

Specialized Private Equity

Case Study

This fast-growing alternative investment firm approached us to create a training program for their new hires. They had never done a program before, as they work with atypical hiring cycles, and were looking for a partner who could deliver tailored training that considered both the digital and real estate aspects of their practices

CLIENT

Florida-based private equity firm specializing in digital infrastructure

PROGRAM

New analyst entry training program

LOCATION

Florida, USA

PARTICIPANTS

5 new analysts

INSTRUCTORS

1



Chris Cordone
—
EX-J.P. MORGAN

1. The Challenges



Sector-specific Expertise

When bringing in an external provider for the first time, they weren't sure where to start. Although the cohort was small, it was comprised of interns who had converted to full-time, campus recruits and lateral hires. This mixed group needed to be equipped with a robust and broad skill set while being focused on one specific sector.

2. The Solution



Save Time

Through years of experience, we were able to suggest a program that catered to their needs in just five days, rather than the ten they had originally budgeted for. We delivered some of the more general financial analysis content as adaptive pre-learning in Felix. This allowed students to come to the instructor with any questions this presented, and for us to focus on more specialized and complex topics in the five days.



Collaboration & Customization

We maintained constant communication with subject matter experts from within the business, for a period of months rather than just the weeks leading up to the program, to ensure the materials were hyper-relevant to business needs.

An example of this is the teaching model that our instructor adapted from a working model of the clients, introducing digital vocab and concepts at the same time. This went through several iterations, with comments from multiple stakeholders, to ensure it was perfect. We also adapted existing Financial Edge real estate content to include specific terms and metrics from their future day-to-day activities.

5

Participants

5

Days

12

Months Felix Access



STAGE 1

The first three days covered modeling, real estate, and valuation.



STAGE 2

The second two days focused specifically on their sector LBO and digital modeling.



STAGE 3

Continuing education delivered through a 12-month subscription to Felix, including Felix Live webinars.

3. The Impact



Desk-ready

At the end of the five days, the new hires had not only acquired a comprehensive technical skill set, but also had experience putting skills into practice with a bespoke teaching model. This inaugural training program made the client's offering to new hires much more attractive.

Felix

Continuing education, eLearning, and financial data all in one plan.

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Trusted by Wall Street's Top Investment Banks

There's a reason we're trusted to teach Wall Street's best analysts. With instructors from J.P. Morgan, Goldman Sachs, Barclays, and other bulge bracket heavyweights, we deliver an unparalleled learning experience.

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