



TRAINING CATALOG

SEPTEMBER 2024

TRAINING CATALOG

Workplace & Career Readiness Training

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Workplace & Career Readiness

Essential Skills

Our Essential Skills training provides participants with the opportunity to develop essential career readiness skills that prepare them to navigate today's modern workplace. Areas of focus include interpersonal dynamics, effective communication and collaboration, workplace norms, common business tools, and more.



➤ Business Communications

Email Communications: Follows communication norms (on-time replies, message appropriateness) and utilizes email composition best practices (formatting, signature, conciseness).

Business Writing: Utilizes processes (peer reviews) and tools (Grammarly, spell check) to clearly articulate ideas and compose well-written business documents.

Public Speaking: Utilizes strategies for gaining and retaining attention while communicating verbally and nonverbally to an audience in a business setting (speech, formal presentation, elevator pitch).

➤ Career & Workplace Navigation

Work-Ready Presentation: Demonstrates SLANT, work-ready attire, appropriate video background, and clear audio/video connection in meetings.

Punctuality & Preparedness: Signs-in to meetings on time, arrives prepared, and provides deliverables and emails in a timely fashion.

Navigating Challenges: Displays grit when navigating difficult or challenging circumstances.

Resourcefulness: Utilize tools, processes & people to support them in seeing activities/projects to the end.

Self-Advocacy: Surfaces issues in a tactful, constructive way, exerting an appropriate level of self-advocacy in communicating challenges, expectations, and needs.

Critical Thinking: Seeks out information and applies knowledge to develop well thought out approaches to qualify, analyze, and solve problems.

Independent Learning: Acts on opportunities to learn new concepts and technologies that support career building; creates and executes plans to effectively build relevant skills with little guidance.

Goal Setting & Execution: Articulates goals, defines a plan of action for completing tasks and deliverables, and demonstrates progress toward set goals.

Career Management: Takes action to gather specific job expectations, establish check-in processes, and articulate career goals to manager.

➤ Career Preparation

Skill Mapping & Storytelling: Communicates how their skills development, experiences, and growing network are helping them prepare for specific jobs, career paths, and/or industries.

Resume Building: Incorporates newly developed skills and experiences into a well-formed resume, with little guidance.

➤ Data Analysis

Spreadsheet Use: Utilizes common spreadsheet management software to create, format and edit spreadsheets; use formulas and functions to analyze data; apply charts/graphs to convey information.

Basic Data Analysis: Utilizes formulas (sum, avg, count, if, and, or), lookup functions (VLOOKUPS), and pivot tables to complete, slice, and analyze data to answer basic questions and enable decision-making.

Technology Essentials

Computer Systems Navigation: Navigates common operating systems (Windows) with ease to accomplish daily tasks such as file management, application use, internet connectivity, browser navigation, etc.

Document Editing: Utilizes common document editing tools such as Microsoft Word to create, format, and edit business documents, letters, flyers, and resumes.

Calendar Use & Management: Utilizes common calendar management tools such as Microsoft Outlook to track daily appointments and schedule meetings; factors in availability and scheduling conflicts, sets vacation and time-off, tracks and manages meeting attendance, and updates meeting invites.

Email Use & Management: Utilizes common email tools such as Microsoft Outlook to organize, draft, and compose emails, set out-of-office notifications, and use features like attachments, email options, rules, and folders to manage email communications.

Editing Presentations: Utilizes common slide deck editing tools such as Microsoft PowerPoint to create, format, and edit presentations, using best practices for multimedia use, data reporting, and storytelling.

Virtual Conferencing Tools: Utilizes common virtual conferencing tools such as Zoom for communicating and collaborating with others.

AI Fundamentals: Demonstrates understanding of the concept of AI; enumerates and explains the branches of AI; describes the terminology associated with AI commonly used in the workplace; explains how AI might be applicable in the roles students are placed in.

Considerations for AI Use: Describes AI weaknesses such as hallucination or bias, resulting risks of using AI, and legal and ethical considerations for AI use.

AI Best Practices: Articulates proper use of AI during the program; describes steps to ensure that company guidelines and policies are followed for AI use.

Self-Awareness & Self-Development

Self-Regulation: Identifies and regulates thoughts and emotions to maintain positive composure and uphold work-ready behaviors.

Proactive Self-Development: Utilizes feedback, grades, and assessment data to identify and employ strategies that target improvement on strengths and growth areas.

Cultural Navigation & Empowerment: Participates in conversations and activities inside or outside of the workspace that support community acknowledgement, building, healing, and mobilization.

Workplace Collaboration & Productivity

Workplace Norms & Expectations: Aligns behavior in a workplace environment to ethical standards, safety concerns, and workplace norms.

Workspace Presence: Demonstrates an available and online presence when expected and attends all expected meetings.

Work Quality: Produces deliverables, participates in activities, and delivers presentations that demonstrate attention to detail and exceed expected quality.

Leadership: Takes actions to lead, follow, or delegate as needed; shows ability to “step up or step back” to support community growth.

Proactive Communication: Demonstrates consistent communications with peers, coaches, and staff.

Initiative: Actively seeks out new ideas and solutions to bring to manager and team; proactively communicates changes in plans and status of deliverables.

Meeting Participation: Participates in meetings; joins on time, displays SLANT, and contributes to conversation with clear/confident communication.

Meeting Coordination: Manages meeting preparation, scheduling, logistics, and follow up actions (e.g., establishes meeting time, sends out invite/agenda, facilitates meeting, documents decisions and action items, sends out notes).

Leveraging Feedback: Provides feedback to peers, seeks out opportunities to receive feedback, and shows clear conversion on received feedback.

