Year Up United | Career Pathways

Training Offerings Catalog
Specialty Trainings

February 2025 Edition

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Foundational Training for All Career Pathways & Specialties

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Essential Skills

Through our Essential Skills training, participants develop career readiness skills that prepare them to navigate today's modern workplace. Areas of focus include interpersonal dynamics, effective communication and collaboration, workplace norms, and common business tools.

Artificial Intelligence

AI Fundamentals: Demonstrate understanding of the concept of AI, branches of AI; and AI terminology commonly used in the workplace; explain how AI might be applicable to internship roles and job placements.

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

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

Generative AI (GenAI) Fundamentals: Identify safe, appropriate use of GenAI, including legal and ethical considerations in the workplace; explain unsafe or inappropriate usage (proprietary/private data use).

Generative AI Application: Utilize tools that use AI such as meeting assistants, writing assistants, and resume builders to improve work efficiency.

Generative AI Usage: Write effective prompts for GenAI using prompt engineering patterns that produce valid and pertinent results.

AI Problem Formulation: Formulate problem statements with context, data, and objectives in which GenAI can be used to solve the problem.

AI Output Validation: Check the output of GenAI for bias, hallucination, and accuracy through independent verification; differentiate output generated by AI and their own work.

Business Communications

Email Communications: Follow communication norms (on-time replies, message appropriateness) and utilize composition best practices (formatting, signature, brevity).

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

Public Speaking: Utilize 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: Demonstrate SLANT, work-ready attire, appropriate video background, and clear audio/video connection in meetings.

Punctuality & Preparedness: Sign-in to meetings on time, arrive prepared, and provide deliverables and emails in a timely fashion.

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

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

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

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

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

Goal Setting & Execution: Articulate goals, define a plan of action for completing tasks and deliverables, and demonstrate progress toward set goals.

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

Career Preparation

Skill Mapping & Storytelling: Communicate how their skills development, experiences, and network prepares them for specific jobs, career paths, and/or industries.

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

Data Analysis

Spreadsheet Use: Utilize 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: Utilize 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

Technology Foundations: Demonstrate understanding of terminology, definitions, and applications within technology topics (data, cloud, security, Agile).

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

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

Editing Presentations: Utilize 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.

Calendar Use & Management: Utilize common calendar management tools like Microsoft Outlook to track daily appointments and schedule meetings; factor in availability and scheduling conflicts, set vacation and time-off, track and manage meeting attendance, and update meeting invites.

Email Use & Management: Utilize 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.

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

Self-Awareness & Self-Development

Self-Regulation: Identify and regulate thoughts and emotions to maintain positive composure and uphold work-ready behaviors with minimal prompting.

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

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

Workplace Collaboration & Productivity

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

Workspace Presence: Demonstrate an available and online presence and attend all expected meetings.

Work Quality: Produce deliverables, participate in activities, and deliver presentations that demonstrate attention to detail and exceed expected quality.

Meeting Coordination: Manage meeting preparation, scheduling, logistics, and follow up actions (establish meeting time, send out invite/agenda, facilitate meeting, document decisions and action items, send out notes).

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

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

Leadership: Take actions to lead, follow, or delegate as needed; show ability to "step up or step back" to support community growth.

Meeting Participation: Participate in meetings; join on time, display SLANT, and contribute to conversation with clear/confident communication.

Leveraging Feedback: Provide feedback to peers, seek out opportunities to receive feedback, and show clear conversion on received feedback.

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

Workplace & Career Readiness

Job Searching and Career Advancement

Through our Job Searching & Career Advancement training, participants leverage hands-on experiences to develop job searching and career advancement skills. Areas of focus include resume and LinkedIn profile creation, interviewing, network building, and negotiation.

Career Advancement

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

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

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

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

Professional Brand Building & Nurturing: Articulate a brand statement such as an elevator pitch, refine public LinkedIn profile, and solicit and utilize colleague feedback to identify areas of development.

