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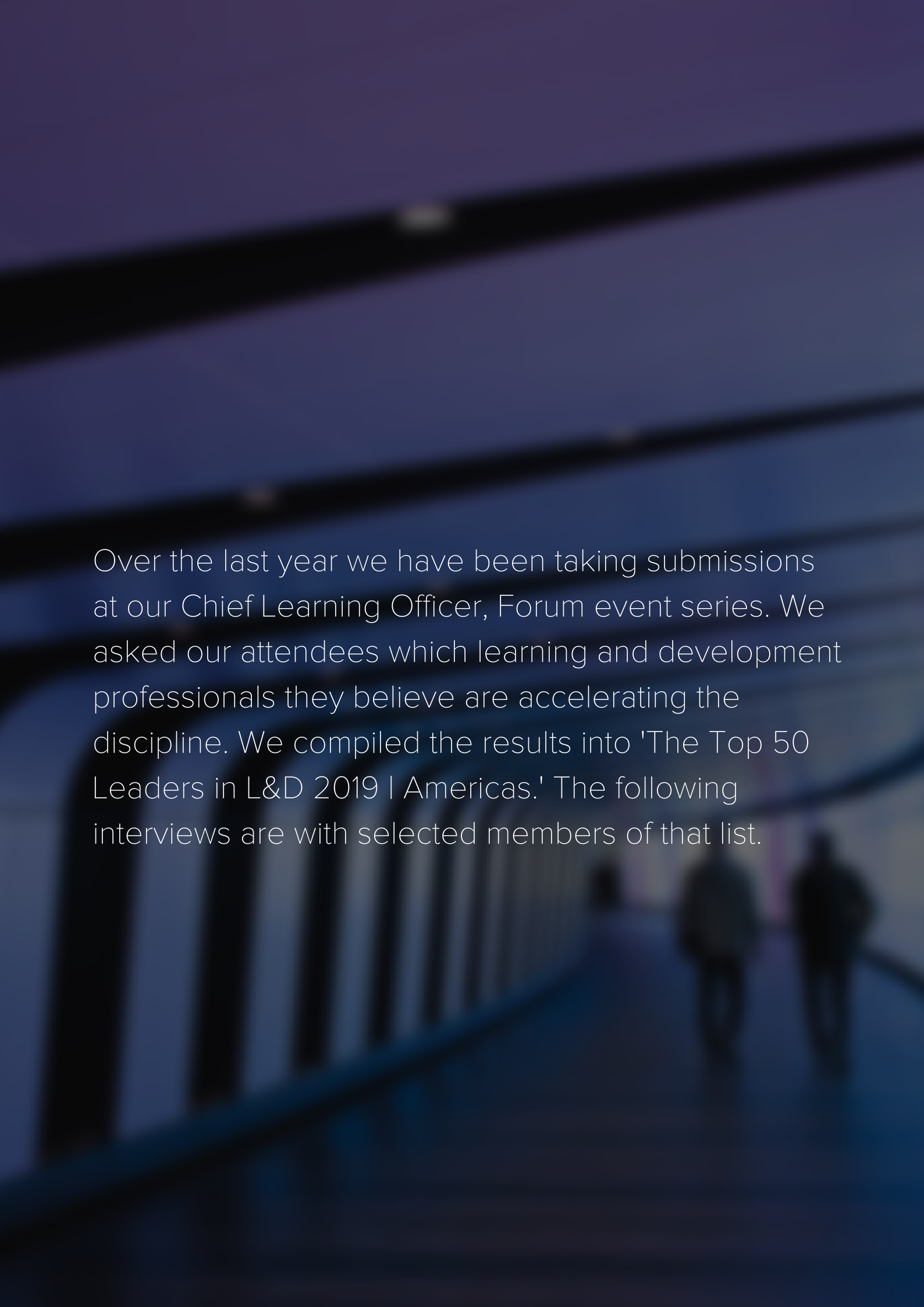
50

The Top Leaders in Learning & Development 2019

Americas

Interview Series

Compiled by Corinium Global Intelligence



Over the last year we have been taking submissions at our Chief Learning Officer, Forum event series. We asked our attendees which learning and development professionals they believe are accelerating the discipline. We compiled the results into 'The Top 50 Leaders in L&D 2019 | Americas.' The following interviews are with selected members of that list.

TELL US ABOUT YOUR CURRENT ROLE?

I am passionate about helping business leaders transform ideas into action to achieve business results. At the core of my practice is a deep belief in people and what they can accomplish. I leverage strong influence skills and trusted relationships to bring out the best in my partners and colleagues as a catalyst for growth and change. My colleagues tell me I bring creativity and innovation to the design of programs, tools, processes, and systems that are profoundly engaging and impactful, creating a safe environment to power breakthrough thinking and results.

In my current role, Senior Director, Executive Development and Organizational Effectiveness at Electronic Arts, I focus on enabling leaders and high impact teams to drive strategic change and growth. Through engaging, developing and empowering change agents, I lead cross-functional organizational effectiveness initiatives to drive innovation and accelerate organizational performance.

What led you to your current role?

I have always been energized by people, creativity and problem solving. My career started in software engineering and progressed over time to program management and then marketing. Then I learned about the field of organizational psychology and realized there was a consulting profession that recognized and focused on people at the heart of what makes companies great. Highly effective people build great companies, which in turn are profitable and grow, creating opportunities for more people and so on. I went back to school for my doctorate in organizational psychology and opened up my consulting practice. My practice focused on leadership effectiveness, innovation and business results to help leaders grow their people and their business. In 2007 EA recruited me to help start-up their internal Organizational Development practice.

Can you describe to us a current project/transformation you are working on?

In a world of rapid change and innovation leaders are faced with the dilemma of managing the business today while planning ahead for tomorrow. Finding the balance between operational and strategic is challenging in the best of times.



Brad Margolis

Senior Director, Exec Development and Org Effectiveness

To this end, a group of my colleagues and I are working jointly on an effort to scale-up leadership across the company. Effectively scaling-up means we grow the business while increasing our leaders capacity for greater breadth and depth in their scope of work. We are looking at how to take what is already working well to the next level of effectiveness. The effort encompasses ways to increase accountability and empowerment, enhance our decision-making capability, and support our leaders to thrive in an environment of ever increasing complexity.

