

# Private Equity

## Case Study

This private equity firm's previous training solution was not fully tailored to private markets, companies, and the type of metrics and technical skills needed to effectively analyze both. They approached us to provide training for a mixed group of analysts and associates, to better suit their business needs.

### CLIENT

**Boston-based private equity firm**

### PROGRAM

**New analyst and associate entry training program**

### LOCATION

**USA**

### PARTICIPANTS

**25 new analysts and associates**

### INSTRUCTORS

**1**



**Chris Cordone**  
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EX-J.P. MORGAN

## 1. The Challenges



### Diverse Backgrounds

As well as the need for a focus on private markets, the biggest challenge for the client was to ensure the entire cohort, from a variety of backgrounds, left the program desk ready. Although there was no one in the group completely new to employment, some had experience as IB analysts and some had previous PE experience.

## 2. The Solution

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### Customized & Relevant

Our trainer worked directly with those in the front office at the firm to ensure the content of the program was hyper-relevant. Together with experts in the business, we created an in-class case study which took up a full day of the training. This allowed participants to put their newfound skills to the test in a situation reflective of those they would encounter on the desk. Measuring success was integral to this client. Once again, we worked closely with them to ensure the final exam was centered around the skills most relevant to their working practices.



### Continued Support

Despite the pre-learning offered, the difference in ability between participants was still clear at the end of the five days. To counteract this, the instructor provided post-program support personally, offering exam reviews and forwarding links to specific Felix playlists to plug skills gaps.

**25**

Participants

**5**

Days



#### STAGE 1

Pre-work provided through Felix.



#### STAGE 2

Five days of in-person training covering financial statement analysis and introduction to modeling. The training was designed to fit in with their own, internal training which covered advanced valuation and capital markets.



#### STAGE 3

Continuing education provided through Felix.

# 3. The Impact



## Desk-ready

By working with VPs to produce a tailored curriculum and testing solution, alongside the one-to-one support offered to lower-ability students, participants were well prepared to hit the ground running and work on real deals.

## Felix

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