



**Retrainee - Job Creation  
Training Proposal for:  
Shamrock Office Solutions, Inc.**

**Small Business ≤ \$50,000**

**ET16-0244**

**Approval Date:** November 2, 2015

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

**Analyst:** R. Jackson

**CONTRACTOR**

- Type of Industry: Services  
Technology/Other  
Priority Industry:  Yes  No
- Number of Full-Time Employees  
California: 30  
Worldwide: 30  
Number to be trained: 24  
Owner  Yes  No
- Out-of-State Competition: No OSC
- Special Employment Training (SET):  Yes  No
- High Unemployment Area (HUA):  Yes  No
- Turnover Rate: 18%
- Repeat Contractor:  Yes  No

**FUNDING**

- Requested Amount: \$25,674
- In-Kind Contribution: \$21,333

**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 SET SB <100	Business Skills, Commercial Skills, Computer Skills, Mgmt. Skills, PL-Commercial Skills	21	8-60	0-30	\$1,012	\$27.40
				Weighted Avg: 46			
2	Retrainee SET SB<100 Job Creation	Business Skills, Commercial Skills, Computer Skills, Mgmt. Skills, PL-Commercial Skills	3	8-80	0-40	\$1,474	\$24.00
				Weighted Avg: 67			

- Reimbursement Rate: Job #'s 1 & 2: \$22 SB Non-Priority
- County(ies): Alameda
- Occupations to be Trained: Manager, Administrative Staff, Sales Staff, Service Staff, Owner
- Union Representation:  Yes  
 No
- Health Benefits: Job #1: \$1.61 per hour

**SUBCONTRACTORS**

- Development Services: John Twomey, Redwood City, assisted with development for a flat fee of \$2,000.
- Administrative Services: John Twomey will also provide administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: Ricoh, Tustin, will provide Commercial Skills; E-Automate, Salt Lake City, Utah; will provide Computer Skills for \$1,000.

**OVERVIEW**

Founded in 2000 and based in Dublin, Shamrock Office Solutions, Inc. (Shamrock) ([www.shamrockoffice.com](http://www.shamrockoffice.com)) sells and services office equipment and technology such as multi-function copier products, printers and cloud technology. Services also include Information Technology consulting, managed technology services and print production solutions.

Shamrock has over 2,000 customers locally. Notable customers include the City of Dublin, Oppenheimer, Saint Mary’s College of California, and the Special Olympics of Northern California.

Shamrock reports that the industry is transitioning from document management to collaborative communication tools, which is presenting a need to upgrade worker skills. Shamrock is undergoing intense competition from larger entities in the market providing similar services including; Xerox, Konica, Sharp, Toshiba, and Canon. With ETP funds, the Company aims to upgrade worker skills to support its goal of becoming a Ricoh Certified PRO Services Dealer. Ricoh is a manufacturer of office equipment. Having this certification means Shamrock will be a designated service provider, which will bring more business opportunities.

ETP funding will help meet company strategic goals to improve technical skills, boost sales, increase speed for service calls, and increase customer satisfaction.

### **Retrainee – Job Creation**

The Panel offers incentives to companies that commit to hiring new employees. Training for newly hired employees will be subject to a lower post-retention wage. Shamrock has committed to hiring 3 new employees (Job Number 2). Trainees must be hired within the three-month period prior to Panel approval or during the term of contract. The Company also represents that these trainees will be hired into “net new jobs” as a condition of contract.

The Company is working to obtain certification as a Ricoh’s Pro Service Dealer. This new certification will increase business demand in both sales and service. Therefore, the Company is hiring additional Sales and Service Staff. In July 2015, Shamrock targeted these growing to include south bay cities such as San Jose. Thus, Shamrock needs to hire additional staff for prospecting and servicing new accounts. Shamrock will integrate three new employees into its existing office location which has ample office space available.

### **Training Plan**

Training will be delivered by subject matter experts in-house and outside vendors in the following:

**Business Skills:** Training will be offered Manager, Owner, Sales, Service and Administrative Staff. Topics will include new products, customer service, communications, leadership, sales training and more in an effort to boost sales, better manage existing accounts and support growth.

