



**Training Proposal for:
Sonoma Pins Etc. Corporation dba Sonoma
Promotional Solutions**

Small Business \leq \$50,000

ET15-0245

Panel Meeting of: July 25, 2014

ETP Regional Office: Sacramento

Analyst: W. Sabah

CONTRACTOR

- Type of Industry: Manufacturing
Services
Priority Industry: Yes No
- Number of Full-Time Employees
California: 19
Worldwide: 19
Number to be trained: 18
Owner Yes No
- Out-of-State Competition: Customers Outside CA
- Special Employment Training (SET): Yes No
- High Unemployment Area (HUA): Yes No
- Turnover Rate: 10%
- Repeat Contractor: Yes No

FUNDING

- Requested Amount: \$16,848
- In-Kind Contribution: \$13,901

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 SB <100 | Business Skills, Computer Skills, Continuous Improvement, Commercial Skills, Management Skills | 18 | 8-60 | 0 | \$936 | \$17.32 |
| | | | | Weighted Avg: 36 | | | |

- Reimbursement Rate: \$26 SB Priority
- County(ies): Sonoma
- Occupations to be Trained: Account Executive, Sales Assistant, Graphics Designer, Operations/Accounting Staff, Communications Director, Shipping Director, Managers, Owner
- Union Representation: Yes
 No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: N/A
- Administrative Services: N/A
- Training Vendors: To Be Determined

OVERVIEW

Established in 1990 and located in Sonoma, Sonoma Pins Etc. Corporation dba Sonoma Promotional Solutions (SPS) (<http://www.sonomapromo.com>) is a supplier of business promotion products. The Company offers full-service sourcing, development, production and importing. SPS helps design, create high-quality custom products at competitive prices for promotional campaigns, product replicas, concept proto-typing and other solutions for business customers through out the U.S. The products include awards, keychains, label pins, belt buckles, and other similar specialty items.

Need for Training

To stay competitive in the industry, SPS needs to differentiate themselves from 'decorator' suppliers and leverage unique and custom products from other promotional product suppliers. The Company has developed an annual sales plan and a long term growth plan identifying new strategies to stabilize sales and position themselves for growth.

As the industry moves to web-based ordering, the Company must evolve branding and marketing to support the changing buying habits of their customers. The Company's objectives are to achieve greater efficiencies, improve business skills, and enhance customer satisfaction. To achieve these goals, SPS must improve processes and procedures, while developing skills through formal training.

Training Plan

Business Skills: Training will be offered to all occupations. Training will focus on team building, communications, and consultative selling skills to improve customer service while maintaining order and sales margin management. These skills will also prepare Staff to work cohesively and promote individual initiative. Training includes topics such as Customer Service, Consultative Selling, Successful Pitching and Product Knowledge.

Computer Skills: Training will be offered to all occupations to increase productivity and improve proficiency in various software and technical skills. The Company will update their Contact Resource Management (CRM) software system, where customers, factory and order information are stored. This will require training on the new platform for all trainees. Training includes CRM System Upgrade Skills, Microsoft (Intermediate/Advanced) Excel & Outlook, Phone System Integration training and Adobe Software training.

Continuous Improvement: Training will be offered to all occupations to enhance time management skills, leadership skills and job satisfaction. Training includes Time Management and Organization, Interdepartmental Communications, Professional Writing and Editing and Process Improvement.

Commercial Skills: Training will be offered to Graphic Designers to design and create unique high quality custom products to differentiate themselves from other suppliers. Training includes Product Photography Skills.

Management Skills: Training will be offered to Managers to improve leadership skills to best manage teams through the change of the upcoming growth. Training includes topics such as Managing Change, Leadership/Morale and Managing Conflict and Conflict Resolution.

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

- Customer Service
- Consultative Selling
- Successful Pitching
- Building a Referral Network
- Delegation, Responsibility, Accountability
- Finance and Accounting Skills
- Marketing and Brand Refresh
- Product Knowledge

COMPUTER SKILLS

- CRM System Upgrade Skills
- Microsoft Excel & Outlook (Intermediate/Advanced)
- Phone System Integration Training
- Adobe Software Training

CONTINUOUS IMPROVEMENT

- Time Management and Organization
- Interdepartmental Communications
- Professional Writing and Editing
- Process Improvement

COMMERCIAL SKILLS

- Product Photography Skills

MANAGEMENT SKILLS (managers only)

- Effective Employee Engagement and Increased Performance, Creating a High Performance Culture
- Managing Change
- Leadership/Morale
- Managing Conflict and Conflict Resolution

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