Networking & Relationship Building: Reaches out to peers/staff in the workspace in order to develop new respectful, professional relationships.

Job Searching & Career Advancement

Our Job Searching & Career Advancement training provides participants with the opportunity to use hands-on experience to develop effective job searching and career advancement skills. Areas of focus include resume creation, interviewing, network building, negotiation, and more.



➤ Career Advancement

Technical Skill Demonstration: Executes and reports outputs on basic technical tasks, relevant to functional role, with expected quality, consistency, and autonomy.

Navigation of Difficult Workplace Circumstances: Communicates plans for navigating difficult scenarios, including identifying support structures.

Professional Development (PD) Planning: Constructs and executes a clear, realistic, and actionable PD plan with clear and measurable learning goals related to job training and self-driven upskilling.

Skill Mapping & Storytelling: Translates internship and job placement experiences into complete power statements and STAR stories.

Professional Brand Building & Nurturing: Articulates a brand statement such as an elevator pitch, refines public LinkedIn profile, and solicits and utilizes colleague feedback to identify areas of development.

Company Benefits Navigation: Leverages company intranet, manager conversations, and HR resources to identify and access available benefits.

➤ Career Exploration

Career Goal-Setting: Articulates effective short and long-term career goals, including financial goals, skill needs, and work preferences (desired work environments, management style, location, etc.)

Career Researching: Utilizes online job platforms and company websites to identify key aspects of a career opportunity.

Informational Interviewing: Strategically targets companies, roles, and contacts of interest to invite for informational interviews.

Professional Network Building: Actively expands and nurtures their professional network through ongoing networking activities, informational interviews, and action item follow up.

➤ Job Searching & Decision Making

Resume Designing: Design clear, detailed, and impactful resume and interview artifacts.

LinkedIn Profile & Cover Letter Writing: Utilizes storytelling techniques to create clear, informative LinkedIn profiles and memorable cover letters.

Job Search Planning & Tracking: Constructs, executes, and tracks all aspects of job searching, artifact building, and prospective job application.

Interview Planning: Sets a clear plan and timeline of actions to prepare for an interview.

Interview Execution: Performs critical actions and applies communication techniques to ensure an on-time, engaging, and informative interview.

Interview Follow-Up: Delivers clear, concise, and actionable follow up communications post-interview.

Offer Decision Making: Utilizes salary, benefits, and other offer information to assess fit of opportunities with personal, financial, and career goals.

Negotiation: Utilizes negotiating techniques to prepare for and engage in clear, confident communications that lead to a solution aligned to career goals, financial goals, skill needs, and work preferences.

New Job Transition Planning: Establishes a clear plan for navigating a new job, including learning norms and expectations, setting PD goals, establishing key relationships, and identifying support and resources.

Job & Industry Training

Banking



Customer-Based Communications

Customer Written Communications: Apply strategies for communicating via email, live chat support, online messaging and other text-based virtual mediums.

Customer Verbal Communications: Utilize strategies such as interpreting and managing tone, pitch and voice, projecting confidence and clarity, and adapting tone, pace and language as needed.

Customer Relationship Building: Leverage empathy and other techniques to build and nurture relationships, earn trust and credibility, and develop rapport.

Navigation of Challenging Customer Behaviors: Apply strategies like empathy for handling objections and responding to challenging customer behaviors.

Customer Problem Identification: Use effective inquiry, problem-solving, and research techniques to understand a customer's needs, motivations, and challenges.

Customer Solution Delivery: Walk customers through solutions, equipping the customer to use self-service resources to resolve the issue on their own.

Customer-Facing Presentation

Company Brand Representation: Clearly communicate company brand and apply company core values during customer interactions.

Company Policy Alignment: Use judgement to adapt prescribed company policies and procedures in order to complete individual requests.

Product Presentation: Utilize product briefs and other company resources to describe company products and services, using industry terminology and concepts.

Customer Service Fundamentals

Multitask Execution: Converse with customer while completing transactional tasks to address their needs.

Call Script Usage: Utilize scripts to ensure compliance with company norms and inform customer interactions, showing flexibility in handling off-script interactions.

Escalation: Identify the need for escalation and refer customers to trained personnel in a timely manner.

KPI Navigation: Communicate strategies to meet and maintain performance metrics to drive improvements in customer engagement outcomes.

Notetaking: Write clear, complete customer interaction notes to support issue transfer and/or cross-selling.

Resource Navigation & Solution Discovery: Use web browsers, search tools, company websites and team knowledge databases to locate information and identify appropriate solutions.

CRM System Navigation: Use CRM system to identify, input, and update customer information, build lists and reports, move customer records through an engagement cycle, interpret business tasks and execute queries.

Consumer Banking

Banking Product Presentation: Clearly describe the key characteristics, benefits, and risks of basic banking products to customers.

Banking Website & Resources Navigation: Navigate company website and resources to describe details of banking products and services to customers.

Cash Handling: Count and handle large amounts of cash with speed and accuracy.

Banking Transactions Execution: Execute basic transactions and processes associated with managing banking clients, and utilize appropriate software such as teller systems with accuracy and completeness.

Workplace & Career Readiness Skills

In addition to technical expertise, we focus on participants' overall career development to ensure their success in any workplace setting. These focus areas include:

Business Communications: Develop communication strategies for in-person and digital platforms.

Workplace Collaboration: Contribute meaningfully to meetings, while demonstrating initiative and leadership.

Technology Essentials: Utilize common email, editing, and conferencing tools in a business setting.

Data Analysis: Gather and analyze data to drive business insights and enable decision-making.

Workplace Navigation: Display self-advocacy when communicating about challenges and expectations.

