



BUSINESS SERVICES REQUIREMENTS

PURPOSE

This policy mandates Business Services program requirements for Workforce Development Board of Ventura County (WDBVC) and its contractors, subrecipients, and service providers.

The purpose of this policy is to guide each WDBVC contractor, subrecipient, and service provider, and its respective business services staff, in its employer engagement activities, business strategy, and connection of skilled workers to vacant jobs. This directive sets forth the required elements that each WDBVC contractor, subrecipient, and service provider will be responsible for tracking and reporting, as well as the mandatory outreach and engagement with businesses that must be conducted.

The required performance measures under this directive are summarized as follows:

- Retention with the Same Employer
- Repeat Business Customers

SCOPE

The Workforce Development Board of Ventura County (WDBVC) and its contractors, subrecipients, and service providers.

REFERENCES

- WIOA, Public Law 113-128
- Training and Employment Guidance Letter (TEGL) 10-16 (PDF), Subject: Performance Accountability Guidance for Workforce Innovation and Opportunity Act (WIOA) Title I, Title II, Title III, and Title IV Core Programs
- Workforce Services Directive (WSD) 19-03 (PDF), Performance Guidance

POLICY

Local Workforce Development Boards must better align with economic development, local business and industry, and education to create a collective response to economic and labor market changes on the national, state and local levels. The WDBVC must adhere to provisions that decree business engagement and the alignment and realignment of training programs to meet the employment demands and dynamic needs of high-growth industries. The Ventura County workforce development system must contribute to economic growth and business expansion by ensuring the emphasis of business services is job-driven, matching business with skilled individuals.

The Workforce Development Board of Ventura County is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities.

All WDBVC contractor, subrecipient, and service provider business services staff must collaborate and coordinate all County-funded business services activities with co-located, local, and regional workforce partners and their respective business services staff as appropriate and as directed by the WDBVC. Further, all WDBVC contractor, subrecipient, and service providers are mandated to register each business they interact with in CalJOBS, including the Employer Activity they have provided to said business.

Definitions of Employer Activities can be found in the latest CalJOBS Activity Codes Directive: https://edd.ca.gov/Jobs_and_Training/pubs/wsd19-06att1.pdf

The WDBVC contractors, subrecipients, and service providers must meet the Effectiveness in Serving Business Accountability Measures by providing the business services outlined in this directive. These measures are different than other performance measures in that they are not calculated for each program individually, but rather all data from the core programs are aggregated to produce one State-level figure.

Per TEGL 10-16, Change 1, DOL will finalize the employer measures “no later than the beginning of Program Year 2019.” This guidance will be updated if necessary when the finalized guidance from DOL is issued. It has been determined the best solution on guidance and data collection for this measure, until the pilot is concluded, is a solution that (1) does not incur any additional costs to the state, and (2) minimizes the impact to Local Areas. All business services staff must track employer services in the CalJOBS Customer Relationship Management (CRM) module.

Performance Measures

Retention with the Same Employer

The Retention with the Same Employer measure determines if WIOA core programs are serving the State’s employers by improving employee workforce skills and reducing employee turnover.

The State must report Retention with the Same Employer in the second quarter and fourth quarter after exit, and calculate it based on wage data for participants who are in the fourth quarter after exit. To be included in the calculation, a participant must have a wage record match with the same employer State Tax ID number for the second and fourth quarters after exit, or supplemental wages with the same Federal Employer Identification Number (FEIN) in the second and fourth quarters after exit.

The number of participants with wage data who exit during the reporting period and were employed by the same employer during the second and fourth quarters after exit (numerator) DIVIDED BY the total number of participants with wage records who exit and were employed during the second quarter after exit (denominator). For example:

$$\frac{\text{\# employed by same employer in Q2 \& Q4}}{\text{Total \# who exited and were employed in Q2 after exit}} = \text{Retention with Same Employer}$$

Repeat Business Customers

The Repeat Business Customers measure tracks the percentage of employers who have used qualifying core program services in the current PY, and had received services in any of the three preceding PYs. This allows the State to determine if business customers are sufficiently satisfied to seek core program services again, and to develop and maintain durable employer relationships.

The total number of Bureau of Labor Statistics (BLS) Quarterly Census of Employment and Wages (QCEW) establishments served during the current reporting period, and who have used qualifying core program services in the current PY and in any of the three previous reporting periods (numerator) DIVIDED BY the total number of establishments served during the current reporting period (denominator). For example:

$$\frac{\text{\# establishments served in prior 3 report periods}}{\text{Total \# of establishments served}} = \text{Repeat Business Customers}$$

Note the following:

- An employer who uses WIOA core program services more than once during the last three reporting periods is only counted once in reporting.
- DOL is not requiring States to use data for services delivered to employers prior to July 2016 to fulfill the prior three reporting periods' requirement.
- For employers with more than one physical location, each location is counted as a separate establishment (TEGL 10-16, Change 1, Attachment 4, Table A) (PDF).
- Qualifying "Core Services" are defined in TEGL 10-16, Change 1, Attachment 4, Table B (PDF).

WDBVC Business Engagement

The WDBVC is centrally coordinating and supporting countywide business engagement to better address industry needs using business data and intelligence. The WDBVC will develop and implement countywide demand driven workforce and economic policies and initiatives; and lead or coordinate business/industry commitments that require system wide, regional, or scaled coordination.

The WDBVC will be responsible for County-wide business outreach and engagement. WDBVC staff will coordinate with its contractors, subrecipients, and service providers to handover businesses for job seeker coordination.

Business Services Staff Requirements

Business Services staff must continue to engage with the business community through other means of networking and outreach, including but not limited to: industry councils, training events, networking events, and resource fairs. It is incumbent upon each business services staff to proactively identify employer demands and reach out to the business community to provide services and link businesses with vacancies to work-ready individuals.

To reduce employer visit fatigue, business services staff shall verify in CalJOBS if that business has already been engaged. If a business has already been engaged, business services staff shall coordinate with the contractor, subrecipient, or service provider who served the business last.

Business Needs Assessment

At the point of business engagement, a Business Needs Assessment form (Attachment I) must be utilized to evaluate the current and future workforce planning, talent management, and business hiring needs of each business outreached to. The Business Needs Assessment must be uploaded into CalJOBS.

Business Services Resource Proposal

After the business has been engaged and needs are determined, a Business Services Resource Proposal (Attachment II) must be used to document the solutions proposed for the business. A copy of the Business Services Resource Proposal must be provided to the business and uploaded into CalJOBS.

Business services staff shall ensure that services being presented to businesses—from across partners—are not siloed or menu-driven, but focus on delivering solutions to expressed business needs.

Business Outreach

Complete and submit the Business Outreach Tracking Form quarterly to the WDBVC (Attachment III). The form should include list of events/meetings attended for outreach purposes and groups engages, job fairs, recruitments, and other candidate recruiting events, and number of sector events or working groups attended. Contractors, subrecipients, and service providers are required to participate in at least one WDBVC Sector Working Group on an ongoing basis.

Follow-up

Appropriate follow-up shall be provided to businesses. Business services follow-up includes, but is not limited to:

- Checking on results, including data collection

- Assessing employer satisfaction
- Inquiring about future needs
- Building and maintaining the relationship

Follow-up services shall be documented in CalJOBS using employer activity codes, document management, and case notes.

CalJOBS

Businesses must be registered in CalJOBS with the assistance of business services staff.

