

# BRUCE KATLIN

PHONE +1 (773) 456-3871 \* 575-224-2135

[brucekatlin@icloud.com](mailto:brucekatlin@icloud.com)

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## PROFILE

Organizational learning and development professional who drives success through organizational and personalized behavioral and cognitive learning and development design, change management, and coaching practices. Blending cutting-edge neuroscience with theatrical performance techniques to expand empathetic learning, technical skills, onboarding, consultative selling, and individual and organizational success. Over sixteen years global experience in the fields of global strategic change management initiatives and scalable and innovative learning and talent development programs. Experience also includes HRMS, Human Resources administration and policies, team, supervisor and leadership development and coaching; matching training programs to core competencies; Human Resources partnerships; needs analysis; 360 degree and multiple personality/strengths tools; customer service; learning program coordination and planning; marketing; forecasting and budgeting; organizational development; recruiting and behavioral interviewing; program and instructional design (classroom and eLearning) and facilitation; change management, competency frameworks, performance improvement, and data analytics. My expertise focuses on identifying the real developmental needs and creating awareness through innovative program and curriculum design and delivery along with, creative coaching techniques that help learners achieve their full potential. I help to fill skills gaps within diverse institutional cultures that benefit individuals, teams and organizations both personally and professionally.

## QUALIFICATIONS & SKILL SUMMARY

- Staff and leadership performance development and coaching; talent recruiting; change management; sales training; organizational development, and succession planning expert, technical writer, facilitator, speaker, and presenter.
- Human Resources partner, consultant, and administrator for talent acquisition, onboarding, and the training of local, state, and Federal laws, regulations and policies.
- Learning and development program and courseware instructional designer, project manager and facilitator with extensive experience designing courseware for sales, operations, technical teams, and managers.
- Adept at incorporating Oracle Sales Cloud, Salesforce, Database, and PeopleSoft Enterprise Compliance trainer; SAP and NetSuite, Workday; Legal Aspects of Leadership, Title VII, Section 508, ISO 9000.
- Strategic and visionary, linking learning and development and HR processes and procedures, and coaching skills to broader organizational objectives.
- Expert at applying ADDIE, SAM, and AGILE methodologies and Bloom's Taxonomy along with learning authoring tools to the design and development of both professional and technical skills training programs.
- Applications into instructional design for blended learning solutions.
- Expertise and proven success utilizing Adobe Prime, Canvas, Moodle, Cornerstone, Articulate 360, Captive 2017, Camtasia, Bridge, Lectora, Blackboard, Keynote Google C Suite, Audacity, Garage Band, Final Cut Pro; InDesign, Image Ready, Photoshop. Prezi, Software, WebX, Mac OSX, MS XP Professional, MS Office 2012, Dropbox, Google Cloud, Adobe Cloud, Zoom, and Skype Meeting software and platforms for training design and delivery.
- Acute awareness and experience with global cultures and their learning and development requirements with excellent oral and written communications and the ability to motivate, inspire and negotiate to win-win results.
- Outstanding knowledge of core competencies used by employees, executives, managers and supervisors.
- Strong advocate of client-focused partnerships, sharing equally in the achievement of positive outcomes.

## PROFESSIONAL EXPERIENCE

### **Bruce Katlin, Global Learning & Development & Coaching, NM, NYC, Chicago - May 2014 - present**

*Principal, Global Learning & Development Instructional Designer, Facilitator & Coach*

- Sole-proprietor of global learning & development and coaching consultancy helping individuals and corporations with goal attainment, leadership and outplacement services. With special expertise in designing bespoke curriculums; technical training; change management, LMS, HRMS; customer service effectiveness, team and leadership development to increase organizational effectiveness, business profitability, employee retention and reduced conflict. Successfully completed OD, curriculum design, leadership development, sales L&D projects for the following clients (partial list):
  - Siemens Healthineers
  - Ritz Carlton
  - El Monte Sagrado Resort & Spa
  - Turner Construction
  - Global Brands Group
  - Franklin Covey
  - UBS
- ISD expert for leadership, operational, professional, and technical skills curriculum and courseware.
- Coordinating with global HR Directors and HRBP to identify needs, match training programs to core competencies, project plan all phases of L&D programs including synchronous and asynchronous online training.
- Market, promote and close client sales calls.
- Measure and analyze organizational learning and development gaps and effectiveness and then implement strategies to meet goals.
- Help organizations from healthcare to fashion design grow and change their businesses into highly effective and prosperous enterprises – consistently receive positive feedback and evaluations from clients with repeat requests for additional services.