What were the key relationships that mattered most?

Effective change starts with great sponsorship. We started with support from sponsor on the executive team. From there we have engaged senior leaders across the company to pilot the work. It's these relationships along with the team of people I am partnering with on this work that are critical to success.

What did you learn from this project?

To make a difference it is critical to get into the flow of how are leaders are working today and meet them where they are. From there, the real impact comes when we can make simple changes to the nature of conversations happening that result in a sophisticated and cascading impact in how work happens.

Can you describe your morning routine?

I am not really a morning person but I do enjoy the quiet thinking time in the early hours of the day.

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I'm usually up at 5:15. I'll meditate for 30 mins and then read the morning news feeds and scan my emails for anything urgent. Then I'll take 15 minutes to complete the daily tasks for my alliance in the mobile game I'm playing (Hey, I work for a video game company - it's important to stay connected to the world of our players). After that I'll head to the gym for a morning workout to jump-start the day.

If you could give your younger self one piece of advice what would it be?

Results matter, relationships matter more. Be a great bucket filler. As my son was growing up he brought home the book, "How Full Is Your Bucket? For Kids". Reading it with him I realized that it holds a key to great leadership. I have had the privilege of working with some amazing leaders in my career and they are all skilled at bringing out the best in people around them. They engage with people in ways that make those people feel seen, supported, and empowered. Watching what they do it's clear they put a priority on building great relationships. Do that.

What is your favourite show to binge watch?

Easy, Game of Thrones. It's a great story, wonderful acting, surprises at every turn. Not for everyone but I'm a sci-fi / fantasy lover so for me it's like candy. Give me that and a pint of homemade ice cream and I'm in heaven.



Brad Margolis

Senior Director, Exec Development and Org Effectiveness

Chief Learning Officers and Influencers Forum, Spring.

June 11- 13, 2019 | Scottsdale, AZ

Accelerating L&D for Organizational Impact to Unleash a Future-Ready Workforce



60+ Speakers

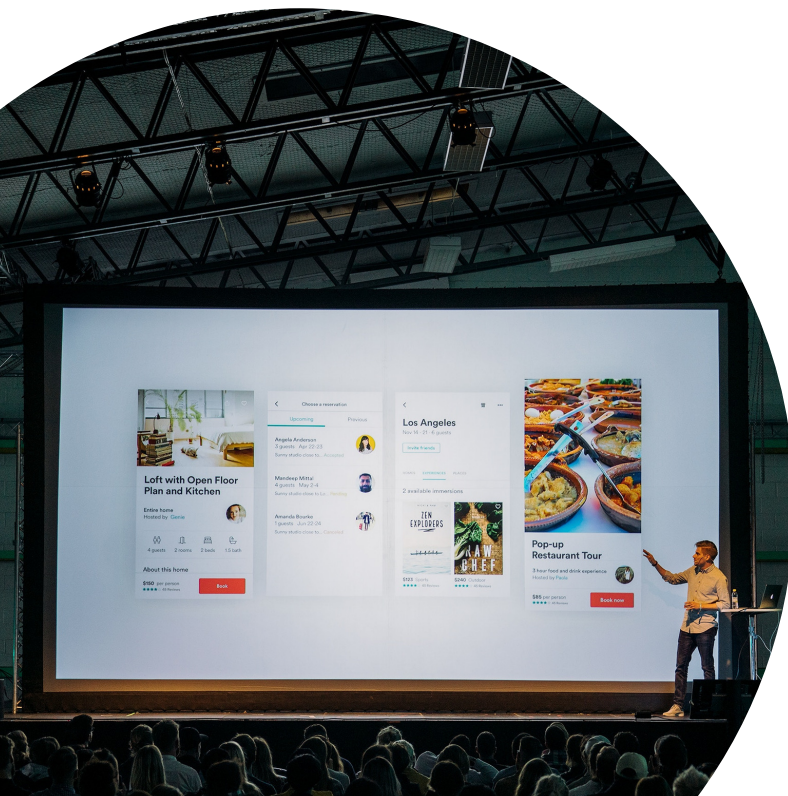


200+ Attendees



3 Days of Content

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TELL US ABOUT YOUR CURRENT ROLE?

Global Head Education Programs I've been in this position for a year. I manage a team of program managers and trainers that manage our education programs and deliver those programs strategically within region.

What led you to your current role?

I've been in education for over 15 years I started as a trainer and grew into management and leadership, I had been targeting Facebook as my next company and a recruiter reached out to me about this role. I spent 4 months interviewing and started in January 2018.

Can you describe to us a current project/transformation you are working on?

We are currently working to close the digital marketing skills gap for students, job seekers, NGO's, and Small Business Owners. We are building content that can be delivered through Universities and Community Colleges, a train the trainer network that can deliver to our NGO's and online content for our Small Business Owners.

What were the key relationships that mattered most?

Working with Policy and our SMB sales team to help us network with the right people within region.

What did you learn from this project?

That scope creep is real, Universities curriculum and is different from Community College curriculum, job seekers are different than students, and NGO's are more like agencies than a small business owner.

Can you describe your morning routine?

I wake up at 6 AM, make my bed, shower, get my kids ready for school (usually while I am on a call), breakfast, drop off the kids (usually while on a meeting), drive into work usually while I'm on a call, and then head into work.