**Commercial Skills:** Training will be offered to Service Staff and Managers on repair/maintenance, equipment set-up, process improvement and troubleshooting. As part of a Ricoh Pro Dealer certification process, workers will receive training direct from Ricoh, Shamrock’s primary equipment supplier. This training is designed to upgrade skills such as network knowledge, testing and measuring and product maintenance related to new desktop printers and copiers. Trainees will also receive Computer-Based Training (CBT) in Commercial Skills to complete certification.

**Management Skills:** Training will be offered to new Managers. Project Management and Leadership topics are designed to strengthen skills needed to help new Managers coach others and to help grow business. Managers will be trained to prepare for additional responsibilities related to planned expansion of sales and service territories.

**Computer Skills:** Training will be offered to Managers, Sales, Service and Administrative Staff. E-Automate operating systems integrated with existing Microsoft products help staff generate up-to-date reports for the management of business. Training on topics such as Network Management, Apple Certification, Microsoft Products and Spreadsheets are all considered critical to Shamrock’s business growth.

**Computer-Based Training**

While the majority of the training being delivered will be in-house instructor led classroom training, Shamrock will deliver some training topics in Commercial Skills via CBT. CBT will not exceed 50% of trainees' total training hours.

**E-learning**

Shamrock will deliver two training topics in Computer Skills via E-learning.

**Productive Lab**

Productive Lab (PL) trainees may produce goods for profit as part of the training in the courses identified under the Curriculum. Approximately six Service and Sales Staff will receive up to 24 hours of PL at a trainer-to-trainee ratio of 1:1. After ETP training, Service Staff will teach equipment operation and solutions for customers in the field.

**Training Hours Cap Modification**

Small Business is capped at 60 hours per trainee; however Shamrock is requesting a modification to 80 for three newly hired Job Creation trainees (Job Number 2). Servicing copy machines is highly technical work. Due to the complexity of training, the evolving nature of technological updates and changes in the field, 60 hours of training is necessary for staff to gain skills needed to achieve competency.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**Exhibit B: Menu Curriculum**

**Class/Lab Hours**

8-60 Job Number 1  
8-80 Job Number 2

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Accounting
- ADP Workforce Now
- Marketing
- Inventory Control
- Product Knowledge
- Business and Report Writing
- Business Strategies
- Business Plans
- Business Analysis
- Developing Sales Strategies
- Developing Marketing Strategies
- Negotiating Skills
- Conflict Management
- Interpersonal Skills
- Selling/Serving Customer
- Customer Relations
- Identifying Customer Needs
- Handling Customer Requests
- Resolving Customer Complaints
- Customer Needs
- Leadership Skills

**COMMERCIAL SKILLS**

- Repair and Maintenance
- Equipment Set-Up
- Process Improvement
- Trouble Shooting

**COMPUTER SKILLS**

- Microsoft/Windows Office
- Apple Certification
- Adobe Creative Suite
- Network Management
- Decision Making
- E-Automate webinars
- Technical Writing
- Telecommuting

**MANAGEMENT SKILLS (Supervisors/Managers Only)**

- Leadership
- Coaching Procedures
- Decision Making
- Effective Communication
- Teambuilding
- Management Skills
- Management Styles
- Performance Management

**E-learning**

0-60

**COMPUTER SKILLS**

- Word Processing
- Spreadsheets

**Productive Lab Hours**

0-24

**COMMERCIAL SKILLS (Ratio 1:1)**

- Equipment Operation
- Software Operation
- Optical Character Recognition

**CBT Hours**

0-30 Job Number 1

0-40 Job Number 2

**COMMERCIAL SKILLS**

- Association Certification (28 Hour)
- Professional Certification (14 Hour)
- Expert Color Certification (11 Hour)
- Expert Production Print Certification (11 Hour)
- Expert Network Certification (19 Hour)
- Expert Office Solutions Certification (15 Hour)
- Master Color Certification (8 Hour)
- Master Production Print Certification (8 Hour)

Note: Reimbursement for retraining is capped at 60 total training hours per trainee in Job Number 1 and 80 total training hours in Job Number 2. CBT is capped at 50% of total training hours, per trainee . PL is capped at 24 hours per-trainee.