

Customizing Curriculum for Sub-Sector Success



Funded by the Fund for the City of New York in conjunction with the New York City Employment and Training Coalition and the Google Tech Opportunity Fund.

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Introduction

KindWork's Customer Experience Fellowship provides 250 hours of technical training to help talented young adults ("fellows") from overlooked communities transform their economic outlook and launch new careers in digital-based, customer-focused jobs. At the program's onset, the co-founders observed a lack of connective tissue between hiring managers, training providers, and low-income young adults looking for career-ladder employment. Their experience working in tech-enabled customer experience and operations roles helped them to quickly identify an opportunity to focus on rapid credentialing for these roles—an unaddressed need in New York City's workforce development community. Since its inception, KindWork has graduated 210 fellows and maintained a consistent post-program employment rate of more than 84%. Placed graduates earn more than \$43K annually on average and are provided with on-going coaching to establish and grow their careers. Through a strategic partnership with Brooklyn Workforce Innovations, KindWork is able to continue this entrepreneurial approach to training, coaching, and job connection. Most recently, this has meant recognizing an opportunity to better prepare fellows for industry-specific roles by complementing graduates' newly-acquired technical skills with sub-sector content knowledge in the innovation economy.

Over the past few years, the growth of the technology sector in New York City has outpaced that of other sectors, and the technology sector in the United States overall. This growth becomes even more staggering when considering that at least a third of technology jobs, specifically developers and programmers, report working across a variety of sectors, and thus, are not included in many of these types of analyses (NYCEDC, 2024). Often, describing growth in technology and innovation is limited to specific occupations or industries, and as a result, cannot fully represent the extent to which these jobs have become increasingly ubiquitous. Almost every sector is now leveraging or relying on technology in some way. Thus, most "technology jobs" benefit greatly from domain expertise, just as many of today's occupations require some level of digital fluency. Further, this type of expertise will only become more relevant as customer experience professionals are required to handle increasingly sensitive or complex inquiries and more routine operations are delegated to Artificial Intelligence tools.

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Leveraging its unique organizational capacity to respond nimbly to industry demand, Brooklyn Workforce Innovation's KindWork program identified promising opportunities for its graduates in two well-established cornerstones of the local economy and two of the fastest-growing subsectors in New York City's innovation sector: Healthcare and Wellness Tech and FinTech. Financial services generally leads the state in terms of Gross Domestic Product ([NY Office of the Comptroller](#)) and education and health services currently leads the greater metropolitan region in overall job growth ([Bureau of Labor Statistics](#)). KindWork wanted to increase its ability to connect graduates to customer experience roles in these sectors while leveraging existing employer partnerships and building on the success of past KindWork fellows working in the fields. Thanks to catalytic funding from the Fund for the City of New York, the New York City Employment and Training Coalition, and the Google Tech Opportunity Fund, KindWork was able to invest in program graduates by crafting two industry-informed program modules that provide domain-specific insights intended to:

- Provide a credential for graduates to add to their LinkedIn and resumes that indicates their knowledge, interest, and commitment to a specific industry;
- Offer overarching context to guide and inform graduates' application and interview responses while job searching; and,
- Once hired, ease the onboarding transition for KindWork graduates by establishing a foundation of industry terminology, core concepts, and regulatory considerations.



Creating the Curriculum

In total, the production of each curriculum took between 80-100 hours, spread across four months. This timeline includes all preliminary planning and research and concludes with piloting the modules with recently-graduated fellows. An overview of the stages of development are outlined below.