facebook

Jeanne Tari

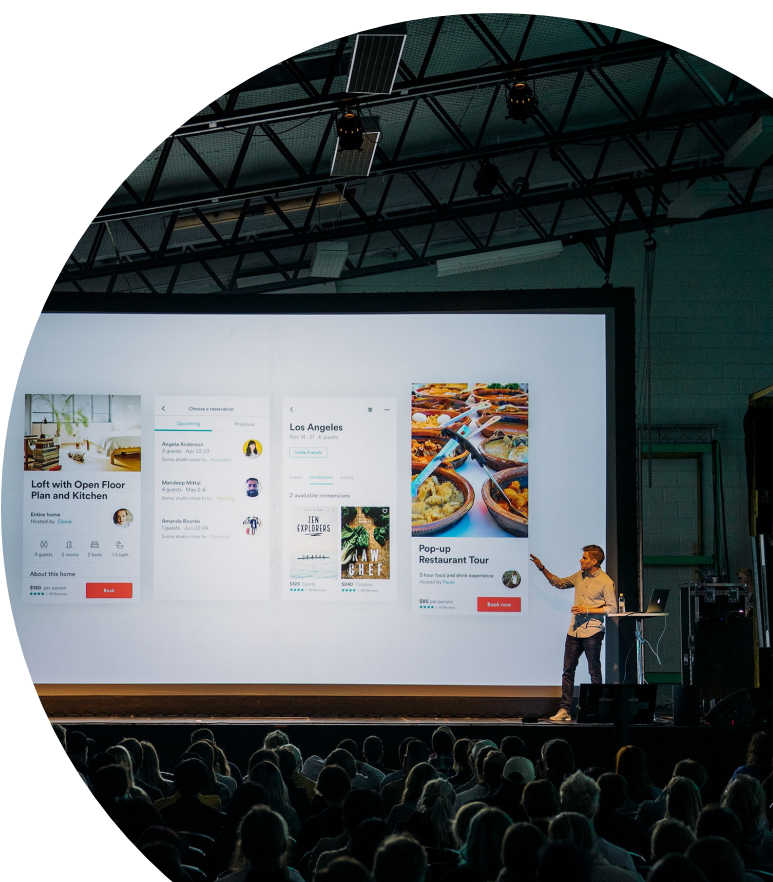
Global Head of Education Programs

If you could give your younger self one piece of advice what would it be?

Don't feel you have to have it all figured out, sometimes the fates will step in and help create a path!

What is your favourite show to binge watch?

Grace and Frankie!!!



TELL US ABOUT YOUR CURRENT ROLE?

As the Head of People Learning & Development I oversee everything learning and development as well as performance management related. Since joining Lyft in June, 2017, I worked predominantly on redesigning performance management, launching a whole suite of manager development workshops / materials, redefining executive development, and offering a wide ranging portfolio of learning offerings aligned with the company's key challenges (e.g., Interview Skills training during hyper growth, Managing in Hyper Growth for senior leaders, etc.).

What led you to your current role?

6 1/2 years at Google certainly up-levelled my game. What led me to leave Google and join Lyft was the challenge of designing Learning and Development from scratch, which allowed me to learn and explore new things every day. I am truly humbled for this amazing opportunity.

Can you describe to us a current project/transformation you are working on?

A major project I'm working on, and a significant transformation for the organization, is to incentivize people managers to fully embrace all our manager development offerings (in-person workshops, self-led manager circles, on-demand learning content, etc.) by means of incorporating upward manager feedback into performance evaluations. In other words, feedback provided by direct reports feeds straight into a manager's performance evaluation and triggers a conversation with their manager to talk about development opportunities. Upward manager questions are aligned with what we believe is most relevant for a people manager to be successful and we've aligned all our manager development offerings against those topics. As such and coming out of a performance conversation, managers will be able to find learning programs / content allowing them to grow and further develop. This thereby becomes a circular reference of being evaluated, identifying new areas to develop and getting the resources to do so.

What were the key relationships that mattered most?

As with any major project, the first step is to run a thorough stakeholder mapping exercise and identifying those most concerned, interested, vocal, etc. about outcomes you're trying to accomplish. In my case, this list ranges from the very top all the way to front-line people managers.



Uli Heitzlhofer

Head of People Learning & Development

In that spectrum, relationships that matter the most are with those who're likely to be most vocal. It's critical to know who they are and to involve them in the ideation and decision making process. That will create lots of amazing ideas and help tremendously to get buy-in when socializing and vetting the project before roll out.

What did you learn from this project?

As with many other projects, I learned that it's an iterative process. Achieving everything at once and in a perfect condition is very unlikely. Instead, I much rather follow the "launch and iterate" philosophy. Take small steps in well defined conditions and refine as you go. This also helps from a change management perspective so as to ease users into a new way of running a process. You generally don't want to "shock" end users by a band aid rip-off and risk organ rejection.

Can you describe your morning routine?

My morning routine starts around 6am when one of my two kids is waking me up. After getting them ready for the day, I usually bike to work around 8am, make myself a coffee to dig into a ~30min email session before heading into my first meeting of the day.

If you could give your younger self one piece of advice what would it be?

Stop focusing on the next level / promotion and instead diversify your experience. Nobody cares which level you were at. People care about your experience and are bringing to the table.

What is your favourite show to binge watch?

How I met your mother :)

TELL US ABOUT YOUR CURRENT ROLE?

I am the Head of Manager Development for Levi Strauss & Co. I have been in this role for about a year now. I am lucky to be a part of the team that's setting up the L&D function in an innovative and impactful way. We rolled out learning solutions for individual contributors last year and this year we have a big focus on developing our managers across the globe.

What led you to your current role?

I was excited about the company's focus on professional development. There was immense scope to add value in L&D in face of a big HR transformation. I was also happy about working with a great team of L&D professionals.

Can you describe to us a current project/transformation you are working on?

We currently working on a new manager on-boarding program that can be globally consistent and locally applicable. We are also focusing on manager development programs.

What were the key relationships that mattered most?

It's important to hear the voice of the internal customers and our HR managers and partners play a key role in communicating that. They are also well equipped to advise on what would help managers in transitioning quickly and smoothly when joining Levi Strauss & Co.

What did you learn from this project?

I was exploring various new technologies for this project and learnt a lot about what's there in the market. I am impressed by how innovative and engaging some of them are.

Can you describe your morning routine?

I am a morning person. I leave for work early. On my way I listen to the news on NPR. I also listen to audiobooks and podcasts. I read on Kindle; these days I'm reading 'Speed of trust' and 'The fearless organization'.

If you could give your younger self one piece of advice what would it be?

Be careful what you wish for it may very well come true.



Sunita Arora

Head of Manager Development

What is your favourite show to binge watch?

When I want to watch comedy, I binge on 'Frasier'. Frasier's entire family makes me laugh. I also love 'Game of Thrones' and can easily binge watch over a long weekend. I love all the actors who are playing Lannisters.



