



**Training Proposal for:
TriVista Business Group, Inc.**

Small Business ≤ \$50,000

ET16-0223

Approval Date: October 5, 2015

ETP Regional Office: San Diego

Analyst: K. Campion

CONTRACTOR

- Type of Industry:
 - Services
 - Technology
 - Priority Industry: Yes No
- Number of Full-Time Employees
 - California: 20
 - Worldwide: 65
 - Number to be trained: 19
 - Owner Yes No
- Out-of-State Competition: Customers Outside CA
- Special Employment Training (SET): Yes No
- High Unemployment Area (HUA): Yes No
- Turnover Rate: 0%
- Repeat Contractor: Yes No

FUNDING

- Requested Amount: \$15,808
- In-Kind Contribution: \$18,848

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	19	8 - 60	0	\$832	\$16.02
				Weighted Avg: 32			

- Reimbursement Rate: \$26 SB Priority
- County(ies): Orange
- Occupations to be Trained: Administration Staff, Consulting Staff, Marketing Staff, Supervisor/Manager
- Union Representation: Yes
 No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: Training Funding Source (TFS) in Seal Beach assisted with development at no charge.
- Administrative Services: TFS will also provide project administration services at no charge.
- Training Vendors: To Be Determined

OVERVIEW

Founded in 2007, TriVista Business Group, Inc. (TriVista)(www.trivista.com) is a global management consulting firm that helps middle market companies boost their operational and financial performance. TriVista's consulting services focus on helping clients in three areas: integration activities for mergers & acquisition; operational issues for manufacturing and supply chain management companies; and design/implementation for new building global footprint issues.

The Company helps its customers minimize business risk, enhance customer satisfaction and margins, and reduce working capital, across a variety of industries. TriVista's customers include Private Equity firms and their portfolio companies, manufacturing companies and multi-national corporations. The Company has one California location in Aliso Viejo, the site of the proposed training.

TriVista reports that, to compete against other technical consulting firms, it must continuously improve business processes and update workers skills. For example, as the Private Equity industry experiences ebbs and flows, TriVista must adjust its business practices to ensure it

provides the most relevant services to its customers. To address these challenges, the Company has developed a five-year strategy for increased growth and revenue. These goals require training to help workers “get to the next skill level”.

Additionally, TriVista recently transitioned to a new CRM and project management software, has instituted Lean Manufacturing Practices for all staff, and is developing its business development/marketing training for client-facing workers. These activities trigger a need for Business and Computer Skills training.

Training Plan

All training will be conducted via class/lab in the following:

Business Skills: Training will be provided to Marketing Staff, Consulting Staff and Supervisor/Managers. Trainees will learn how to improve client relationships through advanced communication skills and learn selling strategies, industry trends, and business development techniques to increase sales.

Computer Skills: Training will be provided to all occupations by job function. All trainees will learn application skills to navigate and input in the Company’s CRM software system. Other courses include MS Office, Cloud Computing, Data Analysis & Architecture, Network Technologies, Social Media trends and Supply Chain Management.

Continuous Improvement: Training will be provided to all occupations. Trainees will learn Lean Manufacturing Best Practices, Leadership Skills, Team Building and other process improvement techniques in order to better serve clients and improve internal processes.

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

- ✚ Business Development
- ✚ Business Environment
- ✚ Client Relationship
- ✚ Communication Skills
- ✚ Essentials of Pricing
- ✚ Industry Trends
- ✚ Strategy
- ✚ Time Management
- ✚ Workflow Processes/Procedures

COMPUTER SKILLS

- ✚ Client Information System/Customer Relationship Mgmt.
- ✚ Cloud Computing
- ✚ Communication Technology
- ✚ Data Analysis & Architecture
- ✚ Data Management & Security
- ✚ Data Modeling
- ✚ Electronics and High Technology Software
- ✚ Enterprise Solutions
- ✚ Microsoft Office Application Skills
- ✚ Network Technology & Security
- ✚ Operational Maturity
- ✚ Process Modeling (Visio)
- ✚ Social Media, Digital Entertainment & Multimedia Standards
- ✚ Supply Chain Management

CONTINUOUS IMPROVEMENT

- ✚ Coaching Procedures
- ✚ High Performance Utility Model
- ✚ Leadership Skills
- ✚ Lean/Six Sigma
- ✚ Lean Manufacturing Best Practices
- ✚ Project Planning
- ✚ Quality Control
- ✚ Team Building

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