



# TRAINING CATALOG

AS OF MARCH 2024



# YEAR UP TRAINING CATALOG

## WORKPLACE & CAREER READINESS TRAINING

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## JOB & INDUSTRY TRAINING

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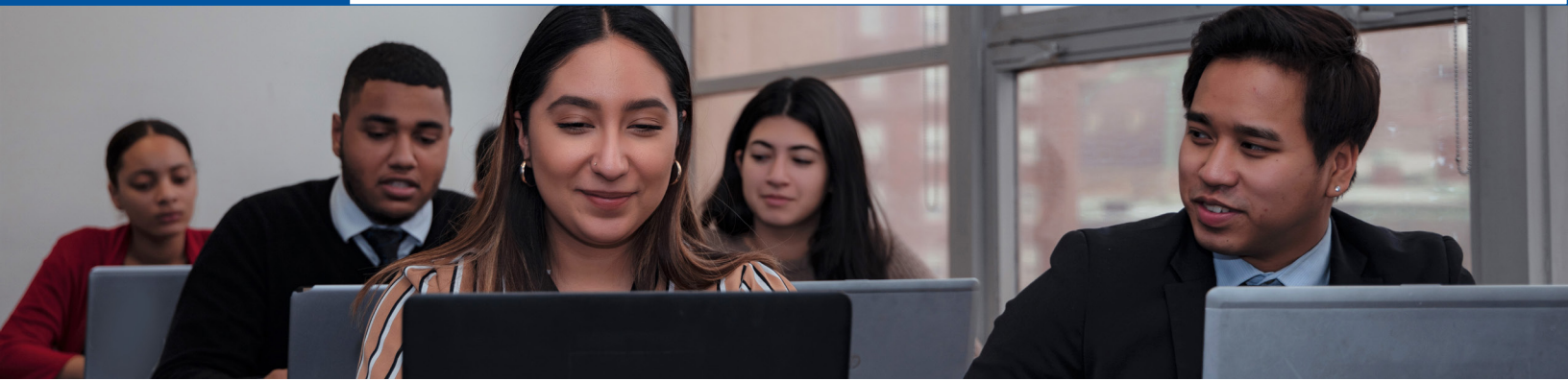
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Year Up's Essential Skills Training provides opportunities for participants to develop the foundational career readiness skills needed to effectively communicate within and navigate a modern, professional work environment. All Year Up participants, regardless of their job and industry training, are expected to demonstrate the following competencies by the end of the training phase of the program.

### **SELF-AWARENESS & SELF-DEVELOPMENT:**

- **Self-Regulation:** Identifies and regulates one's emotions and thoughts to maintain positive composure and uphold work-ready behaviors, with minimal prompting from staff.
- **Proactive Self-Development:** Utilizes feedback, grades, and assessment data to identify and employ strategies that target improvement on strengths and growth areas.
- **Cultural Navigation & Empowerment:** Participates in conversations and activities inside or outside of the workspace that support community acknowledgement, building, healing, and mobilization - outside of standard learning community activities.

### **BUSINESS COMMUNICATIONS:**

- **Email Communications:** Follows email communication norms (e.g., on-time replies, message appropriateness) and utilizes email composition best practices (e.g., formatting, signature, conciseness).
- **Public Speaking:** Utilizes strategies for gaining and retaining attention while communicating verbally and nonverbally to an audience in a business setting (e.g., speech, formal presentation, elevator pitch).
- **Business Writing:** Utilizes processes (e.g., peer reviews) and tools (e.g., Grammarly, spell check) to clearly articulate ideas and compose well-written business documents.

### **TECHNOLOGY ESSENTIALS:**

- **Computer Systems Navigation:** Navigates common operating systems (e.g., Windows) with ease to accomplish daily tasks such as file management, application use, internet connectivity, browser navigation, etc.
- **Document Editing:** Utilizes common document editing tools such as Microsoft Word to create, format, and edit business documents, letters, flyers, and resumes.

- **Calendar Use & Management:** Utilizes common calendar management tools such as Microsoft Outlook to track day-to-day appointments and schedule meetings; factors in availability and scheduling conflicts, sets vacation and time-off, tracks and manages meeting attendance, and updates meeting invites.
- **Email Use & Management:** Utilizes common email tools such as Microsoft Outlook to organize, draft, and compose emails, set out-of-office notifications, and use features like attachments, email options, rules, and folders to manage email communications.
- **Editing Presentations:** Utilizes common slide deck editing tools such as Microsoft PowerPoint to create, format, and edit presentations, using best practices for multimedia use, data reporting, and storytelling in a presentation format.
- **Virtual Conferencing Tools:** Utilizes common virtual conferencing tools such as Zoom for communicating and collaborating with others.
- **AI Fundamentals:** Demonstrates understanding of the concept of AI; enumerates and explains the branches of AI; describes the terminology associated with AI commonly used in the workplace; explains how AI might be applicable in the roles students are placed in.
- **Considerations for AI Use:** Describes weaknesses inherent in AI such as hallucination or bias; the resulting risks of using AI; legal and ethical considerations for AI use.
- **AI Best Practices:** Articulates proper use of AI in the classroom and on assignments; describes steps to ensure that company guidelines and policies are followed for AI use during internship.

## DATA ANALYSIS:

- **Spreadsheet Use:** Utilizes common spreadsheet management software to create, format and edit spreadsheets; tabularizes data, uses formulas and functions to compute, transform, and analyze data; and applies charts and graphs that effectively convey desired information.
- **Basic Data Analysis:** Utilizes basic 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.

## WORKPLACE COLLABORATION & PRODUCTIVITY:

- **Workplace Norms & Expectations:** Aligns behavior in a team/workplace environment to ethical standards, safety concerns, and workplace norms.
- **Workspace Presence:** Demonstrates an “available and online” presence when expected, and attends all expected meetings.
- **Work Quality:** Produces deliverables, participates in activities, and delivers presentations that show attention to detail and exceed expected quality.
- **Leadership:** Takes actions to lead, follow, or delegate as needed; shows ability to “step up or step back” to support community growth.
- **Proactive Communication:** Demonstrates consistent communications with peers, coaches, and staff.
- **Initiative:** Actively seeks out new ideas and solutions to bring to manager and team; anticipates and proactively communicates changes in plans and status of deliverables.
- **Meeting Participation:** Participates in meetings; joins on time, displays SLANT, and contributes to conversation with clear/confident communication.
- **Meeting Coordination:** Manages meeting preparation, scheduling, logistics, and follow up actions (e.g., establishes meeting time, sends out invite/agenda, facilitates meeting, documents decisions and action items, sends out notes).
- **Leveraging Feedback:** Provides feedback to peers, seeks out opportunities to receive feedback, and shows clear conversion on received feedback.
- **Networking & Relationship Building:** Reaches out to peers/staff in the workspace they do not previously know in order to develop new respectful, professional relationships.

