



Workplace Innovation and
Productivity and Skills Incentive (WIPSI)

*an initiative of the
Canada-Nova Scotia Job Grant*

I have read and understood the [WIPSI Guidelines](#)

Select Organization Type: Business
 Association or Private Sector Union
 Social Enterprise/Revenue-Generating Not-for-Profit Organization

Operating Name: _____

Note: This should be the same as on void cheque and mailing address used to process payment.

Nova Scotia Registry of Joint Stocks ID # _____ <http://www.novascotia.ca/sns/access/business/>

Civic address

Street # and Name, Unit/Suite/Apt # _____

City/Town _____ Province _____ County _____ Postal Code _____

Mailing address - if different from civic address

Street, PO Box, RR #, Site #, etc. _____

City/Town _____ Province _____ County _____ Postal Code _____

Primary contact information

Contact Name _____ Job Title _____

Phone _____ Fax _____

Website _____ Email _____

Secondary contact information

Contact Name _____ Job Title _____

Phone _____ Fax _____

Website _____ Email _____
 Workplace Innovation and Productivity Skills Incentive (WIPSI)
 Application Form - Last updated: October 2015 *an initiative of the Canada-Nova Scotia Job Grant*

Tell us about your operation in Nova Scotia (for eligibility and statistical purposes)

Primary NAICS (North American Industry Classification System) Code

For the NAICS definitions, click below
statcan.gc.ca

Industry Sector (check all that apply):

- Aerospace & Defence
- Agriculture
- Clean Technology
- Fisheries and Aquaculture
- Financial Services
- Forestry
- Information & Communications Technology
- Life Sciences
- Manufacturing - please specify type of products

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- | | | |
|--|---|---|
| <input type="checkbox"/> Chemical | <input checked="" type="checkbox"/> Electronics | <input type="checkbox"/> Food |
| <input type="checkbox"/> Machinery | <input type="checkbox"/> Non-Metallic Mineral | <input type="checkbox"/> Petroleum & Coal |
| <input type="checkbox"/> Plastics & Rubber | <input type="checkbox"/> Textile | <input type="checkbox"/> Transportation |
| <input type="checkbox"/> Wood | <input type="checkbox"/> Miscellaneous | |
-

- Mining and Energy
 - Oceans Technology
 - Tourism
 - Other - please specify _____
-

Part A - Organization Information

Brief organization description: What you do, how long in existence, product lines, any unique features, etc.
Associations are to provide number of members.(750 character maximum)

Prism is the leading supplier of customized lighting solutions for exhibits, retail, special projects and environments since 2001. Prism offers a full line of innovative LED, and traditional lighting products. We specialize in energy-efficient LED lighting, investing in research and development to produce a signature line of innovative, custom-engineered display lights which account for about one third of our total sales.

Total net sales (CAD for last fiscal year)	
Date for end of last fiscal year (mm/yyyy)	
Percentage of revenue derived from outside Nova Scotia	

Attach the last two years of financial statements in an email addressed to WIPSI@novascotia.ca. (If financial statements are not available, CRA tax forms or unaudited balance sheets and income statements are required.)

The organization has sales (Check all that apply)

Inside Nova Scotia Outside Nova Scotia Outside Canada

Did organization start operations in another province before starting in Nova Scotia? Yes No

Date organization started operating in another province (mm/yyyy)

Date organization started operating in Nova Scotia (mm/yyyy)

	Full-time	Part-time	Seasonal	Total
Current number of employees	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total wages and salaries paid (CAD for last fiscal year, excluding benefits)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

*Each employee should only be accounted for once.
*Wages (or owner drawings) must be at least \$25,000 per organization.