Self-Development: Identify and implement strategies that target improvement on strength and growth areas.

Hands-On Experience

With access to an internship or job placement, participants are able to put their skills into practice. Example employer partners include:

BANK OF AMERICA 

JPMorganChase

Career Pathways

Our training is designed to prepare participants for a range of roles in banking, including:

Personal Banking Pathway: Develop relationships with retail banking customers to understand their financial needs, resolve issues, and provide thoughtful solutions through additional financial products. These roles are typically in a bank branch setting but may also be in a call center environment.

Consumer Fraud Support: Resolve fraud-related inquiries from retail and small business customers, using issue resolution and appropriate escalation.

Inbound Sales/Inbound Sales Support: Respond to inbound customer inquiries, provide customer support, and generate sales by cross-selling and upselling.

Financial Advisory/Other Licensed Sales Support: Provide operational support and analysis to financial advisors/investment associates, insurance agents, or other licensed sales staff.

Loan/Financial Products Servicing: Respond to financial product-related inquiries and execute transactions for retail banking and small business customers. These roles are typically found in a call center environment.

Job & Industry Training

Customer Success



Customer-Based Communications

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Customer Verbal Communications: Utilize strategies such as interpreting and managing tone, pitch and voice, projecting confidence and clarity, and adapting tone, pace and language as needed.

Customer Relationship Building: Leverage empathy and other techniques to build and nurture relationships, earn trust and credibility, and develop rapport.

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Customer-Facing Presentation

Company Brand Representation: Clearly communicate company brand and apply company core values during customer interactions.

Company Policy Alignment: Use judgement to adapt prescribed company policies and procedures in order to complete individual requests.

Product Presentation: Utilize product briefs and other company resources to describe company products and services, using industry terminology and concepts.

Customer Service Fundamentals

Multitask Execution: Converse with customer while completing transactional tasks to address their needs.

Call Script Usage: Utilize scripts to ensure compliance with company norms and inform customer interactions, showing flexibility in handling off-script interactions.

Escalation: Identify the need for escalation and refer customers to trained personnel in a timely manner.

KPI Navigation: Communicate strategies to meet and maintain performance metrics to drive improvements in customer engagement outcomes.

Notetaking: Write clear, complete customer interaction notes to support issue transfer and/or cross-selling.

Resource Navigation & Solution Discovery: Use web browsers, search tools, company websites and team knowledge databases to locate information and identify appropriate solutions.

CRM System Navigation: Use CRM system to identify, input, and update customer information, build lists and reports, move customer records through an engagement cycle, interpret business tasks and execute queries.

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Self-Development: Identify and implement strategies that target improvement on strength and growth areas.

Hands-On Experience

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 BANK OF AMERICA

JPMorganChase



Morgan Stanley

Career Pathways

Our training is designed to prepare participants for various roles in customer success, including:

Inbound Sales/Inbound Sales Support: Respond to inbound customer inquiries, provide customer support, and generate sales by cross-selling and upselling.

Financial Advisory Support: Provide operational support and analysis to financial advisors, insurance agents, or other licensed sales staff.

Inside/Outside Sales Support: Support sales staff by identifying/qualifying leads, scheduling, and other tasks, working towards outbound customer interactions.

Sales Operations & Analytics: Support sales staff by creating marketing materials, analyzing and visualizing data, monitoring and updating client information, and overseeing client contracts, pricing, and billing.

Insurance Customer Service/Claims Support: Take in claims from customers, initiate the claims process, and respond to inquiries from insurance customers about products, eligibility, coverage, and other topics.

Consumer Fraud Support: Resolve fraud-related inquiries from retail and small business customers, using issue resolution and appropriate escalation.

Patient Services: Interact with patients and insurance providers in order to complete admissions registration, validate insurance, update documentation, complete billing procedures, and perform other administrative tasks. These roles interact in-person and over the phone in a hospital or medical office environment.

Loan/Financial Products Servicing: Respond to financial product-related inquiries and execute transactions for retail banking and small business customers. These roles are typically found in a call center environment.

Product Support: Provide answers to product-related questions and assist customers with product usage and transactions, typically in a call center setting.

Job & Industry Training

Business Fundamentals **Business Foundations & Navigation**

Business Concepts Navigation: Utilize business terminology and describe functions, ethical and social responsibilities, and the value added to marketplace and shareholders.

Marketing Concepts Navigation: Describe the role of the marketing function within business, including promotion, selling, merchandising, distribution, and producing goods and services.

Business Operations: Apply principles of accounting and finance, identify technology solutions to manage business information, and understand human resource management and motivation.

 **Customer-Based Communications**

Customer Written Communications: Apply strategies for communicating via email, live chat support, online messaging and other text-based virtual mediums.

Customer Verbal Communications: Utilize strategies such as interpreting and managing tone, pitch and voice, projecting confidence and clarity, and adapting tone, pace and language as needed.

Customer Relationship Building: Leverage empathy and other techniques to build and nurture relationships, earn trust and credibility, and develop rapport.

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Customer Problem Identification: Use effective inquiry, problem-solving, and research techniques to understand a customer's needs, motivations, and challenges.

Customer Solution Delivery: Walk customers through solutions, equipping the customer to use self-service resources to resolve the issue on their own.

 **Team-Based Project Coordination**

Team Dynamics Navigation: Navigate dynamics within the context of a team, facilitate from a team meeting agenda, and document clear, complete meeting notes.

Problem Analysis: Break down a multilayer and ambiguous problem by identifying assumptions, setting strategies for validating and building clarity, understanding audience, applying root cause analysis, and developing a set of possible solutions.