## CAREER & WORKPLACE NAVIGATION:

- **Work-Ready Presentation:** Demonstrates SLANT, work-ready attire, appropriate video background, and clear audio/video connection in public spaces and meetings.
- **Punctuality & Preparedness:** Signs-in to meetings on time, arrives prepared, and provides deliverables/emails in a timely fashion.
- **Navigating Challenges:** Displays grit when navigating difficult or challenging circumstances (e.g., personal issues, disempowering conversations, setbacks, poor performance, or perceived failure).
- **Resourcefulness:** Utilize tools, processes & people to support them in seeing activities/projects to the end.
- **Self-Advocacy:** Surfaces issues in a tactful and constructive way, exerting an appropriate level of self-advocacy in communicating challenges, expectations, and needs to those in a position of influence.
- **Critical Thinking:** Seeks out new information and applies previous knowledge to develop well thought out approaches to qualify, analyze, and solve a problem with little guidance.
- **Independent Learning:** Identifies and acts on opportunities to learn new concepts & technologies that support career building, then creates and executes plans to effectively build relevant skills with little guidance.
- **Goal Setting & Execution:** Defines and communicates goals and a plan of action for completing tasks and deliverables, and demonstrates goal-oriented behavior and progress toward set goals.
- **Career Management:** Takes actions to gather role expectations, establish agreed-upon check-in processes, and provide career goals to manager.

## CAREER PREPARATION:

- **Resume Building:** Incorporates newly developed skills and experiences into a well-formed resume, with little guidance.
- **Skill Mapping & Storytelling:** Communicates how their skills development, Year Up experiences, and growing professional network are helping them prepare for specific jobs, career paths, and/or industries.



Year Up's Job Searching & Career Advancement Training provides opportunities for participants to leverage their experience during the internship phase of the program alongside training to develop effective job searching and career advancement skills, including resume creation, interviewing, financial decision making, negotiation, and more.

### CAREER EXPLORATION:

- **Career Goal-Setting:** Articulates effective short/long-term career goals, including financial goals, skill needs, and work preferences (e.g., desired work environments, projects, management style, location, etc.)
- **Career Researching:** Utilizes online job platforms and company websites to identify key aspects of a career opportunity.
- **Informational Interviewing:** Strategically targets companies, roles, and contacts of interest to invite for informational interviews.
- **Professional Network Building:** Actively expands and nurtures their professional network, through ongoing networking, informational interviewing, and action item follow up.

### CAREER ADVANCEMENT:

- **Technical Skill Demonstration:** Executes and reports outputs on basic technical tasks, relevant to functional role, with expected quality, consistency, and autonomy.
- **Navigation of Difficult Workplace Circumstances:** Communicates plans for navigating difficult circumstances, including identifying support structures.
- **Professional Development Planning:** Constructs and executes a clear, realistic, and actionable professional development plan with clear and measurable learning goals related to job training and self-driven upskilling.
- **Skill Mapping & Storytelling:** Translates responsibilities from internship experiences into complete power statements and STAR stories.
- **Professional Brand Building & Nurturing:** Articulates a professional brand statement (e.g., elevator pitch), refines public professional profile (e.g., LinkedIn), and solicits and utilizes colleague feedback to identify areas of development.
- **Company Benefits Navigation:** Leverages company intranet, manager conversations, and HR resources to identify and access available benefits.

### JOB SEARCHING & SECURING:

- **Resume Designing:** Constructs clear, concise and impactful resume and interview artifacts that detail work experience skills.
- **LinkedIn Profile & Cover Letter Writing:** Utilizes storytelling techniques to construct clear, concise, informative, and memorable LinkedIn profiles and cover letters.
- **Job Search Planning & Tracking:** Constructs, executes, and tracks all aspects of job searching, artifact building, and prospective job application.
- **Interview Planning:** Sets a clear plan and timeline of actions to prepare for an interview, including company researching, mock interviewing, and "day-of" planning.
- **Interview Execution:** Performs all critical "day-of" actions and leverages effective communication techniques to ensure an on-time, engaging, informative, and complete interview engagement.
- **Interview Follow-Up:** Delivers clear, concise, and actionable follow up communications after an interview.
- **Offer Decision Making:** Utilizes salary, benefits, location, and other offer information, to assess fit of career opportunities with personal, financial, and career goals.
- **Negotiation:** Utilizes negotiating techniques to prepare for and engage in clear and confident communications that lead to a solution that aligns to their short/long-term career goals, including financial goals, skill needs, and work preferences.
- **New Job Transition Planning:** Establishes a clear plan for navigating the first three months of a new job, including learning norms and expectations, setting PD goals, establishing key relationships, and identifying support structures and resources.



Year Up's Job & Industry Training in Banking provides opportunities for participants to develop the essential career readiness and business skills needed to navigate a modern, professional work environment. In combination with the Essential Skills Training, participants will also build technical foundational capabilities and are expected to demonstrate the following competencies by the end of the training phase of the program.

### CUSTOMER-BASED COMMUNICATIONS:

- **Customer Written Communications:** Utilizes strategies for communicating via email, live chat support, online messaging and other text-based virtual mediums.
- **Customer Verbal Communications:** Utilizes 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:** Leverages techniques like empathy & professional etiquette to build and nurture relationships, develop trust, credibility and rapport.
- **Navigation of Challenging Customer Behaviors:** Utilizes strategies like empathy for handling objections and responding to challenging customer behaviors
- **Customer Problem Identification:** Utilizes effective inquiry, problem-solving & research to understand a customer's needs, motivations, and challenges.
- **Customer Solution Delivery:** Walks customers through solutions; use of self-service resources to resolve.

### CUSTOMER-FACING PRESENTATION:

- **Company Brand Representation:** Communicates company brand and applies company core values.
- **Company Policy Alignment:** Uses judgement to adapt prescribed policies and procedures to complete requests.
- **Product Presentation:** Utilizes product briefs and other resources to describe products & services.

### CUSTOMER SERVICE FUNDAMENTALS:

- **Multitask Execution:** Converses with customer while completing transactional tasks to address their needs.
- **Call Script Usage:** Utilizes scripts to ensure compliance with company norms and inform customer interactions; shows flexibility in handling off-script interactions.
- **Escalation:** Identifies the need for escalation; refers customers to trained personnel as needed.
- **Notetaking:** Writes clear, complete interaction notes to support customer issue transfer and/or cross-selling.
- **Resource Navigation & Solution Discovery:** Utilizes search/web browsers, company websites and team knowledge databases to quickly locate information and identify solutions.
- **KPI Navigation:** Communicates strategies to meet and maintain individual/team-based performance metrics to drive improvements in customer engagement outcomes.
- **CRM System Navigation:** Utilizes basic features of CRM systems; identify, input and update customer information; build and export lists, reports, document notes; move a customer record through an engagement cycle; interpret business tasks and execute queries to complete them.