	Last year	Two years ago	Three years ago
Organization paid training investments (CAD)	<input type="text"/>	<input type="text"/>	<input type="text"/>

Are there outstanding or pending litigations/claims against the organization? If so, please explain. Yes No

Part B - Training Plan

Training Summary

See [WIPSI Guidelines](#) for eligible training provider information. **Attach the training provider's quote and supporting information in an email addressed to WIPSI@novascotia.ca.**

Name of training

Customer Relationship Management (CRM) and Technology Training

Name of training provider / trainer

Dan Cousins - DCAA

Trainer qualifications/credentials

DCAA is a boutique training organization that specializes in helping organizations get the most of their Sage CRM strategies, having focused exclusively on Sage CRM since 2004. DCAA comes highly recommended by Sage (publishers of Sage CRM). Dan Cousins has developed himself into the leading Sage CRM trainer in North America quite deliberately. He has worked with hundreds of companies over the past 12 years, and therefore has a unique perspective and skill set geared towards making Sage CRM projects successful. Being a good Sage CRM trainer requires a combination of experience and communication skills.

Rationale for training

Information technology (IT) benefits our business by allowing it to work more efficiently and to maximize productivity. By properly investing in employee training needed to adopt the technology, our business can: 1) improve the effectiveness and impact of this new technology and improve employee performance & motivation 2) Increased efficiencies in processes, Increased capacity & Increase company's competitiveness. 3) Dramatically reduced technology ramp up time 4) Ensuring ROI on our investment in the technology and our people

A brief description of the type of training:

All training will be delivered through online learning in a one to one and /or group sessions where applicable. All sessions will be delivered in 1 to 2.5 hours with none exceeding 3 hours in duration for a single session. Instructional tools will utilize "go to meeting" audio and screen share, supported by additional resources such as videos and workbooks. The training will increase the profitability of our company, by increasing business productivity and performance, reducing costs, satisfying the expectations of customers, delivering the same or better results every time, better internal organization, and continuous problem solving will increase profitability and strengthen the long-term stability of our company.

Anticipated training start date (YYYY-MM-DD)	2017-07-01
Anticipated training completion date (YYYY-MM-DD)	2017-09-15
Number of hours in training	72 hours

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Operating Name: Prism Tradeshow Products Inc.

Complete Table A below. Additional details on training participants will be required at the time you submit the first payment request. This will include personal information such as name, Social Insurance Number, gender, age range, education level, position in the organization, and employment status.

Table A. Details of employees receiving training in the organization.

Title/Position/Role	Details of Training	Number of People
Vice President, Sales Charlie Simpson	<ul style="list-style-type: none"> Attend online training sessions & take part in all training stages to ensure full understanding of Sage CRM as an End User 	1
Technology Implementation & Adoption Shelley Simpson - CEO	<ul style="list-style-type: none"> Take part in all training stages as a CRM Administrator and work closely with the trainer & available for correspondence throughout the term of the project. 	1
Marketing Coordinator Heather Gillis	<ul style="list-style-type: none"> Attend online training as a CRM Administrator by utilizing “go to meeting” audio & screen share and work closely with the trainer. 	1
Total number of people participating in the training		3

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Operating Name: Prism Tradeshow Products Inc.

Description of training costs: (see [Section 5 of guidelines](#) for eligible training costs, e.g. cost of facilitator, workshop, travel, and other training expenses).

All training will be delivered through synchronous online learning in a one to one and /or group sessions where applicable or instructional tools will be utilized such as “go to meeting” audio and screen share, supported by additional resources such as videos and workbook. Therefore, the cost of the facilitator and the workshop are the eligible training costs for Prism Sage CRM Training.

Total cost of training

Description of travel and travel-related costs for participants: (see [Section 5 of guidelines](#) for eligible travel-related costs, e.g. meals and mileage).

Total travel and travel-related costs

Description of organization contribution: in-kind paid to employees during training (e.g. salaries and wages).

In-kind paid to employees during training will be salaries of the three employees receiving training at Prism; Charlie Simpson, Shelley Simpson and Heather Gillis.

Total amount of in-kind contributions \$

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Operating Name: _____

Has the organization received WIPSI funding since April 1st? Yes No

Eligible WIPSI Costs:

Cost of training	\$12,500
Travel-related costs	_____
Total eligible costs	\$12,500

Total WIPSI funding request (Based on Section 3 of WIPSI guidelines)	\$
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*** Note: Minimum funding amounts apply:
 \$5000 for employers employing up to 50 employees;
 \$10,000 for employers employing more than 50 employees.**

Organization Contribution:

In-kind paid to employees during training	\$
Eligible training costs not covered by WIPSI	\$
Total organization contribution	\$

Project Cost Summary:

Total project cost	\$
Number of employees receiving training	3
Cost of training per employee	\$
WIPSI reimbursement per employee:	\$

***Note: WIPSI reimbursement per employee cannot exceed \$10,000.**

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Operating Name:.