- 1. Review of Existing Insights:** The KindWork team first reviewed feedback from past job placements, both from employers and graduates, to get a sense of the type of industry content that might be helpful.
- 2. Preparation for Employer Engagement:** Using existing insights, the KindWork team crafted scripts for outreach to employers and questions for interviews. KindWork also leveraged existing employer partnerships in both Healthcare and Wellness and the Financial sector to garner introductions and gather initial input related to the curriculum.
- 3. Employer Outreach:** Outreach started with KindWork's existing employer partners in the respective sectors and the introductions those partners were able to offer. Outreach included offering gift cards as a "thank you" for participating employees. However, a strategy for cold outreach also proved instrumental to securing the necessary curriculum insights. KindWork used LinkedIn Premium to research and message customer experience professionals working in healthcare and financial services in tech-adjacent roles. Of the 12 curriculum contributors, however, only one was a result of this type of cold outreach. Tech:NYC and Built in NYC's websites also offered insights to NYC-based startups that might be willing to participate. In total, KindWork contacted 23 Healthcare and Wellness Tech organizations to successfully complete six interviews and 27 FinTech organizations to successfully complete six interviews. This amounted to about one partner participating for every four that were contacted. Finally, KindWork found that the most fruitful interviews were often with managers or supervisors directly overseeing the day-to-day roles of new customer experience associates or with learning and development specialists who understood the onboarding process for entry level talent.

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4. **Interviews:** KindWork conducted employer interviews remotely via Zoom, scheduled using Calendly, and confirmed via a calendar invitation. An overview of KindWork’s model as well as conversation prompts were shared with interviewees in advance so that they could prepare to address the following:
 - a. Cataloging the essential skills/knowledge for entry-level CX hires, especially for those roles that would be a strong fit for the KindWork talent pipeline
 - b. Describing the day-to-day in those role(s), including the tech stack used and any FinTech-specific competencies
 - c. Giving input on topics/competencies for KindWork’s industry-specific training that would increase candidates’ readiness
 - d. Describing the onboarding and ongoing training that new hires receive

KindWork also requested documentation that might be informative for its curriculum-building efforts, including:

- a. Job Descriptions to review requirements and preferred qualifications.
 - b. Interview questions to gauge how employers might be measuring things like “experience or interest” in the sector.
 - c. Onboarding or training materials to identify the content new Customer Experience Associates are expected to master in their first few weeks on the job.
5. **Curriculum Development:** Once insights had been gathered across all employer interviews and documentation, KindWork identified themes to inform first a curriculum outline, and then the curriculum. Employers provided additional feedback on the outline before the content was fully developed and loaded into Lessonly, KindWork’s Learning Management System (LMS).
 6. **Module Launch:** Once complete in Lessonly, the KindWork team assigned modules to interested fellows upon graduation and the commencement of their job search. The opportunity was introduced toward the end of their KindWork training, once foundational digital skills and core competencies for customer experience roles were fully covered. Fellows had two weeks to complete the module they opted into and their participation was fully voluntary.

The curriculum development process was supported by the following tools, comprising KindWork's tech stack for this project:

- Airtable for project planning and managing the employer engagement funnel
- Calendly for scheduling interviews
- Zoom for conducting and recording interviews
- Dovetail for notetaking and aggregating qualitative findings
- Lessonly as the learning management system

Employees from the following twelve companies graciously offered their time and insights to construct these modules, seeing it as an opportunity to offer insights and tools to emerging customer experience professionals.

FinTech and Financial Services:

- Bloomberg
- Hearsay
- Melio
- Preqin
- Ramp
- Yotta

Healthcare and Wellness:

- Alma
- Atrium
- Dandy
- Ennoble Care
- Levels Health
- Plush Care

PREQIN



“Proud to pay it forward by backing KindWork candidates on their FinTech career journey. Empowering tomorrow’s leaders is not just an honor and a privilege - it’s our duty as leaders to champion the next generation.”

Shifra Ansoff, Global Head of Customer Experience

hearsay



“Being part of enhancing this curriculum was an absolute joy, knowing that it will equip KindWork candidates with the tools they need to excel in customer experience roles within FinTech, particularly at innovative companies like Hearsay Systems.”

Jon Schlueter, Senior Director, Global Customer Support

The Modules

Ultimately, each module consisted of six sections covering basic terminology and other relevant software, processes, regulations, and context. Both modules are self-paced, delivered via Lessonly, and include a mix of narrative content, videos, and knowledge checks in the form of quizzes and free responses.