### CONSUMER BANKING:

- **Basic Banking Product Presentation:** Clearly describes the key characteristics, benefits, and risks of basic banking products to customers.
- **Banking Website & Resources Navigation:** Navigates company website and resources to describe details of banking products and services to customers.
- **Cash Handling:** Counts & handles large amounts of cash with speed and accuracy, during customer interactions.
- **Banking Transactions Execution:** Executes basic transactions and processes associated with managing banking clients, utilizing appropriate software such as teller systems, with accuracy and completeness.

To best serve our partners and today’s in-demand jobs, Year Up has designed its Job & Industry Training to enable entry and succession across a variety of role pathways. These role pathways reflect the most common entry-level roles that Year Up participants are prepared for and that graduates obtain upon program completion.

**ROLE PATHWAYS**

**PERSONAL BANKING PATHWAY**

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.

**CONSUMER FRAUD SUPPORT**

These roles respond to fraud-related inquiries from retail and small business customers through issue resolution and appropriate escalation.

**INBOUND SALES/INBOUND SALES SUPPORT**

These roles respond to inbound customer inquiries, provide customer support as needed, and generate sales by cross-selling and upselling.

**FINANCIAL ADVISORY/OTHER LICENSED SALES SUPPORT**

These roles provide operational support and analysis to support financial advisors/investment associates, insurance agents, or other licensed sales staff.

**LOAN/FINANCIAL PRODUCTS SERVICING**

These roles respond to financial product-related inquiries and execute transactions for retail banking and small business customers, typically in a call center environment.

**CREDENTIALING OPPORTUNITIES**

*Details vary by location*

- Participants’ completion of Year Up’s Job & Industry Training may prepare them to sit for common industry-recognized certifications prior to or during the internship phase of the program.
- While enrolled in the Year Up program, participants may also be eligible to earn college credits.

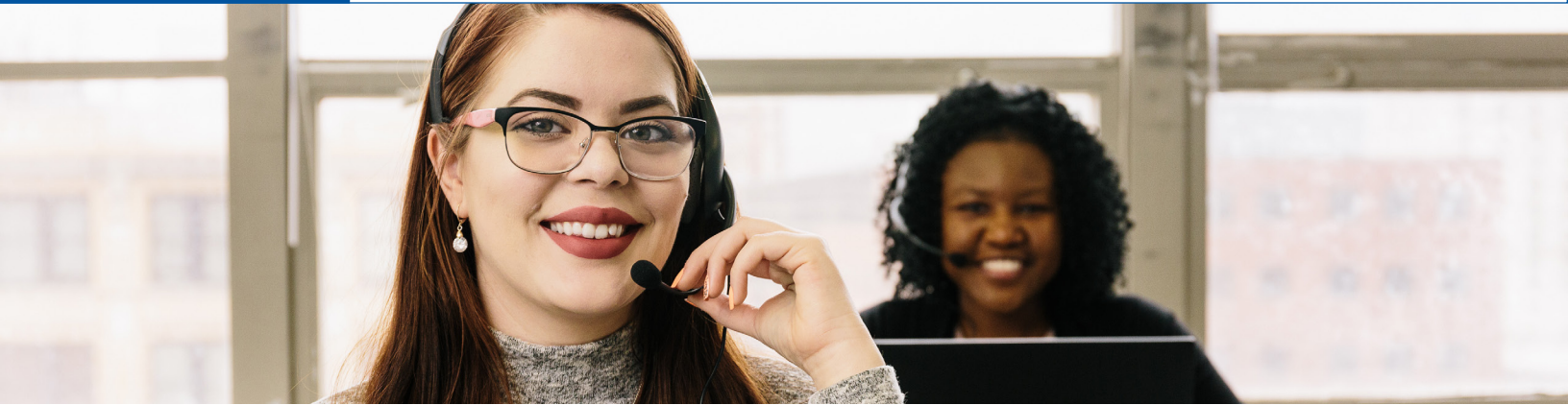
**EXAMPLE TEAMS PARTICIPANTS SUPPORT**

- Personal Banking
- Fraud Support
- Inbound Sales
- Loan Servicing
- Sales Support

**EXAMPLE PARTNER COMPANIES**



**JPMORGAN CHASE & CO.**



Year Up’s Job & Industry Training in Customer Success provides opportunities for participants to develop the essential career readiness and business skills needed to navigate a modern, professional work environment. In combination with the Essential Skills Training, participants will also build technical foundational capabilities and are expected to demonstrate the following competencies by the end of the training phase of the program.

### CUSTOMER-BASED COMMUNICATIONS:

- **Customer Written Communications:** Utilizes strategies for communicating via email, live chat support, online messaging and other text-based virtual mediums.
- **Customer Verbal Communications:** Utilizes 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:** Leverages techniques like empathy & professional etiquette to build and nurture relationships, develop trust, credibility and rapport.
- **Navigation of Challenging Customer Behaviors:** Utilizes strategies like empathy for handling objections and responding to challenging customer behaviors
- **Customer Problem Identification:** Utilizes effective inquiry, problem-solving & research to understand a customer’s needs, motivations, and challenges.
- **Customer Solution Delivery:** Walks customers through solutions; use of self-service resources to resolve.

### CUSTOMER-FACING PRESENTATION:

- **Company Brand Representation:** Communicates company brand and applies company core values.
- **Company Policy Alignment:** Uses judgement to adapt prescribed policies and procedures to complete requests.
- **Product Presentation:** Utilizes product briefs and other resources to describe products & services.

### CUSTOMER SERVICE FUNDAMENTALS:

- **Multitask Execution:** Converses with customer while completing transactional tasks to address their needs.
- **Call Script Usage:** Utilizes scripts to ensure compliance with company norms and inform customer interactions; shows flexibility in handling off-script interactions.
- **Escalation:** Identifies the need for escalation; refers customers to trained personnel as needed.
- **Notetaking:** Writes clear, complete interaction notes to support customer issue transfer and/or cross-selling.
- **Resource Navigation & Solution Discovery:** Utilizes search/web browsers, company websites and team knowledge databases to quickly locate information and identify solutions.
- **KPI Navigation:** Communicates strategies to meet and maintain individual/team-based performance metrics to drive improvements in customer engagement outcomes.
- **CRM System Navigation:** Utilizes basic features of CRM systems; identify, input and update customer information; build and export lists, reports, document notes; move a customer record through an engagement cycle; interpret business tasks and execute queries to complete them.



