yearup

TRAINING SPECIALTIES

AS OF JUNE 2020

YEAR UP TRAINING SPECIALTIES & CURRICULUM

Year Up's Standard Training includes the general professional and business communications skills training that all students receive regardless of their Training Track and Specialty. This Standard Training spans across five key areas: business writing, career development, computer applications, advanced Microsoft Excel, and public speaking.

BUSINESS WRITING:

- Incorporate feedback on grammar, organization, and structure into writing; write more clearly and effectively through practice, feedback, and revision
- Generate ideas, drafts, outlines, and revisions in a timely and creative manner
- Write proposals, presentations, reports, resumes, cover letters, emails, and reports in a professional manner
- Proofread to identify and use the qualities associated with business communication
- Collaborate productively with others in completing group projects and assignments

PUBLIC SPEAKING:

- Identify and illustrate an understanding of the nature and process of oral communication
- Develop effective organizational strategies for oral communication
- Utilize modes of gaining and retaining audience attention for varying settings
- Learn and practice various types of nonverbal communication
- Deliver an informative, a persuasive, and a special occasion speech
- Identify and implement strategies for combatting nerves and stage fright

CAREER DEVELOPMENT:

- Understand the principles and techniques of effective communication & multiple learning styles
- Apply professional communication strategies to working in a team and with a supervisor, managing workplace conflict, and professional etiquette
- Refine professional portfolios through creation of effective cover letters, resumes, networking pitches, social media profiles, and action plans that reflect immediate and long-term professional goals
- Identify & apply principal components of effective interviewing; interview preparation, effective non-verbal behaviors, and interview follow-up

ADVANCED EXCEL:

- Apply logical, statistical, financial, & date functions to data; apply H/VLOOKUP to find an approximate or specific match based upon conditions
- Apply data validation techniques to reduce errors in data entry
- Export and import data to and from various formats
- Create and modify basic pivot charts and tables
- Record basic Excel macros to automate sequences

COMPUTER APPLICATIONS:

- Perform basic file management operations
- Manage Outlook environment, messages and schedules
- Create, format, and edit business documents including reports, business letters and newsletters
- Create, format and edit spreadsheets; use formulas and functions to compute and analyze data

BUSINESS OPERATIONS TRACK FAMILY

Business Fundamentals Training Specialty

Project Management Support Training Specialty

IN-DEMAND SKILLS TRAINING
BUSINESS FUNDAMENTALS

SPECIALTY LEARNING OBJECTIVES

- Broad set of courses in business that align to business degree requirements • Build broad skills in business; may include courses in one or more of the following areas: customer service, project management, personal finance, data analysis, public speaking, marketing, accounting, and business ethics/law

SKILLS DEVELOPMENT: WHAT STUDENTS LEARN

BUSINESS FUNDAMENTALS

- Demonstrate knowledge of basic business concepts and terminology; understanding of the management function, accounting, and basic financial activities
- Understand the role of the marketing function within business, including promotion, selling, merchandising, distribution and producing goods and services
- The importance of ethical issues and social responsibility in business operations
- How to use technology to manage business information
- Examine human resource management and motivation
- How businesses create value in the marketplace and to shareholders

BUSINESS OPERATIONS

- Compile, organize and create correspondence, forms, and reports; analyze and interpret data, information and situations
- Compose correspondence, create and maintain spreadsheets to provide current and concise information that is easily accessible
- Utilize business object reports and data feeds to ensure proper postings of information
- Prepare statistical tables, charts and reports, workflow charts, staffing patterns, and organizational charts
- Understand planning and implementation of new or revised programs, procedures, and organization practices

The Business Fundamentals specialty is designed to provide training pathway options that support a diverse range of internships in business operations. Students at a campus co-located within a community college are enabled to take a broad array of courses aligned with business degree requirements, and students at a standalone location are enabled to take a number of introductory courses to build skills in a broad area, including:

INTRODUCTION TO PROJECT MANAGEMENT

- Key tools (Gantt charts, Microsoft Project), methodologies (Agile, Scrum), and common methods
- Strategies for planning a project: work breakdown structure (WBS) and timeline, calculating task estimates, managing task dependencies, tracking progress, identifying/managing risks, & defining/measuring goals
- Common communication artifacts and tools for executing a project: project plan, statement of work (SOW), status reports, meeting notes, etc.

INTRODUCTION TO CUSTOMER SERVICE

- Communicate effectively and build rapport during phone, in-person, & written customer interactions
- Handle objections and respond to challenging customer behaviors; leverage call scripts & call-handing techniques
- Problem solving, effective inquiry and research to understand a customer's needs, motivations, and challenges and translate into possible solutions

PERSONAL FINANCE

- Practice fiscally responsible spending habits
- Develop a budget; create a plan for building/rebuilding personal credit and savings plan for the future
- Basics of investing and types of retirement accounts
- Compare/contrast types of mutual funds

BUSINESS FUNDAMENTALS TRAINING AT WORK

TYPICAL JOB TASKS

- Complete administrative tasks that aid daily operations of an organization
- Help a team complete a project within its scope, schedule, and budget
- Evaluate business processes, identifying areas for increased efficiency
- Provide research and clerical support to underwriters, to determine if a client qualifies for insurance policies, loans, or other financial services

EXAMPLE TEAMS HOSTING INTERNS

- Human Resources
- Operational and Administrative Support
- Back Office Financial Services

EXAMPLE PARTNER COMPANIES

BANK OF AMERICA

KAISER PERMANENTE.

JPMORGAN CHASE & CO.

MEETING PARTNER DEMAND: BUSINESS FUNDAMENTALS ROLE PATHWAYS

To best serve the different types of roles that our corporate partners need, Year Up has designed its specialty training curriculum to enable entry and succession in a variety of role pathways. These pathways reflect the variety of entry-level roles that Year Up interns and graduates of a particular specialty are equipped to fill.

