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Bridging Tech and Finance : Data Analytics in Bankably App

My TMB journey



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Getting to Know Me

Name: Katlyn Grayson
College: Strayer University
Studying: Softmore in Accounting
Goals: CPA and business owner

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Assignment Overview

Role: Accounting Data Analyst

To support the business owners of the Miles College Women's Business Center (MCWBC).

Require hands-on data strategy, financial guidance, and potentially advisory touchpoints.

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💼 MCWBC + Elevate360 Program Breakdown

The MCWBC just launched a major announcement across their social platforms – applications for their 2025 cohort programs are officially open.

🔗 **Socials Post:**

- Facebook Post
- (Also shared on LinkedIn + Instagram)



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My Key Responsibilities

What I'll be owning and supporting:

Data Strategy + Reporting
Track financial metrics for cohort businesses

On-Site Engagement
Be physically present during Capital Readiness Lab sessions

Admin Crossover
Assist TMB with any shared logistics or data clean-up for the Signature Cohort

Calendar Management
Add all Lab sessions to your calendar

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Learning the Language of Data at Bankably

- Bankably™ Platform
- CoPilot Dashboard
- Quickbooks



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Looking Forward...

Excited to continue this journey with the TMB team and grow my knowledge and experience!

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“Every question is an opportunity”



- Embrace curiosity in learning