



**Retrainee – Job Creation
Training Proposal for:
APHRB LLC dba AmCheck**

Small Business \leq \$50,000

ET15-0250

Panel Meeting of: July 25, 2014

ETP Regional Office: San Diego

Analyst: S. Godin

CONTRACTOR

- Type of Industry: Services
- Priority Industry: Yes No
- Number of Full-Time Employees
 - California: 6
 - Worldwide: 6
 - Number to be trained: 7
- Owner Yes No
- Customers Outside CA
- Out-of-State Competition:
- Special Employment Training (SET): Yes No
- High Unemployment Area (HUA): Yes No
- Turnover Rate: 10%
- Repeat Contractor: Yes No

FUNDING

- Requested Amount: \$8,250
- In-Kind Contribution: \$6,969

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100	Business Skills, Computer Skills, Commercial Skills, Continuous Improvement	3	8-60	0	\$990	\$16.00
				Weighted Avg: 45			
2	Retrainee SB <100 Job Creation Initiative	Business Skills, Computer Skills, Commercial Skills, Continuous Improvement	4	8-80	0	\$1,320	\$14.00
				Weighted Avg: 60			

- Reimbursement Rate: Job #'s 1 & 2: \$22 SB Non-Priority
- County(ies): Orange
- Occupations to be Trained: Service Manager, Owner, Sales Associate, Client Services Rep, Project Manager
- Union Representation: Yes
 No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: N/A
- Administrative Services: N/A
- Training Vendors: To Be Determined

OVERVIEW

APHRB LLC dba AmCheck (APHRB) (www.amcheck.com/irvine) opened its Irvine office in 2006. This is an independently owned and operated AmCheck franchise. The Company provides payroll processing, tax filing, workers compensation processing, retirement plan administration, human resources and benefit administration services and solutions for over 300 clients located in numerous states, across all industries.

APHRB’s strategic plan calls for tripling its revenues within the next four years. To realize this goal, the Company must expand its workforce, improve processes, and develop the skill levels of current and new employees through implementation of a structured training program.

PROJECT DETAILS

APHRB's need for training is driven by the ever changing regulatory and reporting requirements affecting payroll and benefits administration services. These changes, coupled with Affordable Care Act regulations, have added a layer of reporting requirements for employers. To this end, the Company has developed a comprehensive training plan that addresses regulatory changes affecting its clients' payroll and tax reporting requirements. Training will also address the high level of customer service and technical skills necessary to retain current customers and increase market segmentation through solicitation of its services to large-sized businesses.

Large sized customers also require more comprehensive services and technology solutions. To market to these businesses, APHRB has invested in a cloud-based system contained in a single database. This newly launched software (Emphasys) will consolidate multiple tasks into a single platform comprised of payroll management, human resource management and benefit administration solutions. Training on the Emphasys system is scheduled to begin in August.

ETP-funded training will enable the Company to provide its workers with the skill sets needed to meet increased customer demands, navigate multiple software solutions, and stay abreast of industry-driven changes.

TRAINING PLAN

Business Skills – Training will be delivered to all occupations and includes topics such as Communication Skills, Customer Service, Project Management, Marketing/Business Development, Sales Skills and Conflict Resolution.

Commercial Skills – Training will be offered to all occupations in courses related to the Company's product offerings, general accounting principles, regulatory changes, reporting requirements, and risk mitigation/fraud prevention.

Computer Skills - Training will be delivered to all occupations as it relates to individual job functions. Skill sets in Paychoice (existing platform); Emphasys (new platform); customer relationship management software (Salesforce.com and ASO Pro), encryption software, ancillary product interfaces, and AmCheck Tax Software are critical to ensuring accuracy and efficiency in handling all APHRB services.

Continuous Improvement - Training will be offered across all occupations. Continuous Improvement Skills topics are designed to streamline processes, reduce waste, and maximize worker efficiency through the utilization of problem solving, team building, quality control, and process improvement skills.

Retrainee – Job Creation

As part of the Company's planned business expansion, APHRB has committed to hiring four new employees (two Client Service Representatives, one Sales Associate and one Project Manager (Job Number 2) during the term of the Agreement. APHRB represents that three of the four Job Creation trainees have been recently hired. The remaining job creation employee (Client Services Rep) will be hired during the Agreement term.

Training Hours Limitation

APHRB requests an exception to the standard small business maximum range of 60 training hours per trainee. The Company represents that its Emphasys software “super user” will need up to 80 hours of Class/Lab training to become proficient and assume the role of in-house trainer for the new cloud-based platform launch and implementation. This trainee has already been hired. Although the Company has requested an increase to the maximum hours for its super user, the weighted average remains below 60 hours.