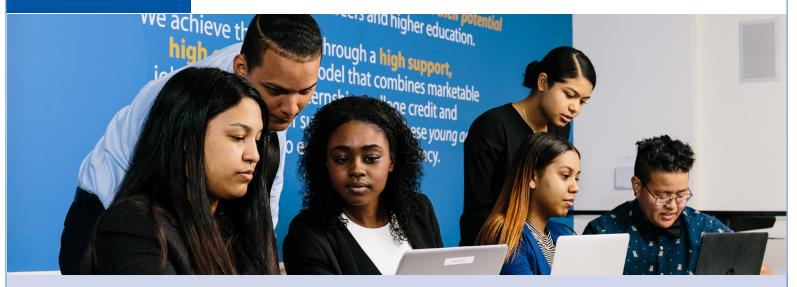|	
OPERATIONS ASSISTANT	Interns in these roles provide various types of assistance to employees. They may carry out tasks for one or many individuals within a department or cross-department work, including accounting, data entry, billing, inventory, record keeping, correspondence and sales.
HR COORDINATOR	Interns in these roles administer a variety of human resources activities and programs, including those related to staffing, compensation, benefits, training & workplace safety. The job requires managing new hire orientations, human resources events and open enrollment for benefits such as health insurance.
ADMINISTRATIVE COORDINATOR	Interns in these roles provide support to company employees, serving as a link between departments, vendors and staff members. They help organize, supervise and facilitate the work among employees as well as provide specialized support to workers.
COLLECTIONS	Interns in these roles specialize in the collection of debt owed to their organization. They use a variety of means to contact individuals who have defaulted on debts and/or who have not paid past due bills.
LOAN PROCESSOR	Interns in these roles manage the administrative tasks associated with loans or mortgages. They ensure that all required documentation and signatures are in place prior to submitting the loan for approval and work closely with mortgage loan supervisors, appraisers, underwriters and others involved in the loan process.

PROJECT MANAGEMENT SUPPORT

SPECIALTY LEARNING OBJECTIVES

- Project management techniques, tools, terminology and concepts
- Familiarity with analytical frameworks
- Project management tools such as Gantt charts and Microsoft Project

SKILLS DEVELOPMENT: WHAT STUDENTS LEARN

PROJECT MANAGEMENT SUPPORT

- Importance of project management in any industry, what it means to be effective in managing a business project, and how skills in apply to different business roles
- Basic concepts and common methods of project management, including: the ten project knowledge areas, the five phases of the project management lifecycle, the triple constraints (scope, time, cost), project selection criteria, and project evaluation methods
- Common roles and responsibilities within a project team and common tools and techniques teams use to collaborate
- Strategies for planning a project: developing a work breakdown structure (WBS), developing a timeline, calculating task estimates, managing task dependencies, tracking progress, and identifying/managing risks
- Common communication artifacts and tools for executing a project: project plan, statement of work (SOW), status reports, meeting notes, email correspondence and calendaring
- Features of a common industry-standard project management tool (i.e. Microsoft Project) and how they are used to support the execution of a project (timeline and stakeholder management, conflict resolution)
- Differences between waterfall and agile methodologies and common tools utilized (i.e. Scrum and Kanban), common project team roles, and when each methodology should be used in project management

BUSINESS FUNDAMENTALS

- Demonstrate knowledge of basic business concepts and terminology; understanding of the management function, accounting, and basic financial activities
- Understand the role of the marketing function within business, including promotion, selling, merchandising, distribution and producing goods and services
- Demonstrate an understanding of the importance of ethical issues and social responsibility in business operations
- How to use technology to manage business information
- Examine human resource management and motivation
- How businesses create value in the marketplace and to shareholders

BUSINESS OPERATIONS

- Compile, organize and create correspondence, forms, and reports
- Analyze and interpret data, information and situations
- Compose correspondence, create and maintain spreadsheets to provide current and concise information that is easily accessible
- Utilize business object reports and data feeds to ensure proper postings of information
- Prepare statistical tables, charts and reports, workflow charts, staffing patterns, and organizational charts
- Understand planning and implementation of new or revised programs, procedures, and organization practices

PROJECT MANAGEMENT SUPPORT TRAINING AT WORK

TYPICAL JOB TASKS

- Help prepare project proposals, timeframes, schedule, and budget
- Act as key contact and communicate project status to participants
- Support Project Manager in the successful planning and execution of a project

EXAMPLE ROLES FILLED BY GRADUATES

- Project Support Analyst
- Junior Project Analyst
- Business Controls Specialist
- Project Coordinator
- Administrative Associate
- Administrative Coordinator

EXAMPLE PARTNER COMPANIES

salesforce

FACEBOOK

KAISER PERMANENTE

HARVARD UNIVERSITY

MEETING PARTNER DEMAND: PROJECT MANAGEMENT ROLE PATHWAYS

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PROJECT SUPPORT	Project Support interns work under a project manager. They may be required to maintain the calendar and schedule of the projectand important tasks including planning the project, delegating responsibilities, assigning budgets and schedules, overseeing meetings and ensuring that all projects are completed within deadlines. The major duties of this job are creating reports and presentations, as well as serving as liaisons between the employees and anyone involved in the project, such as executives and stakeholders. Interns may also be required to set up travel plans, schedule meetings, file expense reports, and allocate resources between different departments. Interns must be well organized, capable of working under pressure, able to multitask, and attention to detail and a patient demeanor are very important.

