

HANDBOOK 09

Licensee Training

BOS Master Loop | 10 Sections

Modular Plant + Multifamily Communities

CONFIDENTIAL | BOS MASTER LOOP

Table of Contents

1. Mission & Scope
2. Enablement Architecture
3. Certification Ladder
4. Training Delivery SOP
5. Compliance & Audit Standards
6. Escalation Protocol
7. KPI Dashboard & Targets
8. Required Forms & Controls
9. 30/60/90 Onboarding
10. Certification & Sign-Off

1. Mission & Scope

Licensee Training standardizes partner capability so external operators execute the BOS operating model with consistent quality, safety, and financial discipline.

No independent operation without certification. No certification without practical demonstration + audit evidence. All licensees measured against the same KPI thresholds.

2. Enablement Architecture

Four Tracks

- **Track A — Operating System Foundations:** BOS loop, reporting, governance
- **Track B — Plant/Field Execution:** SOP, quality, safety
- **Track C — Commercial Controls:** Funding gates, variance, compliance
- **Track D — Leadership Controls:** Escalation, decision cadence, KPI ownership

Delivery Layers

- Knowledge modules
- Practical simulation / lab
- Live supervised execution
- Audit and recertification cycle

3. Certification Ladder

Level	Name	Requirement
1	Foundation Certified	Theory + policy + controls
2	Operational Certified	Practical execution by lane
3	Independent Licensed Operator	Audit pass + KPI stability

Minimum Pass Conditions

- Safety compliance: Pass
- SOP execution score: $\geq 85\%$
- Audit score: $\geq 90\%$
- No unresolved critical findings

4. Training Delivery SOP

- **Step 1:** Role mapping and competency baseline assessment
- **Step 2:** Assign required module path by function
- **Step 3:** Conduct practical drills; evaluate with scorecards
- **Step 4:** Run supervised live cycle; collect KPI evidence
- **Step 5:** Certify, publish status, schedule recertification

5. Compliance & Audit Standards

Audit frequency: initial certification + periodic recertification. Evidence required: checklists, logs, KPI snapshots, escalation records. Critical non-conformance requires immediate corrective action.

Non-Conformance Categories

Code	Category	Scope
C1	Critical	Safety / legal / financial control breach
C2	Major	SOP / systemic failure
C3	Minor	Documentation / process drift

6. Escalation Protocol

Level	Response	Timeline
1	Training Lead intervention	Same day
2	Operations + Compliance review	Within 24h
3	Executive licensing gate	Within 48h

Immediate Escalation Triggers

- Critical safety or compliance breach
- Certification fraud or evidence integrity issue
- Repeated failed assessments without improvement
- KPI collapse post-certification

7. KPI Dashboard & Targets

KPI	Target
Certification Completion Rate	≥ 95%
Audit Pass Rate	≥ 90%
Critical Finding Closure SLA	≤ 7 days
Post-Certification KPI Stability	≥ target for 2 cycles
Recertification On-Time Rate	100%

8. Required Forms & Controls

- Competency Baseline Form

- Module Completion Tracker
- Practical Assessment Scorecard
- Audit Findings Register
- Certification Decision Log

9. 30 / 60 / 90 Onboarding

Day	Focus
30	Learn training framework, competency mapping, evidence requirements
60	Run assessments and practical sessions with scoring discipline
90	Independently manage full certification cycle and audit closure

10. Certification & Sign-Off

Mastery Areas

- Training architecture mastery
- Assessment rigor and objectivity
- Compliance and evidence control
- Escalation and remediation governance

Result:	■ Pass	■ Conditional	■ Fail
----------------	---------------	----------------------	---------------

Training Lead: _____ Date: _____

Operations / Compliance: _____ Date: _____