Has the organization received federal or provincial funding from other departments and/or agencies in the last 12 months?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
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Table B - Government funding in the past 12 months

Amount given	Federal/provincial department or agency	Purpose of funds
\$	NSBI – Nova Scotia Business Inc.	Export Growth Program to support attendance of Trade Shows & Conference to increase sales & find new manufacturing partnerships outside of NS.

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Part C - Intended Training Outcomes (if yes, please explain.)

The training will...

Provide new types of training to employees	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Invest in employee training needed to adopt the new technology in an efficient and effective manner	
Upgrade skills of current employees to improve workforce productivity/operational efficiency	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Improve employee performance and increase capacity and employee motivation to adopt CRM technologies and methods	
Provide employees with skills that are transferable	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Help our employees understand how to use the technology we have, and increase their likelihood of knowing how to use similar technology and methods	
Improve workplace diversity	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Foster innovation in the organization/workforce	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Increase the long-term competitiveness of the organization/workforce	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Increase business productivity, customer satisfaction, and better internal organization will strengthen the long-term stability of our company.	
Support the introduction of new technology, machinery/equipment, and/or processes	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Improve the effectiveness and impact of this new technology	
Enhance competitiveness locally or internationally through entrance into new markets or development of new products	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Increase revenue and/or profit of the organization	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Increase efficiencies in processes, resulting in financial gain (reduce cost & increase profit)	
Enhance environmental sustainability	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

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Operating Name: _____

You identified the intended outcomes of your training plan earlier in this application. In what way do you plan to measure progress in meeting these outcomes?

This training will teach us how to use Sage CRM to track our potential revenue from leads and sales from current customers. With our training, we will learn the finer points of reports and dashboards within Sage CRM which will allow us to measure our progress in meeting our predicted outcomes. This will impact the strategic decisions we make in developing our marketing and sales initiatives.

We will measure progress in meeting our expected outcomes of this project by:

- 1) Measuring the adoption and use of the CRM system by all team members
- 2) Asses team member skills in adoption
- 3) Asses company's access to up to date customer information
- 4) Increased Sales value and customer interactions
- 5) Generation of effective sales reports with higher level sales / marketing intel

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Operating Name: _____

Authorize, certify, and agree

On behalf of the organization identified above, I hereby make application for the Workplace Innovation and Productivity Skills Incentive (WIPSI), an initiative of the Canada-Nova Scotia Job Grant. **I certify** that I am an authorized officer of the applicant and that the information provided in this application and its attachments is true and correct to the best of my knowledge and belief. **I agree** to comply with the terms stated in the program guidelines, including reporting requirements.

I acknowledge and agree to allow the Province to make any enquiries of such persons, firms, corporations, and federal and provincial government agencies and departments required, to collect and to share information with them, including personal information as defined in the *Freedom of Information and Protection of Privacy Act*, as the Province deems necessary, in order to reach a decision on this application; to administer and monitor the implementation of the subject project; and to evaluate the results of the project and this program after project completion. I hereby waive confidentiality of such information and agree that its collection and disclosure will not be the basis of any liability, claim or order against the Province.

Should the organization be a successful applicant, on behalf of the organization, I hereby give the Province permission to release the name of the organization in any form and through any media for purposes of marketing this program.

I authorize, certify, and agree to all of the terms above.

Authorized officer name	
Job Title	
Date	
	*Date will be filled automatically upon submission

Attach the following documents after clicking 'Continue':

1. Last two years of financial statements (If not available, CRA tax forms or unaudited balance sheets and income statements are required)
2. Itemized training quote
3. Training plan (from the training provider)

Questions? Contact us:

Workplace Innovation and Productivity Skills Incentive (WIPSI)
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 Halifax, Nova Scotia B3J 2T8

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 Fax: 902-424-0488
 Email: WIPSI@novascotia.ca