



**Retrainee – Job Creation
Training Proposal for:
Direct Marketing Partners**

Small Business ≤ \$50,000

ET15-0295

Panel Meeting of: August 22, 2014

ETP Regional Office: Sacramento

Analyst: M. Mazzone

CONTRACTOR

- Type of Industry: Services
- Priority Industry: Yes No
- Number of Full-Time Employees
 - California: 21
 - Worldwide: 21
 - Number to be trained: 26
- Owner Yes No
- Out-of-State Competition: Customers Outside CA
- Special Employment Training (SET): Yes No
- High Unemployment Area (HUA): Yes No
- Turnover Rate: 19%
- Repeat Contractor: Yes No

FUNDING

- Requested Amount: \$34,320
- In-Kind Contribution: \$28,467

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, Continuous Improvement, Management Skills	21	8-60	0-28	\$1,320	\$16.00
				Weighted Avg: 60			
2	Retrainee SB <100 Job Creation Initiative	Business Skills, Computer Skills, Continuous Improvement	5	8-60	0-8	\$1,320	\$16.00
				Weighted Avg: 60			

- Reimbursement Rate: Job #'s 1 & 2: \$22 SB Non-Priority
- County(ies): Sacramento
- Occupations to be Trained: Administrative Staff, Telemarketing Staff, Supervisor, Manager, Sales Staff, Owner
- Union Representation: Yes
 No
- Health Benefits: N/A

SUBCONTRACTORS

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

OVERVIEW

Direct Marketing Partners (DMP), founded in 1991, and located in Sacramento, provides business-to-business direct marketing services such as lead generation, database management, email marketing, and marketing automation. DMP serves business-to-business clients across a wide array of vertical markets including Technology, Communications, Healthcare, Education, Life Sciences, Manufacturing, Physical Security, Professional Services and the Public Sector. Customers are located throughout the United States and Canada including many Fortune 500 companies.

DMP is eligible for retraining under Out-of-State Competition as a company that provides a service to out-of-state customers where revenue derived from this service comprises at least 25% of its gross annual revenue.

Need For Training

Over the years, the Company has evolved to offer state-of-the-art best marketing practices which results in a great dependency on ever-changing technology. DMP customers demand sophisticated reporting and metrics tracking for productivity as well as contact/lead disposition. To meet the demands of customers DMP operations are undergoing the following significant change: DMP is migrating from a proprietary callware to a commercial, cloud base callware and Contact Resource Management (CRM) system. DMP is adapting an internal CRM and Marketing Automation (MA) tool. A new phone system is to be installed for admin (Integra/Mitel) in July. And currently DMP has started to use and resell MA. The Company's objectives are to achieve greater efficiencies, improve business skills, and enhance customer satisfaction. To achieve these goals, DMP must improve processes and procedures while developing trainee skills through formal training. Training will help DMP gain an advantage over their competition while fostering growth of the business.

The Company representative also stated that on July 1, 2014, Canada's Anti-Spam Legislation (CASL) goes into effect. DMP employees must become familiar with the requirements this signifies the need for additional and better training. CASL requires all marketers who email Canadians to obtain express consent. Express consent must be obtained either verbally or in writing in order to send commercial email messages lest they face a fine of up to \$10 million. This new law, along with others, requires DMP to constantly train and update employees on legislation and rules.

Retrainee - Job Creation

In support of job creation, the Panel is offering incentives to companies that commit to hiring new employees. Under the Retrainee-Job Creation program, training for newly-hired employees will be reimbursed at a higher rate and trainees will be subject to a lower post-retention wage.

In this proposal, DMP has committed to hiring 5 new employees as shown in Job Number 2. To be eligible for reimbursement under this Job Number, the trainees must be hired within the three-month period prior to Panel approval or during the term of contract.

DMP has a need to hire additional telemarketers due to an increase in large long-term projects with current customers, the expansion to offer more skilled ancillary services (creative content, e-marketing implementation), and the expansion of operating hours. All job creation employees will work as telemarketing staff and will require an extensive amount of training to elevate their skills and proficiencies.

Temporary to Permanent Hiring

The trainees in Job Number 2 come under Panel guidelines for "Temporary to Permanent" employment. DMP has retained these employees through a temporary agency, with the intention of hiring them into full-time, permanent positions after training.

These trainees must be determined eligible to participate in ETP-funded training before the start of training, while on payroll with the temporary agency. However, the retention and post-retention wage requirements cannot be satisfied until after they have been hired by DMP. Until then, the DMP will not receive progress payments.

Training Plan

Business Skills: Training will be provided to all occupations in business skills topics relating to the specific job duties of trainees. These topics include Customer Service, Product Knowledge, Business Writing, and Sales. Business Skills training is intended to identify best practices and increase proficiency.

Computer Skills: Training will be offered to all occupations to increase productivity and improve proficiency in various software and technical skills. The Company will update their CRM software system. This will require training on the new platform for all trainees. Training includes CRM System Upgrade Skills, Microsoft (Intermediate/Advanced) Excel & Outlook, Phone System Integration training and SalesFusion.

Continuous Improvement Skills: Training will be provided to all occupations to identify and analyze important performance levels, improve quality, and reduce waste and errors, thus making the organization more competitive. This training will complement the Company's continuous improvement cycle of updating its systems, procedures and processes.

Management Skills: Training will focus on team leadership, management, and coaching skills for Managers to move the Company toward becoming a higher performance workplace.

Computer-Based Training

CBT hours will be capped at 50% of total training hours per-trainee.

RECOMMENDATION

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-60

Trainees may receive any of the following:

Business Skills

- Communication Skills
- Customer Service Skills
- Sales
- Telephone skills
- DMA Certification
- Integra/Mitel for Admin and Users
- Paychex Time and Labor Online
- Business Writing
- Onboarding
- Advanced Call Skills
- Interpersonal Communications

Computer Skills

- Microsoft Office
- Sequel Server
- Zoomla
- HTML
- Five9
- Authority
- Intranet/Web
- SalesFUSION University (in Atlanta) (MA)
- Act-On (MA)
- Paychex Report Writer

Continuous Improvement

- Refresher/Enhanced Training – General TM Skills
- Campaign Product Knowledge

Management Skills (Managers and Supervisors Only)

- Management Training
- EMA 223 Quantitative Methods for Decision Making

E-Learning

0-24

Computer Skills

- Microsoft Office
- SalesFUSION – Certified User
- SalesFUSION – Certified Reseller
- Product/Industry Knowledge

CBT Hours

Job Number 1: 0-28

Job Number 2: 0-8

Business Skills

- Communications Skills (2 hrs.)
- Product /Industry Knowledge (2 hrs.)

Computer Skills

- Microsoft Office (8 hrs.)
- SalesFUSION - Online Certification (8 hrs.)
- SalesFUSION – Online Reseller Certification (8 hrs.)

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery. CBT is capped at 50% of total training hours, per-trainee.