FINANCIAL OPERATIONS TRACK FAMILY

Accounting & Corporate Finance Training Specialty

Investment Operations Training Specialty

ACCOUNTING & CORPORATE FINANCE

SPECIALTY LEARNING OBJECTIVES

• Demonstrate foundational accounting skills including recording transactions in a ledger, preparing trial balances, & using accounting applications • Critically assess the financial status of a business & communicate insights to stakeholders
• Clean, analyze, visualize, & present financial data to stakeholders • Document & analyze financial processes

SKILLS DEVELOPMENT: WHAT STUDENTS LEARN

FINANCIAL ACCOUNTING

- Key components of the accounting cycle, including recording transactions, preparing trial balances, adjusting entries, closing entries, and financial statements
- Identify the correct account code for common transactions and use accounting principles to record transactions in general ledger
- Analyze trial balances to identify discrepancies and utilize accounting records to find, correct, and confirm the cause of discrepancies
- Interpret example common accounting reports (A/P, A/R, past due, payroll, etc.) and identify their purpose and uses
- Key components of financial statements, including balance sheets, income statements, and cash flow statements
- Utilize basic features of computer applications such as Excel and Quickbooks to develop and maintain accounting records and reports
- Document and analyze representative accounting and corporate finance processes

FINANCIAL ANALYSIS SKILLS

- Review financial statements and financial data; identify trends and outliers to pull out insights
- Key factors and associated metrics (such as ratios) that can be used to understand the financial health of a business
- Utilize common formats and industry best practices to interpret and build a basic budget
- How financial data and financial reports are used in managerial decision-making

FINANCIAL KNOWLEDGE

- Understand the role of accounting, finance, risk management, and compliance, and associated back and middle office functions in running a business across industries
- Explain the role of various types of financial institutions in the marketplace
- Explain terminology associated with accounting and financial reporting across industries
- Apply foundational principles of accounting and financial reporting
- Articulate how to critically assess the financial status of businesses across industries

BUSINESS ANALYSIS SKILLS

- Document business processes using process flows
- Analyze business processes to understand issues, possible solutions, and requirements to implement solutions
- Articulate knowledge of business process automation techniques and tools
- Coordinate internal stakeholders towards a goal
- Communicate effectively in person, by phone, and in writing with internal and external clients

DATA ANALYSIS SKILLS

- Clean, organize, and analyze large data sets to identify key insights and trends
- Create reports from data to visualize key insights and communicate key insights to stakeholders
- Utilize Microsoft Excel features and functions to organize, format, and analyze data

ACCOUNTING & CORPORATE FINANCE TRAINING AT WORK

TYPICAL JOB TASKS

- Assist accountants with routine tasks such as verifying, allocating, and posting transactions to the general ledger, preparing trial balances, and preparing financial reports
- Verify and prepare bills and invoices
- Prepare reports and analyze data for a corporate finance department
- Prepare investment and cash reports
- Assist grants administrators by setting up accounts and entering grant information into system

EXAMPLE TEAMS HOSTING INTERNS

- Accounting
- Billing & Financial Processing
- Grants Administration
- Finance
- Billing

EXAMPLE PARTNER COMPANIES

BNY MELLON

BANK OF AMERICA

wayfair

CVS Health

HARVARD UNIVERSITY

MEETING PARTNER DEMAND: ACCOUNTING & CORPORATE FINANCE ROLE PATHWAYS

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ACCOUNTING CLERK/ASSOCIATE/ASSISTANT/ BOOKKEEPER	Interns assist accountants with tasks such as verifying, allocating, and posting transactions to the general ledger and preparing trial balances and financial reports.
ACCOUNTS PAYABLE/RECEIVABLE SUPPORT	Interns process money owed to or by a company by verifying and preparing bills and invoices, entering into the accounting system, ensuring payments are made and processed in a timely manner, and creating related reports.
BILLING/PAYROLL/PURCHASING SPECIALIST	Interns perform specialized accounting functions such as customer billing, processing expense reports/timesheets, or vendor maintenance and related invoicing.
FINANCIAL REPORTING/DATA/BUDGET ANALYST	Interns prepare and review reports, reconcile accounting discrepancies, analyze data, and develop/maintain budgets to support corporate finance departments.
TREASURY ANALYST	Interns provide support for an organization's cash management by preparing investment and cash reports and analyzing data related to cash management.
MEDICAL BILLER	Interns implement policies and procedures related to patient billing and physician reimbursement in a medical office, hospital, or healthcare facility setting.
GRANTS ADMINISTRATION	Interns support grants administrators by setting up new funder accounts, entering and updating grant data, or verifying that grants meet requirements.

INVESTMENT OPERATIONS

SPECIALTY LEARNING OBJECTIVES

• Follow policies/procedures to execute investment operations • Describe key players in the capital markets and their roles • Demonstrate basic knowledge of accounting, financial reporting, and investment products • Document and analyze financial processes • Communicate effectively with stakeholders • Clean, analyze, visualize, and present financial data to stakeholders

SKILLS DEVELOPMENT: WHAT STUDENTS LEARN

INVESTMENT OPERATIONS

- Differentiate roles of participants in the investments/securities arena and how they interact with each other
- Understand equity (stock) and fixed income (bonds) and what it means to own and sell equity/fixed income in a company from the perspective of investors and issuers
- Understand key terms of a security and a securities sale; types of investment funds and the differences between them
- Role of regulators of the securities industry, the SEC and Federal Reserve in particular
- Investment operations functions, roles and responsibilities within them, and how these functions interact with investment arena participants
- Articulate and use industry terminology associated with securities and investments of businesses across industries

DATA ANALYSIS SKILLS

- Clean, organize, and analyze large data sets to identify key insights and trends
- Create reports from data to visualize key insights and communicate key insights to stakeholders
- Utilize Microsoft Excel features and functions to organize, format, and analyze data

FINANCIAL KNOWLEDGE

- Understand the role of accounting, finance, risk management, and compliance, and associated back and middle office functions in running a business across industries
- Explain the role of various types of financial institutions in the marketplace
- Explain terminology associated with accounting and financial reporting across industries
- Apply foundational principles of accounting and financial reporting
- Articulate how to critically assess the financial status of businesses across industries

BUSINESS ANALYSIS SKILLS

- Document business processes using process flows
- Analyze business processes to understand issues, possible solutions, and requirements to implement solutions
- Articulate knowledge of business process automation techniques and tools
- Coordinate internal stakeholders towards a goal
- Communicate effectively in person, by phone, and in writing with internal and external clients

INVESTMENT OPERATIONS TRAINING AT WORK

TYPICAL JOB TASKS

- Update daily fund pricing; monitor fund cash and custody activity and prepare fund reports
- Take in/execute operational requests from clients; process wires and trades
- Identify and remediate breaks between systems
- Analyze data relating to business processes; communicate business process improvement requirements to a technology team
- Assist wealth managers with trust operations

EXAMPLE TEAMS HOSTING INTERNS

- Reporting & Data Verification
- Billing & Financial Processing
- Fund/Portfolio Administration
- Trust Operations

EXAMPLE PARTNER COMPANIES

BNY MELLON

BANK OF AMERICA

JPMorgan Chase & Co.