### **CME Group Inc, Chicago, IL, New York, NY March 2010 – May 2014**

*Director, Employee Learning Initiatives*

- Created and managed the Learning and Development function with focus on Leadership, Sales, and Operations professional and technical skills which, provided increased revenues, enhanced functional and leadership efficiency and productivity utilizing self-study, classroom, and online training programs.
- Led the Chicago and New York City L&D Teams in creating effective and impactful learning products and programs.
- Designed Corporate-wide role competencies, which resulted in a significant competitive advantage within the Financial Services industry. (Measurements: KPIs.)
- Designed, managed, implemented, analyzed performance management program that included performance review and succession planning utilizing Workday human capital management software to retain high potential talent.
- Created an internal technical systems' certification initiative that assessed staffs' skills and knowledge integral to the Market Regulations' regulatory systems with a 98% certification success rate. Staff's skills levels rose 8% in the first six months of the assessment period. Case initiation to case closure increased 10% overall due to the enhanced skills acquired through the certification process.
- Designed and facilitated of local, state and federal employment law compliance training programs.
- Created an internal coaching and leadership program that taught, demonstrated and implemented basic and advanced best practice leadership and coaching skills to increase staff performance, trust and productivity while reducing conflict and stress. Synthesized skills were in direct correlation to enhanced engagement results.
- Designed and implemented EPIC (Engage, Perform, Innovate, Collaborate) initiative targeting high-performing and high potential staff members who created solutions to challenging operational and business challenges.

- Increased the Market Regulation Department's employee engagement survey results in multiple areas 8% to 17% in a one-year period through a wide variety of creative learning and development programs; the largest increase within the Company.
- Increased employee retention 20% through the creation and implementation of a unique recruiting program, function specific on-boarding and training programs that incorporated internal subject matter experts, mentoring, self-study, and classroom learning methods.
- Designed, implemented and analyzed a 'full-circle departmental 360 Assessment which drove enhanced awareness and leadership effectiveness; customized leadership effectiveness training and coaching programs; a model for effective feedback; an increase in leader and employee self-development enhanced; and employee satisfaction scores.
- Worked directly with stakeholders and HRBPs to identify and implement best practices learning solutions for all business segments with focus on leadership and sales training.
- Designed framework for integrated HR systems and processes as they related to staff and leadership development, functional and job competencies with developmental resources.
- Streamlined recruiting process that reduced interviewing process by 30% while increasing better hires by 20%.

**PEROT SYSTEMS, UBS Account, New York, London, Paris, Zurich, Singapore, Sydney, Frankfurt, Tokyo October 2000 – March 2010**

***Global Training Manager, Designer, Facilitator & Business Coach***

- Saved the Training & Development (T&D) budget on average \$125 million by reducing vendor costs through the design, delivery and implementation of a wide range of unique, creative and educational business, professional skills training courses, and HR compliance programs, which have enhanced associate growth and learning, and morale to over 1,500 associates.
- Managed and led the global L&D teams in the design, implementation and project management of a full suite of both professional and technical skills training programs.
- Designed and implemented technical training for **HRMS** for core HR **SAP** capabilities, and new user laptop/desktop migrations which increased learner synthesis 25% over previous training programs.
- Reduced HR headcount costs by 25% by creating and delivering internal training courses.
- Partnered with Perot Systems Corporate L&D Dept. to design and deliver sales effectiveness training using CRM software Salesforce.
- Created customer service and advanced customer service training programs that increased customer satisfaction rates by 11% in year one.
- Managed and designed training programs for global HR/TD consultants to maintain and support regional training and development needs, client relationships, and train-the-trainer sessions.
- Created revenue producing training and development programs that provided targeted course design and curriculum and one-on-one coaching to global UBS executive and mid-level managers, associates and various Perot Systems Corporate accounts utilizing self-study, classroom, and virtual training platforms.
- Linked identified core competencies to performance appraisal categories to contribute to performance improvement, succession planning and restructuring initiatives.
- Provided coaching in key competencies, including strategic planning, creating high performance teams, managing conflict, leadership, motivation, and retention.
- Created the Managers' Coaching Clinic, an internal coaching program for managers and team leads, teaching managers the skill and art of coaching associates to reach full performance potential; manage through conflict; and build high performing teams. Program drastically reduced the need for vendor supplied coaching.
- Conducted client needs analysis and maintained an ongoing dialogue with executives and managers during and after the coaching process to measure performance improvement.

**EDUCATION**

CITY UNIVERSITY OF NEW YORK, English Studies

**PROFESSIONAL AFFILIATIONS/CERTIFICATIONS**

Certified and qualified to administer and interpret the Myers-Briggs Type Indicator (MBTI)

Certified DiSC

Registered International Coach Federation (ICF) ©

Registered Corporate Coach & Member of, The World Association of Business Coaches (WABC)©

Member of the, Association for Talent Development (ATD)

Certified Instructor Covey *Speed of Trust* & 4DX

Certified Laughter Yoga Leader and Teacher

Langevin Instructional Design Approved

**INTERESTS**

People development, global travel; Native American cultures; environmental friendly handmade products and design; space exploration, the process of innovation and creativity; landscape painting; fiction writing; high-altitude running; world cultures; road cycling, skiing, snowshoeing; hearing and answering the questions, “What if?” “How come?” “How does that work?”