Healthcare and Wellness Tech Certification

1. Introduction to the Healthcare Tech Industry

- 1.1 Overview of healthcare technology
- 1.2 Key healthcare tech companies and startups
- 1.3 Current trends and future outlook

2. Medical Terminology Basics

- 2.1 The structure of medical terms, including prefixes, roots, and suffixes.
- 2.2 Common word roots related to various body systems.
- 2.3 The significance of prefixes and suffixes in medical terminology.
- 2.4 Techniques for decoding and understanding complex medical terms.

3. Introduction to Medical Billing & Coding

- 3.1 What is medical billing vs medical coding
- 3.2 The purpose of medical codes
- 3.3 International Classification of Diseases (ICD) 101
- 3.4 Current Procedural Technology (CPT) 101
- 3.5 Navigating healthcare billing & real world examples
- 3.6 Introduction to insurance terms and processes
- 3.7 Types of health insurance
- 3.8 Key terms in health insurance
- 3.9 In Network vs Out of Network
- 3.10 Explanation of Benefits (EOB) & Electronic Remittance Advice (ERA)
- 3.11 Dealing with insurance in healthcare tech customer support

4. Introduction to Healthcare Regulations and Compliance

- 4.1 Healthcare laws and regulations
- 4.2 Importance of compliance + Regulatory bodies
- 4.3 Data Privacy for the Health Insurance Portability and Accountability Act (HIPAA)

5. Healthcare Software

- 5.1 Overview of healthcare software
- 5.2 Introduction to Electronic Health Record (EHR) systems
- 5.3 Case study customer support scenarios

FinTech and Financial Literacy Certification

1. Introduction to FinTech

- 1.1 Overview of Financial Services
- 1.2 Introduction to FinTech
- 1.3 Example Financial Services and FinTech companies
- 1.4 Current trends and future outlook

2. Financial Literacy

- 2.1 Banking and Personal Finances
- 2.2 Savings, Checking, and Other Accounts
- 2.3 Planning a Budget and Balancing Your Accounts
- 2.4 Building and Retaining Credit
- 2.5 Taxes
- 2.6 Identity Theft and Scams

3. Financial Literacy - Assets, Investments, and Insurance

- 3.1 Assets
- 3.2 Investment
- 3.3 Insurance

4. Financial Transactions and Processes

- 4.1 B2C: business to consumer
- 4.2 B2B: business to business
- 4.3 B2G: business to government
- 4.4 Bank-to-Bank
- 4.5 Deposits and withdrawals
- 4.6 Payments and transfers
- 4.7 Risk Management

5. Introduction to Financial Systems, Regulations, and Compliance

- 5.1 The Federal Reserve, The U.S. Dept. of the Treasury, and The Automated Clearing House (ACH)
- 5.2 Financial Industry Regulatory Authority (FINRA)
- 5.3 Securities Exchange Commission (SEC)

6. Entry-Level Roles in FinTech

- 6.1 Customer/Client Support
- 6.2 Client Solutions
- 6.3 Analytics and Sales
- 6.4 Case studies



Outcomes So Far

In the pilot phase, fourteen KindWork graduates completed at least one of the modules, with four opting to participate in both. Three recently-graduated KindWork fellows provided feedback on their experience with the sub-sector modules. In general, fellows seemed to approach the opportunity as a means to further explore a sector of interest and to enhance their resumes and LinkedIn pages with the addition of a certificate.

Unique Fellows Participating	14
Healthcare and Wellness Tech Certification	12
FinTech and Financial Literacy Certification	6
Both	4

KindWork is now leveraging the business connections cultivated during curriculum development, as well as others in their growing Healthcare and Wellness Tech and FinTech networks, to connect graduates with new careers. So far, a few of these graduates have matriculated into roles aligned with the sub-sector modules they completed. KindWork will continue to monitor related employment outcomes, but will also continue to encourage graduates to accept positions that are ultimately best for them, regardless of sector. Fellows will continue to be asked to provide feedback on

the self-paced curriculum, allowing KindWork to refine and strengthen these modules over time.