TELL US ABOUT YOUR CURRENT ROLE?

I've been Chief Learning Officer at Seven Hills Foundation for two years. I manage the learning and development programs for over 3800 employees of the Foundation and its affiliates. These programs cover a wide area of topics, including employee orientation, safety training, positive behavioural support, human rights, and career development. I also manage the Foundation's education incentive programs, which include university partnerships, tuition support, and student loan counselling.

What led you to your current role?

As a management professor and a practitioner, I've been involved in corporate L&D, information technology, and strategy for much of my career. Seven Hills offered a great opportunity to work with a highly diverse group of dedicated, caring professionals.

Can you describe to us a current project/transformation you are working on?

Our L&D team in the Seven Hills Corporate College is integrating the Seven Hills Core Values into our learning events and materials. Seven Hills promotes and encourages the empowerment of people with significant challenges so that each may pursue their highest possible degree of personal well-being and independence. The Core Values were developed in a series of workshops during 2018 and include respect and kindness; integrity; teamwork; innovation; and service to others.

What were the key relationships that mattered most?

Our president and founder recognized the need for a Core Values statement. That led to the Core Values Project, was led by our Chief Clinical Officer. The Core Values workshops included executives, managers, and staff from many different Seven Hills programs and locations. Seven Hills employees represent over 60 countries, and the workshops reflected the diverse nature of our colleagues. Several vice presidents make great contributions to the development of the workshop and the identification of the Core Values.

What did you learn from this project?

We had many opportunities to discuss the attributes that set Seven Hills and its affiliates apart from other human services agencies. Many different values were suggested during the workshops.



Bill Sodeman
Chief Learning Officer

The discussions were always positive, with an emphasis on making Seven Hills a better place for the individuals in our programs.

Can you describe your morning routine?

Walk our rescue dogs, do my morning exercises, and check my calendar. This gets me in a positive frame of mind for the day.

If you could give your younger self one piece of advice what would it be?

Be an active and attentive listener. People want to see that you understand and value what they have to contribute.

What is your favourite show to binge watch?

My family loves to watch cooking shows. Top Chef and the Great British Baking Show are two of our favourites!



TELL US ABOUT YOUR CURRENT ROLE?

As the Head of Global Learning & Development I lead, develop and implement the global learning strategy.

In February 2018 - after being awarded the accolade of "Learning Professional of the Year"; the Learning & Performance Institute (LPI) stated, "Sharon's passion and determination towards actively promoting Women in Learning and Leadership is an inspiration and further demonstrates her awareness of the environment she currently works within and commitment to a more diverse future. "

2015-2017 - Head of Global Product Education
State Street Global Advisors

In this role my key clients were the internal Global Advisors sales (distribution) workforce. I built institutional and individual capabilities as related to products, asset classes and investment themes; aligned with GA targeting sales channels. In this sales enablement role I designed a curriculum to increase the effectiveness of sales and the investment management professionals in delivering key products and solutions to clients, consultants and prospects.

What led you to your current role?

What led me to my current role - and specifically to my career in learning & development/sales enablement - the love and passion of learning. I especially like the opportunity to drive business results, and analytical proof back to the learning solutions and/or sales enablement programs deployed.

Can you describe to us a current project/transformation you are working on?

I can't define a specific project (due to my current regulated environment) - but I will echo the mantra underlying ALL of my projects, and specifically the award winning Pre-boarding Programs I created for 2 organizations: **ENGAGE, EDUCATE & EMPOWER**. Most times, the key component of empowerment is left out. That is where success is defined - on how well the employees and the organization are driving the learning long after the learning solutions are deployed.

What were the key relationships that mattered most?

Ongoing relationships with industry thought leaders - as guides, mentors and confidants.



STATE STREET GLOBAL ADVISORS

Sharon Claffey Kaliouby

Head of Global Learning & Development

Industry conferences & events (you can gain so much insight into best practices, peer networks, success stories & pitfalls to avoid; you must also share as well as learn!). Key senior stakeholders and executives sponsoring the learning organization in your company. Your learning colleagues/networks and lastly - the vendors! The vendors want to help you solve your business challenges...they've seen it all and if you ask - the good ones will happily share. Partner with them to collaborate on white papers, to research solutions and ...for friendship.

What did you learn from this project?

On one white paper I collaborated writing with a vendor: The State of Compliance Training...the biggest learning came from "how they want compliance training to change" it is through:

- 1) Relevant scenario led and personalized learning.
- 2) Learning versus training must impact behaviour.
- 3) Time invested is appropriate to level of industry experience and regulatory understanding ...

VERSUS

- 1) Video
- 2) Mobile
- 3) Gamification

Can you describe your morning routine?

LOL - Alarm at 4:45AM - I then get up at 5:15AM... Get ready for work. Play with the dog (Disney our Golden Doodle) and commute via the T (MBTA) or Commuter rail to Boston by 7:30AM.

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On the best days, at least twice a week, I go to a coffee house with wifi and Skype with either Donald H. Taylor or Nigel Paine (International L&D Thought Leaders) to hear and share what is going on in the Industry. I also Skype some global vendors (Marc Zao-Sanders from Filtered, Glenn Kenny from Interactive Services, Niall Darby from Intuition and Elliot Burgess from Improved Apps) for the same reason - and I like to look at the world through their eyes/perspective.

It was shared by Nick Shackleton-Jones that he would spend time every morning focused on learning for himself. That resonated with me and although I don't get time to do it every day - those are my best days! Oh and by 8:30 I head to the office fully energized and ready for the day.

If you could give your younger self one piece of advice what would it be?

Continue to live life without regret, as if each day were your last...

Savor the 70's with your family, the summers with your horses and the future with your family!

What is your favourite show to binge watch?

Game of Thrones!