All WDBVC contractor, subrecipient, and service provider business services staff must record the appropriate Employer Services Activity Code in CalJOBS to measure the Effectiveness in Serving Employers. Definitions of Employer Activities can be found in the latest CalJOBS Activity Codes Directive: https://edd.ca.gov/Jobs_and_Training/pubs/wsd19-06att1.pdf

WDBVC contractors, subrecipients, and service providers shall utilize the CalJOBS CRM module to its fullest extent, including inputting case notes, uploading documents, creating job orders, adding employer activities, creating marketing leads, and more. Attachments IV, V, VI, VII will assist business services staff with the above components.

Monitoring

The standard monitoring requirements will be through annual site visits or review of the CalJOBS system, and quarterly self-reporting of performance through the forms listed above.

Contractors, subrecipients, and service providers are required to submit to the WDBVC a quarterly record of events/meetings attended for outreach purposes (i.e., business workshops and seminars, business resource fairs, networking events, etc. on the attached Business Outreach Tracking Form).

Contractors, subrecipients, and service providers are required use the CalJOBS software to track employer engagements, services provided, and other data regarding services. Each WDBVC contractor, subrecipient, and service provider is responsible for updating CalJOBS in real time such that WDBVC may generate a report to monitor progress at any time.

ACTION

Bring this policy to the attention of all affected staff.

INQUIRIES

Inquiries regarding this policy can be addressed to the WDBVC at 805-477-5306.

/S/ Rebecca Evans, Executive Director

Workforce Development Board of Ventura County

ATTACHMENTS:

- Attachment I - Business Needs Assessment
- Attachment II - Business Services Resource Proposal
- Attachment III - Business Outreach Tracking Form
- Attachment IV - How to Register an Employer
- Attachment V - How to Add Employer Activities
- Attachment VI - How to Create and Manage a Marketing Lead in CalJOBS
- Attachment VII - How to Create Job Orders

Business Needs Assessment

*The purpose of this assessment is to help us determine what help you might need. Our primary goal is to help solve your challenges to increase profitability and productivity. (*Denotes mandatory fields. Not all fields need to be completed)*

Business Name: _____

*Contact Initiated by: ☐ **AJCC** ☐ **Business** ☐ **Service Provider** ☐ **WDBVC**

*Form Completed: ☐ **In person** ☐ **By phone** ☐ **Virtually** ☐ **By business**

1. *Contact Name and Title: _____
2. *Phone Number: _____
3. *CalJOBS Account? ☐ **No** ☐ **Recruiting Account** ☐ **Marketing Account** ☐ **Locked Out**
4. *Has the employer received our services before? ☐ **Yes** ☐ **No** If yes, describe: _____
5. *How long has your business been operating? _____ Years _____ Months
6. *Do you plan to remain in your current location? ☐ **Yes** ☐ **No**
7. *Is your business planning to expand or downsize? ☐ **Expand** ☐ **Status Quo** ☐ **Downsize** ☐ **Unsure**
8. If expanding or downsizing, how soon? ☐ **6 months** ☐ **1 year** ☐ **2 years**
9. *Are you currently hiring? ☐ **Yes** ☐ **No**
10. *What is the minimum education required for positions you regularly hire for? ☐ **None** ☐ **No High School Diploma** ☐ **High School Diploma** ☐ **Credential** ☐ **Technical** ☐ **AA/AS Degree** ☐ **Bachelor's Degree** ☐ **Master's Degree** ☐ **PHD**
11. *What type of services that we talked about today would be beneficial? ☐ **Training** ☐ **Recruitment** ☐ **Work Experience** ☐ **Business Certification** ☐ **Contracting** ☐ **HR** ☐ **Business/Financial Planning** ☐ **Licensing/Permit** ☐ **Tax Incentives** ☐ **Bonding**
12. *What Populations is this employer friendly to? ☐ **Justice-involved** ☐ **Homeless** ☐ **Veteran** ☐ **Other** ☐ **Youth 14-16** ☐ **Youth 17-18** ☐ **Disabled**
13. *What's your biggest challenge(s)? ☐ **Integrity** ☐ **Competition** ☐ **Customer Loyalty** ☐ **Regulation** ☐ **Competencies** ☐ **Financial Management** ☐ **Risk Management** ☐ **Recruiting** ☐ **Problem Solving** ☐ **Uncertainty** ☐ **HR** ☐ **Business Planning** ☐ **Cash Flow** ☐ **Talent Management** ☐ **Access to Capital** ☐ **Licensing/Permits** ☐ **Other:** _____
14. Other Challenges currently being faced by business: _____

Business Profile

15. Do you: ☐ **Lease** ☐ **Own** ☐ **Rent**
16. How long has this business been at this location? _____ Years _____ Months
17. Are you currently a Chamber of Commerce member? ☐ **Yes** ☐ **No** If so, which one/s? _____
18. Do you have any business certifications? ☐ **Small Business Enterprise (SBE)** ☐ **(DVBE) Disabled Veterans Business Enterprise** ☐ **Social Enterprise (SE)** ☐ **Other:** _____
19. If Other Business Certifications, please list _____

Financial Health

20. On the scale from one to five how would you rate your financial stability? (5 being the best)
☐ **1** ☐ **2** ☐ **3** ☐ **4** ☐ **5**
21. Do you foresee a need for access to capital within the next year? ☐ **Yes** ☐ **No** ☐ **Unsure**
22. Would further information on financial planning and assistance be beneficial? ☐ **Yes** ☐ **No**
23. Would more information about tax incentive programs be beneficial? ☐ **Yes** ☐ **No**

Workforce

24. Is this business currently working with a WIOA service provider? ☐ **Yes** ☐ **No**
If Yes, what services are being provided? _____
25. Are you planning on hiring within the next six months? ☐ **Yes** ☐ **No**
26. Do some of your positions have significant turnover? ☐ **Yes** ☐ **No**
27. If Yes, Name(s)/Type of Position(s): _____
28. If Yes, what are the significant (turnover) patterns? **Issue/Pattern:** _____
29. Is the Business aware of the Fair Chance Law? ☐ **Yes** ☐ **No**
30. Prior to hiring, does the Business require? ☐ **Background Check** ☐ **Live Scan** ☐ **Drug Test**
☐ **Alcohol Test** ☐ **None**
31. How many part-time employees does the Business have? _____
32. How many full-time employees does the Business have? _____

33. How many employees have you hired within the last 6 months? _____
34. How many employees have you laid off within the last 6 months? _____
35. How do you recruit your (potential) new employees?
36. ☐ **Job Postings** ☐ **Job Fairs** ☐ **Job Centers** ☐ **Temp Agency** ☐ **Word of Mouth**
☐ **Other:** _____
37. What basic competencies is the Business looking for? ☐ **Writing** ☐ **Basic Computer Skills** ☐ **Typing**
☐ **Reading Comprehension** ☐ **Critical Thinking** ☐ **Mathematics** ☐ **Technical skills** ☐ **Other**
38. If Other Competencies, please state what they are: _____
39. Do your employees need training? ☐ **Yes** ☐ **No**
40. If yes, in which area? ☐ **Soft Skills** ☐ **Academic** ☐ **Technical** ☐ **Credential**
41. Do you provide in-house training for employees? ☐ **Yes** ☐ **No**
42. If yes, what type? ☐ **Soft Skills** ☐ **Academic** ☐ **Technical** ☐ **Credential**

Follow-up Services

43. Would you recommend our services to other businesses? ☐ **Yes** ☐ **No**
44. Would it be beneficial to know how businesses and industries around you are doing? ☐ **Yes** ☐ **No**
45. Would you consider participating in a business advisory council? ☐ **Yes** ☐ **No**

Notes

Click or tap here to enter text.



