

Deloitte.



USI Risk and Financial Advisory Learning & Development Offerings

January-February 2021

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Have a question on development? – ask your learning partners

Portfolio	Learning POC(s)
Analytics & Technology	Siddharth Sharma / Yukta
Controls, Compliance & Finance	Karan Sharma / Shrija Kaul
Hybrid / Operate	Avinash SP / Anil Kumar Talluri
GPS	Karan Sharma
A&IC	Siddharth Sharma / Yukta
Cyber & Strategic Risk	Karan Sharma / Kiran Kishore
Regulatory & Legal Support	Avinash SP / Anil Kumar Talluri
Transactions / M&A	Karan Sharma / Shrija Kaul
Level Up & Leadership Dev.	Shubapriya Padmanaban Bhatia
Industry	Siddharth Sharma / Yukta

News from the Learning Desk!



Industry Learning Risk & Financial Advisory

[Click Here](#)

Please write to [Industry mailbox](#)
or [Siddharth Sharma](#) for more information.

The [Risk & Financial Advisory Industry Learning Launchpad](#) is the first stop on your industry learning journey. You will find both instructor led and on-demand learning opportunities that can help with onboarding to a client or introduce you to a new industry or sector.

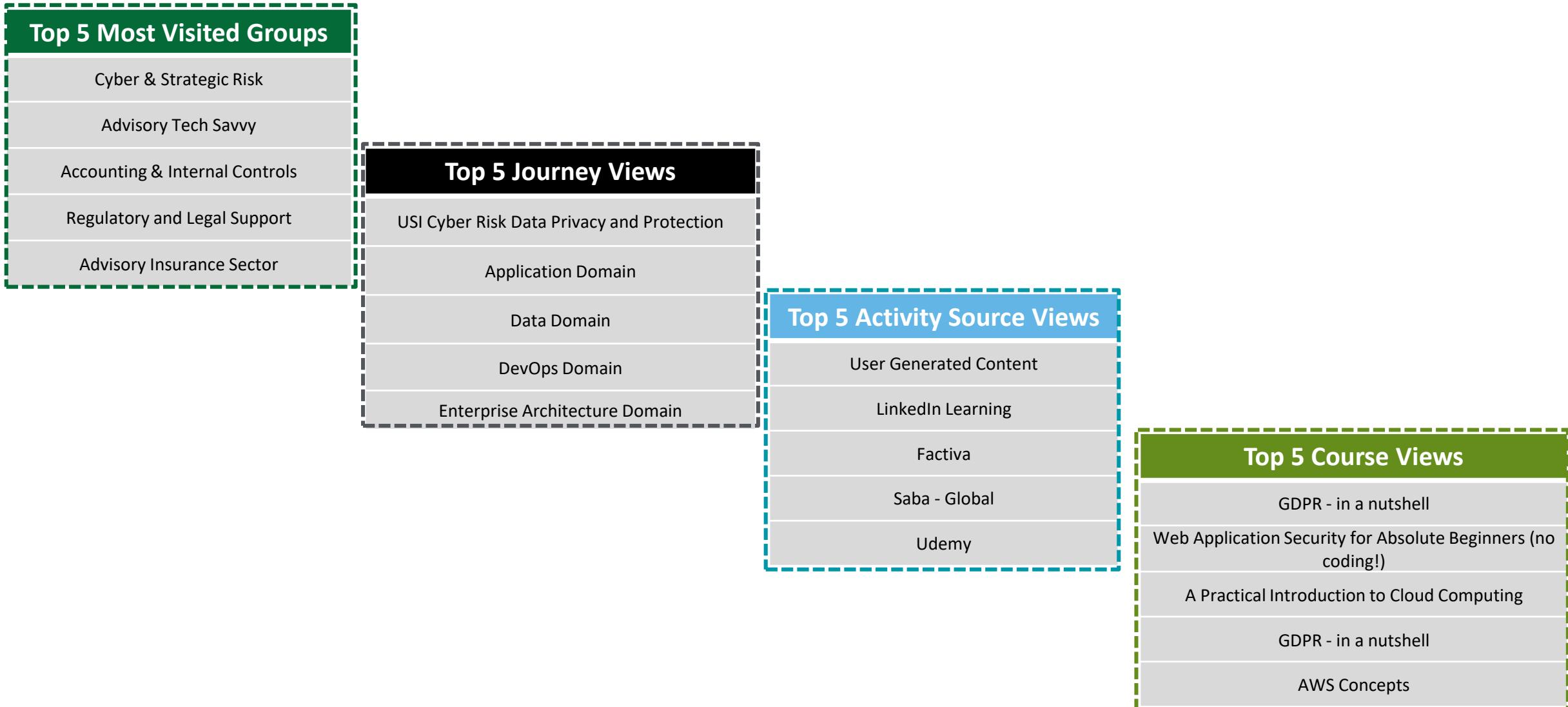
[i360](#) is a vast repository of on-demand, virtual, and classroom industry training applicable to all Deloitte functions, including Risk & Financial Advisory.