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

Career Exploration

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

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

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

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

Job Searching & Securing

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

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

Job Search Planning & Tracking: Construct, execute, and track all aspects of job searching, artifact building, and prospective job application.

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

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

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

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

Negotiation: Utilize 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: Establish a clear plan for navigating a new job, including learning norms and expectations, setting PD goals, establishing key relationships, and identifying support and resources.

Business Operations

Business Foundations & Navigation

Business Operations: Describe core business functions such as finance, operations, marketing, and human resources, related terminology, and their interrelationships in driving organizational success.

Business Ethics: Apply fundamental ethical principles in business activities, promoting integrity, compliance, and ethical workplace decision-making.

Economic Concepts: Explain macroeconomic ideas (scarcity, opportunity cost, supply, demand, incentives).

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 nuture relationships, earn trust and credibility, and develop rapport.

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

Customer Problem Identification: Use effective inquiry, problem-solving, and research 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.

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.

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.

Project Management System Navigation: Navigate the basic features of a project management system, to be able to enter project information, interpret data within the system, and leverage basic reports.

Data Management, Analysis & Reporting

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

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

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

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

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.

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: Use common email, editing, and conferencing tools and leverage AI 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**   **HARVARD** UNIVERSITY   **Citizens**   **Mass General Brigham**

Role Pathways

Our training is designed to prepare participants for various roles in business operations, 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, ensuring that all required documentation and signatures are in place prior to submitting the loan for approval; work 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 managment 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.

Data Analysis & Reporting/Business Intelligence: Import data from spreadsheets or data storage systems, analyze data and interpret trends or insights, and build reports or presentations to summarize findings and help the business make informed decisions.

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

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 and present reports that demonstrate effective storytelling with data.

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

Investment Operations Fundamentals

Investment Product Presentation: Clearly describe the key 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.

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.

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: Use common email, editing, and conferencing tools and leverage AI 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   Fidelity   JPMorganChase   BNY   Citizens

Role Pathways

Our training is designed to prepare participants for various roles in financial operations, 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.

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 feasability studies to evaluate project prioritization.

Project Management Concepts Navigation: Apply concepts like Integation, 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 Artifcant 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: Use common email, editing, and conferencing tools and leverage AI 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:

Role 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.

Specialty 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 nuture relationships, earn trust and credibility, and develop rapport.

Navigation of Challenging Customer Behvaiors: 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.

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.

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

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

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

Technology Essentials: Use common email, editing, and conferencing tools and leverage AI in a business setting.

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**   **us bank**

Role 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.

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

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

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.

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.

Challenging Customer Behvaiors Navigation: Apply strategies like empathy for handling objections and responding to challenging customer behaviors, with resilience to bounce back and ensure a high-quality customer experience.

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

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 while demonstrating flexibility in handling off-script customer interactions.

Escalation: Identify the need for escalation and when appropriate, 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 notes for customer interactions to support the ease of issue transfer and/or cross-selling.

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

CRM System Navigation: Utilize CRM systems to identify, input, and update customer information, build and export lists, create reports, document notes, move customer records through an engagement cycle, interpret business tasks that require CRM system interaction, and execute queries to complete them.

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: Use common email, editing, and conferencing tools and leverage AI 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   NEW YORK LIFE   Morgan Stanley

Role Pathways

Our training is designed to prepare participants for various roles in client services, 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.
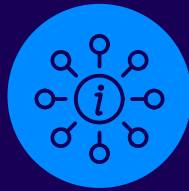
Computer Architecture & Systems Fundamentals

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.

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 (Zendesk, Remedy).

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.

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, then identify and report basic errors and security issues.

Computer Network Configuration: Build out the physical and software configuration of basic computer networks (peer-to-peer LAN, 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, and device, process, memory, and user account management.

Active Directory Navigation: Navigate 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 the basic features of internet configuration options (security, privacy, content, connections, favorites) to configure internet settings on a desktop.

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.

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

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

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

Technology Essentials: Use common email, editing, and conferencing tools and leverage AI in a business setting.