Team-Based Project Execution: Construct, present clearly and confidently, and work as part of a team to execute a team-based project plan out of a given set of requirements.

Team Communications: Assemble well-formatted business artifacts such as forms, reports, and meeting notes for team and stakeholder communications.

 **Data Management, Analysis & Reporting**

Data Loading, Cleaning & Organizing: Utilize Excel to load, clean, validate, and organize business data sets.

Data Reporting & Storytelling: Use common data visualization and business tools such as Tableau, Power BI, PowerPoint, and Excel to develop reports that demonstrate effective storytelling with data.

Intermediate Data Analysis: Use data analysis tools in Excel (Sorting, Filtering, Conditional Formatting, basic Formulas, Charts, Tables, VLOOKUPs, and PivotTables) to identify, analyze, and interpret trends, patterns, or insights and make business-related inferences about data.

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In addition to technical expertise, we focus on participants' overall career development to ensure their success in any workplace setting. These focus areas include:

Business Communications: Develop communication strategies for in-person and digital platforms.

Workplace Collaboration: Contribute meaningfully to meetings, while demonstrating initiative and leadership.

Technology Essentials: Utilize common email, editing, and conferencing tools in a business setting.

Data Analysis: Gather and analyze data to drive business insights and enable decision-making.

Workplace Navigation: Display self-advocacy when communicating about challenges and expectations.

Self-Development: Identify and implement strategies that target improvement on strength and growth areas.

Hands-On Experience

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 BANK OF AMERICA

JPMorganChase

 MERCK

 VERTEX

Career Pathways

Our training is designed to prepare participants for a range of roles in business, including:

Operations Assistant: Provide organizational support by assisting with and carrying out various types of tasks across accounting, data entry, billing, inventory, record keeping, correspondence, and sales.

Collections: Manage the collection of debt owed to the company and use a variety of outreach tactics to contact individuals who have defaulted on debts and/or who have not paid past due bills.

Loan Processor: Perform administrative tasks associated with loans or mortgages, working closely with mortgage loan supervisors, appraisers, underwriters, and others involved in the loan process.

HR Coordinator: Administer a variety of human resources activities and programs related to staffing, compensation, benefits, training, and workplace safety, including the management of new hire orientations, open enrollment for benefits, and other workplace trainings.

Administrative Coordinator: Organize, supervise, and facilitate work among employees, provide specialized support to workers, and serve as a link connecting departments, staff members, and vendors.

Job & Industry Training

Project Management Support



Business Foundations & Navigation

Business Concepts Navigation: Utilize business terminology and describe functions, ethical and social responsibilities, and the value added to marketplace and shareholders.

Marketing Concepts Navigation: Describe the role of the marketing function within business, including promotion, selling, merchandising, distribution, and producing goods and services.

Business Operations: Apply principles of accounting and finance, identify technology solutions to manage business information, and understand human resource management and motivation.

Project Management Support

Requirements Gathering & Project Scoping: Capture and validate business requirements for a project, and use to define project goals, outcomes, and scope.

Project Priority Evaluation: Use cost-benefit analysis and feasibility studies to evaluate project prioritization.

Project Management Concepts Navigation: Apply concepts like Integration, Scope, Time, Cost, Quality, and Human Resources in managing a project.

Agile Project Management: Apply concepts and tools of the agile methodology/SCRUM, to create and execute on an agile workflow.

Project Analysis & Execution: Use project management concepts and tools (charter/ schedule, project lifecycle, Gantt chart, logic network, stakeholder analysis, work breakdown structure, budget, marketing plan, risk plan, HR plans) to inspect, report, and progress on tasks.

Project Artifact Management: Develop and present well-formatted, clear, and complete key artifacts across all phases of the project lifecycle.

Project Management Applications: Utilize features of an industry standard tool like Microsoft Project to articulate key components and actions of a project.

Team-Based Project Coordination

Team Dynamics Navigation: Navigate dynamics within the context of a team, facilitate from a team meeting agenda, and document clear, complete meeting notes.

Problem Analysis: Break down a multilayer and ambiguous problem by identifying assumptions, setting strategies for validating and building clarity, understanding audience, applying root cause analysis, and developing a set of possible solutions.

Team-Based Project Execution: Construct, present clearly and confidently, and work as part of a team to execute a team-based project plan out of a given set of requirements.

Team Communications: Assemble well-formatted business artifacts such as forms, reports, and meeting notes for team and stakeholder communications.

Data Management, Analysis & Reporting

Data Loading, Cleaning & Organizing: Load, clean, validate, and organize business data sets using Excel.

Data Reporting & Storytelling: Use common data visualization and business tools such as Tableau, Power BI, PowerPoint, and Excel to develop reports that demonstrate effective storytelling with data.

Intermediate Data Analysis: Leverage data analysis tools in Excel (Sorting, Filtering, Conditional Formatting, Formulas, Charts, Tables, VLOOKUPs, and PivotTables) to identify, analyze, and interpret trends, patterns, or insights and make business-related inferences about data.

Workplace & Career Readiness Skills

In addition to technical expertise, we focus on participants' overall career development to ensure their success in any workplace setting. These focus areas include:

Business Communications: Develop communication strategies for in-person and digital platforms.

Workplace Collaboration: Contribute meaningfully to meetings, while demonstrating initiative and leadership.

Technology Essentials: Utilize common email, editing, and conferencing tools in a business setting.

Data Analysis: Gather and analyze data to drive business insights and enable decision-making.

Workplace Navigation: Display self-advocacy when communicating about challenges and expectations.

Self-Development: Identify and implement strategies that target improvement on strength and growth areas.