MEETING PARTNER DEMAND: INVESTMENT OPERATIONS ROLE PATHWAYS

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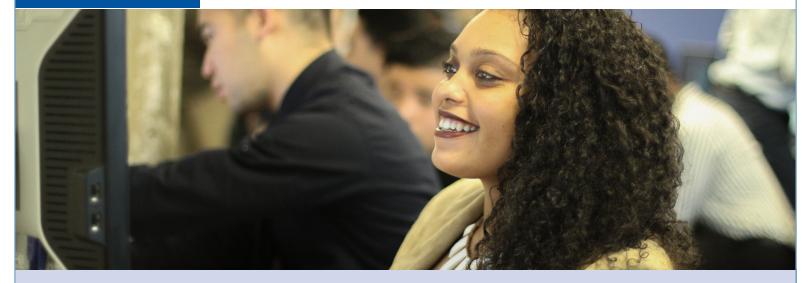|	
FUND/PORTFOLIO ACCOUNTING/ ADMINISTRATION	Interns perform administrative functions on behalf of fund clients; recording and reconciling securities held, preparing reports, collecting payments, and calculating pricing.
RECONCILIATION ANALYST	Interns analyze and remediate exceptions and breaks that occur due to differences in multiple IT systems.
BUSINESS/PROCESS ANALYST	Interns analyze and improve business functions and processes, including analyzing data, identifying and sharing improvement requirements to technology teams, and tracking/communicating progress of change initiatives.
CLIENT SERVICES SUPPORT	Interns interface with investment clients or client-facing teams to provide operational support, such as account openings, customized reporting, and coordinating with internal teams on client requests.
TRANSACTION PROCESSING	Interns 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.
WEALTH/PORTFOLIO MANAGEMENT OPERATIONS	Interns provide operational support to wealth and portfolio managers, including acting as a liaison to custody/ compliance teams, ensuring account maintenance, ensuring proper trade processing, and assisting with research or other requests.

INFORMATION TECHNOLOGY TRACK FAMILY

Cyber Security Training Specialty

Helpdesk/Desktop Support Training Specialty

CYBER SECURITY

SPECIALTY LEARNING OBJECTIVES

- The business context and need for cyber security
- Organizational security policy
- How networks work and how to protect them
- Techniques to secure network communications

SKILLS DEVELOPMENT: WHAT STUDENTS LEARN

CYBER SECURITY

- How a security infrastructure is monitored
- Organizational security policy elements, and the measures needed to enforce it
- The importance of cyber security to businesses and government organizations
- How to identify and explain common TCP and UDP ports, network protocols, & their purpose
- Features and techniques needed to secure network communications
- Fundamentals of risk management and incident detection; identifying network monitoring tools
- Understanding of intrusion Detection System (IDS) and Intrusion Prevention Systems (IPS); vulnerability scanning and penetration testing
- Identify threats to network services, devices, traffic, and data
- Understanding of vulnerability, URL manipulation, SQL injection, XSS (cross-site scripting), & spoofing
- Articulate common causes for company vulnerabilities; design & development errors, poor system configuration, human errors, connectivity, passwords, and system complexity

COMPUTER HARDWARE

- Identify the major components of a personal computer; assembly and disassembly
- Install, configure, and troubleshoot motherboards, disk drives, expansion cards, ports, and other peripherals in a personal computer
- Understand and apply the fundamentals of networking, including IP addressing, subnetting, ports, MAC addressing, & securing wireless networks; set up, configure, & troubleshoot personal wireless networks
- Diagnose and troubleshoot common hardware and software issues using a troubleshooting methodology and/or IT industry standard program
- Identify and apply appropriate customer service strategies that foster customer satisfaction
- Navigate an industry standard ticketing system (i.e. Zendesk) while learning to track and record customer problems throughout the ticketing process

COMPUTER NETWORKING SYSTEMS

- Identify and categorize network cables and connectors
- Demonstrate knowledge of the use of standards for cabling runs terminated at a wiring closet patch panel
- Completely set up a functioning peer-to-peer LAN, troubleshoot LAN operations, and choose appropriate LAN topology for a given physical and logical design
- Identify and explain common TCP and UDP ports, protocols, and their purpose; identify types of networks
- Design a workable set of IP addresses for a given set of networks
- Distinguish between number of bits, format, and addressing capability of IPv4 vs. IPv6

CYBER SECURITY TRAINING AT WORK

TYPICAL JOB TASKS

- Assist with developing security policies and procedures
- Configure and support security tools such as firewalls and anti-virus software
- Create training materials to inform users of secure practices
- Perform secuity upgrades
- Identify and report abnormalities in network activity