Business Services Resource Proposal

Date:	
Employer Legal Business Name:	
Address:	
City, State, Zip Code:	
Contact Person:	
Phone:	
E-mail:	

We would like to propose the following services and solutions to resolve the issues we discussed:

-
-
-
-
-
-
-
-
-
-

Thank you for your partnership!



BUSINESS OUTREACH TRACKING FORM

Service Provider Name:				BSR:	
Date	Name of Event	Type of Event (training, meeting, resource fair, networking event, etc)	Sector(s) targeted?	Number of Attendees	Comments/Notes
TOTAL EVENTS FOR QUARTER:					

Please submit by the 20th of the following month of the quarter to:
hsa-info.wdb@ventura.org

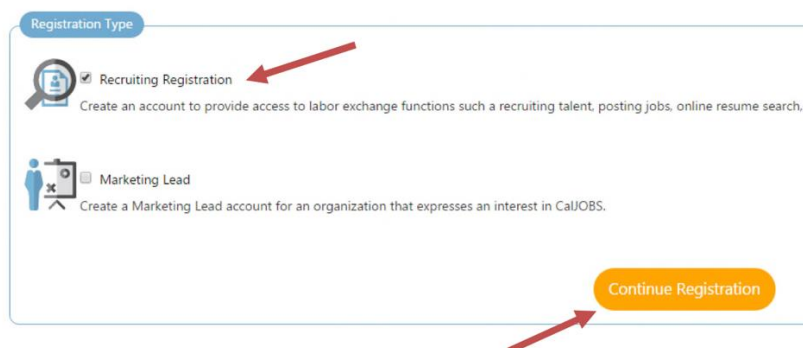
How to Register an Employer in CalJOBS

Registering an Employer:

1. To register an employer, navigate to the left navigation menu and hover your mouse over to “Manage Employers” and click on “Create an Employer”. *(Note: Before creating a new employer, make sure to search for the employer in case it already exists in the system. You may search by clicking “Assist an Employer”. This will prevent duplicates.)*

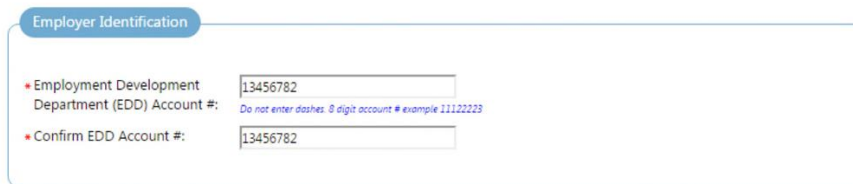


2. Check the “Recruiting Registration” box as the registration type. Click “Continue Registration” to move forward.



3. Enter the employer’s 8-digit EDD Account number in the available boxes. Do not enter dashes. Then click continue to move on.

The EDD number can be found on the DE-9 or the DE-9C Quarterly Contribution Return and Report of Wages form that is submitted to EDD every quarter. Please contact the HR or Finance Department of the employer to find out the EDD number.



Employer Identification

• Employment Development Department (EDD) Account #: 13456782
Do not enter dashes. 8 digit account # example 11122223

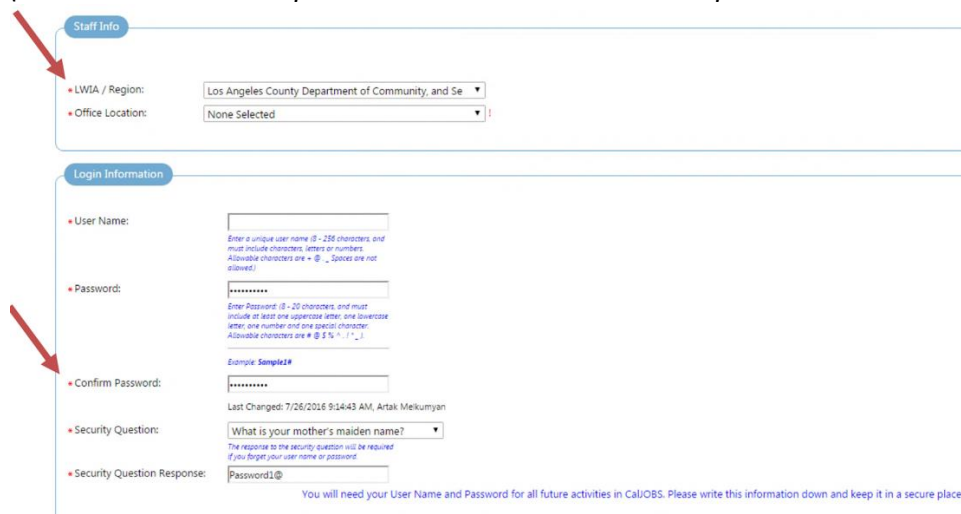
• Confirm EDD Account #: 13456782

Cancel Continue

4. Under “Staff Info,” select Workforce Investment Board, Ventura County as the LWIA and your assigned Office Location.

Under the “Login Information” section, enter a username and password for the employer and a security question and response.

(Note: Username and password must adhere to the required characters and symbols.)



Staff Info

• LWIA / Region: Los Angeles County Department of Community, and Se

• Office Location: None Selected

Login Information

• User Name:
Enter a unique user name (8 - 255 characters and must include characters, letter or numbers. Allowable characters are # @ % ^ _ ' - .)

• Password:
Enter Password (8 - 20 characters and must include at least one uppercase letter, one lowercase letter, one number and one special character. Allowable characters are # @ % ^ _ ' - .)

• Confirm Password:
Example: Sample1#

• Security Question: What is your mother's maiden name?
The response to the security question will be required if you forget your user name or password.

• Security Question Response: Password1@
You will need your User Name and Password for all future activities in Cal/OBS. Please write this information down and keep it in a secure place.

5. Fill in the “Employer Identification” section by entering the company name. You can enter a brand-new employer or, as you type in the Company Name, you can also select the employer from the list of options that appear.
6. Under Primary Location Information, enter the zip code of the primary location of the employer.
 - a. If the company was selected using the Company Name search field, the Zip Code and the rest of the Primary Location Information section will automatically populate.

Employer Identification

* Company Name:

Employment Development
Department (EDD) Account #:

13456782

Primary Location Information

* Zip code:

[Find Zip Code](#)

99999 or 99999-9999

7. In the Mailing Address section, enter the employer's mailing address if it is different from the primary location information. If it is the same, check the box next to "Click here if Mailing Address is the same as the address above."

Mailing Address

☐ Click here if Mailing Address is the same as the address above.

* Mailing Address 1:

Mailing Address 2:

Mailing Address 3:

* Mailing City:

* Mailing State:

None Selected ▼

Mailing County:

▼

* Mailing Country:

United States ▼

Mailing Zip/Postal:

99999 or 99999-9999

8. In the Contact Information section, enter all available employer contact information.
(Note: Required fields are marked with an asterisk *)

Contact Information

* Job Title:

* First Name:

Middle Initial:

* Last Name:

* Primary Phone: - - Ext

Alternative Phone: - -

Contact Text Message Phone Number: - -

Fax: - -

Primary Contact Email Address:

Confirm Contact Email Address:

* Please select a method in which you prefer to receive your notifications:

Company Website:
e.g. (<http://www.companywebsite.com>)

Company Job Application Website:
e.g. (<http://www.companywebsite.com>)

9. In the Company Information section, click the “Search for Industry Code (NAICS)” link to search for the employer’s NAICS industry code. You may search by keyword, sector, listing or industry code. The NAICS industry code you select will automatically populate.