RECOMMENDATION

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab Hours/E-Learning

Job Number 1 8-60

Job Number 2 8-80

Trainees may receive any of the following:

BUSINESS SKILLS

- Customer Service
 - Managing Special Requests
 - FIFO Issue Management, Issue Escalation
 - Managing Client Expectations
 - Earning Client Trust
 - Offering Solutions
- Communication
 - Active Listening
 - Email & Phone Etiquette
 - Communication Tone Within Company Brand
 - Never "Assume," Obtain Clarification
 - Importance of Written Documentation
- Conflict Resolution
- Project Management
 - Organization Standards and Expectations
 - Protecting Sensitive Information in Queue
 - Following Up, Confirming, Requesting Information
 - Quality Control
- Time Management
- Marketing & Business Development
 - Brand Development
 - Marketing Campaigns
 - Understanding the "Core Message"
 - Consistency of Brand Message in Communications
- Vendor Training
 - Vendor Relationship
 - Integration Into All Client-facing Transactions
 - Consistency of Message
 - Establishing Expectation, Exceeding Expectation
- Sales Training
 - Cold Calling
 - Foot Canvassing
 - Recognizing the Need of Prospects
 - Establishing Expectation, Exceeding Expectation
 - On-Boarding Procedures
 - General Sales Techniques
 - Qualification of Leads and Prospects

COMPUTER SKILLS**Paychoice (Existing Platform)**

- New Client Conversions
- Advanced Earning and Deduction Training
- Report Writer
- Online Platform Training
- Payroll Processing Best Practices
- Quarter End and Year End Processing
- Tax Variance Corrections
- Custom Export Builds and Interfaces
- General Ledger Training
- Online Employer
- Employee Self Services
- National Crime Search
- ThinkHR
- Error/Program Halt Resolution
- End of Day Processing

Emphasys (New Platform)

- Implementations - New Clients
- Conversions from Paychoice
- Advanced Earning and Deduction Training
- Report Writer
- Online Platform Training
- Payroll Processing Best Practices
- Quarter End and Year End Processing
- Tax Variance Corrections
- Custom Export Builds and Interfaces
- General Ledger Training
- Ticket Resolution
- Existing Client Conversion Training
- New Client Training
- End of Day Processing
- Learning Management Systems (LMS)
- Applicant Tracking Systems (ATS)
- On-line Demonstrations (Sales)

Customer Relationship Management (Salesforce.com & ASO Pro)

- Payroll Processing Management
- Client Account Management
- Ancillary Service Tracking and Management
- Task and Appointment Management
- Leads, Prospects, and Referral Partners Management
- Activity Metrics Development and Tracking
- Software Platform Management
- Extraction, Manipulation, and Use of Stored CRM Data
- Internal/External Support Issues

Time and Attendance Training

- Account Setup
- Defining and Writing Custom Processing Scripts and Rules
- Client Training
- Payroll Software Interface

Proposal Generator Training

- Proposal Development
- Pricing Strategies
- Presentation Skills

Encryption E-Delivery Service (Shugo)

- Client Setup
- Employee Check Stub Delivery
- "Push" Text Messaging Service
- Quarter End Processing

General Computer Skills

- Microsoft Office Products
- Network Folders
- Offsite Computer/Email Access

Ancillary Product Interfaces

- HR Support Center
- Background Checks ("National Crime Search")
- Paycards
- Worker's Compensation Insurance
- Client Custom Software Packages

AmCheck Tax Software

- Client Setup
- Daily Processing
- UI Rate Management
- Tax Notice Resolution
- Variance Corrections
- Quarter End and Year End Processing

COMMERCIAL SKILLS

- Product Knowledge
 - Core Payroll Software Knowledge
 - Paychoice (Basic Platform)
 - Emphasys
 - HRIS - Human Resources Information System
 - Time & Attendance Platforms
 - Custom Interface Development
 - Ancillary Product Offerings (Third Party Partner Services)
- General Accounting Principles
 - General Ledgers

- Debits and Credits
 - Payroll Costs and Accounting
- ACH NACHA Rules and Processing
- Regulatory Changes and Reporting Requirements
 - Affordable Care Act Training
 - Tax Regulation Changes
 - Recognizing "Red Flags" / Know Your Client
- Due Diligence - Onboarding
- HCIS Industry Movement
- Risk Mitigation & Fraud Prevention

CONTINUOUS IMPROVEMENT

- Teambuilding
 - Train the Trainer
 - Coaching
 - Constructive Criticism versus Defensiveness
- Process Improvements
 - Development
 - Implementation
- Problem Solving Skills
- Quality Control

Note: Reimbursement for retraining in Job Number 1 is capped at 60 total hours per-trainee, regardless of method of delivery. Reimbursement for retraining in Job Number 2 (Job Creation) is capped at 80 hours for one trainee and 60 hours for the other three trainees.