

EMERGING TRAINING LEADERS

These 25 training professionals soar with exceptional leadership skills and business savvy. By Lorri Freifeld

Like butterflies bursting from their cocoons and flying to new heights, the 25 winners of *Training* magazine's 2013 Emerging Training Leaders awards are on an upward trajectory of leadership and organizational success. These 25 training professionals have been in the industry for two to 10 years and have demonstrated exceptional leadership skills, business savvy, and training instincts.

The Emerging Training Leaders (ETL) awards program replaced the five-year-old Top Young Trainer awards program. All Emerging Training Leader candidates had to be nominated by co-workers or industry peers.

Training Editorial Advisory Board members and the editor-in-chief judged the nearly 80 nominations and chose the 25 winners based on the following factors:

- Have been in the training industry for a minimum of two years but no more than 10 years
- Took on at least one new responsibility in the last year
- Successfully led a large-scale training/learning and development initiative within the last year that required management/leadership of a group of people and resulted in the achievement of a corporate strategic goal (with results provided for Kirkpatrick Levels 1-4)
- Demonstrates the following specific leadership qualities (with specific results provided as an example for each): acts as a mentor/coach, adopts new technology, collaborates, communicates often and effectively, embraces and adapts to change, empowers employees, fosters employee/team recognition, has a global mindset, innovates, inspires trust, provides regular feedback, sets an ethical example, thinks outside the box, and thinks strategically
- Has the potential to lead the Training or Learning & Development function at an organization in the next one to 10 years

On these pages, you'll find in-depth profiles of the Top 5 Emerging Training Leaders (listed in alphabetical order), plus slightly shorter profiles of the other 20 Emerging Training Leaders. And we continued our tradition of creating a "To Watch" list, which features five up-and-coming professionals who didn't receive an award this year, but who are well on their way to becoming future Emerging Training Leaders.

"I was impressed with the quality of this year's Emerging Training Leaders class," says ETL Judge Kevin Wilde. "Their innovation, business impact and leadership gives me encouragement that the future of L&D is bright. I look forward to their continued contributions to building our profession."

ETL Judge Daniel Goepf likewise was impressed with the

level of competence and accomplishments indicated in the nominations. "Some individuals demonstrated significant independence, initiative, and leadership that has helped to shape the success of their respective learning organizations. Clearly, the profession is fortunate to have such talented emerging leaders."

What struck ETL Judge Jim Federico about this year's group of Emerging Training Leaders is "their degree of alignment to business priorities and the innovative practices they are bringing to the L&D discipline."

Adds ETL Judge Brent Bloom, "It was inspiring to read and assess the many innovative projects and initiatives these talented leaders have taken from development to implementation."

ETL Judge Cyndi Bruce agrees. "The ability to design and deploy development solutions beyond the typical classroom with measurable results was an ongoing theme among this year's winners."

"This year's winners are an extraordinary group," ETL Judge Ross Tartell concludes. "They showed leadership, the ability to overcome adversity, and an understanding of how to creatively apply their learning expertise to resolve critical business issues across diverse functions."

ETL JUDGES

- **Brent Bloom**, Senior Director, Global Talent & Development, KLA-Tencor Corporation
- **Cyndi Bruce**, Executive Director, KPMG Business School – U.S.
- **Jim Federico**, Senior Director in SMSG Readiness, Microsoft Corporation
- **Daniel J. Goepf**, Managing Director, Learning & Development, PwC
- **Craig Gill**, Director, Development Center of Expertise, Deloitte Services LP
- **Vicente Gonzalez**, Learning and Development, Booz Allen Hamilton
- **Raymond D. Green**, CEO, Paradigm Learning, Inc.
- **Michael S. Hamilton**, CLO, Ernst & Young
- **Alison Hooker**, Chief Talent Development Officer, Ernst & Young
- **Bruce I. Jones**, Programming Director, Disney Institute
- **Donald Keller**, CLO and VP, Global Education & Development, SCC Soft Computer
- **Diana Oreck**, VP, Global Learning & Leadership Center, The Ritz-Carlton Hotel Company
- **Ann Schulte**, Director/Global Practice Leader, Procter & Gamble
- **Ross Tartell**, Manager, Learning & Development – North America, GE Capital Real Estate
- **Kevin Wilde**, VP, Organization Effectiveness, and CLO, General Mills, Inc.
- **Lorri Freifeld**, Editor-in-Chief, *Training* magazine

TOP 5 EMERGING TRAINING LEADERS



LINDSAY D. DONAIRE

Associate Director, Learning & Development (5 direct reports, with total team of 11)
Coca-Cola Enterprises
BS in Industrial and Labor Relations, Cornell University; International Management Program at Vlerick Business School

6 YEARS IN TRAINING CHILDHOOD AMBITION: Nun

FAVORITE PHRASE OR MOTTO: A hermit was meditating by a river when a young man interrupted him and said he wished to become his disciple. "Why?" the hermit asked. The young man thought for a moment. "Because I want to find God."

The master jumped up, dragged him into the river, and plunged his head under water. After holding him there for a minute, the master pulled him up out of the river and asked, "What did you want most of all when you were under water?" "Air!" answered the man. "Very well," said the master. "Go home and come back to me when you want God as much as you just wanted air."

FAMILY/PETS: "Even ratio of children to adults with son, Moxie, and daughter, Quintessence, and husband, Jim."