STATE STREET GLOBAL ADVISORS

Sharon Claffey Kaliouby

Head of Global Learning & Development

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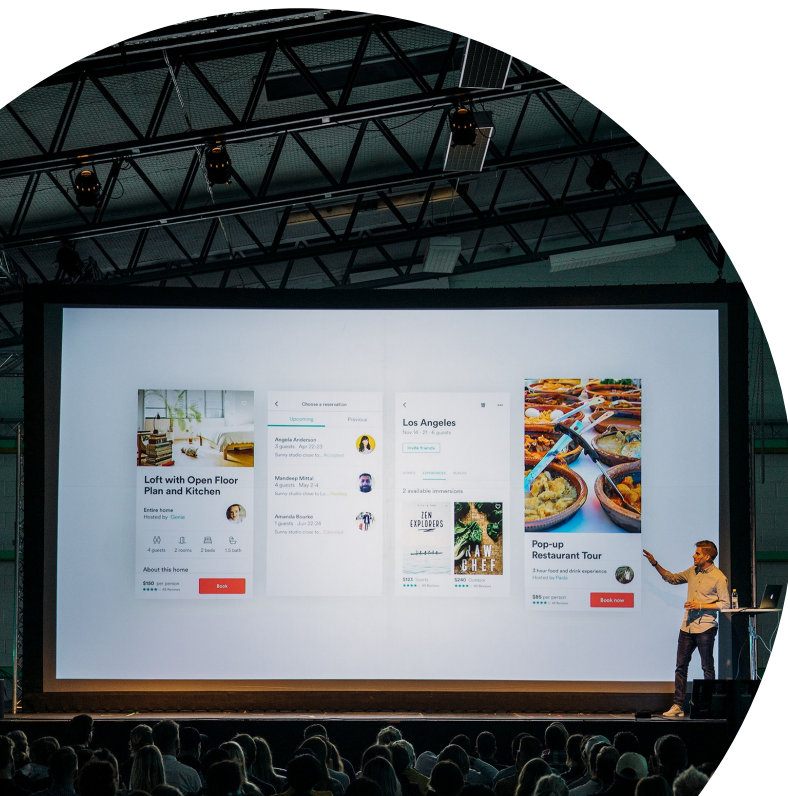


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3 Days of Content

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TELL US ABOUT YOUR CURRENT ROLE?

My current role is leading Culture and Employee Experience. As an organizational design and change management practitioner for over a decade, my role has been to create holistic and cohesive strategies for bringing the vision, capabilities, and culture of an organization to life.

I believe my work is about helping people to adapt and thrive, and a lot of our success relies on the informal learning employees receive from the stories we tell and the engagement and recognition programs we design. In this way, I believe people learn new insights in real-time and in context.

My role in shaping culture proves that you don't have to sit in a formal Learning and Development position to help people recognize and embrace opportunities to grow and change. And while I don't necessarily label what I do in change management as "development," all of my thinking centers on the same thing: shifting people's mindsets and behaviors, and encouraging them to adapt and develop in support of a larger goal.

An example is the leader storytelling campaigns and employee recognition strategies I've used. As we communicate why someone has been successful in their work, employees notice what gets recognized, internalize those behaviors, and look to replicate them. This teaches people something valuable entirely outside the context of formal learning. Instead, the learning comes within the context of their experience with the organization, what they see modeled, and what they hear is important.

Although collaborating closely with learning and development professionals on formal skills-based programs is essential for any change practitioner, a lot of magic happens outside of those venues. An intentional approach to leading change – using neuroscience to inform our thinking, emphasizing growth mindset in our language, and relying on meta-learning in our program design – puts learning at the center of everything we do.

What led you to your current role?

I've always cared about people. I grew up as a gay kid in a rural area near Syracuse, New York. And because of this experience, it is important to me that others feel safe, secure, and capable of offering their best. I believe everyone should have a place and a voice, especially at work where they spend a majority of their time.



Christopher Westcott

Culture and Employee Experience Leader

Delivering great employee experiences is more than just a passion – it's a calling. I've always been someone who observes the behavior of others and has a natural curiosity about why they do the things they do. Even as a kid, I had a knack for dreaming up fun experiences for my family and friends. Bringing these elements together is something that brings me joy.

That said, there's also a roguish part of me that likes the idea of flipping the traditional script of how working in a corporation is "supposed" to be. At the organizations I've worked for, I've been encouraged to question those rules and assumptions and find opportunities to make work more human. I know of so many people who've hated their experiences at work, and I'm thrilled to use my understanding of human behavior to help create a fun, engaging workplace where people see and feel their impact on something bigger than themselves.

Can you describe to us a current project/transformation you are working on?

Our cultural transformation journey at my current organization is a full scope culture change program. That means we're taking a look under the hood at everything we do and every assumption we make.

We've been hyper-focused on changing the formula for success, focusing on both "what" we achieve and "how" we go about it. From re-designing our policies and processes, to communicating our purpose and cultural aspirations, to challenging our long-held beliefs about what is possible, we're looking to redefine our culture and embed it into our organizational DNA.

Driving this change also means we're not accepting the status quo on our previous thinking and practices. A lot of our work is about encouraging people to use their best judgement and autonomy.

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For example, removing any perceived “dress codes” and encouraging flexible schedules grew out of this concept. The team is catalyzing a movement away from policy-based decision-making in favor of letting people use their curiosity and good judgment. On the surface, these are natural changes, but from a culture change perspective, they send an important message. When you approach opportunities with curiosity and autonomy, it leads to experimentation, which shows you what works and what doesn’t. Over time, the whole organization becomes more learning-focused and risk tolerant.

To that end, we’ve also taken a close look at our language. Language is a tool to reflect our realities and a powerful reminder of how organizations see the world. To access its full potential, we’re rebuilding an internal communications guide from the ground up, emphasizing specific growth mindset language that highlights learning over failure and what’s possible versus what’s not. We’re in the early stages of design, and we’re optimistic that a large-scale change in how we speak will have a positive influence on our day-to-day experiences.

There is much work to do but early results of our efforts have led to meaningful improvements in employee engagement and a notable difference in our culture.

What were the key relationships that mattered most?

Senior Leadership:

When I started on our culture change journey, I asked our senior executives to put themselves in VERY uncomfortable situations: first by having them lead our people manager workshops on the cultural aspirations we were building, and then again when I asked them to be extremely vulnerable and visible in a year-long set of “micro-campaigns” highlighting the new mindsets and behaviors we were striving for.