To best serve our partners and today’s in-demand jobs, Year Up has designed its Job & Industry Training to enable entry and succession across a variety of role pathways. These role pathways reflect the most common entry-level roles that Year Up participants are prepared for and that graduates obtain upon program completion.

**ROLE PATHWAYS**

**FINANCIAL ADVISORY/  
OTHER LICENSED SALES SUPPORT**

These roles provide operational support and analysis to support financial advisors/investment associates, insurance agents, or other licensed sales staff.

**INSIDE/OUTSIDE SALES SUPPORT**

These roles provide support to inside/outside sales staff who are actively bringing in new customers for the company through identifying/qualifying leads, scheduling, and other tasks, eventually working towards outbound customer interactions.

**INBOUND SALES/INBOUND SALES  
SUPPORT**

These roles respond to inbound customer inquiries, provide customer support as needed, and generate sales by cross-selling and upselling.

**SALES OPERATIONS & ANALYTICS**

These roles provide operational support and analysis to support sales staff through creating marketing materials, analyzing and visualizing data, monitoring and updating client information, overseeing client contracts, pricing and billing, and other tasks.

**CREDENTIALING  
OPPORTUNITIES**

*Details vary by location*

- Participants’ completion of Year Up’s Job & Industry Training may prepare them to sit for common industry-recognized certifications prior to or during the internship phase of the program.
- While enrolled in the Year Up program, participants may also be eligible to earn college credits.

**EXAMPLE TEAMS  
PARTICIPANTS  
SUPPORT**

- Customer Success
- Sales Operations
- Inbound Sales
- Sales Support
- Inside Sales

**EXAMPLE PARTNER  
COMPANIES**

JPMORGAN  
CHASE & CO.

**BANK OF AMERICA** 

Morgan Stanley





Year Up's Job & Industry Training in Business Fundamentals provides opportunities for participants to develop the essential career readiness and business skills needed to navigate a modern, professional work environment. In combination with the Essential Skills Training, participants will also build technical foundational capabilities and are expected to demonstrate the following competencies by the end of the training phase of the program.

## BUSINESS FOUNDATIONS & NAVIGATION:

- **Business Concepts Navigation:** Describes business terminology, functions, ethical & social responsibilities, and value added to marketplace and shareholders.
- **Marketing Concepts Navigation:** Describes the role of the marketing function within business, including promotion, selling, merchandising, distribution, and producing goods and services.
- **Business Operations:** Applies principles of accounting and finance, identifies technology solutions to manage business information, and understands human resource management and motivation.

## CUSTOMER-BASED COMMUNICATIONS:

- **Customer Written Communications:** Utilizes strategies for communicating via email, live chat support, online messaging & other text-based virtual mediums.
- **Customer Verbal Communications:** Utilizes strategies such as interpreting & managing tone, pitch & voice, projecting confidence & clarity, and adapting tone, pace & language as needed.
- **Customer Relationship Building:** Leverages techniques like empathy & professional etiquette to build & nurture relationships, develop trust, credibility & rapport.
- **Navigation of Challenging Customer Behaviors:** Utilizes strategies like empathy for handling objections & responding to challenging customer behaviors
- **Customer Problem Identification:** Utilizes effective inquiry, problem-solving & research to understand a customer's needs, motivations, and challenges.
- **Customer Solution Delivery:** Walks customers through solutions and equips them with self-service resources to resolve the issue on their own.

## TEAM-BASED PROJECT COORDINATION:

- **Team Dynamics Navigation:** Navigates dynamics within the context of a team when facilitating from a team meeting agenda and documenting clear and complete meeting notes.
- **Problem Analysis:** Navigates a multilayer & ambiguous problem by breaking it down, identifying assumptions, setting strategies/resources for validating, and building clarity, understanding audience, applying root cause analysis, and developing a set of possible solutions.
- **Team-Based Project Execution:** Works as part of a team to execute a team-based project plan out of a given set of requirements.
- **Team Communications:** Constructs well-formatted common business artifacts such as forms, reports and meeting notes for the purposes of team and stakeholder communications.

## DATA MANAGEMENT, ANALYSIS & REPORTING:

- **Data Loading, Cleaning & Organizing:** Utilizes Excel to load, clean, validate and organize basic sets of business data.
- **Intermediate Data Analysis:** Makes business-related inferences about data by identifying, analyzing, and interpreting trends, patterns, or insights utilizing data analysis tools, in Excel (e.g. Sorting, Filtering, Conditional Formatting, basic Formulas, Charts, Tables, VLOOKUPS, and PivotTables).
- **Data Reporting & Storytelling:** Develops & presents reports that demonstrate effective storytelling with data via common data visualization and business tools such as Tableau, Power BI, PowerPoint and Excel.

To best serve our partners and today’s in-demand jobs, Year Up has designed its Job & Industry Training to enable entry and succession across a variety of role pathways. These role pathways reflect the most common entry-level roles that Year Up participants are prepared for and that graduates obtain upon program completion.

**ROLE PATHWAYS**

**OPERATIONS ASSISTANT**

These roles provide various types of assistance to employees and 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**

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 & open enrollment for benefits such as health insurance.

**ADMINISTRATIVE COORDINATOR**

These roles provide support to company employees and serve as a link between departments, vendors and staff members, helping organize, supervise and facilitate the work among employees as well as provide specialized support to workers.

**COLLECTIONS**

These roles specialize in the collection of debt owed to their company and use a variety of means to contact individuals who have defaulted on debts or have not paid past due bills.

**LOAN PROCESSOR**

These roles manage the administrative tasks associated with loans or mortgages and 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 & others involved in the loan process.

**CREDENTIALING OPPORTUNITIES**

*Details vary by location*

- Participants’ completion of Year Up’s Job & Industry Training may prepare them to sit for common industry-recognized certifications prior to or during the internship phase of the program.
- While enrolled in the Year Up program, participants may also be eligible to earn college credits.

**EXAMPLE TEAMS PARTICIPANTS SUPPORT**

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

**EXAMPLE PARTNER COMPANIES**





Year Up's Job & Industry Training in Project Management Support provides opportunities for participants to develop the essential career readiness and business skills needed to navigate a modern, professional work environment. In combination with the Essential Skills Training, participants will also build technical foundational capabilities and are expected to demonstrate the following competencies by the end of the training phase of the program.

## BUSINESS FOUNDATIONS & NAVIGATION:

- **Business Concepts Navigation:** Describes business terminology, functions, ethical and social responsibilities and value added to marketplace and shareholders.
- **Marketing Concepts Navigation:** Describes the role of the marketing function within business, including promotion, selling, merchandising, distribution and producing goods and services.
- **Business Operations:** Applies principles of accounting and finance, identifies technology solutions to manage business information and understands human resource management and motivation.