Company Information

* Industry Title (NAICS): [Search for Industry Code \(NAICS\)](#)

* Type of Employer:

* Are you a Federal Contractor?: ☐ Yes, I am a Federal Contractor
☐ No, I am not a Federal Contractor

Are you ADA Compliant?: ☐ Yes, I am ADA compliant
☒ No, I am not ADA compliant

10. In the Company Profile section, enter a detailed description of the company in the free-form text box, including its products and services. You may paste text directly into the box as well.

11. In the Benefits Offered section, select the benefits that are provided by the employer, if any.

5

12. When you are finished, click “Save” and your employer has been registered! You’ll then have the option to return to staff services, begin working with the employer, or add additional locations and contacts for the employer you’ve registered.

How to Add Employer Activities

Employer Activities can be added to both Marketing Leads and Recruiting Employers. They can be entered as completed or yet to be completed tasks/events.

Employer Activities are essential data entry points, where CalJOBS Employer Activity Codes *must* be entered to track the Effectiveness in Serving Employers performance metrics, as well as other WDBVC measures.

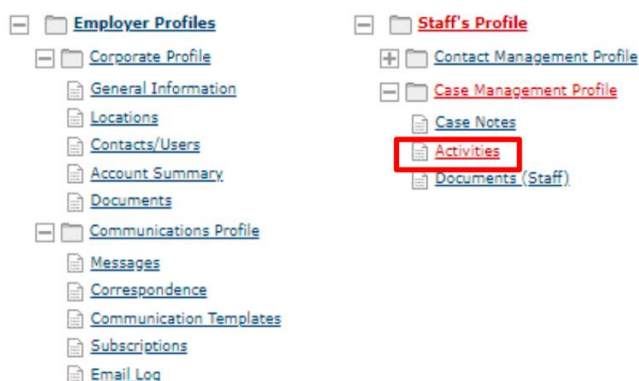
Work Items are like Employer Activities and function as tasks that can be scheduled and assigned. However, because they are NOT included and do not affect the Effectiveness in Serving Employers performance, they are not required to be completed.

Adding an Employer Activity

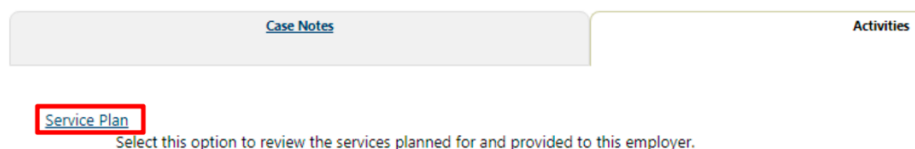
You may enter an Employer Activity for a service that has been completed or one that you are scheduling to be completed in the future.

1. To add an Employer Activity Code, access the business record and navigate to the **Staff's Profile → Case Management Profile → Activities** section.

[[Assist an Employer](#) | [Staff Services](#) | [Employer Portfolio](#)]



2. Once you are in the **Activities** tab, click the **Service Plan** link.



3. On the following page, click the **Add Service** link to add an employer service:

Employer Services

Company Name:

Bill's Bagels

Address:

123 Main St.
South Pasadena, CA 91030

[Add Service](#)
[Add Multiple Services](#)

- On the employer activity page that follows, enter all the information regarding the employer service. You will find a listing of all available Employer Activity Codes by clicking the drop-down arrow in the **Activity/Service** field.

Staff Name:

Lao Staff25

Phone:

*Activity/Service:

E61 - HR Consultation Services

Scheduled Date:

10/09/2018

Today

Scheduled Time:

08

:

30

AM

Actual End Date:

10/09/2018

Today

Completion Code:

Successful

*Region:

Los Angeles County WDACS

*Office:

LAO Community and Senior Services

Position:

Staff

Contact Type:

Staff Initiated

Contact Method:

In Person at Worksite

Contact Name:

Bill Bixby - Bill's Bagels

Rapid Response Event Number:

[Find Rapid Response Event](#)

TAA Petition Number:

[Find TAA Petition](#)

*Worksite Location:

[Find Worksite Location](#)

Comments:

These fields can be left blank if the service is scheduled to be provided in the future.

- Click the **Find Worksite Location** link to select the appropriate worksite location. A pop-up page will appear.
- All worksite locations entered for this employer can be found at the bottom of the pop-up page.

Click the **Location Name** to select the location for the service. The pop-up page will disappear, and the **Worksite Location** field will populate with the selection.

Worksite Location

Hide Filter Criteria

Filter Criteria

Location Name:

Address 1:

Address 2:

Address 3:

City:

Zip Code:

State:

California

County/Parish:

None Selected

LWIA Region:

None Selected

Office:

None Selected

Worksite Status:

☒ Active
 ☐ Inactive
 ☐ All

[\[Apply Filter \]](#)
[\[Reset Filter \]](#)

Click a column title to sort.

Location Name	Address	City	State	Zip	County/Parish
Bill's Bagels (Primary Location)	123 Main St.	South Pasadena	CA	91030	Los Angeles County

Close

- Although it is not required, it is vital that you enter a Comment in the **Comments** text box. Similar to a good case note, enter why the service was provided, what were the results of the service and if there are any next steps related to the service provided.
- Remember to click the yellow **Save** button to save the employer activity you've created.
- The new employer activity will appear in the Employer Services list. To edit or close the activity, click the **View** link under the **Action** column on the right-hand side.

Employer Services

Company Name:

Bill's Bagels

Address:

123 Main St.
South Pasadena, CA 91030

[\[Add Service \]](#)
[\[Add Multiple Services \]](#)

Service Description	Worksite Location	Staff Created	Scheduled Date	Actual End Date	Completion Code	Action
E01 - HR Consultation Services	Bill's Bagels 123 Main St. South Pasadena, CA 91030	Staff25, Lao	10/9/2018 8:30 AM	10/9/2018	1 - Successful	View

Page 1 of 1

Rows 100

[\[Add Service \]](#)
[\[Add Multiple Services \]](#)

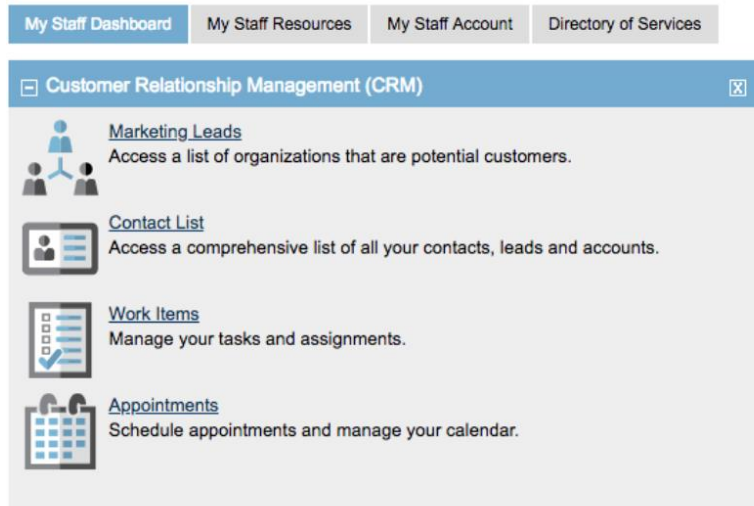
Return to Activities Folder

3

Work Items

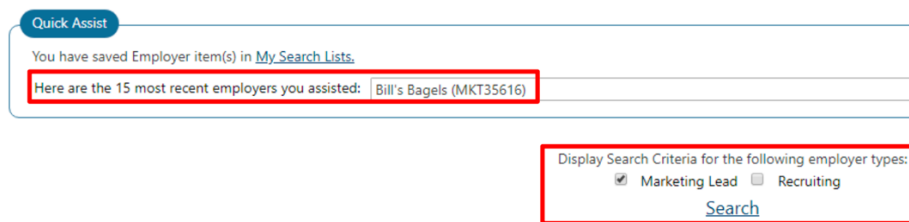
As mentioned, Work Items are not mandatory, but are useful tools to assist with managing the many tasks you may be doing when working with a business.