Ness Hondoy is one of the KindWork graduates who is now in a customer experience role in Health Tech, after completing the Healthcare and Wellness Tech sub-sector module. Ness and a few other KindWork graduates spoke to how the sub-sector modules aided them in their applications and interviews, and even in life beyond their job search.



Ness Hondoy

Graduated April 2024, Cycle 14

Customer Experience Associate at Alma

I'm currently in the last week of 10 weeks of training and I want to say almost everything was applicable to a certain degree. I can list a ton of stuff [that was relevant] because it's basically what I do every day. The module provides a brief overview on healthcare technology and what that encompasses. It goes into tools, platforms, services, and things that improve healthcare delivery and management. We learned about HIPAA and EHRs (electronic health records), and we went over medical coding and billing, which is a lot of what we do. It provided such a solid foundation for training because I at least had a very loose understanding of what we were going to cover.

Additionally, Ness and a few other KindWork graduates spoke to how the sub-sector modules aided them in their applications and interviews, and even in life beyond their job search.

“I want to say almost everything [in the module] was applicable to a certain degree. I can list a ton of stuff [that was relevant] because it's basically what I do every day. “

Having that bullet point on my resume helped a lot. In my interview responses, I was able to pull an example from doing the Healthcare and Wellness Tech module, saying I learned this during that module, and I have really basic knowledge on HIPAA and things like that. But I think more than anything, [the module] was instrumental for that training time. It really helped me not feel lost.

Before taking the module, I had a very loose understanding of insurance, but as you know insurance can be super confusing on so many levels. I wasn't sure what a deductible really was or how co-insurance worked. Now, in addition to the training and experience that I'm receiving at Alma, and with the module before that, I've been able to navigate a lot of my own current medical things. I think just having that knowledge and the accessibility to it was great.



Kyanna Rosario

Graduated June 2024, Cycle 15

I did both [modules] because it's a free extra curriculum and I get a certificate for it. That's going to look good on my portfolio and when I apply to places as I now have basic knowledge for that industry. Health Tech was the one that I was more interested in. I learned the basic HIPAA guidelines and why it's important for employees to not do things like use their personal computers to handle information. For FinTech, I have been able to apply a few of those things in my life, like with my savings and APR. I realized I could get more out of my money when it came to my savings!

“I really appreciated that we were able to take both because I wanted the opportunity to explore [the sectors] without the commitment of having a job.”



Alana Coleman

Graduated June 2024, Cycle 15

I really appreciated that we were able to take both because I wanted the opportunity to explore [the sectors] without the commitment of having a job. Through the modules, I was able to see that I would actually much prefer to work in FinTech and so now, in my daily life, I've been trying to stay more on top of financial news.

[The modules] have really helped me to get a better sense of what these jobs actually entail as somebody who doesn't have a background in health or FinTech. They helped a lot with supplemental questions and how to phrase things that a company is working on. I actually had an application where the question was literally: what do you know about FinTech? With FinTech, I really found the Bloomberg virtual skill builder aspect very helpful because of the prioritization framework. [Before taking the module] I had another application assessment that had a similar question where you would prioritize things. After I got the answers back, I realized that my approach was not really in line with what you would actually have to do because I was giving too much priority to the actual concerns, not the mode through which it was coming through and whether it was a customer or my director. So [because of the module], I kind of knew some of that knowledge for my next assessment.

For HealthTech, the summary of medical coding and billing was super informative, because again, I was not familiar at all with the different ways that things are transcribed in the medical system for insurance. I have a friend who is pursuing a medical billing and coding job and now I can relate to her and her job search as well as with some of the stuff we learned, like the [medical terminology] prefixes and the roots.