## PROJECT MANAGEMENT SUPPORT:

- **Requirements Gathering & Project Scoping:** Captures & validates business requirements for a project; uses to define project goals, outcomes & scope.
- **Project Priority Evaluation:** Utilizes cost-benefit analysis and feasibility studies to evaluate project prioritization.
- **Project Management Concepts Navigation:** Applies knowledge & concepts like Integration, Scope, Time, Cost, Quality & Human Resources in managing a project.
- **Project Analysis & Execution:** Utilizes basic project management concepts and tools (project charter & schedule, project lifecycle, Gantt chart, logic network, stakeholder analysis, work breakdown structure, budgeting, marketing plan, risk plan, HR plans, etc.) to inspect, report, and progress on project tasks.
- **Project Artifact Management:** Develops and presents well-formatted, clear and complete key artifacts across all phases of the project lifecycle.
- **Project Management Applications:** Utilizes basic features of an industry standard project management tool like Microsoft Project to articulate key components and actions of a project.
- **Agile Project Management:** Utilizes concepts and tools of the agile methodology/SCRUM, to create and execute on an agile workflow.

## TEAM-BASED PROJECT COORDINATION:

- **Team Dynamics Navigation:** Navigates dynamics within the context of a team when facilitating from a team meeting agenda and documenting clear and complete meeting notes.
- **Problem Analysis:** Navigates a multilayer & ambiguous problem by breaking it down, identifying assumptions, setting strategies/resources for validating, and building clarity, understanding audience, applying root cause analysis, and developing a set of possible solutions.
- **Team-Based Project Execution:** Works as part of a team to execute a team-based project plan out of a given set of requirements.
- **Team Communications:** Constructs well-formatted common business artifacts such as forms, reports and meeting notes for the purposes of team and stakeholder communications.

## DATA MANAGEMENT, ANALYSIS & REPORTING:

- **Data Loading, Cleaning & Organizing:** Utilizes Excel to load, clean, validate and organize basic sets of business data.
- **Intermediate Data Analysis:** Makes business-related inferences about data by identifying, analyzing, and interpreting trends, patterns, or insights utilizing data analysis tools, in Excel (e.g. Sorting, Filtering, Conditional Formatting, basic Formulas, Charts, Tables, VLOOKUPS, and PivotTables).
- **Data Reporting & Storytelling:** Develops & presents reports that demonstrate effective storytelling with data via common data visualization and business tools such as Tableau, Power BI, PowerPoint and Excel.

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## ROLE PATHWAYS

### PROJECT SUPPORT

These roles provide administrative and functional support to Coordinator-level project personnel.

Individuals in these roles may be required to maintain the calendar and schedule of the project and 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 may also include creating reports and presentations, as well as serving as a liaison between the employees and anyone involved in the project, such as executives and stakeholders.

Individuals in these roles may also be required to set up travel plans, schedule meetings, file expense reports and allocate resources between different departments.

### CREDENTIALING OPPORTUNITIES

*Details vary by location*

- Participants’ completion of Year Up’s Job & Industry Training may prepare them to sit for common industry-recognized certifications prior to or during the internship phase of the program.
- While enrolled in the Year Up program, participants may also be eligible to earn college credits.

### EXAMPLE TEAMS PARTICIPANTS SUPPORT

- Project Support
- Operations
- Administration

### EXAMPLE PARTNER COMPANIES





Year Up's Job & Industry Training in Investment Operations provides opportunities for participants to develop the essential career readiness and business skills needed to navigate a modern, professional work environment. In combination with the Essential Skills Training, participants will also build technical foundational capabilities and are expected to demonstrate the following competencies by the end of the training phase of the program.

## FINANCIAL OPERATIONS FUNDAMENTALS:

- **Financial Transaction Recording:** Interprets and records common financial transactions into a general ledger.
- **Financial Statement Navigation:** Navigates and analyzes basic financial statements to communicate key insights of a business's financial health.
- **Basic Financial Report Analysis:** Leverages common financial analysis techniques (ex. ratio analysis) and reviews basic financial reports to interpret the financial status of a business.

## INVESTMENT OPERATIONS FUNDAMENTALS:

- **Basic Investment Product Presentation:** Clearly describes the key characteristics, benefits, and risks of basic investment products (e.g. stocks, bonds, mutual funds, etc.) to customers.
- **Basic Mutual Fund Analysis:** Reviews online data and prospectus to interpret the performance of a basic mutual fund.

## PROCESS ANALYSIS:

- **Process Documentation:** Documents business processes using process flows.
- **Process Analysis:** Utilizes common analysis techniques to interpret a business process, identify issues and opportunities for improvements, identify and assess possible solutions, and articulate requirements to implement solutions.

## DATA MANAGEMENT, ANALYSIS & REPORTING:

- **Data Loading, Cleaning & Organizing:** Utilizes Excel to load, clean, validate & organize basic sets of business data.
- **Intermediate Data Analysis:** Makes business-related inferences about data by identifying, analyzing, and interpreting trends, patterns, or insights utilizing data analysis tools in Excel (e.g. Sorting, Filtering, Conditional Formatting, basic Formulas, Charts, Tables, VLOOKUPS, and PivotTables).
- **Data Reporting & Storytelling:** Develops and presents reports that demonstrate effective storytelling with data via common data visualization and business tools such as Tableau, Power BI, PowerPoint and Excel.

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## ROLE PATHWAYS

<b>FUND/ PORTFOLIO ACCOUNTING/ ADMINISTRATION</b>	These roles perform administrative functions on behalf of fund clients, such as recording and reconciling securities held, preparing reports, collecting payments, and calculating pricing.
<b>CLIENT SERVICES SUPPORT</b>	These roles 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.
<b>RECONCILIATION ANALYST</b>	These roles analyze and remediate exceptions and breaks that occur due to differences between multiple IT systems.
<b>TRANSACTION PROCESSING</b>	These roles 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.
<b>BUSINESS/PROCESS ANALYST</b>	These roles provide support to analyze and improve business functions/processes by analyzing data, identifying and communicating improvement requirements to technology teams, and tracking/communicating progress of change initiatives.
<b>ACCOUNTING CLERK/ASSOCIATE/ ASSISTANT/BOOKKEEPER</b>	These roles assist accountants with routine tasks such as verifying, allocating, and posting transactions to the general ledger, preparing trial balances, and preparing financial reports.
<b>ACCOUNTS PAYABLE/RECEIVABLE SUPPORT</b>	These roles process money owed to a company 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.
<b>BILLING/PAYROLL/PURCHASING SPECIALIST</b>	These roles perform specialized accounting functions; customer billing, processing expense reports/timesheets, or vendor maintenance and related invoicing.
<b>FINANCIAL REPORTING/DATA/ BUDGET ANALYST</b>	These roles provide analysis and support to corporate finance departments; preparing and reviewing reports, reconciling accounting discrepancies, analyzing data, and developing and maintaining budgets.