You can find a shortcut to Work Items by adding the CRM widget to your **My Staff Dashboard**.



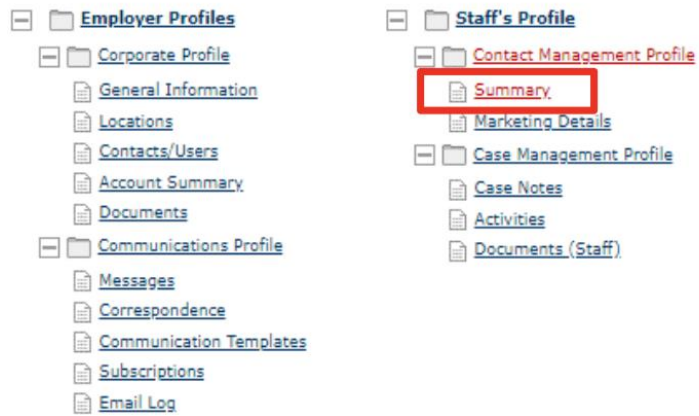
How to Add a Work Item

1. Find the employer you wish to add a Work Item for by navigating to **Manage Employers** → **Assist an Employer** on the left navigation menu. The most recent employers you accessed are available for quick access and you can narrow a search by specifying an employer type.



2. Once you've accessed the business, navigate to **Staff's Profile** → **Contact Management Profile** → **Summary**.

[[Assist an Employer](#) | [Staff Services](#) | [Employer Portfolio](#)]



3. Expand the **Activities** header using the plus (+) icon at the top left corner and click the **Add Work Item** link:



NOTE: This Activities section is NOT the same Activities section where Employer Activities are entered.

4. On the following page, enter the information for the Work Item and click the yellow **Add** button at the bottom.

Create a Work Item

Staff Workgroup:

Customer Relationship Manager

Area of Responsibility:

Customer Relationship Management

Work Item Category:

Face-to-Face Meeting

Currently Assigned to:

Richmond, Lyndsey

Status:

In Progress

Create Date:

Due Date:

10/09/2018 Today

Priority:

Medium

Description:

Provide a Business Assessment

Employer Name:

Bill's Bagels

CRM Contact:

[Bixby, Bill](#)
[Change Contact](#)

Add

Cancel

- The new Work Item will appear under the **Activities** section, in the **Summary** Tab. To edit, update or close a Work Item, simply click the Work Item description to access the Work Item.

Activities

[Show Filter Criteria](#)

To sort on any column, click a column title.

Description	Activity Type	Category	Status	Start Date	End/Due Date	Assigned To
Provide a Business Assessment	Work Item	Face-to-Face Meeting	In Progress	N/A	10/09/2018 12:00 AM	Richmond, Lyndsey

Page 1 of 1

Rows 10

How to Create and Manage a Marketing Lead in CalJOBS

Creating a Marketing Lead is similar to registering an employer. The key difference is that a Job Order cannot be created for a Marketing Lead. A Marketing Lead will have to be 'converted' to a Recruiting Employer in order to create Job Orders under that employer. This Help Sheet will go through creating and managing a Marketing Lead, as well as how to convert them to a registered, recruiting employer.

Search First!

Before creating a new Marketing Lead, search for the business first, in case it already exists in the system. This will prevent duplicates business entries in CalJOBS and better coordinate business service efforts.

Searching for a Marketing Lead:

1. Navigate to the left navigation menu and hover your mouse over to "Manage Employers" and click on "Assist an Employer".



2. On the search page, select both **Marketing Lead** and **Recruiting** under employer types, and enter any **Employer Criteria** to begin your search. You can also click on the plus sign next to **Show Keyword Search Options** to view more search options.

*Because of the many ways a business may have been entered in CalJOBS, entering a **portion** of an Employer Name would be a good place to start.*

Display Search Criteria for the following employer types:
☒ Marketing Lead ☒ Recruiting
[Search](#)

Employer Criteria

Show User Accounts:
☒ Primary User Account Only
☐ Include all contacts with logins
☐ Include all contacts with and without logins

Employer Name:

[Hide Keyword Search Options](#)

Type of Keyword Search:
☐ Begins with ☒ Contains

Data Fields to Search:
☒ Search Company Name Only (Primary location only will return)
☐ Search Company Name & Worksite Location Name (All locations will return)

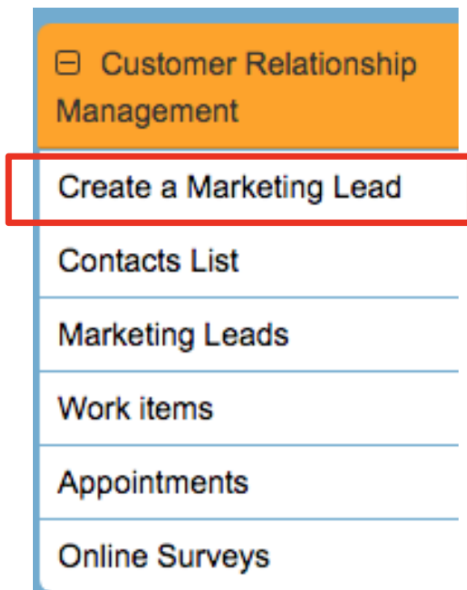
3. Click the yellow **Search** button at the bottom once you've entered search criteria.

Result 1: If there is an existing business with the same employer name, consult with the WDBVC before proceeding. You may be able to add a new location under the existing employer or work directly with another staff.

Result 2: If you are certain you will be entering a brand-new business into CalJOBS, proceed with creating a new Marketing Lead.


How to Create a New Marketing Lead:

1. Navigate to the **Customer Relationship Management** section on the left-hand navigation menu and select **Create a Marketing Lead**.




2. Select **Manual Entry** on the following page.

Create Marketing Lead



Manual Entry

Manually enter the information of your walk-in/collected prospects



External Employers

Quickly import leads from employers posting external/spider job orders

1. Enter the employer's 8-digit EDD Account number in the available boxes, if you have it. *However, it is NOT required when creating a Marketing Lead, and you can click **Continue** to skip this section.*

• Indicates required fields.

Employer Identification

Employment Development
Department (EDD) Account #:

Do not enter dashes. 8 digit account # example 11122223

Confirm EDD Account #:

Cancel

Continue

2. Under "Staff Info" on the following page, select Workforce Investment Board, Ventura County as the **LWIA** and your assigned **Office Location**.
Under the "Employer Information" section, enter the **Company Name**, using proper capitalization (no all caps and no abbreviations!)