Themes and Learnings

The process of engaging employers and compiling the Healthcare and Wellness Tech and FinTech modules produced a few themes that are broadly relevant across workforce development.



Entry-level roles still often assume some “common” knowledge.

Through several employer conversations, KindWork was able to identify ways that recruiters and hiring managers assess interest and experience in ways that might not be clear to applicants. For example, interview questions might include asking about recent headlines the candidate found interesting. Or, they might ask about a candidate’s direct experience in the sector. These are both instances where employers expect candidates to demonstrate their industry-specific knowledge and commitment to building a career within the sector, even if they do not possess prior industry experience. The ability to navigate questions like this, as well as a familiarity with industry tools or services (like banking and credit cards, or healthcare and health insurance), are generally considered “common” knowledge. KindWork found it helpful to specifically ask recruiters about the ways they might assess a candidate’s interest and or transferable skill set in the absence of direct experience. This produced recommendations for a number of industry-specific resources, including free virtual simulations, publications, podcasts, and social media content.



Employer engagement takes time; expect complexity.

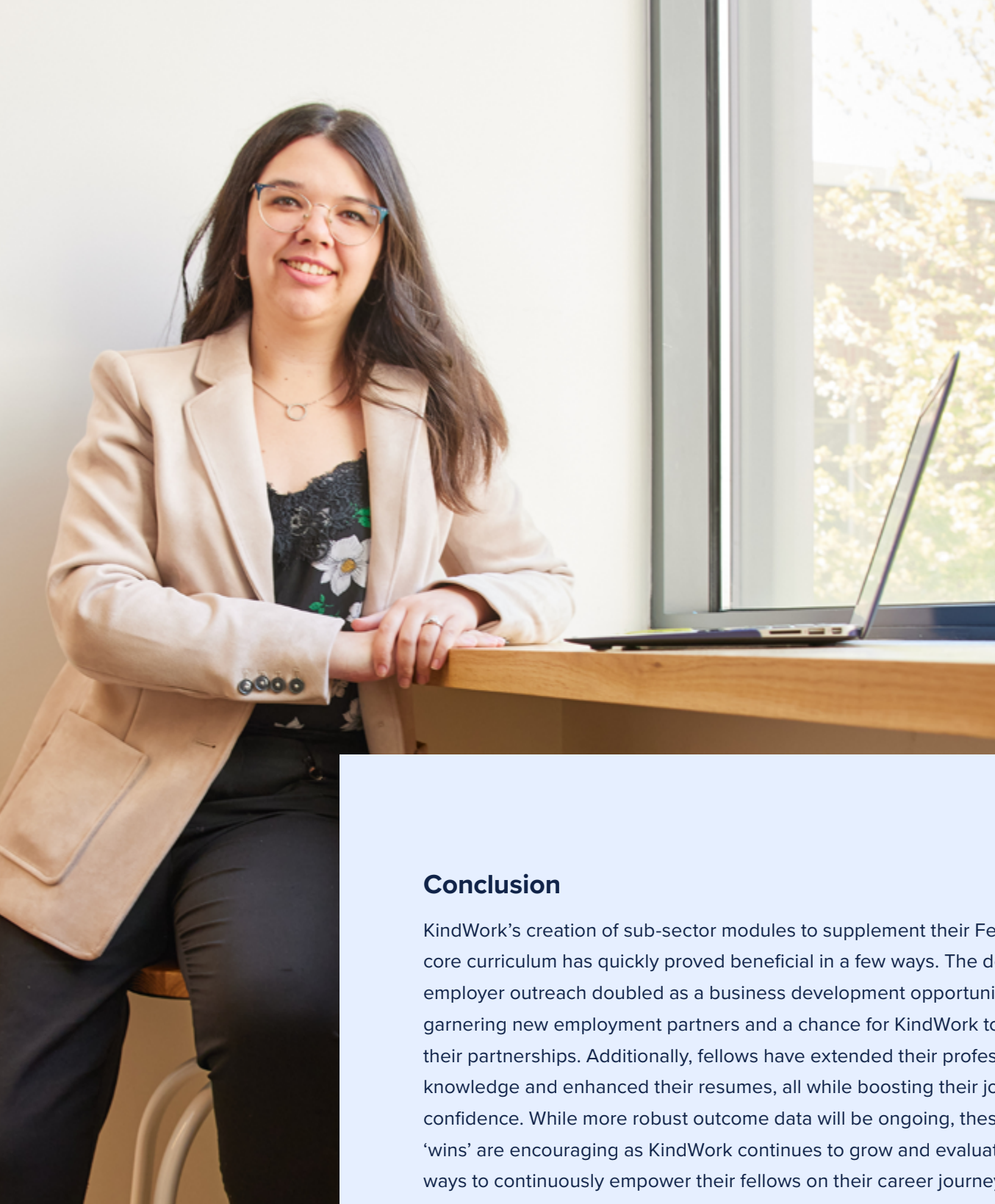
Based on KindWork's employer outreach ratio, each employee participant is the result of outreach to about four potential partners. Additionally, cultivating relationships at multiple levels within an organization is invaluable for partnership development. It may take two or three levels of introductions to get connected to the right person to provide the appropriate feedback. For the development of these modules, that person was ideally a recruiter with an understanding of both the interview process as well as the onboarding process, a customer experience manager overseeing the day-to-day roles of new customer associates, or a learning and development specialist who could speak to the onboarding process. Sometimes, connecting with these folks also required someone in leadership to approve or endorse their participation. Many contributors to this curriculum were connected to KindWork through a chain of introductions. Additionally, budgeting for a cash incentive (in the form of a gift card) was also helpful as many contributors participated on their own time and not necessarily at the bequest of their employer or as part of their formal responsibilities.