### CREDENTIALING OPPORTUNITIES

*Details vary by location*

- Participants' completion of Year Up's Job & Industry Training may prepare them to sit for common industry-recognized certifications prior to or during the internship phase of the program.
- While enrolled in the Year Up program, participants may also be eligible to earn college credits.

### EXAMPLE TEAMS PARTICIPANTS SUPPORT

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

### EXAMPLE PARTNER COMPANIES

JPMORGAN CHASE & CO.

 Citizens™

 BANK OF AMERICA

 Fidelity



Year Up's Job & Industry Training in Cyber Security provides opportunities for participants to develop the essential career readiness and business skills needed to navigate a modern, professional work environment. In combination with the Essential Skills Training, participants will also build technical foundational capabilities and are expected to demonstrate the following competencies by the end of the training phase of the program.

### COMPUTER ARCHITECTURE & SYSTEMS FUNDAMENTALS:

- **Computer Systems:** Navigates computer systems with focus on operating systems (Windows, Linux and Mac), servers, and cloud infrastructure.
- **Computer Architecture:** Navigates basic computer and server hardware configurations.
- **Computer Networking:** Navigates basic wired and wireless computer network protocols; addresses schemes and configurations.

### COMPUTER SYSTEMS ADMINISTRATION:

- **File Systems Management:** Navigates file systems on a computer to perform file management operations, including file path tracking, corruption detection and basic troubleshooting for file recovery.
- **Operating Systems Management:** Utilizes basic features of UI & script-based administrative tools of a common operating system like Windows & Linux to execute install, update & upgrade procedures.
- **Device Management:** Utilizes OS utility software and administrative tools to execute functions such as backup, restore, imaging, partitioning, defragmentation, compression, encryption; device, process, memory, and user account management.
- **Error & Security Monitoring:** Utilizes established protocols and system tools to monitor computer system diagnostics, then identifies and reports basic errors and security issues when they occur.
- **IT Infrastructure Service Navigation:** Navigates common IT infrastructure services used in systems administration.
- **Computer Network Configuration:** Builds out physical & software configuration of basic computer networks (peer-to-peer LAN and WLAN), troubleshoots LAN operations, and chooses appropriate LAN topology for a given physical and logical design.
- **Active Directory Navigation:** Navigates basic features of user profile, account, workgroup, and domain management tools on a common operating system.

### TECHNICAL SUPPORT:

- **Technical Documentation:** Constructs documentation for basic procedures, tools usage & systems changes that can be understood and used by a non-technical business user.
- **Ticketing System Navigation:** Navigates the basic features of a common ticketing/incidence management system (e.g., Zendesk, Remedy, etc.).

### INFORMATION SECURITY FUNDAMENTALS:

- **Information Security:** Communicates principles of Information Security such as confidentiality, integrity, availability, governance, risk management & compliance.
- **Security Architecture:** Communicates the requirements to architect an integrated and resilient security framework.
- **Digital Forensics:** Communicates the branches within Digital Forensics and its laws and governance.
- **Cloud Security:** Navigates security configurations, compliance requirements & access control considerations for cloud systems; communicates different security automation techniques & tools for the cloud.

### INFORMATION SECURITY METHODOLOGIES:

- **Network Monitoring Tools Navigation:** Navigates the basic features of network monitoring tools and other resources for service risk management.
- **Threat Identification:** Utilizes established protocols to monitor network services, then identify and report basic threats to the services, devices, traffic & data.
- **Penetration Testing:** Utilizes standard testing methods to test a basic network for vulnerabilities from inside & outside of the firewall.
- **Scripting:** Utilizes basic commands and programming constructs in Python and/or shell scripts in Linux to automate tasks.
- **Incident Management:** Monitors, detects and triages infrastructure and security incidents, executes defensive measures; responds and escalates, as necessary.
- **Data Access:** Executes simple queries in a data query language such as SQL to answer questions around data.



To best serve our partners and today's in-demand jobs, Year Up has designed its Job & Industry Training to enable entry and succession across a variety of role pathways. These role pathways reflect the most common entry-level roles that Year Up participants are prepared for and that graduates obtain upon program completion.

## ROLE PATHWAYS

### INCIDENT MONITORING & RESPONSE

These roles help organizations monitor traffic, enter tickets when incidents occur, and respond to or escalate tickets.

### SECURITY OPERATIONS CENTER (SOC) ANALYST

These roles help organizations secure themselves against cyber attacks by effectively communicating, executing and monitoring cyber security protocols.

### PENETRATION TESTING

These roles perform security tests on networks, web-based applications, and computer systems, as well as design tests and tools designed to break into security protected applications and networks to probe for vulnerabilities.

### COMPUTER & DIGITAL FORENSICS ANALYST

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.

### CREDENTIALING OPPORTUNITIES

*Details vary by location*

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- While enrolled in the Year Up program, participants may also be eligible to earn college credits.

### EXAMPLE TEAMS PARTICIPANTS SUPPORT

- Compliance
- Incident Monitoring
- Security Awareness & Training

### EXAMPLE PARTNER COMPANIES

**BANK OF AMERICA** 

**LinkedIn**  **MERCK** 

**UNITED** 



Year Up's Job & Industry Training in Helpdesk & Desktop Support provides opportunities for participants to develop the essential career readiness and business skills needed to navigate a modern, professional work environment. In combination with the Essential Skills Training, participants will also build technical foundational capabilities and are expected to demonstrate the following competencies by the end of the training phase of the program.

## COMPUTER ARCHITECTURE & SYSTEMS FUNDAMENTALS:

- **Computer Systems:** Navigates computer systems with focus on operating systems (Windows, Linux and Mac), servers, and cloud infrastructure.
- **Computer Architecture:** Navigates basic computer and server hardware configurations.
- **Computer Networking:** Navigates basic wired and wireless computer network protocols; addresses schemes and configurations.

## COMPUTER SYSTEMS ADMINISTRATION:

- **File Systems Management:** Navigates file systems on a computer to perform file management operations, including file path tracking, corruption detection & basic troubleshooting for file recovery.
- **Operating Systems Management:** Utilizes basic features of UI & script-based administrative tools of a common operating system like Windows & Linux to execute install, update & upgrade procedures.
- **Device Management:** Utilizes OS utility software and administrative tools to execute functions such as backup, restore, imaging, partitioning, defragmentation, compression, encryption; device, process, memory, and user account management.
- **Error & Security Monitoring:** Utilizes established protocols and system tools to monitor computer system diagnostics, then identifies and reports basic errors and security issues when they occur.
- **IT Infrastructure Service Navigation:** Navigates common IT infrastructure services used in systems administration.
- **Computer Network Configuration:** Builds out physical & software configuration of basic computer networks (peer-to-peer LAN and WLAN), troubleshoots LAN operations, and chooses appropriate LAN topology for a given physical and logical design.
- **Active Directory Navigation:** Navigates basic features of user profile, account, workgroup, and domain management tools on a common operating system.