OUTSIDE INTERESTS: Travel to 30 countries, certified PADI open water diver, tasting wine and Belgian beer

ADVICE FOR THOSE ENTERING THE TRAINING FIELD: Follow your curiosity that led you to join the L&D field, and focus it on:

1. Honing your craft
2. Being obsessive about applying your understanding of business strategy and how people contribute to it
3. Seeking the answer to the questions: What is the expected



CHARLES L.C. HO

Manager – Quality & Staff Wellness Training (5 direct reports)
MTR Corporation Limited
B.Engineering, University of Hong Kong; MBA, Hong Kong University of Science & Technology

10 YEARS IN TRAINING

CHILDHOOD AMBITION: "I wanted to be an engineer and that's why I enjoy making models of airplanes, cars, battleships, machines, etc. That may explain why I studied engineering in my undergraduate years. But as time passes, I find I am more interested in dealing with people. And I enjoy inspiring people and also being inspired by people around me. So, I choose to be a 'human engineer'—a Training & Development professional!"

FAVORITE PHRASE OR MOTTO: "Sow a thought, reap an action. Sow an action, reap a habit. Sow a habit, reap a character. Sow a character, reap a destiny."—Samuel Smiles

FAMILY/PETS: "The eldest son in my family, I am married without kids."

OUTSIDE INTERESTS: "I like reading, traveling, and playing racketball games (e.g., badminton, table tennis, tennis, etc.). I also volunteer to be a mentor to university students/young graduates and deliver seminars related to career development, personal leadership, and positive thinking."

ADVICE FOR THOSE ENTERING THE TRAINING FIELD: "Know that:

1. You have the talents to become a training professional. That means you need to possess the training skills (e.g., presentation skills) or have the determination to develop and master these skills.
2. You have the passion to develop people and foster continuous learning.
3. The training intervention can address or relate to the needs of the organization and the participants."

performance? What is the gap between expectations and current performance? How will closing the gap be measured?

>> In 2012, in addition to Lindsay D. Donaire's "day job" of leading the commercial capability team, she was asked to take on two other responsibilities: 1) to select and onboard Coca-Cola Enterprises, Inc.'s first-ever instructional designer (80 percent of CCE's L&D solutions were created externally by vendors) and 2) centralize Leadership/Management development. Donaire supported the instructional designer role development, led the recruitment, and onboarded the hire. As a result, four e-learnings were created in-house and saved CCE \$154,000

Donaire's second new large responsibility in 2012 was taking two different senior managers reporting to different leaders, and centralizing them under herself. This meant her client focus was expanded to 6,500 employees, including 2,000 people managers across all countries and business units (she is based in Brussels, Belgium). She assumed responsibility for three additional senior managers, expanding her direct reports from two to five. Kirkpatrick Level 1 ratings for her leadership deployment are a strong 4.47 of 5.

Donaire also redesigned the CCE Marketing training program across business units. The redesign included six e-learning modules, a group on Chatter (a type of corporate Facebook), virtual classroom experience with experts for Q&A, coaching by Chatter 30 days after the session, and a 90-day follow-up to share real-life experiences. **Results:** accelerated learning, classroom time reduced by eight hours, and cost savings of \$375,000.

"Lindsay approaches problem-solving with an ROI mindset, both quantitatively and qualitatively," notes nominator James Matte, VP, Organizational Capability, Coca-Cola Enterprises, Inc. "She also is the only American within the L&D team. Her success is a testament to her ability to be open to and aware of the diversity across cultures and markets, seeing the simultaneous uniqueness and commonalities."

>> Charles L.C. Ho oversaw a team of five to drive and manage the "You Have a Say" Work Improvement Team Training Scheme (WIT), a corporate-wide strategy in MTR to engage 5,000 staffers to improve work processes and create value for the Hong Kong-based transportation corporation, nurturing a continuous learning and innovation culture. It operated in three stages: Team Formation, Project Initiation, and Annual Presentation and Awards.

Ho implemented a four-phase framework, which included top management alignment, formulating WIT training policies, activities, and models for different improvement projects; forming divisional steering committees to uphold the partnership among the relevant departments; and engaging staff in ongoing initiatives through "See-Understand-Use" marketing. **Results:** Some 798 WIT teams submitted 823 WIT projects in 2012, contributing to a saving of HK\$30.9 million through improvements in productivity, customer service, safety, reliability, and environmental protection.

Ho also drove the customized client-based Continuous Professional Development (CPD) Curriculum for several departments, including the HR & Administration Division, Legal & Procurement Division, IT Services Department, and Internal Audit Department. With positive responses from staff members and division/department heads (4.6 out of 5 on a 5-point scale), all these curricula have been continued in 2013, and the approach is being extended to the Commercial & Marketing Division in 2013.

"Charles has a clear mission that L&D is the most effective way to help people discover and develop their talents, and he has a strong passion to work toward this mission," says nominator Chester Tsang, senior manager, Management Training & Development, MTR Corporation Ltd. "As a result, he can create a more effective working atmosphere in the department, as well as in the corporation, which can help drive many complex L&D and HR interventions efficiently."



MARITA JONES

Project Manager, Training and Development for Payroll Operations (managed/led 20)
Paychex, Inc.
BA, SUNY Brockport

8 YEARS IN TRAINING CHILDHOOD AMBITIONS:

Archeologist or extra in a Star Wars movie

FAVORITE PHRASE OR MOTTO:

"Do not follow where the path may lead. Go instead where there is no path and leave a trail." And, "It's all good!"

FAMILY/PETS: "Husband, Doug; sons, Jared (14) and Lucas (12); 2 dogs, Ares and Ellie; 2 guinea pigs, Rocky and Creamsicle; a cat, Elmo; and a partridge in a pear tree (not really)."

OUTSIDE INTERESTS: "Spending time with the family—hiking, fishing, playing euchre, planning our cross-country road trip, parental groupie for swim team and marching band."