- Find CPE-eligible learning based on industry and sector. You can also filter learning to find foundation, advanced and mastery level programs
- Are you new to an industry? Access the Introductory Collection for each industry, which enables you to speak your client's language by getting up to speed where and when you choose

The [Industry Proficiency Program \(IPP\)](#) is a self-paced program that helps guide your industry skill-building activities and recognizes your accomplishments as you achieve your goals at each industry milestone.

- Build a roadmap toward Industry proficiency and meet requirements in the areas of Education, Experience and Exposure
- Deloitte industry training and external training programs qualify for IPP credit

CURA Update



Advancing Tech Savvy | Learn More

Advancing Tech Savvy was launched in June 2020 featuring five learning personas and advanced learning pathways with over 180 on-demand courses in Artificial Intelligence (including Analytics) and Cloud. **All Advisory PPMDs and professionals (excluding EA)** are required to complete three **Advancing Tech Savvy courses by March 6, 2021** to stay informed on the latest technology trends

Advancing Tech Savvy

- Five personas tailored to engagement roles
- Learning pathways featuring over 180 courses
- 6 AI skill domains & 16 Cloud skill domains



Curious Conversationalist



Savvy Deal Maker



Diligent Delivery Professional



Strategic Solution Architect



Deep Developer

NEW! Time to get started on the mandatory 3 course requirement due March 6, 2021. (*Courses offer CPE and count towards the Firm's annual 40-hour learning requirement*)

1. Visit [Advancing Tech Savvy](#) (content is best viewed in Edge or Chrome)
2. Select [What's my Tech Savvy Persona?](#) to determine your persona OR select [I know my persona](#)
3. Select either Artificial Intelligence or Cloud
4. Select the skill domain that you want to learn more about
5. Complete any three courses within the learning paths and receive CPE and meet the mandatory requirement

Technology

1. Virtual Instructor-led
2. E-Learnings
3. Cura Journeys

Technical – Virtual Instructor Led Trainings (vILTs)

Program Name	Enrollment Link	CPE Credits	Start Date	Learning POC
Fusion Managed Services Bootcamp	Coming Soon	NA	TBD	Anil Kumar Talluri
Capital IQ Tool Training	By invitation	2	24-Feb	Shrija Kaul
Byte Sized Learning Series - SAP Security and Segregation of Duties	Coming Soon!	1	15-Feb	Yukta

Technical – Virtual Instructor Led Trainings (vILTs)

Program Name	Access Link	Duration (Hours)	CPE Credits	Course Description
Blockchain Basics	Click Here	1	1	In this introductory-level course, learn what blockchain is and what it might mean to you. The course is primarily non-technical by design, intended for those working in business leadership positions, data science, and IT management.
Learning Data Analytics	Click Here	1.40	1.6	The course teaches techniques for repurposing, charting, and pivoting data.

Technical E-Learnings

Program Name	Access Link	Duration (Hours)	CPE Credits	Course Description
The New Age of Risk Management Strategy for Business	Click Here	1.5	2	A practical approach to risk management, helping you think strategically about some of the most pressing risks of the 21st century
Blockchain A-Z™: Learn How To Build Your First Blockchain	Click Here	14.5	14	Helps to understand the basics of blockchain
Learning Cloud Computing: Cloud Security	Click Here	1.5	1	Understand the difference between on-premise and hosted solutions and its vulnerabilities
Learning Cloud Computing: Monitoring and Operations	Click Here	1.20	1	To help you understand the latest tools and set of guidelines to select and plan for the implementation of cloud monitoring and operations solution
Learning Cloud Computing: Networking	Click Here	1	1	To understand networking—how it works, how it interacts with your existing enterprise network, and how to work with different networking services—is crucial in the world of cloud computing.