Staff Info

• LWIA / Region:

• Office Location:

Employer Identification

• Company Name:

Short Name:

Employment Development
Department (EDD) Account #:

Do not enter dashes. 8 digit account # example 11122223

Confirm EDD Account #:

- Under Primary Location Information, enter the primary location information of the employer.
- In the Mailing Address section, enter the employer's mailing address if it is different from the primary location information. If it is the same, check the box next to "Click here if Mailing Address is the same as the address above".

Mailing Address

☐ Check here if Mailing Address is the same as the address above.

* Mailing Address 1:

Mailing Address 2:

Mailing Address 3:

* Mailing City:

* Mailing State:

Mailing County:

* Mailing Country:

Mailing Zip/Postal:

99999 or 99999-9999

- In the Contact Information section, enter all available employer contact information. (Note: Required fields are marked with an asterisk *)

Contact Information

Job Title:

* First Name:

Middle Initial:

* Last Name:

* Primary Phone: - - Ext.

Alternative Phone: - -

Contact Text Message Phone Number: - -

Fax: - -

Primary Contact Email Address:

Confirm Contact Email Address:

* Please select a method in which you prefer to receive your notifications:


[Read Our Email Security Policy](#)

Select the best method for the **Employer** to receive any messages. Most likely, you will be communicating outside the CalJOBS system.


[Save](#) [Cancel](#)

- Click the yellow **Save** button at the bottom to save the Marketing Lead. You should then see options to further manage the newly created Marketing Lead. Click on **Open Employer's Folder** to begin engaging with the record.


What would you like to do next?



[Staff Services](#)
Select this option to return to staff services.



[Open Employer's Folder](#)
Select this option to begin working with this Employer.



[Add Locations and Contacts](#)
Select this option to enter multiple locations and contacts for the employer.

How to Manage a Marketing Lead

How to Search for a Marketing Lead

You can access a Marketing Lead by going to Manage Employers → Assist an Employer and selecting Marketing Lead for your search. The most recent employers you accessed are available for quick access as well:

Quick Assist

You have saved Employer item(s) in [My Search Lists](#).

Here are the 15 most recent employers you assisted: [Bill's Bagels \(MKT35616\)](#)

Display Search Criteria for the following employer types:

☒ Marketing Lead ☐ Recruiting

[Search](#)

Using the left navigation menu, you can also navigate to **Customer Relationship Management** → **Marketing Leads** and a pre-filtered set of Marketing Leads will be displayed. Please note that it will show the contact of the Marketing Lead.

Customer Relationship Management

Create a Marketing Lead

Contacts List

Marketing Leads

Work items

Appointments

Online Surveys

Contact List

[Hide Filter Criteria](#)

Filter Criteria

Lead Source: All

Lead Owner: Staff25, Lao

Keyword: Last name

Account Type: ☒ Marketing Lead ☐ Recruiting

Lwia: None Selected

Office: None Selected

[Filter | Reset Filter(s)]

To sort on any column, click a column title.

Contact Name	Company Name	Title
Jenny-Jill (Primary Contact)	Bill's Bagels	
Smith, Jake (Primary Contact)	Test	acamins@wdacs.lacounty.gov

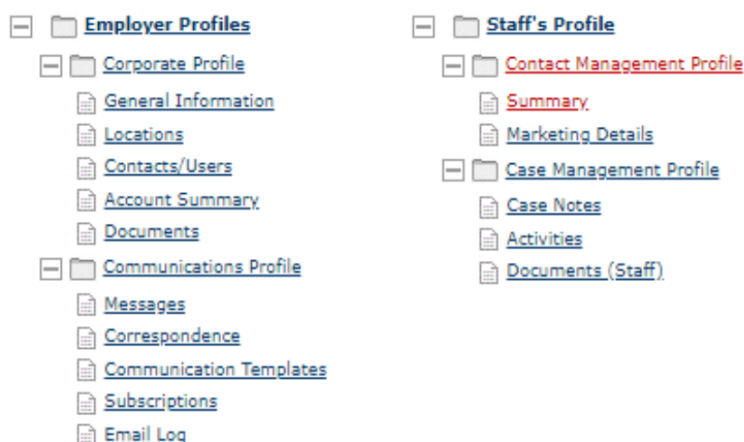
Page 1 of 1

Once you've found the Marketing Lead you'd like to manage, clicking on the name of the contact will take you the Marketing Lead folders associated with that contact. You can then update the company's information, update its Marketing Details and create Work Items and Activities.

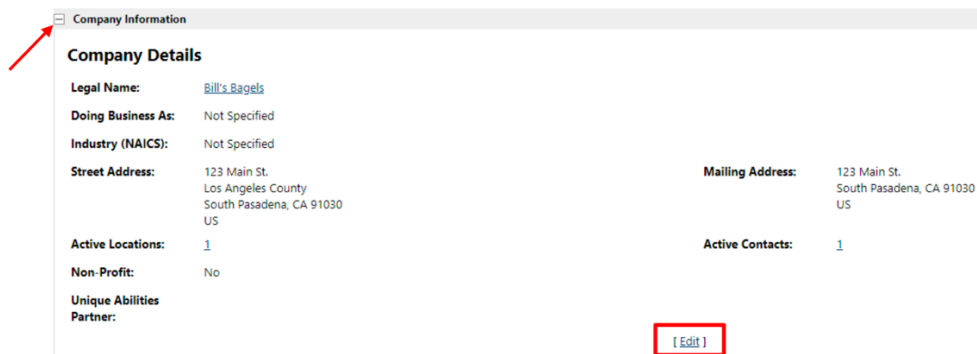
How to Update a Marketing Lead Information

1. Access the Marketing Lead and expand the folder at the top of the page to view all the options.

[[Assist an Employer](#) | [Staff Services](#) | [Employer Portfolio](#)]



2. Navigate to **Staff's Profile** → **Contact Management Profile** → **Summary** to view and update Company information, including Contact Details and Address.
3. Expand headings using the plus (+) icon on the top-left of each section and click the **Edit** link to edit any of the information displayed:



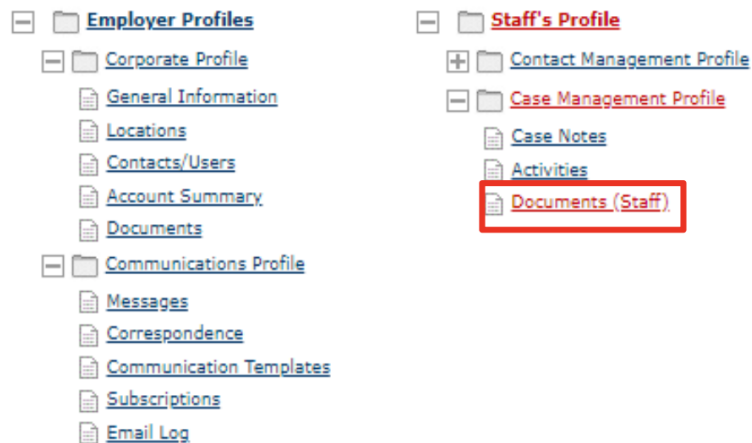
4. Remember to click the yellow **Save** button at the bottom to save any information you update.