ADVICE FOR THOSE ENTERING THE TRAINING FIELD: "We have been the recipients of training from pre-K to college to our first job. In some sense, we are all subject matter experts when it comes to learning. Use your own learning experiences and apply them to your day-to-day job, whether it is as a trainer, instructional designer, leadership developer, project lead, or training manager. Stay in touch with your audience and don't create training in a bubble."

>> Marita Jones was instrumental in developing a global training strategy to ensure the success of a companywide technology project at Paychex Inc. As a result of her leadership on this project, the organization obtained measurable data showing an increase in sales revenue and

operations productivity (this data was provided in the nomination but is not for publication).

Jones currently is the training project manager assigned to oversee many of the assimilation activities for a company Paychex recently acquired. The goal of the project is to integrate the acquired company's tax system for efficiencies, legal, and expense reasons. According to nominator Laurie O'Mara, Training manager, Paychex Inc., "Marita was chosen to lead this effort because of her ability to embrace and adapt to change on a day-to-day basis. Her experience and expertise in payroll fundamentals allows her to manage the expectations of the project while at the same time lead the employees of the acquired organization through this massive change effort." Measurable results to date include successful integration of systems, no turnover of acquired employees, and high employee morale.

Jones also was part of a project team that was responsible for creating productivity actions for Paychex's field operations front line. One of the specific areas targeted was the use of a feature in the payroll system called Check Templates. The Check Template training was delivered to more than 2,000 front-line service givers, and as a result, running bonus checks for a seven-person payroll saved 65 percent or just over two minutes per payroll. This translated into a significant time savings across the branches at a busy time of year.

As a result of Jones' leadership and direction to Paychex instructional designer Cindy Caldwell, the training for a recent onboarding project was rolled out to more than 300 employees, who successfully onboarded 4,700-plus clients in December 2012. "Marita is an excellent and creative leader who trusts her project team and appropriately, willingly, and seamlessly shares that leadership role, resulting in a fully engaged and motivated team," says Caldwell. "These feelings of empowerment spill over into all of the projects I work on—pushing me to take on a leadership role whenever I am presented with the opportunity."



ELIZABETH LYNN KINDER

Senior Training Specialist
Bankers Life and Casualty Company (led 15)
BA in Communication (Journalism), Bradley University; MBA, Saint Xavier University

3 YEARS IN TRAINING

CHILDHOOD AMBITION: A doctor, lawyer, or writer

FAVORITE PHRASE OR MOTTO:

"Before you are a leader, success is all about growing yourself. When you become a leader, success is about growing others."—Jack Welch

FAMILY/PETS: "I'm currently engaged to be married in October 2013 to the love of my life, Dr. Tom Kim."

OUTSIDE INTERESTS: "Running! I'm addicted to road races and have completed five marathons in two states over the last six years."

ADVICE FOR THOSE ENTERING THE TRAINING FIELD: "A trainer must perform many roles throughout the day: coach, facilitator, communicator, counselor, guide, and leader. It is a daunting list, and it will take time to learn how to be effective. While you're learning, take cues from others. Listen before you speak and build connections from the start. Prepare for success tomorrow by building meaningful relationships today."

>> Elizabeth Lynn Kinder joined Bankers Life and Casualty Company's Learning & Development function as a subject matter expert in Long Term Care two years ago. She had six years of experience in operations and was asked to join the team as a stretch assignment. "Elizabeth has led many high-profile, long-term projects over the last two years," says nominator Tori England, manager, Long Term Care Learning &

Development, Bankers Life and Casualty Company. "She is able to look at the big picture of the department and the company to make good choices and collaborate with others. Her passion to succeed and commitment to our brand are extraordinary within not only our department but also our enterprise."

In 2012, Kinder spearheaded Project Alpha, the Long Term Care Learning & Development team's repeatable, multi-phase approach to handbook creation and baseline assessment of key production departments. With a focus on best practices, Kinder coordinated with key business members, subject matter experts, and quality assurance teams to discover and document processes, which participants then were trained and assessed on. Audit scores for procedural quality of work went from a pre-training average of 97.23 percent to 98.32 percent after six months. Audit scores for financial accuracy went from a pre-training average of 90.78 percent to 95.61 percent after six months.

Kinder also acts as an early-adopter change agent within the department for key initiatives, chairing the department's weekly Change Management meeting where supervisors, managers, and senior members of the department's 12 units convene to announce and discuss changes. As a Senior Training specialist in this department, Kinder is trained in the procedures of all units and oversaw 103 completed changes in 2012. Kinder received an "innovator" award in third quarter 2012 for her work in identifying and creating a new process for claim adjusters to follow, which reduced errors and increased servicing accuracy.

Last summer, Kinder served as the project manager to train approximately 30 associates located in India on role procedures. Kinder turned to Audacity, a free Web-based audio recording tool she had never used, to build "broadcast" training programs. Five unique sessions were provided over eight weeks. Quiz scores steadily rose from an 82 percent average on the first quiz to a high of 98 percent on the fifth.

2013 EMERGING TRAINING LEADERS – TOP 5



RACHEL GOBER KLEMENS
Manager, Training and Development
(3 direct reports)
CHG Healthcare Services
BS, University of Utah

8 YEARS IN TRAINING

CHILDHOOD AMBITION: "When I was a child, I wanted to be a horse trainer or a rodeo barrel rider. Pretty much anything that had to do with horses, I was on board."

FAVORITE PHRASE OR MOTTO:

To paraphrase John Lennon, "The learning you take is equal to the learning you make."

FAMILY/PETS: Married to David Klemens with two Labrador retrievers and one child on the way in July.