Technical Cura Journeys

Program Name	Access Link	Journey Description
Artificial Intelligence (AI) and Machine Learning (ML)	Click Here	Do you know the difference between AI and ML? Are you interested in knowing how businesses are leveraging these disruptive technologies? Are you interested in developing technical skills in these areas? This journey will help develop your understanding and skills in AI & ML.
Artificial Intelligence Guild - Self-Guided Learning Playlist	Click Here	Leverage this curated list of learning & resources to supplement your Machine Learning knowledge or obtain very targeted knowledge in an area.
Power BI	Click Here	This journey takes beginner Power BI users through the steps of preparing, modeling, visualizing, and analyzing data using the Power platform available through Microsoft.
Cyber Risk General Journey	Click Here	This pathway lists courses and other resources that cover on foundational topics and content related to cyber risk and cybersecurity. These do not need to be completed in any particular order. Choose the courses that meet your needs and interests.
Journey on Agile Framework	Click Here	For many projects, an agile approach and mindset helps us accelerate value realization for our clients. The Journey covers courses on fundamentals of Agile and on Agile Planning
Java - The Complete Guide	Click Here	The journey contains modules on basics of Java; JDBC; Spring; Junit; Mockito and SQL for beginners

Industry

1. Virtual Instructor-led
2. Industry 360 E-Learning
3. Cura Journeys

Industry – Virtual Instructor Led Trainings (vILTs) | Upcoming programs

Program Name:	Enrollment Link	CPE Credits	Start Date	Description
Conduct Risk – Foundation	Click here	1	19-Jan	This session would cover the basics of Conduct Risk and help the participants understand unfair outcomes for clients, counterparties and/or agents that undermine market integrity, and damage the firm's reputation and competitive position
Industry JumpStart: Renewable Energy	Coming Soon!	1	20-Jan	Course includes the following sections: Overview High-level description of sector activities and customers Business models Sector outlook Sector dynamics Leading companies Sector culture.
Consumer Training	Coming Soon!	1	20-Jan	
Guardian Client Insight Session	Click here	1	21-Jan	The Guardian Life Insurance Company of America is one of the largest mutual life insurance companies in the United States. It provides life insurance, disability insurance, dental insurance, and other benefits for individuals, at the workplace, and through government-sponsored programs.
Jumpstart: Power & Utilities	Coming Soon!	1	22-Jan	Course includes the following sections: Overview High-level description of sector activities and customers Business models Sector outlook Sector dynamics Leading companies Sector culture.
Regulation Best Interest (Reg BI)	Click here	1	28-Jan	The training focuses on Regulation Best Interest ("Reg BI") and its purpose, requirements for Form CRS, key challenges firms are facing with Reg BI Compliance and Deloitte's offerings, and approach for Reg BI compliance for a firm through a case study.
Oil and Gas Sector Valuation Overview	Coming Soon!	1	28-Jan	

Industry – Virtual Instructor Led Trainings (vILTs) | Upcoming programs

Program Name:	Enrollment Link	CPE Credits	Start Date	Description
Regulatory Proceedings	Coming Soon!	1	29-Jan	This course explains key types of proceedings used to set regulations, how the proceedings are initiated, and the process they follow
Life Care and Health Sciences	Coming Soon!	2	29-Jan	
AuditWise - Travel and Expense Analysis	Coming Soon!	2	22-Feb	This offering is part of confluencia series aimed as a refresher for participants on the nuances of Auditwise Travel and Expense Analysis
Overview of Order to Cash Cycle	Coming Soon!	1	24-Feb	This offering is part of confluencia series aimed as a refresher for participants on the Overview of Order to Cash Cycle

Industry 360 E-Learning

Program Name

Access Link

CPE Credits

Course Description

Industry 360

[Click Here](#)

CPE Enabled
Modules

Industry knowledge allows you to speak to clients in a language they understand. This network of learning resources will help you to learn that language... whether you need to understand general trends or business-specific details. These CPE enabled, self-paced courses with varied durations are open for you to explore and understand your industry better. These are personalized courses and gives the Practitioners an option to filter based on their choice of Industry, sector, content level, and program type

Industry Cura Journeys

Program Name	Access Link	Journey Description
Telecom Media and Technology	Click Here	
Government and Public Sector	Click Here	These Cura journeys are for Risk & Financial Advisory professionals who are aligned to the Government and Public Services (GPS) industry. Here you will find both instructor-led and on-demand learning opportunities that can help with onboarding to a client or introduce you to a new industry or sector. Out of hundreds of industry courses available to Deloitte professionals, here you will find recommended courses, videos and podcasts, that are more specifically for Risk and Financial Advisory practitioners.
Life Sciences and Health Care	Click Here	
Energy Resources and Industrials	Click Here	
Financial Services	Click Here	
Consumers	Click Here	