Hands-On Experience

With access to an internship or job placement, participants are able to put their skills into practice. Example employer partners include:

 BANK OF AMERICA

 MERCK

 salesforce

 LinkedIn

 UNITED

Career Pathways

Our training is designed to prepare participants for various roles in project management, including:

Project Support: Maintain the project calendar and schedule, manage important planning tasks, delegate responsibilities, assign budgets, oversee meetings, and ensure that all deadlines are met.

Project Coordinator: Ensure the success of a project by assigning and monitoring daily tasks, facilitating communication, and delivering reports and updates.

Administrative Coordinator: Organize, supervise, and facilitate work among employees, provide specialized support to workers, and serve as a link connecting departments, staff members, and vendors.

Operations Support: Provide support by managing and optimizing a project's operations, monitoring systems, and ensuring efficient workflows.

Job & Industry Training

Investment Operations



Financial Operations Fundamentals

Financial Transaction Reporting: Interpret and record common financial transactions into a general ledger.

Financial Statement Navigation: Navigate and analyze basic financial statements in order to communicate key insights about a business's financial health.

Financial Report Analysis: Utilize common financial analysis techniques such as ratio analysis and review basic financial reports to interpret the financial status of a business.

Investment Operations Fundamentals

Investment Product Presentation: Clearly describe the characteristics, benefits, and risks of basic investment products (stocks, bonds, mutual funds) to customers.

Mutual Fund Analysis: Leverage online data and review prospectus documents to interpret the performance of a basic mutual fund.

Data Management, Analysis & Reporting

Data Loading, Cleaning & Organizing: Load, clean, validate, and organize business data sets using Excel.

Data Reporting & Storytelling: Use common data visualization and business tools such as Tableau, Power BI, PowerPoint, and Excel to develop reports that demonstrate effective storytelling with data.

Intermediate Data Analysis: Leverage data analysis tools in Excel (e.g., Sorting, Filtering, Conditional Formatting, Formulas, Charts, Tables, VLOOKUPS, and PivotTables) to identify, analyze, and interpret trends, patterns, or insights and make business-related inferences about data.

Process Analysis

Process Analysis: Apply common analysis techniques to interpret a business process, determine issues and opportunities for improvements, identify and assess possible solutions, and articulate requirements to implement solutions.

Process Documentation: Document business processes using process flows.

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Business Communications: Develop communication strategies for in-person and digital platforms.

Workplace Collaboration: Contribute meaningfully to meetings, while demonstrating initiative and leadership.

Technology Essentials: Utilize common email, editing, and conferencing tools in a business setting.

Data Analysis: Gather and analyze data to drive business insights and enable decision-making.

Workplace Navigation: Display self-advocacy when communicating about challenges and expectations.

Self-Development: Identify and implement strategies that target improvement on strength and growth areas.

Hands-On Experience

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 BANK OF AMERICA

 Fidelity

 JPMorganChase

 Citizens™

Career Pathways

Our training is designed to prepare participants for various roles in finance, including:

Fund/Portfolio Accounting/Administration: Perform administrative functions on behalf of fund clients, such as recording and reconciling securities held, preparing reports, collecting payments, and calculating pricing.

Reconciliation Analyst: Analyze and remediate exceptions and breaks that occur due to differences across multiple IT systems.

Client Services Support: Interface with investment clients or client-facing teams to provide operational support such as account openings or customized reporting, often coordinating with internal teams to implement client requests.

Transaction Processing: Ensure proper delivery of securities and cash during purchases and sales by processing wires and trades, providing related reporting, and/or interfacing with a central body to provide clearing and settlement instructions.

Billing/Payroll/Purchasing Specialist: Perform specialized accounting functions such as customer billing, processing expense reports and timesheets, vendor maintenance and related invoicing.

Financial Reporting/Data/Budget Analyst: Provide analysis and support to corporate finance departments by preparing and reviewing reports, reconciling accounting discrepancies, analyzing data, and developing and maintaining budgets.

Business/Process Analyst: Analyze and improve business functions and processes by analyzing data, identifying and communicating improvement requirements to technology teams, and tracking and communicating progress of change initiatives.

Accounting Clerk/Associate/Bookkeeper: Assist accountants with routine tasks such as verifying, allocating, and posting transactions to the general ledger, preparing trial balances, and creating reports.

Accounts Payable/Receivable Support: Process money owed to a company or owed by a company by verifying and preparing bills and invoices, entering bills and invoices into the accounting system, ensuring payments are made and processed in a timely manner, and creating related reports.

Job & Industry Training

Cyber Security



Computer Architecture & Systems Fundamentals

Computer Systems: Navigate computer systems with focus on operating systems (Windows, Linux and Mac), servers, and cloud infrastructure.

Computer Architecture: Navigate basic computer and server hardware configurations.

Computer Networking: Navigate basic wired and wireless computer network protocols, address schemes, and configurations.

Computer Systems Administration

File Systems Management: Navigate file systems on a computer to perform file management operations such as file path tracking, corruption detection, and basic troubleshooting for file recovery.

Operating Systems Management: Utilize features of UI and script-based administrative tools of a common operating system (Windows, Linux) to execute install, update, and upgrade procedures.

IT Infrastructure Service: Navigate common IT infrastructure services used in systems administration.

Error & Security Monitoring: Apply protocols and system tools to monitor computer system diagnostics, and identify and report basic errors and security issues.

Computer Network Configuration: Build out physical and software configuration of basic computer networks (peer-to-peer LAN and WLAN), troubleshoot LAN operations, and choose appropriate LAN topology for a given physical and logical design.