OUTSIDE INTERESTS: "My husband and I enjoy taking our dogs hiking around the mountains in Utah. We also love to travel and cook together."

ADVICE FOR THOSE ENTERING THE TRAINING FIELD: "This can be a hard field to break into, so don't get discouraged if it takes time. Take any opportunity you can to train or develop others in your current role. That can translate into training experience when applying for a training role."

>> Rachel Gober Klemens was promoted to the position of manager, Training & Development, within the Corporate Training & Development team at CHG Healthcare Services and took on the responsibility to lead the Leadership, Employee, and Team Development programs and the supporting team. Gober Klemens led a team of four (including two senior training and development specialists, a director, and a senior vice

president) in researching, sourcing, and developing the content for the Leaders Leading Leaders (L3) initiative, which aimed to increase the size of CHG's leadership bench by 15 percent while increasing leadership promotions from within the company to 75 percent. The resulting program featured an initial two-day instructor-led classroom session, followed by five 90-minute instructor-led classroom or videoconference sessions. During the period of the program implementation, overall leadership within CHG has increased by 20 percent, with 76 percent coming from internal promotions. This is a 15-plus percent increase over the previous year in internal versus external leadership placements.

Gober Klemens mentors current leaders in the development of their new leaders and coaches the new leaders themselves in the use of the models and tools taught in the company's basic leadership development program, "LEAD." In her 360-degree assessment scores, Gober Klemens received a 6.3 out of 7 for coaching and mentoring from her team and 6.0 to 6.5 from other leaders.

"In fulfilling her strategic leadership role, whether it is guiding her team members in projecting their longer-term strategy or developing their coming year's business plan, contributing to the creation of the three-year and one-year plans for the larger corporate Training & Development team, or participating in defining the direction of learning and development for all of CHG, Rachel always brings an eye for results and outcomes and the realistic steps needed to effectively deliver what is needed," says nominator Wayne Davis, director, Corporate Training & Development, CHG Healthcare Services. "This translated into her team accomplishing multiple extensive projects this previous year, including rolling out the L3 program for directors and above, revamping the 'LEAD' program to include 'Crucial Conversations,' and completing the implementation of the 'Building and Inspiring Trust' training for all leaders. This has led to a team effectiveness score of 97 percent."



JAMIE GOODMAN
Director of Training Development & Technology, Sales, Inventory, & Event Management Solutions (managed/led 7)
Marriott International

13 YEARS IN TRAINING

Jamie Goodman headed up the initiative to train 16,000 users (global and franchise audience groups) of Marriott's Consolidated Inventory – Total Yield production software application. It took five years (from 2009 through 2013) to build, sustain, and implement the 45 blended learning curricula; monthly software releases are required with appropriate content updates and migration. Each associate must successfully pass skill checks to be granted a log-in to the production application, helping to ensure they can start using the application to meet the ROI from day one. Online testing results were targeted at 80 percent; in 2012, Goodman's team achieved an 85 percent pass rate. A Certified Subject Matter Expert (SME) curriculum was developed to ensure each property has a "resident expert" on the application and reporting. To date, 60 percent of the properties using Consolidated Inventory have Certified SMEs; the year-end goal was 50 percent. Says nominator Cindy Frick, VP, Marriott International, "Jamie works toward achieving short-term and long-range learning objectives, taking into account available resources and constraints. She creates an environment that encourages excellence, innovation, and strong business performance."



HEATHER GREENBERG
Senior Manager, Partner & Leadership Development (managed 30)
PwC
BS in Human Ecology, The Ohio State University

10 YEARS IN TRAINING

Heather Greenberg was recruited to run PwC's Discover – Senior Associate Leadership Development Experience project after successfully leading the Diversity Leadership Forum and the PwC Assurance Sector Conferences. Greenberg worked with a team of designers to develop the Discover content in just five months. Discover leads participants on a journey through a "life leadership framework," encouraging each individual to explore his or her options in self, family, career, and community, and to develop skills and acumen focused on the capacity and capability to make effective choices. Discover was delivered to 2,690 new senior associates through blended learning: face-to-face conference, lecture, breakouts, and coaching groups; virtual learning: pre-work Webex, Webcasts, online modules; social learning: Jive collaboration groups; and mobile learning: apps used for registration, evaluation, and feedback. As a result, voluntary turnover for the senior associate staff level decreased from 23 percent in 2011 to 12 percent in 2012. Says nominator Candace Haynes, Learning & Relationship director, PwC, "In our L&D organization, if a high-priority, high-visibility, and even high-risk initiative is introduced to L&D, Heather tops the list as an individual who can make it successful."

2013 20 WINNERS



AMY ALEXY
Director, Learning and Talent Development,
North American Tire (managed/led 12 L&D associates and 12 trainers)
The Goodyear Tire & Rubber Company
BA in Communications, Walsh University;
MBA, Kent State University

8 YEARS IN TRAINING

In 2012, Amy Alexy took over responsibility for the Learning & Development function within Goodyear's North American Tire (NAT) Division, covering approximately 25,000 associates. Alexy spearheaded the creation of the North American Tire Senior Leader Development Program (SLDP), which included collaborating with Harvard Business Publishing (HBP) to develop a custom portal that contained functionality to host live development plans for those in the program. The SLDP was delivered via a blended delivery approach (live and virtual), leveraging the 70/20/10 Learning Model, labeled in North American Tire as "Learn. Grow. Act." Within one month of launching the NAT SLDP, 98 percent of the participants had used the Individual Development Plan feature. In addition, 50 percent of the learners received a new job assignment while participating in the program; 21 percent of the moves were developmental in nature; and 29 percent of the moves were promotions. "Amy can develop a strategy and bring people on board to support her vision," says nominator Steve Haigh, senior strategic relationship manager, HBP. "She understands and communicates in the language of business, as well as L&D."