EXAMPLE TEAMS HOSTING INTERNS

- Compliance
- Incident Monitoring
- Security Awareness and Training

EXAMPLE PARTNER COMPANIES

BNY MELLON

MCKESSON

Capital One®

BANK OF AMERICA

MEETING PARTNER DEMAND: CYBER SECURITY ROLE PATHWAYS

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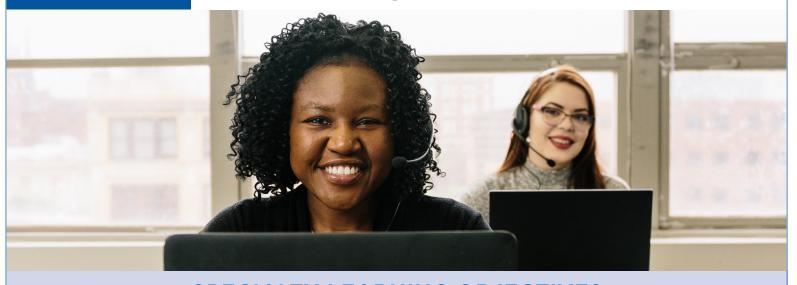|	
INCIDENT MONITORING & RESPONSE	Interns in these roles perform tasks that Involve monitoring traffic, entering tickets when incidents occur, and responding to our escalating tickets.
SECURITY OPERATIONS CENTER (SOC) ANALYST	Interns in these roles help organizations secure themselves against cyber attacks by effectively communicating, executing and monitoring cyber security protocols.
PENETRATION TESTING	Interns perform security tests on networks, web-based application and computer systems. They design tests and tools designed to break into security protected applications and networks to probe for vulnerabilities.
COMPUTER & DIGITAL FORENSICS ANALYST	Interns in these roles perform tasks handling computer hard drives, and storage devices using different computer programs to recover information destroyed on media devices and prepare reports after running software analysis.

HELPDESK/DESKTOP SUPPORT

SPECIALTY LEARNING OBJECTIVES

- Ability to support hardware and operating systems
- Understanding of network protocols, ports, and topologies; standards for cabling
- Set-up and troubleshoot peer-to-peer LAN
- Customer Service skills

SKILLS DEVELOPMENT: WHAT STUDENTS LEARN

OPERATING SYSTEMS

- Perform file management operations
- Explain file attributes and file extensions
- Describe the components of system software and four major functions of an operating system
- Compare types of operating systems to include purpose, limitations, and compatibilities
- Identify requirements needed to install, and upgrade various operating systems
- Install an operating system (physical/virtual)
- Perform functions using the GUI and command line interface in A windows and Linux
- Utilize utility software within the operating system (backup, restore, imaging, device mangagement, defragmentation, process and memory management, and user accounts)
- Utilize windows control panel and administrative tools; and apply preventative maintenance techniques
- Navigate and complete the most common tasks and functions of an industry standard directory service such as active directory

CUSTOMER SERVICE

- Communicate effectively through both oral and written customer interactions
- Maintain professional voice quality throughout telephone communication
- Satisfy customers' needs using active-listening and problem-solving
- Identify and diffuse challenging customer behaviors
- Work toward exceeding customer expectations

COMPUTER HARDWARE

- Identify the major components of a personal computer; assembly and disassembly
- Install, configure, and troubleshoot motherboards, disk drives, expansion cards, ports, and other peripherals in a personal computer
- Understand and apply the fundamentals of networking, including IP addressing, subnetting, ports, MAC addressing, & securing wireless networks; set up, configure, & troubleshoot personal wireless networks
- Diagnose and troubleshoot common hardware and software issues using a troubleshooting methodology and/or IT industry standard program
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HELPDESK/DESKTOP SUPPORT TRAINING AT WORK

TYPICAL JOB TASKS

- Provide first level contact and communicate resolutions to customer issues; properly escalate unresolved queries to the next level of support
- Track, route and redirect problems to correct resources
- Support the maintenance and upgrade of network devices
- Support users with issues involving network connectivity

EXAMPLE TEAMS HOSTING INTERNS

- Application Support
- IT Operations Support
- End-User Support

EXAMPLE PARTNER COMPANIES

BANK OF AMERICA

amazon

FACEBOOK

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MEETING PARTNER DEMAND: HELPDESK/DESKTOP SUPPORT ROLE PATHWAYS

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HELPDESK SUPPORT	Remote support roles that focus on troubleshooting hardware and software issues. There is a focus on customer service and an emphasis on de-escalation.
DESKTOP SUPPORT	Onsite support roles in which the intern is responding to user needs in person. Interns troubleshoot both hardware and software issues. Like helpdesk roles, there is a focus on customer service and an emphasis on de-escalation.
APPLICATION SUPPORT	Often grouped with helpdesk and desktop support roles, interns in these roles help users with specific systems, such as Salesforce, Office, or SharePoint.
TELECOMMUNICATIONS SPECIALIST	Often grouped with helpdesk and desktop support roles, interns in these positions support users with telephone and video products and equipment. The role is customer-facing and includes installation, troubleshooting, repair, maintenance, and inventory.
NETWORK ANALYST	Interns in these roles support users with issues involving email administration, user activation, email group administration, and Active Directory.

SALES & CUSTOMER SUPPORT TRACK FAMILY

Client Services & Sales Support Training Specialty

Customer Service Training Specialty

SPECIALTY LEARNING OBJECTIVES

• Assess customer needs & resolve issues • Engage customers effectively & confidently • Articulate a product's value proposition • Implement cross-selling & upselling opportunities • Build relationships with customers by establishing credibility & rapport • Support the sales function through effective use of CRM reports, data, & research

SKILLS DEVELOPMENT: WHAT STUDENTS LEARN

SALES & CLIENT SERVICES

- Communicate effectively and build rapport during phone, in-person, & written interactions
- Strategies, like empathy, for handling objections & responding to challenging customer behaviors
- Problem solving & effective inquiry to translate a customer's needs into possible solutions
- Communicate solutions to customers, including walking a customer through company web sites and other customer-facing resources
- Different stages of the sales cycle, skills essential for success at each stage, and how different roles interact with the customer throughout
- Articulate a product's value proposition and tailor a sales pitch to customer needs
- Build rapport with customers during sales interactions and develop relationships
- Identify and close on opportunities for upselling and cross-selling (active listening, problem solving, negotiation, effective inquiry, leveraging insights from customer profiles, etc.)
- Selling techniques and methods; using market, client & other data to drive sales activities
- Develop and identify sales leads through social media & other digital marketing channels
- Gather and utilize prospective account information to qualify a lead
- Manage performance through metrics

