



**RETRAINEE – JOB CREATION**

**Training Proposal for:**

**DocuSign, Inc.**

**Agreement Number: ET15-0338**

**Panel Meeting of:** January 22, 2015

**ETP Regional Office:** San Francisco Bay Area

**Analyst:** L. Lai

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative	Industry Sector(s):	Services Technology/IT  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Francisco	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 251	U.S.: 707	Worldwide: 891
<u>Turnover Rate:</u>	10%		
<u>Managers/Supervisors:</u> (% of total trainees)	12%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$188,000		\$0	\$0		\$188,000

In-Kind Contribution:	100% of Total ETP Funding Required	\$340,760
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**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 Priority Rate	Business Skills, Computer Skills, Cont. Impr.	150	8-200	0	\$720	*\$16.25
				Weighted Avg: 40			
2	Retrainee Job Creation Initiative Priority	Business Skills, Computer Skills, Cont. Impr.	100	8 – 200	0	\$800	*\$16.25
				Weighted Avg: 40			

\*This proposal was scheduled to be heard in December. Staff recommends “grandfathering” the CY 2014 wages to ensure there is no detriment caused by the cancellation of December’s meeting where, as here, some occupations would not meet CY 2015 wages.

**Minimum Wage by County:** Job Number 1: \$16.25 per hour for San Francisco; Job Number 2 (Job Creation): \$13.55 per hour for San Francisco

**Health Benefits:**  Yes  No This is employer share of cost for healthcare premiums – medical, dental, vision.

**Used to meet the Post-Retention Wage?:**  Yes  No  Maybe

Although employer provides health benefits, they are not being used to meet Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Engineer/IT Staff		30
Sr. Engineer/IT Staff		40
Marketing/Sales Staff		30
Support Staff		20
Sr. Support Staff		10
Manager/Director*		20
<b>Job Number 2</b>		
Engineer/IT Staff		30
Sr. Engineer/IT Staff		10
Marketing/Sales Staff		20
Support Staff		20
Sr. Support Staff		10
Manager/Director*		10

\*Directors included are not top-level executives who set company policies. They are frontline workers in the Marketing Department who spend more than 50% of their time doing frontline work.

## **INTRODUCTION**

Headquartered in San Francisco, DocuSign, Inc. (“DocuSign”) maintains offices in Washington, Illinois, France, England, Brazil and Australia. The Company provides electronic signature technology and Digital Transaction Management (DTM) electronic exchange services for facilitating contracts and signed documents. DTM has emerged as a new category of cloud services designed to manage document-based transactions digitally. DocuSign serves customers in financial services, health care, high tech, education, insurance, real estate, life sciences, manufacturing, communications, consumer goods and government.

### **Need for Training**

Businesses are looking to eSignature technology as a step in the new paperless environment to speed up processes, save money, increase revenues, and remove processing errors. DocuSign's DTM platform helps companies keep document/contract processes 100% digital from start to finish.

Although DocuSign eSignature and the DocuSign Secure Network form a basis for legally binding contract execution, many organizations and some countries also require enhanced validity. To address this, the Company is launching DocuSign Express Digital Signatures (EDS) that will provide enhanced digital certification capabilities. Elements like email and geolocation (the identification of the real-world geographic location of an object, such as radar, mobile phone or an Internet-connected computer terminal) can be used to seal a signature into a document. EDS is easy to use, integrates with DocuSign's other functions, and is entirely cloud-based.

The Company is also planning to release the New DocuSign Experience, which is the next generation of the DocuSign user interface. This new interface is more intuitive, easier and faster for sending and managing documents. This includes improved navigation, streamlined welcome screen, and responsive e-mail notifications, with a modern look.

DocuSign must provide supplemental training to its current and growing workforce to enable them to develop, market, sell, implement, and support its products.

### **Retrainee - Job Creation**

More than 40,000 new users join the DocuSign Global Network every day, and more than 885,000 documents containing more than 3.5 million pages are DocuSigned each day. The Company is growing by expanding along multiple dimensions: Customer size — worldwide enterprises; Vertical markets — public sector; and Geography — worldwide. DocuSign's employee base has grown by 120% year after year for the past five years. The Company plans to add more than 300 net new employees in California between now and 2016. DocuSign has recently expanded their office space, totaling over 13,000 sq. ft. to support the new employees and projected business growth.

DocuSign has committed to hiring 100 new employees (Job Number 2). DocuSign represents that the date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. The Company also represents that these trainees will be hired into “net new jobs” as a condition of contract. Trainees must be hired within the three-month period prior to Panel approval or during the term of contract.

## **PROJECT DETAILS**

**Business Skills** (30%) – All occupations will receive training. The workers will be able to perform job functions in the DocuSign environment and provide improved and consistent customer service through enhanced product knowledge, sales/marketing skills and customer service/support skills.

**Computer Skills** (35%) – Training will be offered to all occupations to enable design, develop, implement, and market new DocuSign products and systems. Trainees will also receive Intermediate/Advanced Microsoft Office training.

**Continuous Improvement** (35%) – Training will be offered to all occupations in an effort to provide the best quality and service to its customers. Frontline workers will increase their skillsets in the areas of leadership, process improvement and project management.

## **LMS**

DocuSign will utilize a Learning Management System (LMS) to track training. The LMS has been reviewed and approved by ETP staff for documentation of all class/lab training.

## **Commitment to Training**

The company training budget for 2015 is approximately \$467,000. Training includes anti-harassment, diversity, basic computer skills, new employee orientation, and on-boarding, expense report processing. DocuSign represents that ETP funds will not displace the existing financial commitment to training.

### ➤ Training Infrastructure

DocuSign has one main point of contact that will be responsible for managing the scheduling, delivery, and documentation of ETP training. This person will also meet with ETP staff and working with the administrative subcontractor.

## **RECOMMENDATION**

Staff recommends approval of this proposal.

## **DEVELOPMENT SERVICES**

Training Funding Partner, in Tustin, assisted with development of this proposal for a flat fee of \$11,500.

## **ADMINISTRATIVE SERVICES**

Training Funding Partner will also perform administrative services for an amount not to exceed 13% of payment earned.

## **TRAINING VENDORS**

To Be Determined

**Exhibit B: Menu Curriculum****Class/Lab Hours**

8 - 200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Business Acumen
- Communication
- Conflict Resolution
- Customer Service/Support
- New/Updated Product Knowledge
- Presentation Skills
- Sales/Marketing and Methodologies

**COMPUTER SKILLS**

- Cloud Computing
- Computer Software Skills
  - Concur Expense Management System
  - JIRA Issue and Project Management System
  - Birst Business Intelligence Software
  - UltiPro HR Information System
  - Jobvite Applicant Tracking
- Eloqua Marketing System
- Intermediate/Advanced Microsoft Office
- New DocuSign Proprietary Systems/Technology
- Salesforce Customer Relationship Management System

**CONTINUOUS IMPROVEMENT**

- Change Management
- Creative/Critical Thinking
- Leadership
- Process/Performance Improvement
- Project Management
- Team Building

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.