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:

Role Pathways

Our training is designed to prepare participants for various information technology roles, including:

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

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

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

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.

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

Network Security & 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 protocols and system tools to monitor computer system diagnostics, then identify and report basic errors and security issues.

Computer Network Configuration: Build out the physical and software configuration of basic computer networks (peer-to-peer LAN, 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 like backup, restore, imaging, partitioning, defragmentation, compression, encryption, and device, process, memory, and user account management.

Active Directory Navigation: Navigate 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 threats to the services, devices, traffic, and data.

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

Scripting: Use basic 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 simple queries in a data query language like SQL to answer questions around 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.

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

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

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

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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:

Role Pathways

Our training is designed to prepare participants for various information technology roles, 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.

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

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

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

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 software development environment components, including IDE, frameworks, and libraries.

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

Computer Science Fundamentals: Apply fundamentals of algorithms, data structures, and problem solving to develop efficient and effective solutions.

Software Development Fundamentals

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

Problem Analysis: Clarify the problem statement and objectives, break down into discrete components, identify assumptions, set strategies for validating, understand audience, apply root cause analysis, and develop possible solutions to navigate a multilayer, ambiguous problem.

Software Methodology: Use concepts, processes, and tools of common SDLC methodologies (Agile/Scrum, Waterfall).

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

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

Application Development

Intermediate Program Writing: Write and execute intermediate programs (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.

Computer Architecture & Systems Fundamentals

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

Cloud Fundamentals: Leverage cloud platforms and services to deploy, manage, and scale applications in distributed environments.

Software Engineering: Navigate how software engineering practices assist in the design and the implementation of software solutions, using modern program languages and development methodologies.

AI for Application Development

Best Practices: Identify use cases for AI in software to increase efficiency and eliminate repetitive manual work; describe risks of using AI and how to mitigate such risks.

Coding Prompts: Write effective prompts to generate code for solving an application development problem.

Code Validation: Analyze AI generated code for accuracy, precision, quality; identify errors in logic and/or solution.

Code Analysis: Compare code written by AI against independently written code and identify differences in logic to solve a given problem.

Database Fundamentals

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

Database Literacy: Navigate a basic relational database design (tables, keys, constraints, indexes, normalization).

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

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Technology Essentials: Use common email, editing, and conferencing tools and leverage AI in a business setting.

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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   Fidelity   Linked in   Deloitte.

Role Pathways

Our training is designed to prepare participants for various roles in software and application 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, and make incremental changes, debug issues, apply fixes, and maintain server/cloud infrastructure and applications.

Quality Assurance Analysis: Work in agile teams to ensure the quality of systems throughout the software development life cycle (requirements gathering, design analysis, testing, release), build and execute test plans, and document results.

Production Support: Assist with identifying and resolving issues with software systems in production, communicate findings and resolution with end users, 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.

Software Testing & Automation: Work in agile teams to build automated test scripts to verify and validate the function of software systems, execute automated tests, and document results.

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), 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 like 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 (Sorting, Filtering, Conditional Formatting, Formulas, Charts, Tables, VLOOKUPs, PivotTables) to identify, analyze, and interpret trends, patterns, or insights and make business-related inferences.

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.

AI for Data Analytics

Terminology: Understand structured and unstructured data terminology and the type of data needed to train Large Language Models (LLMs).

Considerations for Use: Describe how data used to train an LLM can result in AI hallucination or bias and how to mitigate these weaknesses.

Programming Concepts: Articulate and use basic computing data structures and algorithms.

Data Security: Describe security concerns and risks that need to be mitigated with data used to train AI, such as protecting sensitive data or data containing personal identification information.

Computer Architecture & Systems Fundamentals

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

Workplace & Career Readiness Skills

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

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Hands-On Experience

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JPMorganChase   Linked in   exelon   MERCK   UNITED

Role Pathways

Our training is designed to prepare participants for various roles in data analysis and business intelligence, 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.

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.

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.