SALES PRACTICUM

Hands-on practice with the above skills

CONSUMER BANKING PRACTICUM
Supplemental training available in lieu of Sales Practicum

- Problem solving, effective inquiry and research to understand a banking customer's needs, motivations, and challenges and translate into possible solutions
- Utilize bank's customer-facing website and mobile apps to identify banking products and solutions that will satisfy the customer's needs; techniques to educate customer on banking products and solutions
- Ability to simultaneously complete common banking transactional tasks required to satisfy a customer need with quality and continuously engage with the customer in a proficient and professional manner

INTRODUCTION TO CRM SYSTEMS

- Purpose of CRM systems, common characteristics and features, and how they are used in an organization
- Utilize basic features of a common CRM system, to input and change customer information, build and export reports, take notes of customer interactions, and move a customer record through a complete engagement cycle
- Interpret basic business tasks that require CRM systems and articulate common queries utilized to execute them

EMAIL COMMUNICATION

- Editing and revising techniques
- Manage an email thread/conversation to demonstrate responsiveness and follow-through
- Utilize features in Outlook to manage an email inbox and Outlook calendar efficiently (flagging, searching & organizing, switching calendar views, scheduling, etc.)
- Set up, confirm, decline and manage meetings, through Outlook, with all important details

CLIENT SERVICES & SALES SUPPORT TRAINING AT WORK

TYPICAL JOB TASKS

- Provide high-quality customer service
- Educate customers on products & services
- Generate sales through renewals, upselling, and cross-selling
- Support sales staff; open/update client accounts, documentation, scheduling reporting, and client contracts
- Identify, research, and qualify new account opportunities
- Utilize CRM systems to record and access client & sales leads information

EXAMPLE TEAMS HOSTING INTERNS

- Consumer Banking
- Customer Support
- Sales Operations
- Inbound Sales
- Sales Support
- Inside Sales

EXAMPLE PARTNER COMPANIES

BANK OF AMERICA

AT&T

JPMorgan Chase & Co.

NEW YORK LIFE

MEETING PARTNER DEMAND: CLIENT SERVICES & SALES SUPPORT ROLE PATHWAYS

To best serve the different types of roles that our corporate partners need, Year Up has designed its specialty training curriculum to enable entry and succession in a variety of role pathways. These pathways reflect the variety of entry-level roles that Year Up interns and graduates of a particular specialty are equipped to fill.

CLIENT SERVICES	Interns in these roles respond to inquiries from customers and assist with transactions and issue resolution.
PERSONAL BANKING	Interns in these roles develop relationships with retail banking customers to resolve customer issues, engage them to understand their financial needs, and provide thoughtful solutions through additional financial products. Typically in a bank branch setting but may be a call center based role.
FINANCIAL ADVISORY/OTHER LICENSED SALES SUPPORT	Interns in these roles provide operational support & analysis to support financial advisors/investment associates, insurance agents, and other licensed sales staff.
INSIDE/OUTSIDE SALES SUPPORT	Interns in these roles provide support to inside and outside sales staff who are actively bringing in new customers through identifying/qualifying leads, scheduling, and other tasks, eventually working towards outbound customer interactions.
INBOUND SALES/INBOUND SALES SUPPORT	Interns in these roles respond to inbound customer inquiries, provides customer support as needed, and generates sales by cross-selling and upselling.
SALES OPERATIONS & ANALYTICS	Interns in these roles provide operational support & analysis to support sales staff through creating marketing materials, analyzing and visualizing data, monitoring and updating client information, overseeing client contracts, pricing and billing, etc.

CUSTOMER SERVICE

SPECIALTY LEARNING OBJECTIVES

• Engage customers effectively and confidently • Assess customer needs and resolve issues • Identify, diffuse, and respond to challenges and customer behaviors • Use call scripts, digital platforms, and escalation protocols • Respond effectively to metrics-driven environments

SKILLS DEVELOPMENT: WHAT STUDENTS LEARN

CUSTOMER SERVICE

- Communicate effectively and build rapport during phone, in-person, & written interactions
- Strategies, like empathy, for handling objections and responding to challenging customer behaviors, with resilience to bounce back and ensure high quality customer experience.
- Strategies for leveraging call scripts and common call-handling techniques
- Multitask during in-person or call center interactions to simultaneously interact with a customer, take effective notes, and perform transactions
- Problem solving, effective inquiry and researching to understand a customer's needs, motivations, and challenges and translate customer needs into possible solutions
- Use customer-facing websites and other company resources to locate solutions for customers
- Following procedures to complete operational requests by customers
- Communicating solutions to customers, including walking a customer through company websites and other customer-facing resources
- Identify situations requiring escalation and follow escalation procedures
- Meet and maintain customer service team goals and KPI's, including managing the pressure of a metrics-driven work environment

INTRODUCTION TO CRM SYSTEMS

- Articulate the purpose of CRM systems, common characteristics and features of CRM systems, and how they are used in an organization
- Utilize basic features of a common CRM system, to input and change customer information, build and export reports, take notes of customer interactions, and move a customer record through a complete engagement cycle
- Interpret basic business tasks that require CRM systems and articulate common queries utilized to execute them

EMAIL COMMUNICATION

- Editing and revising techniques to ensure proper spelling and grammar
- Manage an email thread/conversation to demonstrate responsiveness and follow-through
- Utilize features in Outlook to manage an email inbox efficiently (including flagging, searching and organizing)
- Set up, confirm, decline, and manage meetings, through Outlook, with all important details
- Utilize features in Outlook calendar to manage a calendar efficiently (including switching calendar views, checking responses, using scheduler tool, and using recurring features)

CUSTOMER SERVICE PRACTICUM

Hands-on experience with the above skills

CUSTOMER SERVICE TRAINING AT WORK

TYPICAL JOB TASKS

- Respond to calls and customer interactions in a professional manner
- Locate and communicate solutions for customers during a customer interaction, using knowledge management systems, websites, etc.
- Obtain and maintain accurate and complete customer information
- Track, route and redirect problems to correct resources

EXAMPLE TEAMS HOSTING INTERNS

- Call Centers
- Customer Service
- Technical Support
- Loan Servicing
- Fraud Support
- Insurance Customer Service
- Patient Services

EXAMPLE PARTNER COMPANIES

BANK OF AMERICA

AT&T

JPMorgan Chase & Co.

