

Belinda (Billie) James-Vogel

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Qualifications Summary

Senior strategic learning and development business partner with 20+ years in directing, leading, and facilitating global learning initiatives that align with corporate initiatives. Proven track record of designing and developing curricula that improves, productivity and client satisfaction, while reducing costs and building a positive work environment. Extensive experience leading and facilitating instructor-led, virtual and web-based learning solutions across the globe including Europe, Asia, South America, North America and Australia.

Professional Experience

Founder & Senior Consultant

March 2014 - Present

Achieve by Design, Peachtree City, GA

Achieve by Design is committed to designing, developing and delivering innovative and cost-effective solutions that maximize employee engagement, growth and overall performance. Clients have included NORFOLK SOUTHERN, PNC BANK, FAZOLI'S, HORIZON BANK, SAP and AMERICAN EXPRESS.

Client: American Express (September 2020 – Present)

Acting as Senior Instructional Designer for Global Commercial Services (GCS) in development of a global B2B Payments sales methodology and product integration curriculum.

Client: American Express (November 2018 – September 2020)

Acted as Senior Learning Consultant and Instructional Design Lead for Global Merchant Network Services (GMNS)

- Leading the strategic direction, instructional design, program development and delivery of a global B2B Payments sales curriculum
- Senior Instructional Design Lead for global finance competency framework and curriculum

Client: SAP (June 2018- March 2019)

Delivered a global sales curriculum to SAP Fieldglass sales consultant and client executives globally

- Hired and managed a team to design and build out multi-modal learning solutions
- In partnership with global SAP leadership, defined sales process that aligned with enterprise-wide methodologies
- Partnered with Global Operations to redesign CRM to align with new sales process and methodologies
- Designed and delivered new hire and incumbent sales curricula

Client: American Express (May 2015- June 2018)

Acted as Senior Learning Consultant and Instructional Design Team Lead for Global Commercial Services (GCS) supporting 3548 Sales and Account Development global field representatives as well as 6000 employees across GCP.

- Partnered with Senior Management in transforming learning strategy and operational capabilities for Global Field Enablement. Played key role in defining 2016 and 2017 global learning strategies, resourcing and key initiatives.
- Lead Global Instructional Design and LMS Administration team which consisted of Instructional Designers, LMS Global Administrator, and a SharePoint and Graphic Designer.

Client: Horizon Bank (2014)

Acted as Strategist and Senior Instructional Designer for the design, development and implementation of new retail sales training for Horizon Bank's retail sales employees.

Client: PNC Bank (2014)

Client: Norfolk Southern (2014)

Client: Fazoli's (2014)

Senior Vice President, Training Director, Retail Branch Network & Segments

February 2012 - March 2014

Citigroup, Citi Learning North America Consumer, New York, New York

Retail Branch and Segments includes 13K+ employees in 1004 branches across Citi's North American Retail Consumer Bank. Learners include Tellers, Personal Bankers, Business Bankers, Citigold Relationship Managers, Branch Managers, Assistant Branch Managers, Area Directors, Division Managers and Operations.

- Led and managed a team of Performance Consultants across North America.
- Managed and directed all learning and development solutions including product, sales, regulatory and compliance, operations, functional, professional development and Leadership and management training across multiple functions and businesses for the North American Retail Consumer Bank.

CONTINUED:

Senior Vice President, Training Director, Retail Branch Network & Segments

February 2012 - March 2014

Citigroup, Citi Learning North America Consumer, New York, New York

- Partnered and counseled Senior Executives in assessing needs, aligning interventions with objectives, and developing strategy in support of organizational goals.
- Created strategy and implemented learning infrastructure, processes and standards in support of learning initiatives.
- Led end to end development of training programs and internal certification including Teller, Personal Banker, Global Branch Manager and other job families within the Consumer Bank.
- Developed strategic relationships with internal partners across departments such as sales Operations, Human Resources, Regulatory Compliance and internal Learning teams in driving and delivering client initiatives.
- Created and delivered a comprehensive new-hire on-boarding process and suite of materials which include ongoing new hire engagement measurement, reporting and analytics.

Senior Vice President, Training Director, Small Business Banking

September 2011- February 2012

Citigroup, Citi Learning North America Consumer, New York, New York

Small Business Banking segment includes 450+ Small Business Bankers, 30 Market Managers and Regional Directors across North America.

- Defined and implemented comprehensive Small Business learning strategy and business aligned initiatives that addressed critical knowledge and performance gaps within the Small Business Banking Segment.
- Redesigned Small Business Banker New Hire Curriculum to ensure relevant and just-in-time learning.
- Devised segmented credit training approach, managed external vendors and internal partners in the design, development and delivery of targeted credit solutions for both Small Business Bankers and Branch Leaders.
- Redesigned Small Business Banker new hire curriculum; reducing new hire time to production from 32+days to 15 days.
- Developed and delivered comprehensive robust reporting and analytics ensuring transparency around the effectiveness of new hire on-boarding, regulatory and compliance training requirements, and performance improvement opportunities.

Vice President, Training Head, Best-In-Class (BIC) Finance Strategic Initiatives

May 2009- September 2011

Citigroup, Global Functions Learning & Development, New York, New York

Best-In-Class Finance is Citi's global finance transformation program focused on the creation of an integrated finance function across Citi, facilitating the creation and adoption of common data standards across finance, partnering with finance teams to design, co-ordinate, manage, and deliver improved process designs across finance, driving standardization and utilization of shared services and ensuring all technology initiatives in finance are aligned to the Citi Finance Business Architecture.