Device Management: Use OS utility software and administrative tools to execute functions such as backup, restore, imaging, partitioning, defragmentation, compression, encryption; device, process, memory, and user account management.

Active Directory Navigation: Navigates basic features of user profile, account, workgroup, and domain management tools on a common operating system.

Technical Support

Technical Documentation: Construct technical documentation for basic procedures, tools usage, and systems changes that can be understood and used by a non-technical business user.

Ticketing System Navigation: Use the basic features of a common ticketing/incidence management system (Zendesk, Remedy).

Information Security Fundamentals

Information Security: Communicate principles of Information Security such as confidentiality, integrity, availability, governance, risk management, and compliance.

Security Architecture: Describe requirements to build an integrated and resilient security framework.

Digital Forensics: Articulate the branches within Digital Forensics and its laws and governance.

Cloud Security: Navigate security configurations, compliance requirements, and access control considerations for cloud systems; communicate the different security automation techniques and tools.

Information Security Methodologies

Network Monitoring: Navigate network monitoring tools and resources for service risk management.

Threat Identification: Apply established protocols to monitor network services, and identify and report basic threats to the services, devices, traffic, and data.

Penetration Testing: Utilize standard testing methods to test a basic network for vulnerabilities.

Scripting: Use commands and programming constructs in Python and/or Linux to automate tasks.

Incident Management: Monitor, detect, and triage infrastructure and security incidents and execute defensive measures, escalating as needed.

Data Access: Execute queries in a data query language such as SQL to answer questions around data.

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Business Communications: Develop communication strategies for in-person and digital platforms.

Workplace Collaboration: Contribute meaningfully to meetings, while demonstrating initiative and leadership.

Technology Essentials: Utilize common email, editing, and conferencing tools in a business setting.

Data Analysis: Gather and analyze data to drive business insights and enable decision-making.

Workplace Navigation: Display self-advocacy when communicating about challenges and expectations.

Self-Development: Identify and implement strategies that target improvement on strength and growth areas.

Hands-On Experience

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 BANK OF AMERICA

 LinkedIn

 MERCK

 UNITED

Career Pathways

Our training is designed to prepare participants for various roles in cyber security, including:

Incident Monitoring & Response: Play an important role in monitoring computer systems and network traffic in real time in order to report and escalate potential security incidents.

Security Operations Center (SOC) Analyst: Secure organizations against cyber attacks by effectively communicating, executing, and monitoring protocols.

Penetration Testing: Create and perform security tests designed to break into protected networks, applications, and systems in order to probe for vulnerabilities.

Computer & Digital Forensics Analyst: Use computer programs and tools to investigate, analyze, and recover information destroyed on media and storage devices, preparing reports after running analysis.

Job & Industry Training

Helpdesk/Desktop Support



Computer Architecture & Systems Fundamentals

Computer Systems: Navigate computer systems with focus on operating systems (Windows, Linux and Mac), servers, and cloud infrastructure.

Computer Architecture: Navigate basic computer and server hardware configurations.

Computer Networking: Navigate basic wired and wireless computer network protocols, address schemes, and configurations.

Computer Systems Administration

File Systems Management: Navigate file systems on a computer to perform file management operations such as file path tracking, corruption detection, and basic troubleshooting for file recovery.

Operating Systems Management: Utilize features of UI and script-based administrative tools of a common operating system (Windows, Linux) to execute install, update, and upgrade procedures.

IT Infrastructure Service: Navigate common IT infrastructure services used in systems administration.

Error & Security Monitoring: Apply established protocols and system tools to monitor computer system diagnostics, and identify and report basic errors and security issues when they occur.

Computer Network Configuration: Build out physical and software configuration of basic computer networks (peer-to-peer LAN and WLAN), troubleshoot LAN operations, and choose appropriate LAN topology for a given physical and logical design.

Device Management: Use OS utility software and administrative tools to execute functions such as backup, restore, imaging, partitioning, defragmentation, compression, encryption; device, process, memory, and user account management.

Active Directory Navigation: Navigates basic features of user profile, account, workgroup, and domain management tools on a common operating system.

Desktop Management

Business Applications: Install and configure common business applications (Microsoft Office Suite/Outlook, cloud storage, meeting applications) on a desktop.

Antivirus Configuration: Install and configure common antivirus client applications on a desktop.

Internet Configuration: Utilize basic features of internet configuration options (security, privacy, content, connections, favorites) to configure internet settings on a desktop.

Technical Customer Service

Technical Documentation: Construct technical documentation for basic procedures, tools usage, and systems changes that can be understood and used by a non-technical business user.

Basic Troubleshooting: Apply common techniques for troubleshooting to trace a system or application issue, identify the root cause, apply a documented fix, verify the fix, and communicate resolution to the customer.

Ticketing System Navigation: Use the basic features of a common ticketing/incidence management system.

Incident Lifecycle Management: Triage software and infrastructure issues, execute appropriate procedures, accurately record notes for work completed at each stage of an incidence, and escalate as necessary.

Customer Communications: Utilize inquiry, empathy, active listening, problem-solving, and challenge diffusion tactics to communicate with customers in ways that meet or exceed customer expectations.

Workplace & Career Readiness Skills

In addition to technical expertise, we focus on participants' overall career development to ensure their success in any workplace setting. These focus areas include:

Business Communications: Develop communication strategies for in-person and digital platforms.

Workplace Collaboration: Contribute meaningfully to meetings, while demonstrating initiative and leadership.

Technology Essentials: Utilize common email, editing, and conferencing tools in a business setting.

Data Analysis: Gather and analyze data to drive business insights and enable decision-making.

Workplace Navigation: Display self-advocacy when communicating about challenges and expectations.