COX ENTERPRISES

MEETING PARTNER DEMAND: CUSTOMER SERVICE ROLE PATHWAYS

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LOAN/FINANCIAL PRODUCTS SERVICING	Interns in these roles respond to financial product-related inquiries and execute transactions for retail banking and small business customers, typically in a call center environment.
INSURANCE CUSTOMER SERVICE/CLAIMS SUPPORT	Interns in these roles respond to inquiries from insurance customers about products, eligibility, coverage, and other topics. Other responsibilities include taking in claims from customers and initiating the claims process.
PATIENT SERVICES	Interns in these roles interact with patients and insurance providers in-person and over the phone in a hospital or medical office environment to complete admissions registration, validate insurance, update documentation, complete billing procedures, and other administrative tasks.
PRODUCT SUPPORT	Interns in these roles provide answers to product-related questions, assistance with product usage, and assistance with transactions to customers, typically in a call center setting.
CONSUMER FRAUD SUPPORT	Interns in these roles respond to fraud-related inquiries from retail and small business customers through issue resolution and appropriate escalation.

Application Development & Support Training Specialty

Data Analytics Training Specialty

Quality Assurance Training Specialty

APPLICATION DEVELOPMENT & SUPPORT

SPECIALTY LEARNING OBJECTIVES

- Understand and apply object-oriented concepts, data structures and simple algorithms to develop code solutions • Understand user interface design with the goal of maximizing usability and improving user experience • Understand full-stack development, design patterns and unit testing

SKILLS DEVELOPMENT: WHAT STUDENTS LEARN

APPLICATION DEVELOPMENT PRACTICUM

Hands-on experience with the below skills

- Utilize decision trees, flow charts, algorithms and pseudocode as tools to effectively communicate solutions to business problems
- Concepts to build basic software programs
- Code review processes to interpret, analyze, and provide feedback on peer code
- Writing and running unit testing to verify code

ADVANCED TOPICS

- Object-oriented concepts such as encapsulation, inheritance and polymorphism
- Utilize data structures such as stacks, queues, lists, hash-maps; develop simple algorithms that can be implemented with these data structures
- Create user interface designs that maximize usability and improve user experience
- Apply design patterns such as Model View Controller (MVC)
- Basic concepts of full-stack development, including an overview of server-side development, databases and coding with Application Programmatic Interfaces (APIs)

INTRODUCTION TO DATABASES

- Relational database objects such as tables, attributes, records and fields
- Design effective databases using E-R diagrams
- Utilize a DBMS to create tables, query data and generate customized forms and reports
- Utilize SQL to build and populate tables, specify constraints, apply indexes; query tables (filters calculated fields, sorting, aggregates & joins)

SOFTWARE DEVELOPMENT FUNDAMENTALS

- Gather and analyze requirements to solve a business problem; utilize decision trees, flow charts, algorithms and pseudo-code as tools to effectively communicate solutions to business problems
- Articulate the different types of software environments & their purpose (Dev, QA, UAT, Production w. examples)
- Explain the basic concept of full-stack development (front-end and back-end/server-side development) and databases; differences between types of application development such as desktop, web and mobile
- Articulate basic concepts of computer hardware and systems, including operating systems, cloud platforms, servers and databases
- Utilize version control and team management tools to manage, track and organize code across a team
- Basic concepts and common tools used in agile and continuous development & team management processes
- Articulate the different components of software release management processes

INTRODUCTION TO PROGRAMMING

- Basic programming concepts, including data types and variables, control flow, functions/methods, data structures, user inputs, and string processing
- Utilize an Integrated Development Environment (IDE) such as Eclipse, NetBeans or Visual Studio to write, build, execute and debug code
- Identify and analyze similarities in structure, syntax and semantics of different coding languages
- Describe the basic concept of a library and framework and its use in the development process
- Utilize software quality control processes (peer code reviews, code refactoring & standards, code navigation in a debugger, & using comments for documentation

APPLICATION DEVELOPMENT & SUPPORT TRAINING AT WORK

TYPICAL JOB TASKS

- Work in an agile software team to develop and release a product in increments
- Work with clients and development teams to build technical requirements for a software request or user story
- Update, fix, or write simple code that meets software specifications and passes code reviews
- Assist with debugging, testing, and releasing features and bug fixes to production

EXAMPLE TEAMS HOSTING INTERNS

- Web Development
- UI/UX Design and Development
- DevOps

EXAMPLE PARTNER COMPANIES

AMERICAN EXPRESS

JPMorgan Chase & Co.

Microsoft

salesforce

MEETING PARTNER DEMAND: APPLICATION DEVELOPMENT & SUPPORT ROLE PATHWAYS

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UI/UX DESIGN & DEVELOPMENT	Interns 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.
SERVER/CLOUD DEVELOPMENT	Interns gather requirements for building server or cloud applications, make incremental changes to server or cloud systems, debug issues, make fixes and maintain server or cloud infrastructure and applications.
MOBILE APP DEVELOPMENT	Interns work in agile teams to update and edit mobile applications, use programming languages to incrementally build new mobile applications, and assist in associated processes such as requirements gathering, design, testing and mobile app release.
DEVOPS/AUTOMATION	Interns work with software engineering teams to 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.
PRODUCTION SUPPORT	Interns assist with identifying and resolving issues with software systems in production and communicate findings/resolution with end users and software teams; build or utilize tools to monitor production systems and automate production support processes.
SOFTWARE PROJECT MANAGEMENT	Interns work in agile teams to assist in the management of software development processes using established methodologies like Scrum.
APPLICATION DEVELOPMENT	Interns work in agile teams to update and edit software systems, use programming languages to incrementally build new software, and assist in associated processes.
WEB DEVELOPMENT	Interns work in agile teams to update and edit web pages and services, use programming languages to incrementally build new websites or web servers, and assist in associated processes.