Finally, through this employer outreach, KindWork discovered that many larger, multi-city institutional partners (banks, for example) locate their customer experience operations in lower-cost locations, and thus, were not interested in recruiting partners based in New York City. Further, some had internal policies governing their recruiting relationships or candidate requirements (like four-year degree completion) which impacted their ability to even offer insights for the curriculum. All of this further bolstered KindWork's understanding of these sub-sectors and the employment opportunities they offer.

Contextualization is key.

Recruiters have very specific ways they assess interest or experience with a sub-sector that extends beyond the technical and interpersonal skills required for their customer experience positions. While technical and interpersonal skills are undoubtedly important, sub-sector knowledge indicates an understanding of how to apply those skills as well as an interest in contributing to the field. These are the types of insights often used to determine whether someone might be a good “fit” or be committed to growing with the company, and therefore, worth investing in. Being able to respond to questions about recent industry trends or demonstrate commitment via a credential like KindWork’s sub-sector certificates are tangible ways for an applicant to stand out during the interview process. In a “sector” as broad and ubiquitous as technology, the modules help fellows demonstrate a command of how their customer experience skills and role might be specifically influenced by conditions unique to a given sub-sector. This is something that KindWork fellows understand from their training, as well. The most common piece of feedback KindWork received from graduates who completed the modules was a request for more examples of how the content might apply to the day-to-day role of a Customer Experience Associate. They offered great suggestions including alumni testimonials, a case study, or an example customer exchange referencing the concepts and terminology they were learning.

While the technical and interpersonal skills are undoubtedly important, sub-sector knowledge indicates an understanding of how to apply those skills as well as an interest in contributing to the field.



Conclusion

KindWork's creation of sub-sector modules to supplement their Fellowship's core curriculum has quickly proved beneficial in a few ways. The dedicated employer outreach doubled as a business development opportunity, garnering new employment partners and a chance for KindWork to grow their partnerships. Additionally, fellows have extended their professional knowledge and enhanced their resumes, all while boosting their job search confidence. While more robust outcome data will be ongoing, these initial 'wins' are encouraging as KindWork continues to grow and evaluate the best ways to continuously empower their fellows on their career journeys.

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