



**Training Proposal for:
ISR Holdings, Inc.**

Small Business ≤ \$50,000

ET15-0483

Approval Date: June 25, 2015

ETP Regional Office: Sacramento

Analyst: W. Sabah

CONTRACTOR

- Type of Industry: Insurance
Services
Priority Industry: Yes No
- Number of Full-Time Employees
California: 43
Worldwide: 49
Number to be trained: 35
Owner Yes No
- Out-of-State Competition: Competitors Outside CA
- Special Employment Training (SET): Yes No
- High Unemployment Area (HUA): Yes No
- Turnover Rate: 8%
- Repeat Contractor: Yes No

FUNDING

- Requested Amount: \$33,880
- In-Kind Contribution: \$182,921

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	35	8-60	0	\$968	\$15.07
				Weighted Avg: 44			

- Reimbursement Rate: Job #1: \$22 SB Non-Priority
- County(ies): Placer and Orange
- Occupations to be Trained: Administrative Staff, Information Technology Staff, Sales Staff, Marketing Staff, Accountant, Manager, Owner
- Union Representation: Yes
 No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: Sierra Consulting Services in Cameron Park assisted with development for a flat fee of \$4,820.
- Administrative Services: Sierra Consulting Services will also provide administration services for an amount not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

OVERVIEW

Founded in 2009 and headquartered in Roseville, ISR Holdings, Inc. (ISR Holdings) (www.westerneliteins.com) is a retail insurance brokerage that provides insurance products, services and risk management solutions to commercial clients. The Company's services are concentrated in the Health Care Industry and their primary customer base consists of Skilled Nursing Facilities, Surgery Centers, Physicians offices, Managed Care and Cost Containment Companies. ISR Holdings seeks funding to train its own employees, and those of its three wholly-owned subsidiaries: Western Elite Insurance Company, Arissa Cost Strategies, LLC, and MDVantage Pain Management, LLC.

The affiliates offer services related to ISR Holdings as follows:

- Western Elite Insurance Company is a provider of targeted, detailed and customized insurance to customers.

- Arissa Cost Strategies is a provider of Comprehensive Managed Care Services for Worker's Compensation and Liability Claims.
- MDVantage is a provider of programs ranging from early intervention Rx programs to chronic intervention needs around prescription control.

ISR Holdings training will take place at its locations in Roseville; training for the subsidiaries will be at those company's locations in Roseville and Tustin.

Need for Training

In the past few years, ISR Holding's competitors, including companies located out-of-state have focused their sales and marketing efforts on low-cost services. ISR Holdings cannot compete with their volume of sales. Therefore, the Company has decided to promote their advanced expertise and quality of service in order to retain long-term customers. To remain competitive, ISR Holdings will provide claims training and cross training to Sales and Marketing Staff to increase their expertise and product knowledge in all areas. There will be special courses on new issues in the industry such as Cyber Liability Claims. In addition, staff require training in team building and leadership to build cohesiveness and improve communication internally. Training will allow employees to provide customers with exceptional service and respond to cross functional challenges quickly to maximize company profitability and acquire long-term clients.

Training Plan

Training will be delivered by in-house trainers in the subject matters outlined below.

Business Skills: Training will be offered to all occupations to improve product knowledge, customer service, sales and marketing, and business operation skills. Training will include course topics such as Communication Styles, Product Knowledge, Operational Skills, Strategic Planning, Time Management, and Conflict Resolution.

Computer Skills: Training will be offered to Administrative Staff, Information Technology Staff, Sales Staff, Marketing Staff and Accountants. Training will focus on presentation development, marketing/ad design and social networking/marketing. Information Technology Staff will improve their knowledge in network design, network maintenance, and program development. Training will include Microsoft Office Suite (Intermediate/Advanced), Publisher and Illustrator, Network Administration and Web Programming.

Continuous Improvement: Training will be offered to all occupations to enhance decision making skills, improve business flow and encourage team collaboration. Training will include course topics such as Cross-Training, Decision Making, Process Improvement, Project Management and Team Building.

Management Skills: Training will be offered to Managers and Owner to identify Company goals, improve administration processes, and motivating employees. Training will include course topics such as Coaching Procedures, Leadership, Motivation, Supervisors Skill and Effecting Meetings for Leaders.

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

- Conflict Resolution
- Customer Service
- Communication Skills/Styles
- Dealing with Difficult People
- Financial Analysis
- Interpersonal Communication
- Marketing/Sales Techniques
- Operational Skills
- Planning and Organization
- Product Knowledge
- Retaining Customers
- Relationship Building
- Strategic Planning
- Successful Selling Techniques/Sales
- Time Management

COMPUTER SKILLS

- Microsoft Office (Intermediate/Advanced)
- Publisher and Illustrator
- Network Administrator
- Web Programming

CONTINUOUS IMPROVEMENT

- Leadership
- Cross Training
- Creating Quality Organizations
- Change Management
- Decision Making
- Meeting Management
- Process Improvement
- Project Management
- Team Building

MANAGEMENT SKILLS (Managers and Owner Only)

- Coaching and Mentoring Procedures
- Decision Making
- Planning and Organization
- Strategic Planning
- Effective Meeting for Leaders
- Finance for Technical Managers
- Leadership
- Motivation
- Teambuilding

- Time Management
- Supervisor Skills

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