Self-Development: Identify and implement strategies that target improvement on strength and growth areas.

Hands-On Experience

With access to an internship or job placement, participants are able to put their skills into practice. Example employer partners include:

 BANK OF AMERICA

 LinkedIn

 exelon™

 amazon

Career Pathways

Our training is designed to prepare participants for various roles in helpdesk/desktop, including:

Helpdesk Support: Provide first-level troubleshooting support for hardware and software issues. These roles are typically remote support roles.

Desktop Support: Analyze and troubleshoot issues with desktop computers and their applications. These roles are typically onsite support roles.

Application Support: Assist users with specific systems such as Salesforce, Microsoft Office, or SharePoint.

Telecommunications Specialist: Provide installation, troubleshooting, repair and maintenance support for communication systems, video products, and equipment.

Network Analyst: Support and resolve issues with email connectivity and administration, user activation, email group administration, and LAN/WLAN connective via systems like Active Directory.

Job & Industry Training

Application Development & Support



➤ Programming Fundamentals

Basic Program Writing: Write and execute basic programs using a programming and scripting language such as Java, Python, C#, R or JavaScript.

Programming Concepts: Utilize programming concepts such as data types, variables, conditionals, methods, loops and data structures to solve problems.

Code Update: Read code, understand code logic, and make updates to code to correct or enhance its function.

Development Environment: Navigate and work with the common components of a software development environment, including IDE, frameworks, and libraries.

Code Error Identification: Identify software issues through code reviews and utilize IDE tools to debug and resolve issues.

➤ Software Development Fundamentals

Version Control System: Utilize basic features of a version control system (Git, CVS, Subversion, etc.), including command line & GUI tools.

Software Solutions: Articulate software solutions to business problems, using design tools such as flow charts, decision trees, or pseudocode.

Software Release: Navigate the terminology and architecture of software release management infrastructure and common processes.

Software Methodology: Apply basic concepts, tools, and processes of common SDLC methodologies such as Agile/Scrum or Waterfall.

Problem Analysis: Navigate a multilayer, ambiguous problem by clarifying the problem statement and objectives, breaking it down into discrete components, identifying assumptions, setting strategies for validating and building clarity, understanding audience, applying root cause analysis, and developing possible solutions.

➤ Application Development

Intermediate Program Writing: Write and execute intermediate programs using programming and scripting languages (Java, Python, C#, R, JavaScript).

User Interface Design: Interpret a software design that includes user interface design.

Object Oriented Programming: Interpret a software design that includes data structures, basic algorithms and patterns, object-oriented programming concepts, and APIs.

➤ Database Fundamentals

Databases: Navigate a basic relational database design including tables, keys, constraints, indexes and normalization.

Basic Query Writing: Construct and execute basic SQL commands to answer questions with a database.

➤ Computer Architecture & Systems Fundamentals

Computer Systems: Navigate computer systems with focus on operating systems (Windows, Linux and Mac), servers, and cloud infrastructure.

➤ Quality Assurance & Software Testing

Software Test Writing & Execution: Utilize software testing concepts and techniques, including the development of unit tests, to validate code.

Workplace & Career Readiness Skills

In addition to technical expertise, we focus on participants' overall career development to ensure their success in any workplace setting. These focus areas include:

Business Communications: Develop communication strategies for in-person and digital platforms.

Workplace Collaboration: Contribute meaningfully to meetings, while demonstrating initiative and leadership.

Technology Essentials: Utilize common email, editing, and conferencing tools in a business setting.

Data Analysis: Gather and analyze data to drive business insights and enable decision-making.

Workplace Navigation: Display self-advocacy when communicating about challenges and expectations.

Self-Development: Identify and implement strategies that target improvement on strength and growth areas.

Hands-On Experience

With access to an internship or job placement, participants are able to put their skills into practice. Example employer partners include:

 BANK OF AMERICA

 BNY

 WELLS FARGO

 Fidelity

 LinkedIn

 AMERICAN EXPRESS

Career Pathways

Our training is designed to prepare participants for various roles in app development, including:

UX Design & Development: Work with software engineering teams to gather requirements for building desktop, web, or mobile user interfaces, use design tools and practices to build user interfaces to specifications, and assist in the development, testing, and release of user interface code.

Mobile App Development: Work in agile teams to update and edit mobile applications, use programming languages to incrementally build new mobile apps, and assist in associated processes such as requirements gathering, design, testing and mobile app release.

DevOps/Automation: Assist in the automation of software build, testing, deployment, configuration and monitoring processes to improve efficiency and reduce the complexity and length of the software development life cycle.

Server/Cloud Development: Gather requirements for building server or cloud applications, make incremental changes to server or cloud systems, debug issues, make fixes, and maintain server/cloud infrastructure and applications.

Production Support: Assist with identifying and resolving issues with software systems in production, communicate findings and resolution with end users through appropriate systems, and utilize tools to monitor production systems and automate production support processes.

Application Development: Update and edit software systems, use programming languages to incrementally build new software, and assist in associated processes such as requirements gathering, design, testing and software release.

Web Development: Update and edit web pages and services, use programming languages to incrementally build new websites or web servers, and assist in associated processes such as requirements gathering, design, testing and software release.

Software Project Management: Work in agile teams to assist in the management of software development processes using established methodologies.

Job & Industry Training

Data Analytics



Programming Fundamentals

Basic Program Writing: Write and execute basic programs using a programming and scripting language such as Java, Python, C#, R or JavaScript.

Programming Concepts: Utilize programming concepts such as data types, variables, conditionals, methods, loops and data structures to solve problems.