Professional & Leadership

1. [Level UP](#)
2. [Level UP \(Hybrid Operate\)](#)
3. [Leadership Development](#)
4. [Cura Journeys](#)

Level Up Courses – Virtual Instructor Led Trainings (vILTs)

Program Name	Start Date	CPE Credits	Career Level	Description	Learning POC
Critiquing and Improving Client Deliverables	22-Jan	4.5	Sr. Consultant	Activity based, virtual instructor-led session on business writing. Will help review written materials for quality and learn to critique client deliverables.	Shubapriya Padmanaban
	4-Feb				
Engagement Pricing and Profitability	20-Jan	3	Sr. Consultant	Learn the concept of active listening; how to identify barriers to listening and to determine techniques to overcome barriers and enhance skills as a listener.	Bhatia
	17-Feb				
Communicating with Executives	21-Jan	5	Manger	This course equips professionals with a systematic approach to achieve greater buy-in from their leaders & stakeholders. In the session, participants will apply each module through activities to include giving and receiving peer feedback	Shubapriya Padmanaban Bhatia
	3-Feb				
	11-Feb				
Building your deliverables story	20-Jan	5	Manager	This course will help Deloitte professionals craft compelling deliverables by using elements of the proprietary "Four Sweeps" technique. Professionals will work through three modules to build client-ready deliverables that have a clear focus and storyline, relevant details, logical messaging and storyboarding, compelling design, brand appropriate formatting, and memorable call to action.	
	5-Feb				
	11-Feb				

All Level Up courses are invitation based; look out for calendar invites based on your career level

Hybrid Operate P&L Offerings – Virtual Instructor Led Trainings (vILTs)

Program Name	Start Date	CPE Credits	Career Level	Description	Learning POC
Communicating with Impact	1-Feb	4.5	Analyst & Consultant	Learn to think critically, synthesize information, and craft effective documents, presentations, memos, and emails by adopting reader-centric writing strategies, contemporary business voice, and quick editing and formatting techniques.	
Foundations of Effective Email	8-Feb	2	Analyst, Consultant & Sr. Consultant	The purpose of this course is to help participants understand when emails should be sent, purpose of emails, how to send effective emails to persuade the audience and how to best present emails based on the target audience it is being sent to.	
Creating Your Story	22-Feb	4.5	Manager	This course will help hybrid operate professionals craft compelling deliverables by using elements of the proprietary "Four Sweeps" technique.	Shubapriya Padmanaban Bhatia
Critiquing and Improving Communications	15-Feb	4.5	Sr. Consultant	This course is an interactive, activity based, virtual instructor-led session on business writing. This course will help to review written materials for quality, using the 4 sweeps technique to critique client deliverables	
Foundations of Active Listening	25-Jan	2	Consultant	The course will help participants to define the meaning of active listening and apply active listening skills, identify barriers to listening and determine techniques to overcome	

All Level Up courses are invitation based; look out for calendar invites based on your career level

Professional & Leadership - Virtual Instructor Led Trainings (vILTs)

Program Name	Start Date	CPE Credits	Career Level	Description	Learning POC
DFX Global Virtual Track	1-Feb	6	All	A Global DU certification program that supports the development of facilitators who are effective and confident in guiding the growth of others, and more broadly, professionals who communicate with greater impact and are better at engaging with internal and external client teams. The DFX Virtual Classroom Track is specifically focused on teaching in the virtual classroom environment.	Shubapriya Padmanabhan Bhatia
	10-Feb				
	15-Feb				
	24-Feb				
Creating Client Deliverables	19-Jan	5	Consultant	Learn to think critically, synthesize information, and craft effective documents, presentations, memos, and emails.	
	28-Jan				
	2-Feb				
	9-Feb				
	16-Feb				
	18-Feb				
	23-Feb				
	25-Feb				

All Level Up courses are invitation based; look out for calendar invites based on your career level

Professional & Leadership - Virtual Instructor Led Trainings (vILTs)

Program Name	Start Date	CPE Credits	Career Level	Description	Learning POC
Presenting with Confidence	21-Jan	6	Consultants	This course will help Deloitte professionals to hone existing skills of senior professionals, and to enhance their delivery styles for impactful business interactions	Shubapriya Padmanabhan Bhatia
	27-Jan				
	29-Jan				
	3-Feb				
	10-Feb				
	12-Feb				
	17-Feb				
	19-Feb				
	24-Feb				
	26-Feb				

