



RETRAINEE - JOB CREATION

Training Proposal for:

Saama Technologies, Inc.

Agreement Number: ET16-0405

Panel Meeting of: March 25, 2016

ETP Regional Office: San Francisco Bay Area

Analyst: C. Hoover

PROJECT PROFILE

Contract Attributes:	Retrainee Job Creation Initiative Priority Rate	Industry Sector(s):	Services Technology/Other Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Santa Clara	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: 222	U.S.: 314	Worldwide: 826
<u>Turnover Rate:</u>	2%		
<u>Managers/Supervisors:</u> (% of total trainees)	20%		

FUNDING DETAIL

<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">Program Costs</td></tr> <tr><td style="text-align: center;">\$316,800</td></tr> </table>	Program Costs	\$316,800	-	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center;">(Substantial Contribution)</td> <td style="text-align: center;">(High Earner Reduction)</td> </tr> <tr> <td style="text-align: center;">\$0</td> <td style="text-align: center;">\$0</td> </tr> </table>	(Substantial Contribution)	(High Earner Reduction)	\$0	\$0	=	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">Total ETP Funding</td></tr> <tr><td style="text-align: center;">\$316,800</td></tr> </table>	Total ETP Funding	\$316,800
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In-Kind Contribution:	100% of Total ETP Funding Required	\$1,248,786
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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, Mgmt Skills	180	8-200	0-20	\$1,260	\$22.84
				Weighted Avg: 70			
2	Retrainee Priority Rate Job Creation Initiative	Business Skills, Computer Skills, Mgmt Skills	100	8-200	0-20	\$900	\$22.84
				Weighted Avg: 45			

Minimum Wage by County: Job Number 1: \$17.02 per hour for Santa Clara County;
Job Number 2 (Job Creation): \$14.19 per hour for Santa Clara County.

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

Employer provides health benefits; however, they are not being used to qualify trainees.

Wage Range by Occupation

Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1:		
Administrative Support Staff		6
Managers		37
Professionals I (Analysts/Consultants/Engineers/Human Resources)		30
Professionals II (Analysts/Consultants/Engineers/Human Resources)		60
Professionals III (Analysts/Consultants/Engineers/Human Resources)		39
Sales Workers I		3
Sales Workers II		1
Sales Workers III		2
Sales Workers IV		2
Job Number 2:		
Administrative Support Staff		3
Managers		18
Professionals I (Analysts/Consultants/Engineers/Human Resources)		30
Professionals II (Analysts/Consultants/Engineers/Human Resources)		30

Professionals III (Analysts/Consultants/Engineers/Human Resources)		13
Sales Workers II		2
Sales Workers III		2
Sales Workers IV		2

INTRODUCTION

Founded in 1997, and headquartered in Campbell, Saama Technologies, Inc. (Saama) (www.saama.com) provides data and analytics services to help companies fast-track product launches, streamline supply chain, optimize forecast demand, improve marketing strategies, and establish new business models. Saama uses a platform to leverage customers' existing data infrastructure based on prior business intelligence efforts. For example, it uses a proprietary "Fluid Analytics Engine" to convert the customer's raw data into analytics. The Company also provides ready-analytics solutions (a data solution designed to accelerate a company's data and analytics initiative to completion within weeks instead of months)

Saama has customers in a variety of industry sectors: high technology, healthcare, insurance, life sciences, consumer packaged goods, and government. Customers include Verizon, SunPower, Pharmacyclics, Intuitive Surgical, iCracked, Hortonworks, Rainmaker Systems, MasterCard, and Men's Warehouse.

PROJECT DETAILS

Saama's training goals for the next two years will focus on upgrading software systems and employee business skills to increase productivity and efficiency. The following are some of the software investments that Saama will implement in this time period:

- NetSuite- \$330,000 in January 2016
- HRIS System- \$235,000 in August 2016
- Learning Management System (LMS)- \$100,000 in June 2016
- Sales Incentives System- cost and installation date is to be determined (TBD)

In addition, the Company is currently building on its Fluid Analytics Engine for key industry sectors (healthcare, consumer packaged goods, high technology and insurance). A formal needs assessment concluded that on-going training will be required to meet these enhancements.

Retrainee - Job Creation

The Panel is offering incentives to companies that commit to hiring new employees. Training will be reimbursed at a higher rate and trainees will be subject to a lower post-retention wage.

The Company is at full capacity at the current facility and anticipates moving into a 22,000-square-foot facility (the current facility is 15,000-square-foot) in July, when the lease on the current facility ends, to keep up with recent and projected growth.

Saama is also expanding existing business capacity. With the rise of Big Data platforms and cloud-based technology, companies must keep up with their data quality to remain competitive. Saama realized the need and, in 2015, secured \$35 Million in funding to accelerate business moving forward. The funding helped the Company achieve 37% growth last year. The Company

is also expecting the same growth rate in 2016.

Saama has committed to hiring 100 new employees (Job Number 2). The date-of-hire for these trainees will be within the three-month period before contract approval or within the term-of-contract. The company represents that these trainees will be hired into “net new jobs” as a condition of contract.

Training Plan

Training will be delivered through Class/Lab, E-Learning and Computer-Based Training (CBT) methods.

Business Skills (43%): This training will be offered to all employees. This training will cover project management, leadership, business communications, social media, presentation skills, structured problem solving and technical writing. The purpose of this training is to upgrade the business skills of the company’s employees.

Management Skills (10%): This training will be offered to the Mid/First Level Managers. This training will cover business analysis/requirements management, the role of the manager, leading and facilitating clients. The purpose of this training is to improve the incumbent and the newly-hired (frontline) managers’ skills.