Code Update: Read code, understand code logic, and make updates to code to correct or enhance its function.

Development Environment: Navigate and work with the common components of a software development environment, including IDE, frameworks, and libraries.

Code Error Identification: Identify software issues through code reviews and utilize IDE tools to debug and resolve issues.

Software Development Fundamentals

Version Control System: Utilize basic features of a version control system (Git, CVS, Subversion, etc.), including command line & GUI tools.

Software Methodology: Apply basic concepts, tools, and processes of common SDLC methodologies such as Agile/Scrum or Waterfall.

Problem Analysis: Navigate a multilayer, ambiguous problem by clarifying the problem statement and objectives, breaking it down into discrete components, identifying assumptions, setting strategies for validating and building clarity, understanding audience, applying root cause analysis, and developing possible solutions.

Data Management, Analysis & Reporting

Data Loading, Cleaning & Organizing: Navigate steps in data preparation, and load, clean, validate, and organize business data sets using Excel.

Data Analysis Fundamentals: Navigate the data ecosystem, data analysis terminology, and describe the role of data and data analysis in business.

Data Visualization: Use data visualization tools such as Tableau, Power BI, and Excel to source data, create data visualizations, and build interactive shareable dashboards.

Data Reporting & Storytelling: Use common data visualization and business tools such as Tableau, Power BI, PowerPoint, and Excel to develop and present reports that demonstrate effective storytelling with data.

Intermediate Data Analysis: Leverage data analysis tools in Excel (e.g., Sorting, Filtering, Conditional Formatting, Formulas, Charts, Tables, VLOOKUPS, and PivotTables) to identify, analyze, and interpret trends, patterns, or insights and make business-related inferences about data.

Database Management

Database Design & Modification: Design, build, populate, and edit relational databases, apply data normalization practices and utilize appropriate keys and constraints.

Query Writing: Construct and execute basic SQL commands to answer questions with a database.

Data Governance: Communicate the benefits of data governance and the methods by which an organization can ensure high quality governance throughout the lifecycle of data.

Computer Architecture & Systems Fundamentals

Computer Systems: Navigate computer systems with focus on operating systems (Windows, Linux and Mac), servers, and cloud infrastructure.

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Workplace Collaboration: Contribute meaningfully to meetings, while demonstrating initiative and leadership.

Technology Essentials: Utilize common email, editing, and conferencing tools in a business setting.

Data Analysis: Gather and analyze data to drive business insights and enable decision-making.

Workplace Navigation: Display self-advocacy when communicating about challenges and expectations.

Self-Development: Identify and implement strategies that target improvement on strength and growth areas.


Hands-On Experience

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 BANK OF AMERICA

 exelon™

JPMorganChase

 Fannie Mae

 LinkedIn

Career Pathways

Our training is designed to prepare participants for various roles in data analytics, including:

Data Preparation: Import data from spreadsheets or data storage systems, use data preparation tools, and apply techniques to clean, validate, transform and load data into appropriate systems for analysis.

Data Analysis & Reporting/Business Intelligence: Import data from spreadsheets or data storage systems, analyze data, and build reports or presentations to summarize findings and support business decisions.

Database Development: Use SQL and programming languages such as Python to modify or edit databases, design, build new databases, build tools and scripts to query databases in an efficient manner, and troubleshoot issues in databases.

Quality Assurance



➤ Programming Fundamentals

Basic Program Writing: Write and execute basic programs using a programming and scripting language such as Java, Python, C#, R or JavaScript.

Programming Concepts: Utilize programming concepts such as data types, variables, conditionals, methods, loops and data structures to solve problems.

Code Update: Read code, understand code logic, and make updates to code to correct or enhance its function.

Development Environment: Navigate and work with the common components of a software development environment, including IDE, frameworks, and libraries.

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➤ Software Development Fundamentals

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Software Solutions: Articulate software solutions to business problems, using design tools such as flow charts, decision trees, or pseudocode.

Software Release: Navigate the terminology and architecture of software release management infrastructure and common processes.

Software Methodology: Apply basic concepts, tools, and processes of common SDLC methodologies such as Agile/Scrum or Waterfall.

Problem Analysis: Navigate a multilayer, ambiguous problem by clarifying the problem statement and objectives, breaking it down into discrete components, identifying assumptions, setting strategies for validating and building clarity, understanding audience, applying root cause analysis, and developing possible solutions.

➤ Quality Assurance & Software Testing

Software Test Writing & Execution: Utilize software testing concepts and techniques, including the development of unit tests, to validate code.

Test Plan Design, Execution & Reporting: Construct, execute, and report on test plans for a software solution.

Bug Report Writing: Construct and organize clear, detailed and accurate bug reports.

User Interface Design: Interpret a software design that includes user interface design.

➤ Database Fundamentals

Databases: Navigate a basic relational database design including tables, keys, constraints, indexes and normalization.

Basic Query Writing: Construct and execute basic SQL commands to answer questions with a database.

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Data Analysis: Gather and analyze data to drive business insights and enable decision-making.

Workplace Navigation: Display self-advocacy when communicating about challenges and expectations.

Self-Development: Identify and implement strategies that target improvement on strength and growth areas.

Hands-On Experience

With access to an internship or job placement, participants are able to put their skills into practice. Example employer partners include:

 accenture

 Microsoft



Morgan Stanley

Career Pathways

Our training is designed to prepare participants for various roles in quality assurance, including:

Software Testing & Automation: Build and execute automated test scripts in order to verify and validate the function of software systems.

Quality Assurance Analysis: Ensure the reliability, precision, and accuracy of software releases by applying software quality assurance practices throughout the software development life cycle process.



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Pathways