DATA ANALYTICS

SPECIALTY LEARNING OBJECTIVES

- Understand big data terminology and concepts including data cleansing, validation and transformation techniques and use Tableau for data visualization
- Understand and apply data preparation techniques
- Understand data analysis and reporting tools and

SKILLS DEVELOPMENT: WHAT STUDENTS LEARN

BUSINESS INTELLIGENCE FUNDAMENTALS

- Understand big data, data mining, data lakes, data warehouses, Extract-Transform-Load (ETL), and NoSQL databases
- Perform simple data preparation tasks such as data cleansing, validation and transformation
- Importance of data governance
- Utilize techniques for reporting, including the appropriate use of charts, graphs and heat maps, and basic features of data visualization tools, such as Power BI or Tableau, for practical applications

DATA MANAGEMENT, ANALYSIS & REPORTING

- Loading, cleaning and organizing data in Excel
- Interpreting and making business-related inferences about data, using data analysis tools in Excel (Sorting, Filtering, Charts, Tables, Conditional Formatting, PivotTable, VLOOKUP's)
- Utilizing Excel, PowerPoint and data visualization tools (i.e. Tableau or Power BI), to develop reports that demonstrate effective storytelling with data

INTRODUCTION TO DATABASES

- Role of database management systems in an organization; relational database objects such as tables, attributes, records and fields
- Design effective databases using E-R diagrams
- Utilize a DBMS to create tables, query data and generate customized forms and reports
- Utilize SQL to build and populate tables, specify constraints, apply indexes; query tables (filters calculated fields, sorting, aggregates & joins)

SOFTWARE DEVELOPMENT FUNDAMENTALS

- Gather and analyze requirements to solve a business problem; utilize decision trees, flow charts, algorithms and pseudocode as tools to effectively communicate solutions to business problems
- Articulate the different types of software environments & their purpose (Dev, QA, UAT, Production w. examples)
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INTRODUCTION TO PROGRAMMING

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- Utilize software quality control processes (peer code reviews, code refactoring & standards, code navigation in a debugger, & using comments for documentation

DATA ANALYTICS TRAINING AT WORK

TYPICAL JOB TASKS

- Gather business requirements, analyze and propose data solutions to meet requirements
- Compile, validate, clean and transform data for analysis
- Analyze, interpret and summarize data and develop reports and presentations

EXAMPLE TEAMS HOSTING INTERNS

- Business Intelligence
- Big Data
- Sales/Marketing Operations

EXAMPLE PARTNER COMPANIES

Linked in

PayPal

Exelon

accenture

MEETING PARTNER DEMAND: DATA ANALYTICS ROLE PATHWAYS

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DATA PREPARATION	Interns in these roles Import data from spreadsheets or data storage systems, use data preparation tools and techniques to clean, validate, transform and load data into appropriate systems for analysis.
DATA ANALYSIS & REPORTING/BUSINESS INTELLIGENCE	Interns in these roles Import data from spreadsheets or data storage systems, analyze data, and build reports or presentations to summarize findings and help businesses make decisions.
DATABASE DEVELOPMENT	Use SQL and programming languages such as Python to modify or edit databases, design and build new databases, build tools and scripts to query databases in an efficient manner and troubleshoot issues in databases.

IN-DEMAND SKILLS TRAINING
QUALITY ASSURANCE

SPECIALTY LEARNING OBJECTIVES

• Evaluate and test system or user interface design, software features, & bug fixes • Create test plans described by a list of test cases or a trace-ability matrix developed using project summaries, requirements, and functional specifications • Understand how to devise and develop automated test scripts

SKILLS DEVELOPMENT: WHAT STUDENTS LEARN

SOFTWARE TESTING AND QUALITY ASSURANCE

• Describe the quality assurance process and its role in software development
• Validate business requirements gathered with a focus on completeness and testability
• Analyze, devise, & execute tests described by a list of test cases or a trace-ability matrix developed using project summaries, requirements, and FSD
• Evaluate system or user interface design to validate fulfillment of customer requirements
• Verify software features and bug fixes against a functional specification, both manually and using automated testing tools
• Write clear, approximated, & detailed bug reports
• Utilize software (such as JIRA) to track progress of software feature requests and bug fixes
• Define automated testing, identify its purpose, and write automated test scripts

INTRODUCTION TO DATABASES

• Role of database management systems in an organization; relational database objects such as tables, attributes, records and fields
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QUALITY ASSURANCE TRAINING AT WORK

TYPICAL JOB TASKS

- Use testing methods, tools and techniques to verify and validate software releases
- Analyze and understand business requirements to ensure quality and completeness
- Develop automated test scripts to test software features and bug fixes

EXAMPLE TEAMS HOSTING INTERNS

- Manual Testing
- Automated Testing

EXAMPLE PARTNER COMPANIES

salesforce

Microsoft

Expeditors®

HARVARD UNIVERSITY

MEETING PARTNER DEMAND: QUALITY ASSURANCE ROLE PATHWAYS

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SOFTWARE TESTING & AUTOMATION	Interns in these roles work in agile teams to build automated test scripts to verify and validate the function of software systems. Other role responsibilities include executing automated tests and documenting results.
QUALITY ASSURANCE ANALYSIS	Interns in these roles participate in agile work teams to ensure quality of systems throughout the software development life cycle, including requirements gathering, design analysis, testing and release. Other role responsibilities include building and executing test plans and documenting the results.