Professional & Leadership Cura Journeys

Program Name	Access Link	Career Level	Journey Description
Building Compelling Presentations & Communications	Click Here		Explore this journey to learn how to structure, design and improve your presentations and other written communications.
Successful Interactions – Interpersonal Communication (0.5 CPE)	Click Here		Learn techniques for getting your message across effectively in the workplace, and how to tackle potential communication challenges with your colleagues and supervisor
Successful interactions -Creating Personal connections (1.4 CPE)	Click Here	Relevant for all career levels	Learn how to create personal connections—that sense of chemistry, comfort, and confidence—even with new people, in unfamiliar situations, and under stressful circumstances.
Successful interactions -Persuading others (0.5 CPE)	Click Here		Learn techniques to cultivate your persuasion skills in order to establish credibility when meeting new people, make it easier for people who know you to say "yes," and communicate with authority.
Persuade and Influence Without Authority	Click Here		Explore this journey in order to see ways to make the best use of your time! Own your time management for productivity!
Maximizing Efficiency and Productivity Virtually	Click Here		Discover how to maintain focus and optimize performance when we are bombarded with information, constantly available courtesy of multi-source technology and distraction overload.

QRM and PM&G

1. QRM and PM&G Courses

QRM and PM&G e-learning Courses

Program Name	Access Link	Career Level	Duration (Hours)	Course Description	SPOC
Deloitte Advisory Quality and Risk Management 101	Click Here	All	1:00	The course will introduce you to how Advisory values and embeds quality into everything it does. You will be introduced to the concept of risk, risk mitigation planning, and how risk is linked to quality.	
Advanced QRM: Pre-Engagement Activities	Click Here	Managers & Above	1:15	This course will cover the primary quality and risk management (QRM) related considerations in the pre-project phase of the engagement life cycle. Participants will gain an understanding of the important concepts that underlie our approach to client and engagement acceptance.	Hetal Mehta
Advanced QRM: Execution and Post-Engagement Activities	Click Here	Managers & Above	0:50	In this course, we will cover the second phase of the engagement life cycle, the project phase, where the actual work agreed to in the engagement agreement is performed. During the engagement, we focus on quality work effort and client satisfaction.	

QRM and PM&G offerings

Program Name	Enrollment Link	Career Level	Start Date	Time
USI Global DAP Session		Senior Consultants & above	11-Feb	3:00 – 4:00 PM
NCA Session	Please write to <u>Hetal Mehta</u> for attending the sessions	Consultants and above	16-Feb	3:00 – 4:00 PM
DAP Session		Consultants and above	17-Feb	2:00 – 3:30 PM
QRM SC Session		Senior Consultants & above	18-Feb	12:00 PM

What's Brewing?

