodologies and operating procedures can be used as the foundations of a formal training and handover pack.

Training content is validated through walkthrough delivery, scenario-based exercises, and practical demonstrations where appropriate. Where the engagement includes handover of operational procedures, Global Initiative supports rehearsal of key workflows such as deployment steps, incident response, backup and restore checks, and access management processes.

Peer review is embedded into delivery as a standard quality control step. Work is reviewed at three levels before it is considered complete:

- Creative review to confirm clarity, usability, and consistency of user-facing content and training materials
- Functional review to confirm guidance reflects the actual system behaviour and operational steps
- Business review to confirm alignment with the intended operational objective, scope, and governance expectations

Where required, Global Initiative supports controlled user acceptance of training and handover outputs, including sign-off against agreed acceptance criteria.

9. Onboarding, Knowledge Transfer, and Handover

Onboarding is structured to ensure that training and handover activities start quickly with clear scope, roles, and governance. Engagements begin with discovery and definition phases to confirm training audiences, current capability, target operating model, supported components, and transition risks. This includes agreement of access arrangements, environments, and communication channels.

Knowledge transfer is delivered through a combination of training sessions, documentation, paired working, and practical exercises. Global Initiative shares architectural context, dependencies, operational risks, and day-to-day procedures in a way that is aligned to the client's real organisational responsibilities.

Handover is planned and managed explicitly, with the route agreed based on client preference and operational maturity. Common handover pathways include:

3 Handover to internal stakeholders

Structured transfer to client teams through documentation finalisation, runbooks, repository walkthroughs where applicable, decision records, and knowledge transfer sessions. The aim is to enable internal teams to operate and evolve the system confidently.

4 Transition with embedded or newly formed internal team

Where the client is building or expanding capability, Global Initiative supports transition planning and onboarding of new roles. This may include role definition, contribution to job specifications, interview support, onboarding plans, and pairing during the early phases of operation, as agreed.

5 Continuation into delivery or operational support

Where the client prefers continuity with the existing supplier team, Global Initiative can support progression into delivery or ongoing operational support through separate or associated service engagements. This includes structured transition planning and agreement of service boundaries and operational responsibilities.

The aim throughout is to leave clients informed, confident, and able to sustain operation and delivery with minimal dependency.

10. Service Constraints

Training, Handover, and Capability Building is delivered primarily on a remote basis, with on-site delivery available by prior agreement where required. Effective delivery depends on timely access to systems, documentation, and appropriate staff availability for training sessions and transition activities. Delays or limitations in access may affect delivery timelines.

Where services involve regulated environments, legacy systems, restricted networks, or third-party platforms, Global Initiative's ability to deliver may be influenced by dependencies outside its direct control, including third-party change processes, security approvals, and contractual constraints.

Unless otherwise agreed, services support UK-based infrastructure and data residency. Requests for alternative hosting locations or sovereign

environments are subject to feasibility, regulatory review, and commercial agreement.

This service does not provide certification services and Global Initiative does not certify client organisations or systems. Where required, we can support certification and assurance efforts through training, documentation, and knowledge transfer aligned to client governance processes. Responsibility for achieving and maintaining any certifications remains with the client organisation and its appointed assurance bodies.

This service is delivered on a project-based or time-and-materials basis and does not include formal service level commitments by default. Recruitment support is advisory and operational and is not an employment agency service.

Training materials, documentation, and handover outputs are reviewed with the client as part of delivery. Any corrections required due to defects directly attributable to the supplied work will be addressed during the engagement or within an agreed close out period. Ongoing support after completion can be provided by agreement.

11. Support Model, SLAs, and Warranty

Global Initiative provides delivery-led support throughout the engagement. Support is provided via email and an online ticketing system for coordination, clarification, and follow-up. Phone support is available during UK business hours for handover and transition activities. A named Delivery Manager provides continuity and acts as a single point of contact throughout.

This service does not include formal service level commitments by default. Response expectations and delivery cadence are agreed at the outset of each engagement and reviewed as work progresses.

This service does not include a warranty period. Training materials, documentation, and handover outputs are reviewed and agreed with the client as part of delivery, and any corrections required due to defects directly attributable to the supplied work are addressed during the engagement or within an agreed close out period.

Where a client requires ongoing operational support following handover, this can be provided through a separate or associated service engagement with agreed support boundaries and, where required, an optional service level agreement applying only to explicitly defined operational components.

12. Pricing model



All consultancy, training, and delivery services are provided on a time and materials basis unless otherwise agreed.

Global Initiative operates a deliberately simple and transparent charging structure, reflecting a senior, multi-disciplinary delivery model.

Day rates are fixed by level of seniority and applied consistently across applicable roles listed in the framework.

- Directors / Heads of Department / Department Lead - £1320+VAT per day
- Senior Staff - £1144+VAT per day
- All other staff - £920+VAT per day

Third-party hosting, infrastructure, and service costs are charged at cost, with an agreed administrative fee where applicable.