People Managers:

The next year, I shifted our focus to influential people managers. I designed a new program that asked people managers to learn from their senior leaders the previous year and put their own spin on the activities, learnings, and insights that were inspired. I recognize that people managers are the engine of change, and I looked to them to help us continue activating the organization around our culture change and learning new ideas to work differently. Simultaneously, this program also helped senior leaders move into coaching and advisory roles, which was a great way for them to practice the specific leadership behaviors we were aspiring to generate.



Christopher Westcott

Culture and Employee Experience Leader

What did you learn from this project?

Fear & Psychological Safety.

We are all afraid to change. It really doesn’t matter who you are. When confronted with new expectations, we all wonder if we are capable and ready for them. As change practitioners, it’s our job to empathize with the fear of trying something new and learning a new skill. We also need to provide just enough structure to help people feel secure without feeling restricted. When people have too many choices, too many decisions, and no real playbook, their anxiety actually trumps their ability to be creative or innovative or adaptive. It’s about finding the optimal arousal level for people to work and learn. We want to provide enough structure to get people started, but not so much that it becomes formulaic. We want to give them the ingredients; we don’t want to bake them the cake. It’s a really tough balance from a design perspective, and you need to be ready to learn and calibrate yourself!

Experimentation.

You never know what is going to work. During our design sessions, we experimented with multiple models of change management and learning techniques. From traditional workshops to insight-generating panel discussions, to creative outdoor exercises, I decided to open up my risk tolerance and try just about anything! And as a result, I learned a few fascinating insights. First, people like to express their learning in creative ways. Second, being social really is a key to learning. Get folks together and let them discover new insights for themselves. When it comes to learning experiences, it’s time to break the rules and try new things. Even if they fail. Especially when they fail.

Meta-Learning

We designed our programs to both deliver new insights but also to offer opportunities to practice – or “meta-learning.”

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In the design of my programs, I often create roles for executives to be “advisors” rather than “sponsors.” This is intentional as I look to build cultures based on a growth mindset and up-level leaders’ capability to teach, mentor, and coach. Don’t leave learning opportunities behind by not understanding that every role in any program has the opportunity to teach and be taught in the process!

Can you describe your morning routine?

First: Coffee. I’m nothing without it.

Second: My cat, Jack the Fat. He doesn’t let me do much before I give him love and attention.

Third: Read. I’m a voracious reader. I love to check out the news to start the day. I gradually move on to research articles to understand some of the latest thinking. I’ll read just about any new research out there. I love, love, love my job, and I’m passionate about bringing new ideas into my work.

Finally: Gym Time. You can always catch me at the gym in the morning. I love staying in shape and on top of my personal wellness. So after I’m done getting caffeinated, checking in on Jack, and catching up on the latest and greatest, you’ll find me whining about a few squats on Instagram!

If you could give your younger self one piece of advice what would it be?

Stop caring about what others think.

Honestly, I’ve always worried about what everyone would think of me. One of my first lessons in childhood was that first impressions matter. And that drives my thinking to this day. But as a child, especially a gay youth, I worried about everything – how I was dressed, how I spoke, how I compared to my peers, how I might avoid being bullied. I was driven by the environment and others around me, and that can be a little anxiety-inducing! Now that I’m an adult, I’d love to go back in time and let my younger self know that he can relax a little bit. The bullies go away, your passions have life, and you can do whatever the hell you want to with enough conviction and confidence.

What is your favourite show to binge watch?

Usually Survivor (yes, the show is still on). But right now? The Marvelous Mrs. Maisel. Holy cow! I watched the entire first season on New Year’s Day. It’s fun, witty, and full of emotion.



Christopher Westcott

Culture and Employee Experience Leader

Also, who doesn’t love a period piece? It makes you think life was somehow simpler in the past, even though we all know every decade had its own challenges, inequities, hopes, and fears. But something about a divorced stand-up comic set in the late 1950s really helps me escape!



TELL US ABOUT YOUR CURRENT ROLE?

As the Head of Talent & Development at GYK Antler, I support and work towards providing the best People Experience. This includes talent strategy, building a talent pipeline, hiring, employee education, teaming, employee growth, leadership development, executive development, coaching and more. It includes partnering with the CEO to set direction for the year, as well as having a consistent pulse on talent and culture.

What led you to your current role?

In our lifetime, we are more connected than ever before, and yet still struggle with key elements of connectivity which support organizational success: communication, teaming, strategy, alignment, growth mindset. I strive to help make positive change so to unlock success on an individual, team and system-wide level. I started my career thinking I would be an ambassador, and I guess you could say that in many ways, I still practice this kind of work, just on an organizational level.

Can you describe to us a current project/transformation you are working on?

My role is new at GYK Antler, so laying the groundwork for positive change has been the focus. Alongside regular coaching for leaders, team development and process work, we are defining our optimal organizational health by looking at the whole, what the focus needs to be, how to communicate more effectively, how to further align as leaders and be in tighter lockstep in carrying out the strategy, etc. This is critical in parallel to work creating a seamless people experience, via hiring, culture, talent planning, career pathing, improving the review process and deepening employee learning and growth.

What were the key relationships that mattered most?

It's critical to have the support of the CEO as well as have high trust relationships with the C-Suite and HR team, while also continuing to build relationships at all levels across the organization. Understanding the employee experience at every level is critical to success.

What did you learn from this project?

An organization is an ecosystem, so it needs to be looked at holistically and learned from.



GYKANTLER

Marian Spurrier

Head of Talent and Development

Just paying attention to one part will not fully address needs, nor be able to see valuable insights that can inform further success in other areas. It's been really fun to work with GYKA, as they truly embrace a growth mindset. I feel lucky!

Can you describe your morning routine?

I meditate each morning and then set intentions for my day. From there, I enjoy my favorite green tea and listen to the news. Some kind of movement is helpful depending on the season: either yoga or a walk or bike ride a couple times a week. No one ever talks about night time routines and I've found that personally, these are also important transitions, where I reflect on my day, focus on gratitude and earning and prepare for the next day.

If you could give your younger self one piece of advice what would it be?

Make time to look at the whole and seek mentorship from the top to learn about the intricacies of what goes on at a high level. We often start our careers looking at the details from the bottom. Because it's all connected, it's critical to learn about how everything is interrelated.