ABDALLAH ALJURF
Training and Development Senior Specialist
National Water Company- NWC,
Saudi Arabia (managed/led 9)
Bachelor's in Systems Engineering, KFUPM
(King Fahd University of Petroleum and Minerals)

6 YEARS AND 4 MONTHS IN TRAINING

Abdallah Aljurf led the companywide Middle Management Development Program (MMDP), which aimed to improve retention of middle managers, develop leadership competencies and business acumen skills (NWC is in the process of being privatized), and increase employee engagement. The program features six courses created by Aljurf, who also mentored the external trainers. The courses included group and pair discussions, brainstorming, games, videos, coaching, case studies, individual exercises, and one-on-one feedback during and after each session. As a result, the turnover rate of Saudi employees in headquarters compared to last year decreased from 8 percent to 3.5 percent, and the employee satisfaction index increased companywide from 65.8 percent last year to 78.3 percent this year. "Abdallah coaches a minimum of 10 middle managers every week (face to face) for different performance- and development-related issues," notes nominator Mohammed Shabib, NWC T&D senior specialist. "This resulted in higher productivity, clarity of business goals, and more confidence on how to achieve them. Some 98 percent of middle managers gave great feedback on Abdallah's coaching style and results."



Sales Academy

Nationwide Sales Academy is happy to celebrate Christine Marciano, CIC as a Training magazine Emerging Leader for 2013.



Christine, you deliver an exceptional training experience in a fun and adventurous way. It's exciting to see you recognized by the industry for your enthusiasm and results.

Congratulations and thank you Christine!



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2013 EMERGING TRAINING LEADERS - 20 WINNERS

**ELIZABETH HANNON**

IT Training Manager (directly led 23 on project)
Accretive Health, Inc.
BS in Health and Human Sciences,
Northern Illinois University; MBA and
MS, Certificate of Health Administration,

University of Illinois - Chicago

5 YEARS IN TRAINING

Elizabeth Hannon led the charge to implement Accretive Health's Front End Revenue Cycle Technology Suite across the pre- and point-of-service registration functions at a \$3 billion hospital system's 26 sites, which entailed training 300-plus users. The project took just under a year to complete and included developing technology documentation, updating video content, creating an online certification training program, training on-site client mentors, and conducting coaching sessions. Upon the completion of the rollout in January 2013, the client was able to fully migrate off its current front-end revenue cycle technology, which will save \$1.4 million per year. "Within Accretive Health, Elizabeth is continually sought out as both a thought and process leader on training and technology," says nominator D'Anna Flowers, IT Training Department manager. "Her leadership skills, initiative, and work ethic have set her apart as a strong training resource for our clients and throughout our organization. Her health-care and product-line knowledge, as well as her willingness to take action, have resulted in her being recognized as a member of the top 15 percent of our company."

**AMBER ISRAELSEN**

Manager and Technical Trainer, Global Learning and Development (managed/led 16)
Avanade
BS in Information and Computer Science, University of California, Irvine

4 YEARS IN TRAINING

During the last year, Amber Israelsen took on training program management responsibilities for five strategic programs at Avanade. In March 2012, Israelsen took over as program manager for the Emerging Technologies Series (ETS) program, one of the cornerstone programs within the technical curriculum. This involved managing the virtual delivery of 67 courses to 1,200 employees across 26 countries, plus an additional 3,600 people trained using ETS self-study materials. Israelsen implemented several cost-cutting measures, including shortening the span of vendor sessions (saving \$60,000), leveraging Microsoft materials for classes (saving \$90,000), and providing downloadable labs rather than hosting them internally (saving \$150,000). Despite these measures, the "overall satisfaction" rating for all 2012 ETS classes was 4.33 out of 5.0, and the "learning objectives met" rating was 4.29 out of 5.0. "During her four years in Avanade's Global Learning and Development department, Amber has consistently proven herself to be a leader," says nominator Darren Short, senior director, Global Learning and Development, Avanade. "She is passionate about training, is results oriented, and wants to help others excel."

**WENDY KIRKPATRICK**

President (managed/led 17)
Kirkpatrick Partners
BS, University of Wisconsin

10 YEARS IN TRAINING

Wendy Kirkpatrick was promoted from director to president of Kirkpatrick Partners in 2012. New responsibilities included affiliate contracting, international business development, domestic and international staff recruitment and training, and documenting and standardizing procedures. Kirkpatrick led the "Getting to Levels 3 and 4: Creating Believable Value" initiative, which consisted of creating silver and gold Kirkpatrick certification programs; developing a Webinar, keynote, and workshop; co-authoring "The Brunei Window Washer" book with her husband, Jim; and producing supporting articles and weekly quick tips. **Results:** Some 2,158 have been certified in the Kirkpatrick methodology; participants went from evaluating only 23 percent of programs at Level 3 and 22 percent at Level 4 to 55 percent and 54 percent, respectively; and an international airline reduced call center complaints by 60 percent after participating. "Wendy is learning and growing quickly to fulfill the position and all of the demands of a growing company in a changing industry," says nominator Vicente Gonzalez, director, Learning and Development, Booz Allen Hamilton. "She has shown herself to be resilient and adaptable when circumstances change or programs do not go as expected."

