



Powering superior virtual and live learning outcomes



XP3RT
NETWORK

TCC Solutions Overview

Reimagining Professional Development

About TCC and the **XP3RT**® Network



We launched the Training and Consulting Consortium, LLC (“TCC”) in 2017 with the core philosophy of delivering the highest quality content by the most diverse and engaging industry professionals to maximize learning outcomes. Our client partners receive a full-service experience, from logistics to learning.

TCC and its XP3RT Network partner with global and boutique organizations to deliver live and virtual training programs to large multinational banks, asset-management firms, sovereign wealth funds, pension funds, boutique asset managers, insurance companies, and universities.

TCC SERVES THE LEARNING AND DEVELOPMENT COMMUNITY THROUGH:

XP3RT® NETWORK

TCC’s XP3RT Network is a marketplace powered by artificial intelligence, where industry experts (XP3RTs) can connect with our client

partners. We bring a modern gig economy model to the financial services training industry, passing more revenue to our XP3RTs while maximizing learning outcomes.

VIRTUAL TRAINING SOLUTIONS

TCC XP3RT classes incorporate the best aspects of live, synchronous, and asynchronous virtual training. We enable real-time participation in instructor-led virtual classes, coupled with supplemental discussions, questions, and commenting in an enhanced study portal. This blended format increases learning outcomes significantly.

EXPERIENCE AND INNOVATION

Our XP3RT Network includes leading practitioners and industry pioneers in the virtual learning space. Our XP3RTs combine deep knowledge of the financial services industry with synchronous and asynchronous virtual training approaches that ensure successful outcomes.



“The Instructor was awesome - he simplified complex topics splendidly, and he was willing to answer any question. It was evident that he has great experience as an instructor.”

A priority for every organization

XP3RT
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Developing ways to maximize outcomes for e-learning programs should be a priority for every organization. Blended learning programs have the potential to increase engagement and drive performance.



The nine steps of the learner journey

1. Initial Assessment

Benchmark initial product knowledge

2. Online Curriculum

Level-set understanding

3. Microsoft Suite game

Establish a minimum proficiency across Excel and PowerPoint.

4. Interim Assessment

Measures impact of self-study and knowledge base leading into live training.

5. Core & Elective Content

Core content is delivered across all three streams and allows for cross-stream engagement.

6. Instructor-Led Training

Comprehensive training and development through skills application, through out the program.

7. Final Assessment

Demonstrates acquired knowledge. Provides guidance on gaps for continuing development.

8. Digital Library Access

Fosters continuous learning. Fills knowledge gaps. Allows for exploring new areas of interest.

9. Continuous Professional Development

Regular touchpoints covering data driven topics.

Core Financial Skills Development

Investment Banking

- Excel Best Practices
- Financial Modeling
- Merger Modeling
- LBO Analysis
- Comparable Company Valuation Comps
- Discounted Cash Flow Valuation

Technology

- Data Analytics
- Blockchain
- Artificial Intelligence
- Machine Learning
- Coding (all levels)
- Excel VBA

Sales and Trading

- High Frequency Trading
- Market Structure
- Market Making
- Settle Cycle of a Trade
- Modeling Financial Instruments
- Simulations
- Algorithmic Trading "Algo"

Capital Markets

- Fixed Income
- Commodities
- Macro Markets
- Derivatives
- Foreign Exchange
- Credit/Counter Party Risk
- Short Term Interest Rate Derivatives
- Equity
- Primary Markets
- Interest Rate Swaps
- Structure Products CDO, CLO, MBS
- Distressed Debt

Support Functions

- Matrix Management
- Operations
- Compliance
- Risk
- Legal
- Human Resources
- Technology

Asset Management

- Liability Driven Investing
- Active vs. Passive Management
- Asset Liability Management
- Indexing
- Enhanced Indexing
- Exchange Traded Funds
- Environmental, Social and Governance Investing
- Factor Investing
- Alternative Investments
- Wealth Management
- Portfolio Management
- Risk and Return
- Manager Selection

Commercial & Retail Banking

- Banking Products and Customers
- Accounting Fundamentals
- Credit Analysis
- Modeling With Liquidity and Debt Capacity Analysis
- Lending and Credit Structuring
- Distressed Debt and Restructuring

Hot Topics

- Python
- Diversity Training
- Blockchain
- Data Visualization
- Excel (all levels)
- ESG

Contact Us

Learn more about the virtual and live professional learning outcomes we can customize for your organization

Office: 1-212-689-0999
Email: info@tccxp3rt.com



Professional “Soft” Skills Development

Managing Others

- Interviewing for Success
- Prioritization and Time Management
- Giving Feedback to Others
- Effective Appraisal Techniques
- Dealing with Underperformance
- Coaching for Success
- Successful Mentoring
- Building Resilience
- Effective Leadership
- The First-time Manager
- Motivation and Employee Engagement
- Enterprise Agility

Communications

- Essential Business Writing
- Persuasive Writing Techniques
- Writing Business Plans
- Report Writing
- Email and Messaging Etiquette
- Running Effective Meetings
- Communicating within Teams
- Presentation Skills
- Briefing Others
- Communicating Expectations
- Storytelling for Business

Career Development

- Building Effective Support Systems
- Finding and Utilizing Mentors
- Planning and Organizing
- Developmental Planning
- Time Management
- Emotional Intelligence
- Working with Your Preferences
- Meeting Expectations
- Navigating Your Career Paths
- Meyers Briggs MBTI®
- Pace® Palette

Diversity Training

- Veteran Transitioning
- Supporting Cognitive Differences
- Tying Good Intentions to Tangible Actions
- Executive Presence Across the Organization
- Exercises aimed at adopting the perspective of BIPOC or LGBT People
- Setting goals for individual behavior with aim of building a more tolerant workplace

Building Relationships

- Building Effective Relationships
- Influencing Skills
- Working with Personalities
- Dealing with Difficult Situations
- Negotiation Skills
- Managing and Communicating in a Matrix Environment
- Networking Online
- Diverse Team Building
- Retaining Top Talent
- Managing Up

Sales and Client Focus

- Pitching for Success
- Presenting Solutions
- Creative Problem Solving
- Social Media Presence
- Listening Skills for Sales
- Client Engagement In 2020/2021
- Relationship Management
- Prospect Management
- Business Ethics

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