How to Upload a Business Assessment or Other Documents

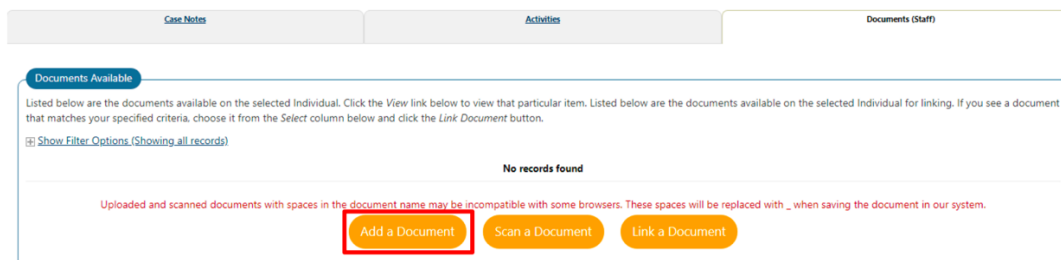
You can upload a Business Assessment or any other document, to both Marketing Leads and Recruiting Employers.

1. Access the Marketing Lead and expand the folder at the top of the page to view all the options.

[[Assist an Employer](#) | [Staff Services](#) | [Employer Portfolio](#)]



2. Navigate to **Staff's Profile** → **Contact Management Profile** → **Documents (Staff)**.
3. Once in the **Documents (Staff)** tab, click the yellow **Add a Document** tab to upload the document.



4. On the following page, you do NOT need to make any selections in the **Document Association** section. (This upload section is normally for participant documents only.)
5. However, you must enter information in the **Document Tags** field, in the **Document Information** section. This is where you can label or tag the document. We suggest providing the name of the document and the date it was completed.

Document Information

*** Document Tags:**

Keywords that will be indexed with this attachment.

Business Assessment - 10/10/2018

User Accessible:

☐ Yes ☒ No

- Click the **Choose File** button in the **Attach Document** section to find the document in your computer and upload it. Remember to click the yellow **Save** button to save your attachment.

Attach Document

Location:

Choose File

CRM Biz Assessment Tool Revised 100418.docx

Save

Cancel

- You should now see the newly uploaded document in your **Documents (Staff)** list. If you need to delete the document for any reason, please email hsa-info.wdb@ventura.org.

Documents Available

Listed below are the documents available on the selected Individual. Click the View link below to view that particular item. Listed below are the documents available on the selected Individual for linking. If you see a document that matches your specified criteria, choose it from the Select column below and click the Link Document button.

[Show Filter Options \(Showing all records\)](#)

Click a column title to sort.

Document Name	Document Tags	Category	Modify Date	Action
CRM_Biz_Assessment_Tool_Revised_100418.docx	Business Assessment - 10/10/2018	General	10/10/2018 09:07	View Delete Edit Download Meta Data

Page 1 of 1 Rows 10

How to Update Marketing Detail Information

Marketing Detail information is designed to aid in managing the business contact, as you move them closer to agreeing to register in CalJOBS, post job orders and receive Employer Services. Marketing Details should be updated often, especially whenever any key details for business changes. Marketing Details can be viewed and updated by accessing the **Marketing Details** link in the folders at the top of the page, or by expanding the **Marketing Details** heading under the Summary and clicking the **Edit** link.



The **Employer Marketing Profile** section is the core of the CRM functionality, where the 'lead' or employer's level of engagement is entered and assessed.

The screenshot shows the 'Employer Marketing Profile' and 'Contact Marketing Profile' sections. The 'Employer Marketing Profile' section includes fields for 'Business Category' (Transportation), 'Lead Source' (Manual Entry), 'Status' (Open - Contacted), 'Probability' (25%), 'Revenue' (\$750,000.00), 'Rating' (Warm), 'Competitor' (Yes/No), and 'Lead Owner' (Staff25, Lao). The 'Contact Marketing Profile' section includes fields for 'Influence' (Decision Maker) and 'Key Contact' (Yes/No).

Remember to click the yellow **Save** button to save any details you've updated.

The use of the fields largely depends on your organization's operation and how you'd like them to be used. Contact the WDBVC if you have any questions about how each field should be completed.

How to Convert a Marketing Lead

Once a Marketing Lead has decided that they would like to fully register as an employer in CalJOBS to be able to add job orders, you will 'convert' the Marketing Lead into a Recruiting Employer.

1. Find the Marketing Lead and navigate to **Staff's Profile**→ **Contact Management Profile**→ **Summary**, then expand the **Company Information** section:

Company Information

Company Details

Legal Name: [Bill's Bagels](#)

Doing Business As: Not Specified

Industry (NAICS): Not Specified

Street Address: 123 Main St.
Los Angeles County
South Pasadena, CA 91030
US

Mailing Address: 123 Main St.
South Pasadena, CA 91030
US

Active Locations: 1

Non-Profit: No

Unique Abilities Partner:

Active Contacts: 1

[Edit]

Account Type

☒ Marketing Lead

☐ Recruiting

[Update Account Type(s)]

2. Once there, uncheck the Marketing Lead box under the **Account Type** section and check the box next to **Recruiting**.
3. Click on the **Update Account Type(s)** link to finish converting the Marketing Lead into a Recruiting Employer.
4. You will then be taken to a Recruiting Employer registration page, where you will be required to enter additional information about the business, including the business's Employment Development Department (EDD) Account number, Contact Email Address and NAICS code. These items are now required for EDD to verify the business.
5. Once you've entered all the required items, click the yellow **Save** button at the bottom to save the information. This business can now be found as a Recruiting Employer and once it is verified by EDD, job orders can be created for the business.

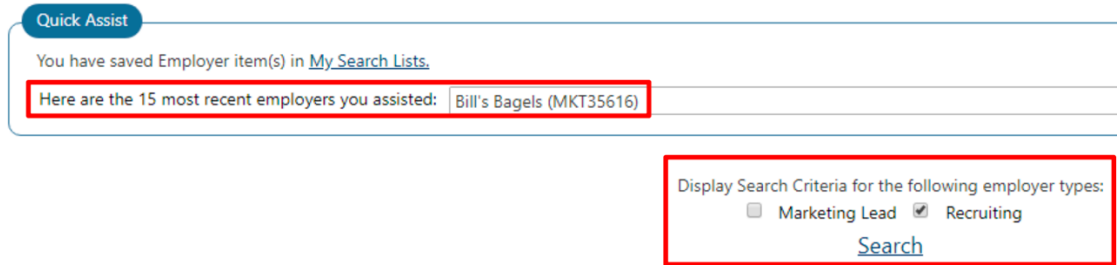
How to Create Job Orders

Job Orders

A Job Order is a job listing or posting that can be created under a Recruiting Employer in CalJOBS. Job Orders can be referred to selected participants who are registered in CalJOBS and conversely, participants can be referred to Job Orders. Job Seekers can also search Job Orders on their own. Skills and other data items in a Job Order can be matched with participant data to provide a pairing percentage, indicating the level of match between Job Order and participant. This Help Sheet will go over the basic steps for creating a Job Order.

Creating a Job Order

1. Find the employer you wish to add a Job Order for by navigating to **Manage Employers** → **Assist an Employer**. The most recent employers you accessed are available for quick access.



Quick Assist

You have saved Employer item(s) in [My Search Lists](#).