Marquee Programs

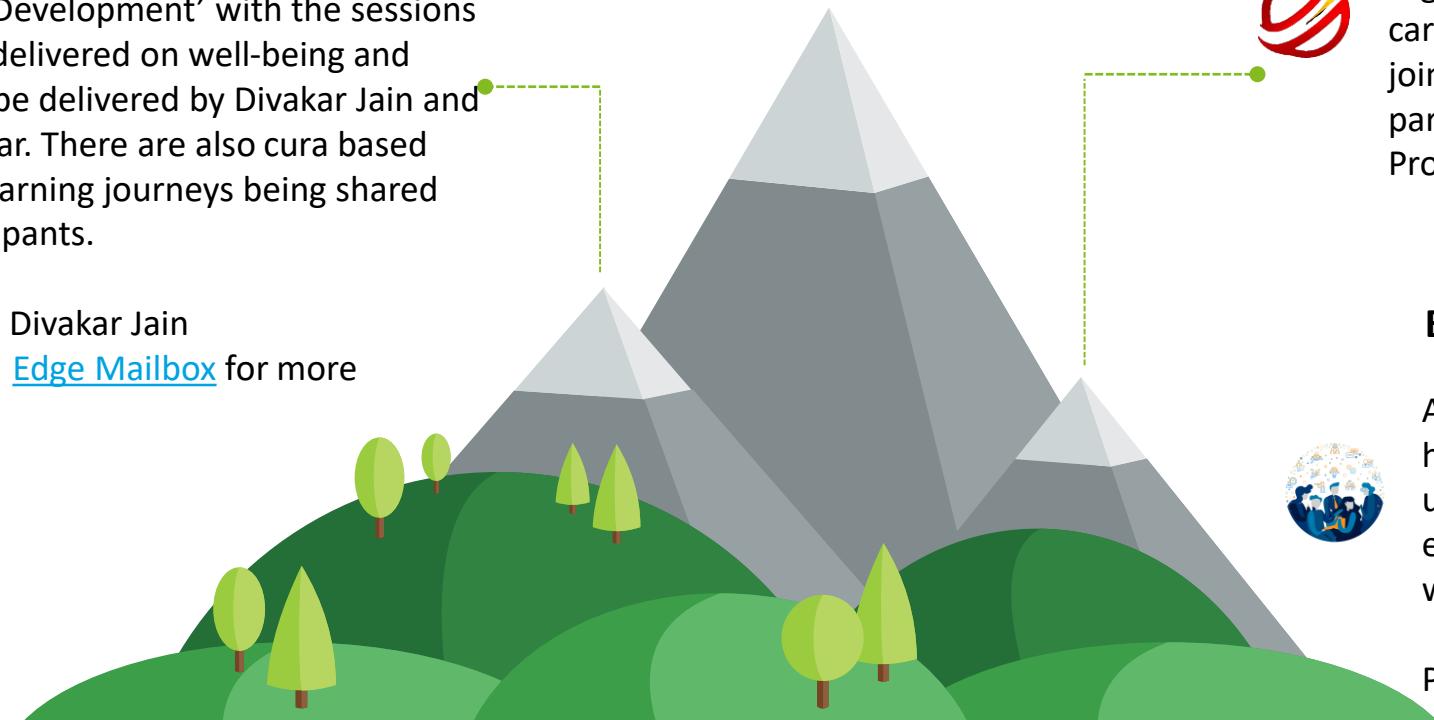


New Senior School & New Senior Journey

The month of January started off with the theme of 'Self Development' with the sessions planned to be delivered on well-being and networking to be delivered by Divakar Jain and Pashupati Kumar. There are also cura based personalized learning journeys being shared with the participants.

Program Dean: Divakar Jain

Please write to [Edge Mailbox](#) for more information.



On-Boarding

Technical Internship Onboarding



A curated learning intervention designed to help our tech interns to understand the organization and successfully build their careers. A total of 118 technical interns would be joining across January and February.

Program Dean : Veena Bangarappa

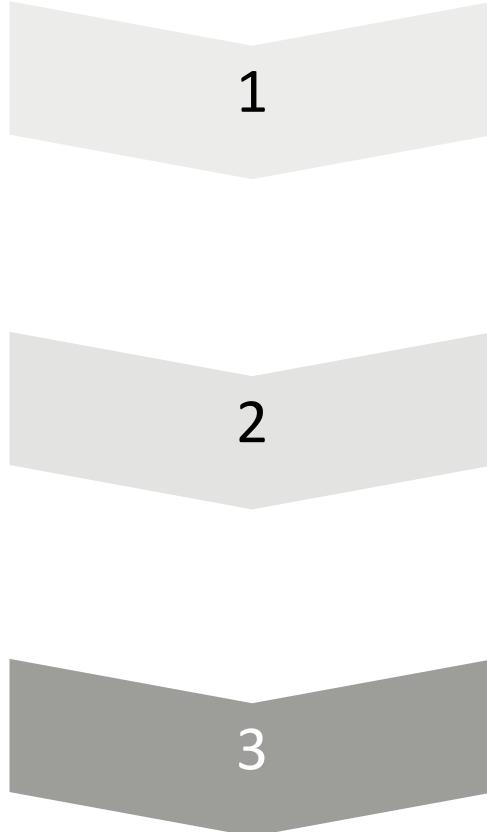
Experience Hire Onboarding



A platform that helps our new experienced hires seamlessly integrate into the practice by understanding our culture. Upcoming third edition of the experienced hire onboarding will have close to 220 experienced hires.

Program Date : 8 February 2021

Want to check your CPE credits? – follow the below steps



- [**Click here**](#) to know your CPE credit history.
- The US Firm mandates a CPE compliance requirement for Professionals performing Client Service that consists of earning at least forty (40) CPE Credits by Dec 31st every calendar year. The 40-Credit requirement does not have any limitations/caps based on CPE Credit subject area, type of CPE Credit, or the training's delivery method. Know more about the US Firm CPE requirement [**here**](#).
- To receive CPE credits for any CPE enabled external trainings or certifications (including LinkedIn Learning) submit your completion certificates by following the [**External Training submission**](#) process.



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