## DESKTOP MANAGEMENT:

- **Business Applications Configuration:** Installs and configures common business applications (Microsoft Office Suite, Microsoft Outlook, cloud storage, meeting applications, etc.) on a desktop.
- **Internet Configuration:** Utilizes basic features of internet configuration options (security, privacy, content, connections, favorites) to configure internet settings on a desktop.
- **Antivirus Configuration:** Installs and configures common antivirus client applications on a desktop.

## TECHNICAL CUSTOMER SERVICE:

- **Technical Documentation:** Constructs technical documentation for basic procedures, tools usage, and systems changes that can be understood and used by a non-technical business user.
- **Basic Troubleshooting:** Utilizes common troubleshooting techniques to trace a basic computer system or application issue, identify the root cause of the issue, apply a documented fix to the issue, verify the fix resolved the original issue, and communicate resolution to the customer.
- **Ticketing System Navigation:** Navigates the basic features of a common ticketing/incidence management system (e.g., Zendesk, Remedy, etc.).
- **Incident Lifecycle Management:** Triage software and infrastructure issues, executes appropriate procedures, accurately records notes for work completed at each stage of an incidence and escalates as necessary.
- **Customer Communications:** Utilize professionalism, inquiry, empathy, active listening, problem-solving, and challenge diffusion tactics to communicate with customers in ways that meet or exceed customer expectations.

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## ROLE PATHWAYS

### HELPDESK SUPPORT

Remote support roles that troubleshoot both hardware & software issues. There is a focus on customer service and an emphasis on de-escalation.

### DESKTOP SUPPORT

Onsite support roles that troubleshoot both hardware & software issues. User needs are responded to in person and 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, these roles help users with specific systems, such as Salesforce, Office, or SharePoint.

### TELECOMMUNICATIONS SPECIALIST

Often grouped with helpdesk and desktop support, these roles support users with telephone and video products and equipment. The role is customer-facing and includes installation, troubleshooting, repair, maintenance, and inventory.

### NETWORK ANALYST

These roles support users with issues involving email connectivity & administration, user activation, email group administration, and LAN/WLAN connective via systems like Active Directory.

## CREDENTIALING OPPORTUNITIES

*Details vary by location*

- Participants' completion of Year Up's Job & Industry Training may prepare them to sit for common industry-recognized certifications prior to or during the internship phase of the program.
- While enrolled in the Year Up program, participants may also be eligible to earn college credits.

## EXAMPLE TEAMS PARTICIPANTS SUPPORT

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

## EXAMPLE PARTNER COMPANIES

**BANK OF AMERICA** 

**amazon** 

 **exelon** <sup>SM</sup>

**LinkedIn** 



Year Up's Job & Industry Training in Application Development & Support provides opportunities for participants to develop the essential career readiness and business skills needed to navigate a modern, professional work environment. In combination with the Essential Skills Training, participants will also build technical foundational capabilities and are expected to demonstrate the following competencies by the end of the training phase.

## COMPUTER ARCHITECTURE & SYSTEMS FUNDAMENTALS:

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

## PROGRAMMING FUNDAMENTALS:

- **Basic Program Writing:** Writes and executes basic programs by employing concepts of a programming and scripting language such as Java, Python, C#, R or JavaScript.
- **Programming Concepts Application:** Utilizes different programming concepts such as data types, variables, conditionals, methods, loops and data structures to solve problems.
- **Development Environment Navigation:** Navigates and works with the common components of a software development environment, including IDE, frameworks, and libraries.
- **Code Error Identification:** Identifies software issues through code reviews and utilizes IDE tools to debug and resolve issues.
- **Code Update:** Reads code, understands code logic, and makes small updates to code to correct or enhance its function.

## DATABASE FUNDAMENTALS:

- **Databases:** Navigates a basic relational database design including tables, keys, constraints, indexes and normalization.
- **Basic Query Writing:** Constructs and executes basic SQL commands to answer questions with a database.

## QUALITY ASSURANCE & SOFTWARE TESTING:

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

## SOFTWARE DEVELOPMENT FUNDAMENTALS:

- **Version Control System Navigation:** Utilizes basic features of a version control system (e.g., Git, CVS, Subversion, etc.), including command line & GUI tools.
- **Software Solution Communication:** Articulates software solutions to business problems, using design tools such as decision trees, flow charts or pseudocode.
- **Software Release Navigation:** Navigates the terminology and architecture of common software release management infrastructure and processes.
- **Software Methodology Application:** Utilizes basic concepts, tools and processes of common SDLC methodologies such as Agile/Scrum or Waterfall required to work within a software development team.
- **Problem Analysis:** Navigates a multilayer & ambiguous problem by clarifying the problem statement and objectives, breaking it down into discrete components, identifying assumptions, setting strategies/resources for validating, and building clarity, understanding audience, applying root cause analysis, and developing a set of possible solutions.

## APPLICATION DEVELOPMENT:

- **Intermediate Program Writing:** Writes and executes intermediate programs using programming and scripting languages such as Java, Python, C#, R, or JavaScript.
- **User Interface Design:** Interprets a software design that includes user interface design.
- **Object-Oriented Programming:** Interprets a software design that includes data structures, basic algorithms and patterns, object-oriented programming concepts, and APIs.

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## ROLE PATHWAYS

<b>UI/UX DESIGN &amp; DEVELOPMENT</b>	These roles 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.
<b>SERVER/CLOUD DEVELOPMENT</b>	These roles 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.
<b>MOBILE APP DEVELOPMENT</b>	These roles work in agile teams to update & 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.
<b>DEVOPS/AUTOMATION</b>	These roles 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.
<b>PRODUCTION SUPPORT</b>	These roles assist with identifying & 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.
<b>SOFTWARE PROJECT MANAGEMENT</b>	These roles work in agile teams to assist in the management of software development processes using methodologies like Scrum.
<b>APPLICATION DEVELOPMENT</b>	These roles work in agile teams to update and edit software systems, use programming languages to incrementally build new software, and assist in associated processes.
<b>WEB DEVELOPMENT</b>	These roles 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.

