



**Critical Proposal
Training Proposal for:**

Mavenlink, Inc.

Agreement Number: ET15-0256

Panel Meeting of: July 25, 2014

ETP Regional Office: San Diego

Analyst: S. Godin

PROJECT PROFILE

Contract Attributes:	Job Creation Initiative Priority Rate SB <100 Critical Proposal	Industry Sector(s):	Technology/IT Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Orange, 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: 52	U.S.:52	Worldwide: 52
Turnover Rate:	5%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$168,480		\$0	\$0		\$168,480

In-Kind Contribution:	100% of Total ETP Funding Required	\$291,600
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TRAINING PLAN

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 Job Creation Initiative SB <100 Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Impr	54	8-200	0	\$3,120	\$16.83
				Weighted Avg: 120			

Required Minimum Wage by County: Orange: \$13.32 (Job Creation); San Francisco: \$13.55 (Job Creation)

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
Junior Software Engineer		2
Senior Software Engineer		5
Junior Sales Associate		23
Senior Sales Associate		16
Product Marketer		1
IT/Customer Support Staff		4
Manager		3

INTRODUCTION**Critical Proposal**

The proposal for Mavenlink, Inc. (Mavenlink) (www.mavenlink.com) has been designated as a “Critical Proposal” by the Governor’s Office of Business and Economic Development (Go-BIZ). Mavenlink is expanding its workforce due to a significant increase in new product development. ETP funding will enable Mavenlink to provide highly technical training for newly hired workers.

Formed in 2008 and headquartered in Irvine with an additional facility in San Francisco, Mavenlink is a high technology firm that provides Software as a Service (SaaS). This is a model whereby software is licensed and delivered on a subscription basis and is centrally hosted in the Cloud. With SaaS, Mavenlink’s customers can efficiently manage a project from start to finish with enterprise-grade, growth-management software and consulting. SaaS provides a myriad of features such as file sharing; document/task management; resource planning; time/expense tracking; online invoicing; custom-branding security; and authorization control. Mavenlink is an

affordable solution for outsourcing project management for professional services firms and other customers principally located in California.

According to Mavenlink, their SaaS is the first product of its kind to integrate with QuickBooks and Microsoft Office 2013, and one of the first to work with PayPal. The Quickbooks integration enables customers to sync project financials, invoices, time, and budgets. The Microsoft Office 2013 integration extends project management and collaboration to track time, tasks, and project communication. Customers can send and receive payments via PayPal Business payments.

PROJECT DETAILS

Mavenlink operates in an industry that is subject to rapid technological developments, evolving compliance standards and changing customer demands. New features are added weekly, and the Company's ability to compete is dependent upon introducing new software solutions in a timely manner while improving the customer experience. To that end, Mavenlink has developed training initiatives for its newly hired employees (Job Creation):

- **On-Boarding for New Engineers** – Newly hired Engineers will learn Mavenlink's technologies and internal vernacular. Extensive training will provide skill sets in coding instructions and practices. The trainees will use Percona Server, and shoot off of the MySQL Relational Database Management System. These skills and additional training are necessary to meet changing industry demands for seamless technology capabilities.
- **Process and Customer Service Improvements** – IT/Customer Support Staff will receive cross-training on multiple Mavenlink products. Currently, the Company's workforce is trained to provide customer support on one product; if customers need help on other products, they are transferred to someone else at the company. Cross-training will allow the workforce to support multiple products and recommend integrated solutions.

Training Plan

Business Skills (25%) - This training will be provided to IT/Customer Support Staff, Product Market/Sales Associates and selected Managers. Trainees will develop the skill sets needed to provide seamless customer service through topics such as Business Analysis Skills, Consultative Marketing/Sales Skills, Inbound/Outbound Client Engagement, Customer Service/Retention Skills, Presentation Skills, Conflict Resolution, and Active Listening.

Commercial Skills (30%) – This training will be provided to IT/Customer Support Staff and selected Software Engineers. The IT/Customer Support department is staffed 24 hours a day, 7 days a week. These trainees must have the technical product knowledge to trouble-shoot and respond to customer demands on a variety of different computer/phone applications. Extensive product knowledge training on Mavenlink's solutions and product offerings will enable trainees to support multiple products and recognize if the customer is a candidate for other integrated solutions that can help solve their business challenges.

Computer Skills (30%) – Training will be provided to Software Engineers. Training is highly technical in nature and includes software programming and development skills. Training is necessary due to changing technologies, new programming, and new systems including Cloud Computing, Agile, user interface technologies, HTML/CSS, MySQL, Multiple XML/JSON API Integration, JavaScript, and Ruby-on-Rails.

Continuous Improvement (15%): Training will be delivered to all occupations and is designed to improve processes and efficiencies throughout the organization. Courses such as Team

Building, Project Management, Leadership, Problem Solving/Troubleshooting, and Goal Setting will give trainees effective leadership and team building skills in order to manage performance and process improvement in an efficient manner. These skills will also enable Mavenlink's workforce to think strategically and set appropriate goals for themselves and the organization.