- Training Lead for all major Best-in-Class Finance Global Strategic Initiatives for Citi.
- Created and Led global training strategy supporting the implementation of a new data warehouse intended as a common pool of Contracts, Positions and Customer Account balances across all of Citi to be used by Finance, Risk, Compliance and any other unit requiring such data.
- Partnered with senior Financial Planning & Analysis and BIC Leadership to build 6-week training strategy for the opening of new Planning & Analysis centers of excellence in North and Latin America, Europe and Asia. Led the creation of all documentation of activities to be migrated to Mumbai, new hire curriculum and website, and custom blended learning solutions. Strategy is used as model for the opening of P&A offices globally.
- Led design and implementation end-to-end processing of intra-company expenses, revenue, allocations, attributions and charges systems training for FP&A, Tax, Controllers, Operations, Service Providers, Business Customers and Application Support users in North America, UK, Latin America and India.
- Designed, developed and implemented training strategy for enterprise planning tool providing budget/forecast scenarios to management reporting for ICG, Global Functions, Consumer Asia & EMEA and parts of O&T.
- Designed, developed, and delivered forecast and budget methodology and systems training globally.
- Architect of Training Champion model and approach for the ongoing support of Finance Strategic Initiatives.
- Delivered Professional Development/soft skills virtual and instructor-led training across functions globally.
- Designed and developed diversity and inclusion virtual series and learning solutions for the global audit population.
- Delivered Myers Briggs Type Indicator training and teambuilding across functions and globally.

Global Training Manager**October 2007-November 2008***AIG Consumer Finance Group, New York, New York*

AIG Consumer Finance Group focuses on consumer finance products and services in global emerging markets which supported 8000 employees globally operating in Argentina, China, Hong Kong, Colombia, Poland, Taiwan, The Philippines, Thailand, Mexico, India, and Russia.

- Defined performance management process and developed and facilitated workshops for senior management of AIG Bank. Included review of process and timeline, alignment and creation of effective goals and objectives, development of tools and methods for ongoing tracking and feedback, guidelines for conducting effective performance reviews, and key considerations for effective development planning.
- Designed, developed, and implemented a global on-boarding solution including guidelines, best practices and tools addressing logistical, learning and developmental needs to 8000 employees in New York, Thailand, The Philippines, Hong Kong, México, Poland, Argentina and India.
- Developed and maintained core curriculum for NY corporate headquarters.
- Partnered with HR generalist to evaluate current against desired performance, determine skill gaps, and devised a blended-solution which included development planning, instructor-led, web-based, on/off the job interventions for designated core employees and senior management.
- Partnered with subject matter experts (SMEs) to design and deliver functional training globally.

AVP, Learning & Development Manager**April 2000 – October 2007***Citigroup, New York, New York*

Audit and Risk Review (ARR) - Supported areas included Consumer Banking, Corporate Investment Banking, Emerging Markets, and Technology.

- Facilitated courses from ARR Professional Development curriculum globally.
- Facilitated Leadership development, soft skills and performance management training courses.
- Partnered with client management to identify learning and development support needs for the division/teams.
- Designed / delivered courses based on adult learning theory using traditional and online delivery methods.
- Supported the implementation of ARR/client groups' change management initiatives.
- Worked with ARR groups and HR counterparts to develop and implement Leadership development processes.
- Researched new training techniques and enhanced existing training programs.
- Led ARR's implementation of Learning Management System, developed best practices, designed tools and training leveraged for enterprise wide adoption.

Marketing & Research Analyst**January 99 - March 00***Opus 360 Corporation, New York, New York*

- Delivered client-training services for early adopters including 1:1 sessions, documentation, and webinars.
- Monitored / reported all activity for Opus360's web-based workforce procurement and management system.
- Generated monthly, quarterly, and annual statistics for the Executive Committee.
- Researched and reported on competition and market to the Executive Committee and Board of Directors.

Training Coordinator**May 97- November 98***Volt Technical Services Group, New York, New York*

- Arranged and coordinated all recruiting events for the U.S. East Coast and Europe.
- Managed and monitored budget and purchasing for recruiting events and activities.
- Managed vendor relationships for recruiting materials.
- Worked with marketing division in design and delivery of requests for proposals.

Education & Certification

- BFA, Purchase College, Purchase NY, 1995
- Staff Development - Teacher's College, Columbia University, September 2008 – December 2008
- Research & Organizational Development – Teacher's College, Columbia University, September 2008 –December 2008
- American Society for Training & Development- Designing Learning Certification
- Myers Briggs Type Indicator- Qualification
- Development Dimensions International (DDI) Certification
- DiSC Administrator

Proficiencies

- Learning Authoring Tools - Articulate 360, Lectora Publishing Suite, Captivate, Adobe Creative Cloud
- Collaboration Tools: Net Meeting, MS Live Meeting, Adobe Connect, WebEx
- Learning Management Systems: SumTotal Suite, Cornerstone, Element K- Knowledge Hub
- Web Publishing Tools: Mimeo.com
- Query and Reporting Tools: BusinessObjects Enterprise XI R2, Hyperion Planning, Jade 1.0 & 2.0 Forecast & Budgeting Systems
- Microsoft Suite: Word, Excel, PowerPoint, Publisher, One Note