Computer Skills (47%): This training will be offered to all employees. This training will cover structured query language (SQL), data modeling, Java, NetSuite, data science, SQL server analysis/integration/reporting services, and the company’s fluid analytics engine. The purpose of this training is to gain new computer skills while facilitating new software system upgrades.

Commitment to Training

Saama represents that ETP funds will not displace the existing financial commitment to training. The Company spends \$300,000 on training annually. Company-wide, job-specific training is offered to all departments in Business Skills, Continuous Improvement, Management Skills and Advanced Technology, as needed. The training methods used were classroom, WebEx (E-Learning), and one-on-one training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

Saama’s plan for administering the project include one main administrator who is dedicated to ensuring the success and proper handling of training courses and materials. An email will be distributed as a means to announce upcoming training courses. Employees will then sign up for classes, and an email invite confirmation will be sent. On the date the training is delivered, an attendance sheet (ETP approved roster) will be distributed. Employee training will be captured on a spreadsheet detailing all training courses completed.

Impact/Outcome

The goal of training is to familiarize employees with the new technologies and upgrades.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Saama retained RSM US LLP in Los Angeles to assist with development of this proposal for a fee of \$9,504.

ADMINISTRATIVE SERVICES

Saama also retained RSM US LLP to perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

Effective Training Associates of San Jose has been retained to provide training in Business Skills for a fee to be determined.

Third Eye Consulting of Santa Clara has been retained to provide training in business analytics and intelligence for a fee of \$20,000 per class.

Other training vendors will be identified for ETP record-keeping purposes as they are retained.

Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 200

Trainees may receive any of the following:

BUSINESS SKILLS

- + Winning By Influencing
- + Communication Essentials
- + Clear Email Writing
- + Managing Time & Multiple Priorities
- + Social Media
- + Technical Writing
- + Emotional Intelligence
- + Business Communications
- + Consulting Mindset
- + Leadership Training
- + Structured Problem Solving
- + Presentation Skills
- + Crucial Conversations
- + Giving & Receiving Feedback
- + Project Management
- + Effective Sales Presentations
- + Commercial Life Sciences (Pharmaceutical Industry)
 - o Overview of Sales and Marketing Functions
 - o Market Trends and Challenges (Sales & Marketing)
 - o Data: 360 Degree View
 - o Claims and Payer Data Sets (Sales Data)
 - o Reimbursement - Process, Data & Analytics
 - o Incentive Compensation- Process, Data & Analytics
- + Insurance Industry
 - o Business of Insurance (Insurance Terminology)
 - o U.S. Insurance Industry (Results/Market Trends)
 - o Insurance Regulation
 - o Distribution Channels and Market Management
 - o Lifecycle of an Insurance Policy
 - o Policy Contracts, Forms and Attachment Logic
 - o Rate Revisions, Indications and Product Revisions
 - o Claims Processes, Data and Reporting
 - o Insurance Company Underwriting and Operations
 - o Statistical Reporting and Key Metrics
 - o Common Data Challenges
 - o Trends in Insurance Analytics and Big Data

COMPUTER SKILLS

- + Qlikview
- + Tableau
- + Structured Query Language (SQL)
- + SQL Server Analysis Services (SSAS)
- + SQL Server Integration Services (SSIS)
- + SQL Server Reporting Services (SSRS)
- + Data Modeling

- + Hadoop
- + Cognos
- + Agile
- + Fluid Analytics Engine (FAE) L1
- + Fluid Analytics Engine (FAE) L2
- + Informatica
- + Java
- + NetSuite
- + Human Resource Information System (HRIS)
- + Learning Management System (LMS)
- + Data Science
- + Sales Incentive System (SIS)

MANAGEMENT SKILLS (Managers only)

- + Business Analysis/Requirements Management
- + Leading & Facilitating Clients
- + The Role of the Manager

E-Learning

0–200

BUSINESS SKILLS

- + Social Media

MANAGEMENT SKILLS (Managers only)

- + Business Analysis/Requirements Management

COMPUTER SKILLS

- + SQL Server Analysis Services (SSAS)
- + SQL Server Integration Services (SSIS)
- + SQL Server Reporting Services (SSRS)
- + Data Modeling
- + Cognos
- + Fluid Analytics Engine (FAE) L1
- + Fluid Analytics Engine (FAE) L2

CBT Hours

0–20

BUSINESS SKILLS

- + iLearn
 - o Purpose of BI (Business Intelligence) (.25 hours)
 - o Brand Launch Process (.5 hours)
 - o Aggregate Spend and the Law (.75 hours)
 - o Track and Report Aggregate Spend and your DATA (.75 hours)
 - o Life Sciences Managed Market Analytics Webinar (1 hours)

COMPUTER SKILLS

- + iLearn
 - o OLTP (Online Transaction Processing) vs OLAP (Online Analytical Processing) (.25 hours)
 - o What is BI (Business Intelligence) (.25 hours)

- o Regression I (.25 hours)
- o Regression II (.25 hours)
- o Ladder of Business Intelligence (LOBI) (1 hour)
- o Detecting Fraud Through Data Analytics (1 hour)
- o Predictive Analytics (.5 hours)
- o Big Data and Social Media Analytics (1 hour)
- o What is Big Data (.25 hours)
- o Big Data is the Answer – What was the Question (1 hour)
- o Getting Started with SSIS (6 hours)
- o Cognos TM1 Informatica (.25 hours)

Note: Reimbursement for retraining is capped at 200 total hours per-trainee, regardless of method of delivery. CBT is capped at 50% of total training hours, per trainee.