**JOE KNYTYCH**

Director, Leadership & Professional Development (10 reports)
Health Care Service Corporation (HCSC), which operates Blue Cross & Blue Shield plans in IL, TX, OK, and NM
MEd and BA, University of Illinois - Urbana-Champaign; MBA, Keller Graduate School of Management - Chicago

9 YEARS IN TRAINING

Joe Knytych recently assumed responsibility for leadership development at all levels at HCSC. Additionally, he is now accountable for various types of informal development, including mentoring and coaching programs and professional and leadership assessment tools. Knytych also stepped up to manage major enterprise workforce and talent strategy efforts, including the implementation of a campaign to build employee awareness and knowledge around the changing health-care environment and its impact on HCSC's business model. The blended approach included four role-based Web courses, six Executive Strategy Cohort programs, and an executive engagement tool kit. Some 96 percent of more than 14,000 participants who completed the employee courses reported increased knowledge, and 93 percent of 90-plus VPs who completed the Executive Strategy Cohorts reported specific examples of knowledge application in the 60 days following completion of the cohort. Says nominator Mary Jo Burfeind, VP, Talent Management & Leadership Development, HCSC, "Joe readily gains sponsorship and followership, both as a leader of his own team and as one who influences and gains support from the most senior levels of the organization."

**KARA LACHANCE**

Director of Learning (led 350)
Wequassett Resort and Golf Club
BFA, University of Massachusetts, Amherst

3 YEARS IN TRAINING

In 2012, Kara Lachance was responsible for taking Wequassett Resort and Golf Club's property-wide training (Wequassett Academy) for 358 employees digital. She presented classes, tests, and surveys on multiple online avenues. She researched and implemented Web-based exam software and online survey technology, and purchased iPads for employee use. This year, both new and returning employees had the option to take tests and test out of courses at their own pace online. This initiative saved the company a total of \$16,420 in training payroll. Self-paced courses took employees half the time as instructor-led ones, so departments were able to cut 25 percent of their standard training hours. Lachance made employee surveys available online, which increased the capture rate by 18 percent. "Kara is self-motivated, possesses a strong work ethic, and is always willing to go above and beyond," says nominator Florence Kiernan, director of Marketing at Wequassett. "She has had three promotions during her six-year tenure at Wequassett, and she has truly embraced each role, setting the standard for those to follow."

**CHRISTINE NILSEN MARCIANO**

Commercial Lines Training Consultant (led 5 on project)
Nationwide Insurance
BA in Business Administration, Oregon State University

7 YEARS IN TRAINING

The Midwest region took on a multi-state roll-out of a new personal auto policy. The regional thought was to create one team that would travel through four states, repeating the same roadshow. Christine Nielsen Marciano suggested using local field employees to save on travel expenses, and she took on the responsibility to select, educate, organize, and lead the roadshows. Multiple shows were being organized at the same time, but were in different stages of development. Weekly teleconferences, printed job aids, and one-on-one Q&A ensured that Marciano's training of the team was on schedule. Meetings of this size were usually theater-style with PowerPoint. Marciano utilized a job-fair-like format, with each timed rotation introducing a different topic using a game such as Operation or Jenga. **Results:** Four states, 10 meetings, 51 table rotations, 398 agents trained, and an overnight spike in homeowner quoting in each city. Notes Catherine Scott, Training & Development specialist at Nationwide Insurance, "Christine's passion (it's contagious), technical knowledge (and willingness to grow it), and her ability to work with others in a non-threatening way all will suit her well as she moves up in our organization."



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We proudly congratulate Heather Greenberg, a member of our Learning & Development team, on being recognized by Training Magazine as an Emerging Training Leader.

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2013 EMERGING TRAINING LEADERS – 20 WINNERS



JULIA MAYER
Associate Director, Learning Services
(5 directs reports)
PPD
Bachelor's in Biochemistry, Universidad de Buenos Aires; Master's in Business Administration, Universidad Siglo XXI

5 YEARS IN TRAINING

In 2012, Julia Mayer was promoted to associate director, Global Learning Services, from manager, Latin America. Mayer led a team charged with implementing a virtual world conversion of the Clinical Foundation Program training for 700 clinical research associates (CRAs). The team had to become experts in the technology, convert the existing face-to-face training to the virtual world platform, and manage the challenges associated with integrating the training format with the rest of the onboarding experience. The team met the delivery goals to the first class in North America within six months. Expense savings are conservatively estimated to be \$1.2 million per year. The initiative also resulted in reduction in materials costs, as well as a nearly 50 percent decrease in trainer hours. "Julia has gained confidence in discovering and introducing new strategies and ideas for training in the organization," says nominator Stacy Weil, executive director, Process, Analytics, and Learning Services, PPD. "When pressed for resources, she developed innovative plans that allow resource sharing between groups, and has ensured the longevity and future direction of her team."



JACOB PANTOJA
Instructional Designer (informally led 6)
Vanguard
BS in Supply Chain Management, Arizona State University

5 YEARS IN TRAINING

Jacob Pantoja coordinated the development and implementation of Vanguard's RIG Broker-Dealer Education Center, a continually evolving online media center that includes videos, e-learning, audiocasts, job aids, infographics, and Webinars, and serves 4,000 Vanguard crew members. For the RIG Broker-Dealer Education Series—which helps equip leaders to navigate a series of financial industry regulations—Vanguard required an additional 400 leaders to undergo written supervisory procedures (WSP) training and/or be assigned WSPs. Some 42 percent of new leaders felt unprepared to properly execute a WSP. Pantoja designed and developed a WSP e-learning that included a robust scenario-based assessment. After three months, 90 percent of leaders reported they felt prepared to properly execute a WSP. The remaining 10 percent of leaders expressed interest in a coach/mentor, which prompted the creation of a WSP coaching program. "Jacob Pantoja has demonstrated his ability to develop innovative learning experiences and provide clear direction and solutions," says nominator Emily Yanok, line manager, Vanguard. "His vision, leadership, and talents position him well to lead the Learning & Development function at Vanguard in the future."