What is your favourite show to binge watch?

I'm more of a book nerd, but really enjoyed Jack Ryan recently and can't wait for the next season. I'm also a huge SNL fan!

TELL US ABOUT YOUR CURRENT ROLE?

Senior Manager, Instructional Design with Cox Automotive for 2 years and 10 months.

In my role, I focus on the design and development of educational multimedia as well as the measurement and analysis of learning for nationwide sales, service, and operations teams. I have had the opportunity to craft a thorough learning measurement strategy and push a team of multimedia designers to enhance learning experiences through creative and innovative video solutions.

What led you to your current role?

My passion for learning and development led me to my current role. Starting as an Instructional Designer, I found myself wanting to deliver content in a different way. I wasn't a fan of the lengthy eLearning modules and stale videos. I wanted something better, something that was consumed in a matter of minutes.

Using some out of the box thinking, a co-worker and I developed a series of videos focused on educational entertainment - or Edutainment, as we called it. From there I began supervising the team I was on, helping the other designers learn the same skills and focus on enhancing the learning design strategy. As I continued to learn and explore the business, it became clear that there was one area where we struggled - measurement.

Being in a primarily sales organization, numbers are everything and we didn't have quality metrics that defined what we did. I began focusing on how we could prove our impact to the company and began developing an over-arching learning analytics strategy. With this strategy, we can now see trends in our learning solutions, make adjustments as needed, and deliver learning scorecards that demonstrate our overall impact on the business.

Can you describe to us a current project/transformation you are working on?

Currently, I'm working on implementing the learning analytics strategy. I have begun the implementation stages and have successfully delivered consistent measurement for level 1 evaluations as well as the strategy to assess knowledge transfer. The next steps in my journey include working with the business to identify key performance tasks that drive results as well as identifying how those performance tasks impact business metrics.



COX
AUTOMOTIVE™

Michael Whatley
Senior Manager, Instructional Design

What were the key relationships that mattered most?

Throughout this process, the relationships that matter most are within the business. With the support of my leadership team and the collaboration with various departments across the organization, I have been able to establish clear goals and ideas on what needs to be measured and how to measure those things. Having a leadership team that understands the importance of measurement and a focus on improvement has been the most valuable component of this journey.

What did you learn from this project?

So far from this project, I have learned that there is a fine line when it comes to metrics. There are some equations that need to be used that aren't common sense, so being able to explain how numbers are arrived at and the theory behind them in a non-analytical way has been a challenge.

Additionally, I have learned that it is okay to show unfavorable metrics as long as you have rationale for what went wrong and a strategy in place to alleviate the impacts and improve on the next round.

Can you describe your morning routine?

My morning routine is fairly simple. I wake up at 5am every day and either head to the gym or head to work. In either case, I spend half an hour to an hour reading articles or watching videos online that spark creativity.

I look for things that I'm curious about, things that help me focus or gain a different perspective on a common problem. Thinking through the mind of another is one of the greatest ways to solve a problem.

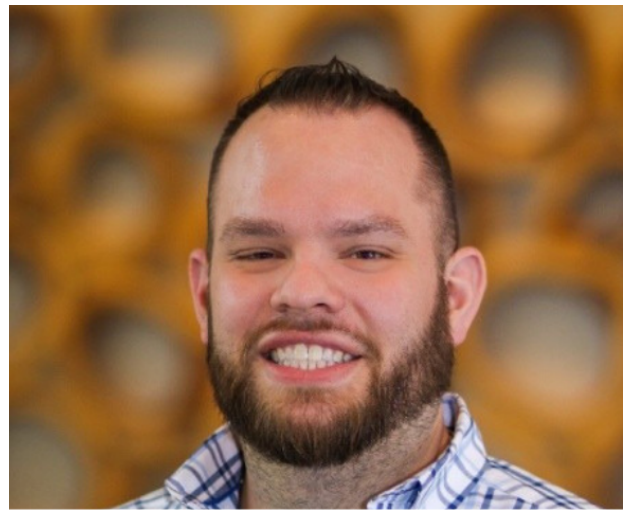
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If you could give your younger self one piece of advice what would it be?

I would definitely tell my younger self to pay more attention in Statistics class. The way of the future is data and analytics, so being able to create and calculate complex formulas and visualize results in an engaging way is a great skill to have. The other piece of the puzzle is storytelling. I would tell my younger self to read more books and pay attention to how authors grab the reader and pull them in through compelling information.

What is your favourite show to binge watch?

My favorite shows to binge watch are anything that requires logical reasoning. Anything that has a problem to solve or a mystery to unravel is right up my alley. I especially like shows with an unexpected twist at the end. That always keeps me on my toes.



Cox
AUTOMOTIVE™

Michael Whatley

Senior Manager, Instructional Design

Chief Learning Officers and Influencers Forum, Spring.

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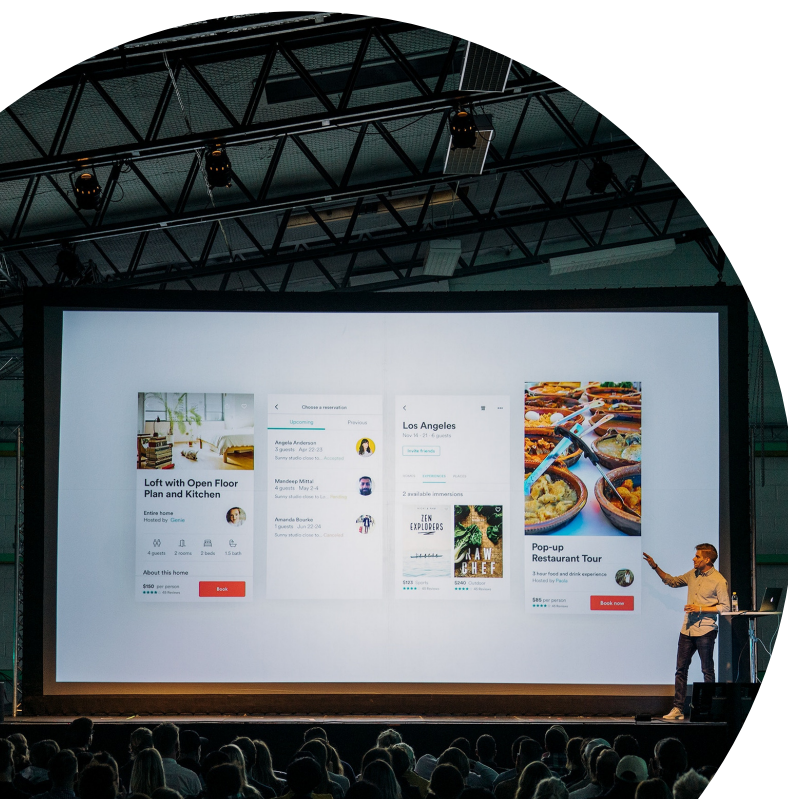


200+ Attendees



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TELL US ABOUT YOUR CURRENT ROLE?