Note: Many Commercial Skills and Computer Skills courses are at an Advanced Technology (AT) level but are not designated as such because the AT rate and the Small Business Priority Rate are the same (\$26 per hour).

Training Hours Limitation

Mavenlink requests an exception to the standard Small Business maximum range of training hours from 60 hours to 200 hours per-trainee. The majority of the new Software Engineers and IT/Customer Support Staff will be hired right out of college, with little real-world work experience. The Company states that it will need to provide these individuals with 200 hours of Computer Skills, as needed to develop and troubleshoot solutions for Mavenlink's proprietary software solutions and applications.

All trainees will receive 80 hours of class/lab training during the first two weeks of employment. After that, the Company expects to provide up to five hours of supplemental skills training per month per-trainee. Mavenlink's designation as a Critical Proposal allows flexibility in the number of training hours being delivered.

Retrainee – Job Creation

To keep up with software technology and implement new customer service improvements, Mavenlink must expand its business capacity by adding newly hired employees to its existing workforce. Mavenlink has committed to hiring 54 new employees during the Agreement's 24 month term. Trainees must be hired within the three month period prior to Panel approval or during the term of the contract.

Commitment to Training

Mavenlink represents that ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law. The Company's current training budget is approximately \$100,000 annually for training in new-hire company orientation, basic computer skills, sexual harassment prevention training, violence in the workplace prevention, and safety training.

Training will be delivered by in-house trainers. The first class is scheduled to begin during the first week of August. Mavenlink has an in-house dedicated administrator who will be responsible for meeting all record keeping requirements.

Impact/Outcome

The proposed training will provide the necessary skills and knowledge to frontline staff so they can better serve customers. Mavenlink anticipates that training on the latest technology/software applications and solutions will allow the Company improve its process and ultimately increase sales.

Professional Employer Organization

Although Mavenlink has an active CEAN, it uses a Professional Employer Organization (PEO), TriNet. A copy of the PEO contract with TriNet was received and approved by ETP during the development of this proposal. It is agreed that Mavenlink will retain the right to direct and control the work performed by trainees during retention and set the amount of their post retention wages.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Mavenlink retained McGladrey LP in Chicago, IL to assist with development of this proposal for a flat fee of \$10,000.

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined

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

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- Business Analysis Skills
- Consultative Marketing/Sales Skills
- Inbound/Outbound Client Engagement
- Customer Service/Retention Skills
- Communication Skills
- Active Listening Skills
- Conflict Resolution
- Presentation Skills

COMMERCIAL SKILLS

- New/Upgraded Product Design and Implementation Skills
- Technical Product Support
- New/Upgraded Software/Hardware Information
- Mobile/Cloud Technology Product Information
- New/Upgraded Software/Hardware Product Knowledge
- Collaborate on Projects in a Central, Convenient Workplace
- Create Sub-Tasks and Add Details to your Project Tasks
- Sync Tasks with Google Apps, including Calendar & Contacts
- View Conversation History and Items Relating to any Task
- Track Time and Expenses
- Modify the Cost, Duration, and Terms of a Project
- Create Invoices and Send to Clients
- Roll-Up Multiple Client Projects into a Single Invoice
- Allocate Resources and Personnel to Tasks and Deliverables
- Track the Precise Percentage of Time Spent on any Task
- Manage Budgets and Integrate with Quickbooks and PayPal
- Compare Actual Costs Against your Predetermined Budget
- Track Project Timelines and Dependencies on Gantt Charts
- Assign Tasks to Team Members via Chrome Plugin
- Generate Reports & Analytics
- Assign Permissions & Access to Individual Participants
- Upload and Share Files with Colleagues and Clients
- Set Up Unlimited Projects and Tasks Across your Teams
- Customize Mavenlink with your Company's Logo and Colors
- Encrypted with SSL Security to Protect Private Information
- Salesforce.com Product Knowledge
- Project Based Margin Reporting Support

COMPUTER SKILLS

- Advanced Software Design and Architecture
- Crystal Reports
- Ruby
- Ruby on Rails
- HTML/CSS
- JavaScript and Many New Frameworks (e.g. JQuery, Backbone.js)
- Web Development
- Resource Optimization & Utilization Tracking
- Mobile Development
- Multiple XML/JSON API Integrations
- Live Deployments and Continuous Integration
- Staging/Production UNIX Environment Systems and Maintenance
- Agile Software Development
- Test-Driven Development
- Pair Programming
- Code Versioning and Pull Requests Best Practices
- Lean User Experience (UX)
- Systems Architecture
- Intermediate/Advanced Mac Office Skills
- MySQL
- Client Relationship Management Skills (SalesForce.com)
- Mobile/Cloud Technology Skills
- Rapportive Application for social networking accounts
- Yesware
- Tinderbox (Proposal Management Software)
- Google Mail
- New/Upgraded Software/Hardware
- Technical Product Support

CONTINUOUS IMPROVEMENT

- Goal Setting Skills
- Leadership Development Skills
- Problem Solving/Troubleshooting Skills
- Process/Performance Improvement Skills
- Project Management Skills
- Team Building Skills

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