CHERYL DILLON SWANN
Vice President, Clinical Services
(managed/led 16)
Care2Learn
BS in Nursing, Southern Illinois University of Edwardsville; Board-certified in Gerontological Nursing, Wound Care-certified, Licensed Nursing Home Administrator

7 YEARS IN TRAINING

Care2Learn merged with another training and management provider in 2012, and that led to a year of transition and new challenges for Cheryl Dillon Swann. During the merger and subsequent integration, she led 16 team members to create an 11-module online "Reducing Rehospitalizations" curriculum series made available to nearly 4,000 clients. She also revamped the quality control process under the newly merged company. Dillon Swann established owners/centers of control, including script proofing and beta testing. As a result, she reduced course mistakes by 20 percent. Additionally, she nearly eliminated the needed step to integrate content into already released modules, which had been as high as one in every eight courses requiring content reintegration in 2011 to only one module requiring changes in the 50 courses released in 2012. "Cheryl sees the entire picture from the components of her team, the process, and the clients' needs and perspectives," says nominator Tamar Abell of Care2Learn. "She has demonstrated her true impact in course development productivity increases and quality improvement."



MATTHEW VALENCIUS
Instructional Design Manager, Center for Advanced Learning (managed/led 59)
IBM
BS in Mechanical Engineering, Harvard College; MBA with Specialism in HR Management, Heriot-Watt University

5 YEARS IN TRAINING

Matthew Valencius began 2012 leading an eight-person, U.S.-based instructional design and development team—one of several. He ended 2012 leading a 59-person, global, consolidated team representing IBM Learning's core design capability. The 17-month effort to create a centralized instructional design team began in May 2011, when Valencius' sales design team joined the Center for Advanced Learning during a reorganization. Three more designers and the three-person Project Management Learning team then were moved to his group, and he was asked to assume responsibility for IBM's fast-growing India design and development team. In March 2012, Valencius merged the veteran Leadership Development team into his, and appointed team leads to better organize work. As a result, the India team reduced performance support development time by 50 percent. Says nominator Gordon Fuller, director, Global Learning Design and Development, IBM Center for Advanced Learning, "Matt's knowledge of instructional design coupled with his leadership skills and ability to manage projects, people, and funding promise that he will continue to be a leader in our profession."



PRATAP MISHRA
Group Manager (Learning & Development)
(managed/led 32)
HCL Technologies Ltd.
(Infrastructure Division)
MBA (HR), National Institute of Management

8.10 YEARS IN TRAINING

Pratap Mishra led a team of 32 to create the Service Desk Academy for 2,700 newly hired customer-facing End User Computing engineers. The goal was to improve communication and customer satisfaction scores while growing the End User Computing business. There are five stages to the process: screening, training, shadowing, steady state, and certification. In 2.5 months, a team of four instructional designers developed a communication pre-assessment; a 56-hour instructor-led program focused on soft skills, voice, and accent; plus post-training call auditing and coaching. As a result, customer satisfaction increased from 70.46 in 2010/2011 to 87.94 percent in 2011/2012, and the End User Computing business grew 40 percent in 2011/2012, with a revenue share of 22 percent (up from 19 percent). "Pratap has a unique ability to accurately assess the needs of the business, work through them in a structured manner, and take them to fruition," says nominator Chetna Munshi, general manager, Learning & Development, HCL Technologies Ltd. "He is very focused and has earned the respect of his team—which has varied experience and skill sets—as well as the organization at large."



DAVE RUBENSTEIN
Senior Director, Learning
(managed/led 4)
Coldwell Banker Real Estate
Bachelor's in Computer Science and MBA, Rutgers University

9 YEARS IN TRAINING

Dave Rubenstein runs learning operations at Coldwell Banker Real Estate, LLC, like a "business." He took a Six Sigma approach to improving classroom operations, focusing on data, results, and quantifiable goals to improve efficiencies. He improved the "show up" rate of the classes from 51 percent to 66 percent through improved communications with students. Using a predictive analytics approach and his own custom algorithm, Rubenstein developed an accurate formula that predicted the number of students who would show up to class, allowing for optimal allocation of classroom, technology, and instructor resources. Rubenstein also developed an incentive bonus to contracted instructors based on the percentage of students who graduate various taught programs without lowering Coldwell Banker University's rigorous student requirements. Overall, these methods and others increased enrollments and graduation rates. His nominator, David Birnbaum, vice president of Learning, says, "Dave Rubenstein is an innovative, entrepreneurial learning leader who is not afraid to take risks on the operational or development side. He is always focused on taking action that will improve overall real estate business results and advance the skills of our agents and brokers."



National Water Company- Saudi Arabia is proud to congratulate our colleague Abdallah Aljurf on being named an 'Emerging Training Leader' for this year. We are proud of this achievement and we look forward to see more global achievements from all of our employees in the near future.

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2013 EMERGING TRAINING LEADERS – 20 WINNERS

**GRANT VELIE**

Learning and Development Manager
(managed/led 16)
Farmers Insurance
BS in Psychology with a minor in Business,
Grand Valley State University; MS in
Administration - Leadership Emphasis,

Central Michigan University

7.5 YEARS IN TRAINING

In 2012 Grant Velie was the project manager in charge of transitioning Farmers Insurance's learning team from instructor-led and computer-based training into the world of expanded virtual facilitation—specifically focusing on the technical skills employees need to succeed on the job. Content developed included a Virtual Training Manual (complete with video tutorials) and plug-and-play activities to generate interaction within the classroom and modified for virtually any technical training content (including role-plays via breakout rooms, teach-backs, and assessment strategies to verify competency). Some 70 percent of all instructor-led Career Path training sessions (for targeted lines of business) were held virtually in 2012. Costs savings included: \$1,100 per class that would have required travel (based on a three-day course); and \$52.50 per classroom hour saved by running one class with participants from multiple locations. Says nominator Mark Franciskovic, Learning and Development director, Farmers Insurance, "Grant has proven to me and our senior leadership that he can think strategically, successfully implements his strategies, incorporates technology to enhance team effectiveness, and continually works to build the skills of his direct reports."