Here are the 15 most recent employers you assisted: Bill's Bagels (MKT35616)

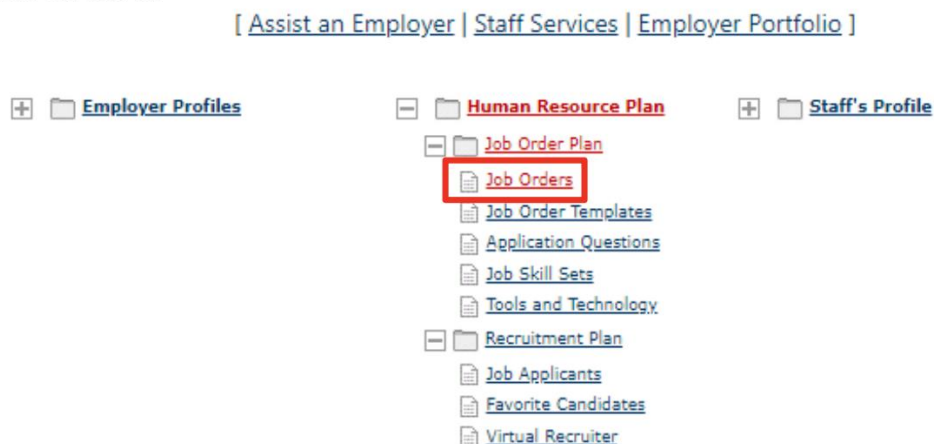
Display Search Criteria for the following employer types:

☐ Marketing Lead ☒ Recruiting

[Search](#)

Since Job Orders are only available for Recruiting Employers, if you do a search, ensure you select the **Recruiting** employer type first.

2. Once you've accessed the business, navigate to **Human Resource Plan** → **Job Order Plan** → **Job Orders**.



3. Once you are on the **Job Order** tab, click the yellow **Add New Job Order** button at the bottom of the page.

4. On the page that follows, select a **Job Creation Method**. The **Manual Entry Basic Job Order** is the simplest, quickest method for creating a Job Order

* Indicates required fields.
[If you are a H-2B employer, please click here.](#)

Job Creation Method

- ☒ Manual Entry Basic Job Order - Minimal Data entry will use some default settings.
- ☐ Manual Entry Custom Job Order - Build your Job Order using a step-by-step data entry process. More Flexibility and custom settings.
- ☐ Copy Existing Job Order - Build your new Job Order by transferring the information from an existing Job Order (quickest)

Job Title

Please accurately describe the position in the job title as this will be searched by individuals using keywords. As you are entering your job title in the list, select it.

* Job Title:

Job Occupation

Cook
Cook
Cook (Dinner)
Cook (Elementary School)
Cook and Waitress/Waiter

5. Start typing in the **Job Title** field and a list of available job titles will appear. Select one that best represents the job order you are creating.
6. Once a Job Title has been selected, the **Job Occupation** section will populate with related occupations. Use the drop-down arrow to open the menu and make a selection.

Job Title

Please accurately describe the position in the job title as this will be searched by individuals using keywords. As you are entering the job title, you may see a list of your job title in the list, select it.

* Job Title:

Job Occupation

Please select the occupation that best matches your job title. You may either select from the Suggested Occupations drop-down list, which is populated based on the job search link.

Suggested occupation(s):

None Selected

None Selected

Food Cooking Machine Operators and Tenders
Cooks, Institution and Cafeteria
Cooks, Restaurant

* Job Occupation: Occupation Code Job Occupation **None Selected**

7. Click the yellow **Next** button at the bottom of the page to save the information you entered and continue.
8. Enter the **Job Description**. You can click the **Insert Sample Text** to insert a description based on the job and occupation you selected. You can select between a short **Summary** or a comprehensive **Detailed** description.

Job Description

*Job Description
Click the [Insert Sample Text](#) link to insert the occupational description or create your own job description by entering the text below.

Format | Font | Size | A | [Icons]

Prepare, season, and cook dishes such as soups, meats, vegetables, or desserts in restaurants. May order supplies, keep records and accounts, price items on menu, or plan menu.

[Spell Check] | **Insert Sample Text** | Clear Text | Remove All Formatting

9. Add **Compensation and Hours** for the job order using the correct format.

Compensation and Hours

For an exact salary, not a range, enter the same amount in the minimum and maximum salary fields below.

☐ Do not display salary requirements to job seekers

Salary requirements are visible to job seekers

Minimum Salary: \$ (Ex: 5.00 or 25000.00 - no commas)

Maximum Salary: \$ (Ex: 5.00 or 25000.00 - no commas)

*Basis for unit of salary/pay:

Typical Labour Market Rates: [View Typical Labor Market Rates for Cooks, Restaurant](#)

* Pay Comments:

Is Supplemental Compensation offered? ☐ Yes ☒ No

* Hours Per Week:

* Hours

* Shift:

You can click the **View Typical Labor Market Rates for ...** to get more information on compensation for the occupation you've selected.

If you select **Hours are Specific** under the **Hours per Week** field, you will have to enter the **Hours**.

10. In the **Skills** section, you'll be able to add or remove skills desired for this particular job. Expand the headers using the plus (+) icons. Some skills will already be selected, based on the occupation code you've chosen

Select Skills from All Available Skills

[Delete All Saved Skills](#)

- ☐ [General Skills \(0\)](#)
- ☐ [Computers & Mathematics \(0\)](#)
- ☐ [Construction \(2\)](#)
- ☐ [Education & Social Services \(1\)](#)
- ☐ [Entertainment & Media \(0\)](#)
- ☐ [Financial Services \(0\)](#)
- ☐ [Agriculture & Wildlife \(0\)](#)
- ☐ [Healthcare \(0\)](#)
- ☐ [Legal & Protective Services \(0\)](#)
- ☐ [Management & Office Services \(5\)](#)
- ☐ [Science & Engineering \(1\)](#)
- ☒ [Service & Sales \(23\)](#)
 - ☐ [Advertising & Marketing \(0\)](#)
 - ☒ [Hospitality \(23\)](#)
 - ☒ [use knowledge of food handling rules](#)
 - ☒ [cook in quantity](#)
 - ☒ [decorate cakes](#)
 - ☒ [determine food or beverage costs](#)

11. Complete the required fields in the **Minimum Education, Experience, & Age Requirements** and **Transportation Requirements** for the job. Links to certain fields are provided for comparison.

Minimum Education, Experience, & Age Requirements

If you have a minimum age requirement for this job, what is that requirement:

* Reason for age requirement:

* Minimum education required:

Typical Education Required: [View Typical Education Requirements for Chefs and Head Cooks](#)

* Minimum Months of Experience in Selected Occupation:

Typical Experience Required: [View Typical Work Experience Requirements for Chefs and Head Cooks](#)

Transportation Requirements

* Is this job accessible by public transportation? ☒ Yes ☐ No

* Is a driver's license required for this position?

12. Complete the required items in the **Staff Information** section, including the **Staff Alien Labor Certification**, if applicable.

Staff Information

* LWIA/Region: Los Angeles County WDACS

* Office Location:

* Category:

* Job Developer / Mandatory Listing:

On-line Status: On-Line

Employer Job Order Status: Open and available

* Staff Job Order Status:

Featured Job: ☐ Yes ☒ No

13. Remember to click the yellow **Save** button at the bottom of the page to save your job order.
14. The next page will provide you more options. You can click **Edit this job** to confirm the data you entered or enter additional information for the job order.

What would you like to do next?



[Search for Candidates that are a good match for this Job](#)

This option will allow you to search for online résumés based on your job order's information.



[Edit this job](#)

This option will enable you to edit your newly created Job.



[View all your Job Orders](#)

This option will allow you to review and modify all your job orders



[Add Another Job Order](#)

This option will take you to the Job Order wizard to create and post a job on the virtual OneStop system.



[Return to your Dashboard](#)

Use this option to navigate to your dashboard page and manage jobs, search for candidates, create a candidate search alert (Virtual Rec) and manage your message center.

[Return to the Directory of Services](#)