<p><b>CREDENTIALING OPPORTUNITIES</b> <i>Details vary by location</i></p> <ul style="list-style-type: none"> <li>• Participants’ completion of Year Up’s Job &amp; Industry Training may prepare them to sit for common industry-recognized certifications prior to or during the internship phase of the program.</li> <li>• While enrolled in the Year Up program, participants may also be eligible to earn college credits.</li> </ul>	<p><b>EXAMPLE TEAMS PARTICIPANTS SUPPORT</b></p> <ul style="list-style-type: none"> <li>• Web Development</li> <li>• UI/UX Design &amp; Development</li> <li>• DevOps</li> </ul>	<p><b>EXAMPLE PARTNER COMPANIES</b></p>
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Year Up's Job & Industry Training in Data Analytics provides opportunities for participants to develop the essential career readiness and business skills needed to navigate a modern, professional work environment. In combination with the Essential Skills Training, participants will also build technical foundational capabilities and are expected to demonstrate the following competencies by the end of the training phase of the program.

### COMPUTER ARCHITECTURE & SYSTEMS FUNDAMENTALS:

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

### PROGRAMMING FUNDAMENTALS:

- **Basic Program Writing:** Writes and executes basic programs by employing concepts of a programming and scripting language such as Java, Python, C#, R or JavaScript.
- **Programming Concepts Application:** Utilizes different programming concepts such as data types, variables, conditionals, methods, loops and data structures to solve problems.
- **Development Environment Navigation:** Navigates and works with the common components of a software development environment, including IDE, frameworks, and libraries.
- **Code Error Identification:** Identifies software issues through code reviews and utilizes IDE tools to debug and resolve issues.
- **Code Update:** Reads code, understands code logic, and makes small updates to code to correct or enhance its function.

### DATABASE MANAGEMENT:

- **Database Design & Modification:** Designs, builds, populates and edits relational databases, following data normalization practices and applying and utilizing appropriate keys and constraints.
- **Query Writing:** Constructs and executes basic SQL commands to answer questions against a database.
- **Data Governance:** Communicates the benefits of data governance and the methods by which an organization can ensure high quality governance throughout the lifecycle of data.

### SOFTWARE DEVELOPMENT FUNDAMENTALS:

- **Version Control System Navigation:** Utilizes basic features of a version control system (e.g., Git, CVS, Subversion, etc.), including command line & GUI tools.
- **Software Methodology Application:** Utilizes basic concepts, tools and processes of common SDLC methodologies such as Agile/Scrum or Waterfall required to work within a software development team.
- **Problem Analysis:** Navigates a multilayer & ambiguous problem by clarifying the problem statement and objectives, breaking it down into discrete components, identifying assumptions, setting strategies/resources for validating, and building clarity, understanding audience, applying root cause analysis, and developing a set of possible solutions.

### DATA MANAGEMENT, ANALYSIS & REPORTING:

- **Data Analysis Fundamentals:** Navigates the data ecosystem, describes the role of data and data analysis in business; navigates commonly-used terminology used in data analysis.
- **Data Visualization:** Uses data visualization tools such as Tableau, Power BI and Excel to source data, create data visualizations and build interactive shareable dashboards.
- **Data Loading, Cleaning & Organizing:** Navigates steps in data preparation; Utilizes Excel to load, clean, validate and organize basic sets of business data.
- **Intermediate Data Analysis:** Makes business-related inferences about data by identifying, analyzing, and interpreting trends, patterns, or insights utilizing data analysis tools, in Excel (e.g., Sorting, Filtering, Conditional Formatting, basic Formulas, Charts, Tables, VLOOKUPS, and PivotTables).
- **Data Reporting & Storytelling:** Develops and presents reports that demonstrate effective storytelling with data via common data visualization and business tools such as Tableau, Power BI, PowerPoint and Excel.

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## ROLE PATHWAYS

### DATA PREPARATION

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

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

These roles 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.

### CREDENTIALING OPPORTUNITIES

*Details vary by location*

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### EXAMPLE TEAMS PARTICIPANTS SUPPORT

- Business Intelligence
- Big Data
- Sales/Marketing Operations

### EXAMPLE PARTNER COMPANIES





Year Up's Job & Industry Training in Quality Assurance provides opportunities for participants to develop the essential career readiness and business skills needed to navigate a modern, professional work environment. In combination with the Essential Skills Training, participants will also build technical foundational capabilities and are expected to demonstrate the following competencies by the end of the training phase of the program.

### COMPUTER ARCHITECTURE & SYSTEMS FUNDAMENTALS:

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

### PROGRAMMING FUNDAMENTALS:

- **Basic Program Writing:** Writes and executes basic programs by employing concepts of a programming and scripting language such as Java, Python, C#, R or JavaScript.
- **Programming Concepts Application:** Utilizes different programming concepts such as data types, variables, conditionals, methods, loops and data structures to solve problems.
- **Development Environment Navigation:** Navigates and works with the common components of a software development environment, including IDE, frameworks, and libraries.
- **Code Error Identification:** Identifies software issues through code reviews and utilizes IDE tools to debug and resolve issues.
- **Code Update:** Reads code, understands code logic, and makes small updates to code to correct or enhance its function.

### DATABASE FUNDAMENTALS:

- **Databases:** Navigates a basic relational database design including tables, keys, constraints, indexes and normalization.
- **Basic Query Writing:** Constructs and executes basic SQL commands to answer questions with a database.

### SOFTWARE DEVELOPMENT FUNDAMENTALS:

- **Version Control System Navigation:** Utilizes basic features of a version control system (e.g. Git, CVS, Subversion, etc.), including command line & GUI tools.
- **Software Solution Communication:** Articulates software solutions to business problems, using design tools such as decision trees, flow charts or pseudocode.
- **Software Release Navigation:** Navigates the terminology and architecture of common software release management infrastructure and processes.
- **Software Methodology Application:** Utilizes basic concepts, tools and processes of common SDLC methodologies such as Agile/Scrum or Waterfall required to work within a software development team.
- **Problem Analysis:** Navigates a multilayer & ambiguous problem by clarifying the problem statement and objectives, breaking it down into discrete components, identifying assumptions, setting strategies/resources for validating, and building clarity, understanding audience, applying root cause analysis, and developing a set of possible solutions.

### QUALITY ASSURANCE & SOFTWARE TESTING:

- **Software Test Writing & Execution:** Utilizes software testing concepts and techniques, including development of unit tests, to validate code.
- **Test Plan Design, Execution & Reporting:** Constructs, executes, and reports on test plans for a software solution.
- **Bug Report Writing:** Constructs and organizes clear, detailed and accurate bug reports.
- **User Interface Design:** Interprets a software design that includes user interface design.



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## ROLE PATHWAYS

### SOFTWARE TESTING & AUTOMATION

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

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.

### CREDENTIALING OPPORTUNITIES

*Details vary by location*

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### EXAMPLE TEAMS PARTICIPANTS SUPPORT

- Manual Testing
- Automated Testing
- Technical Project Support

### EXAMPLE PARTNER COMPANIES

Morgan Stanley