**MARK WILSON**

Senior Manager, Human Resource Development (managed/led 13)
Cincinnati Bell Inc.

5 YEARS IN TRAINING

Through a company-wide assessment, Mark Wilson learned that new hire training had opportunities for improvement, so he led the overall design implementation of a comprehensive new hire program that included on-the-job practical exercises, e-learning, video animations, planning tools, and social learning. As a result, for outside sales, the company saw a 26 percent increase in acquisition year over year from new hires. Wilson also spearheaded an innovative problem-solving training program, in partnership with Xavier University, to improve the internal and external customer experience. The blend of application-based and virtual instructor-led training sessions resulted in a 10 percent reduction in resources from Cincinnati Bell's internal IT department on the project implementation and an 18 percent reduction in post-launch resources. "Mark has developed collaborative relationships with his business leaders across the entire organization and at multiple levels," says nominator Amy Fox, president, Accelerated Business Results. "Mark has transformed his group and they now are looked upon as collaborative partners. He has delivered tangible business results for the organization and is considered a trusted business advisor among his peers and superiors."

**ANNIE YUKISH**

Performance Consultant (managed/led 7)
Think Up Consulting
BA in Speech & Communication Studies
and MA in Professional Communication
(MAPC), Clemson University

7 YEARS IN TRAINING

Annie Yukish took on a project leader role for a large-scale, international project called Access Edge for an established global hospitality client. Aiming to close the gap in sales basics and eliminate training inconsistencies across multiple lodging brands, this project involved three hotel brands and 2,563 trainees spread across 1,700 locations. Yukish led the development of the training materials for the initiative, which utilizes a blended learning curriculum featuring e-learning, instructor-led training, guided workbooks, coaching, social learning, and performance support tools. The training is tailored to each specific hotel—meaning participants assess their property's actual data and current accounts from day one. Through this solution, new hotel managers reach proficiency within six months on the job, versus the previous 12 months, and travel costs are reduced by more than \$3,600 per participant, saving the company approximately \$9.2 million in annual travel expenses. "Annie has the vital combination of skill, experience, and knowledge to succeed as a leader of Learning & Development," says nominator Ron Doney, president, Think Up Consulting. "She is strategically focused, constantly seeks improvement, and drives results both for the client and for our consulting firm."

**BORYS ZHALILO**

Business trainer and consultant
(managed/led 33)
Solutions2b LLC
MS in Management and BBA in Economics,
Taras Shevchenko Kiev University; MBA,
University of New Brunswick; Ph.D.,

Ukrainian Academy of Science

10 YEARS IN TRAINING

In 2012, Borys Zhalilo developed three new training programs in the fields of strategic management, sales management, and sales techniques, and managed four large training projects for new employees for clients in Russia (PEK Company; Sibdel Company), Azerbaijan (Access Bank), and Ukraine (PrivatBank). The Complex Training and Consulting Project Zhalilo spearheaded for PEK Company featured several days of in-class training followed by on-the-job training of 389 sales personnel by their supervisors using the developed "Model-38" behavior change tool; collection and distribution of the best audio-recorded outgoing sales phone calls; testing; and evaluation. **Results:** Total company sales increased 42 percent, surpassing the 40 percent goal; as a result of requested coaching meetings, 11 salespeople saw their sales increase 267 percent (from 29 percent). Says nominator Leonard Willis, vice president, Solutions2b LLC: "Borys has integrated training and development with business functions and made it not just the training process but an ongoing process of performance improvement and business goals achievement through necessary changes in behavior and business processes."

EMERGING TRAINING LEADERS TO WATCH

**APRIL T. COLE**

Global Learning and Development Consultant
(indirectly led 2)
Savvis, A Centurylink Company
BA in Political Science, St. Louis University;
MA in Human Resources, Washington University
(expected summer 2013)

5 YEARS IN TRAINING**DAVID COLÓN**

Manager, Professional and Skills Development
(3 direct reports/staff of 20)
United States Postal Service (USPS)
Pursuing undergraduate degree in Business
Administration with HR Concentration

7 YEARS IN TRAINING**MARIA DAWES**

General Skills Curriculum Manager
(2 to 3 direct reports)
Accenture
BS in Clinical Biochemistry,
University of Manchester

5 YEARS IN TRAINING**CARMEN MURRELL RANDALL**

Manager, Field Training Services & E-Learning
(indirectly managed 60 field trainers)
G4S Secure Solutions (USA) Inc.
BS in Psychology, Liberty University;
MS in Strategic Leadership, Mountain State
University; Graduate Certificate in Learning
and Development, University of Colorado at
Colorado Springs

4.5 YEARS IN TRAINING**FREDRIK SCHULLER**

Vice President (4 direct reports, approximately
15 on account teams and projects)
BTS
Bachelor's with Honors in Management Science,
University of Strathclyde

10 YEARS IN TRAINING

Think Up Consulting congratulates ANNIE YUKISH 2013 Emerging Training Leader

Annie's passion for developing customized and creative learning solutions makes her a leader in our organization, an inspiration to others and an invaluable asset to our clients.

Congratulations Annie!

We also congratulate the other 2013 award winners

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