Global Director of Learning and Development at Eventbrite currently focusing on employee experience, onboarding, career development and leadership evolution.

What led you to your current role?

Eventbrite's mission statement was a strong driver for me: Bringing people together through live experiences.

Can you describe to us a current project/transformation you are working on?

Currently, my main focus is bringing employees and teams together through live L&D experiences with a high focus on employee engagement, onboarding, agile learning and innovation.

What were the key relationships that mattered most?

Employees and leaders throughout Eventbrite and external peers who are open to sharing best practices, failures and innovative processes.

What did you learn from this project?

The most important learning I've experienced has been from external peers sharing common challenges across our industry and there isn't just one solution. Culture, mission, company size and mindset are all important factors to consider.

Can you describe your morning routine?

I live in Sausalito so the best part of my morning routine starts with riding the ferry from Sausalito to San Francisco. A brisk walk to the office wakes up my brain, provides inspiration and I'm ready to roll through the day.

If you could give your younger self one piece of advice what would it be?

The newest trend isn't always the best star to follow. Think in terms of impact, company strategy, and learner application.

What is your favourite show to binge watch?

Top Gear / The Grand Tour because the show evaluates different types of vehicles, puts them to the test and makes recommendations.



eventbrite

Elizabeth Pierce

Global Director of Learning & Development

There are also challenges throughout the world such as racing different modes of transportation across a country - learning about the culture and pitfalls of hacked vehicles. Finally, there's always a good dose of humor and fun.



TELL US ABOUT YOUR CURRENT ROLE?

Head of Sales Global Learning & Development for Verizon Media. My team is responsible for learning needs and programs for the Verizon Media global sales organization, including multiple sales groups, account management, and sales operations. We are responsible for fulfilling learning needs throughout our audiences' career - onboarding, product, systems, tools, sales skills, soft skills, professional development, and leadership development.

What led you to your current role?

I started my career as a high school social studies teacher which truly fostered my drive to be an educator. When I moved to Portland, Oregon in 1996, I couldn't find a teaching job so I took a sales job with an educational software company. There I discovered the corporate learning and development function that I didn't know existed. I knew that was what I wanted to do.

So I spent the next couple of years working toward an L&D career, including some volunteer and shadowing time in a trainer role. So when an opening on the L&D team was available, I was the obvious choice. Over the years after that, I worked my way into management roles and eventually had the opportunity to lead the entire global organization here at Verizon Media. I think the experience of being a seller and a trainer who worked my way up the ladder has helped me to empathize with my audiences and employees, and I think lends credibility to my role as a leader.

I believe that L&D professionals need to be educators at heart, with an inherent drive to help people grow and succeed. It has been that drive that has helped me grow as a professional and led me to my current role.

Can you describe to us a current project/transformation you are working on?

We are right in the middle of building a program that will change the culture of how we approach and partner with our customers and prospects. Currently, our sales organization spends nearly all of their time talking about Verizon Media and all of our products and capabilities. To be successful as an organization, we need to build strategic, consultative partnerships with our customers on every level, meaning that we need to spend significantly more time talking about our customers' businesses, their goals and aspirations, and most importantly, how they can disrupt the marketplace with their products and services.



verizon

Michael Hyatt Evenson

Head of Sales Global Learning & Development

To achieve such a monumental shift in culture, we are engaging with the business on all levels, including HR (building corresponding competencies), business operations (ensuring goals, MBOs, and job descriptions align), leadership development (coaching the skills and knowledge), and marketing (ensuring GTM and collateral are aligned). This is not an L&D initiative. It is a business initiative in which learning is a key element.

What were the key relationships that mattered most?

The obvious answer is building a culture of trust and strategic partnerships with leaders and stakeholders. This relationship must be one of mutual trust and respect - one where they trust my opinion as an L&D professional to help solve business needs and foster employee growth.

But I'm absolutely convinced that it is equally important to find and build relationships with what I call "influencers." These are the folks that have a strong and respected voice in their organizations, and understand the true day-to-day needs of the business. All organizations have gaps between the strategy/priorities of leaders and the day-to-day realities of the job. These influencers can help us bridge that gap to provide solutions that solve business needs and address the day-to-day needs and realities of the job.

What did you learn from this project?

This approach, of building a holistic business program in which learning is a key element, that addresses important business needs is the approach we should do with nearly everything. It is critical, even for product, systems, and tools, to attack it as a business problem or need that we need to solve, rather than a training program.

CONTINUED...

Can you describe your morning routine?

As a father, husband, people-manager, and morning person, the morning is a rare opportunity for some "me time." I always start with a couple shots of espresso, then take the opportunity to exercise and read the paper (yes, I still get the paper delivered every day). This routine gives me a great jump start to the day.

If you could give your younger self one piece of advice what would it be?

I believe that it is important to have goals and aspirations, but it is equally important to be open to all of the different paths that present themselves in life. My goal was to be a career high school teacher. But life presented an alternative path that allowed me to achieve accomplishments that I didn't think were possible. So it is important to have and drive toward your goals, but equally important to not let your goals limit you.

What is your favourite show to binge watch?

The best show that I have seen in recently is "The Marvelous Mrs. Maisel." In many ways, it feels like an old-fashioned stage play built on a premise that is incredibly unique and simply enjoyable.



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Michael Hyatt Evenson

Head of Sales Global Learning & Development

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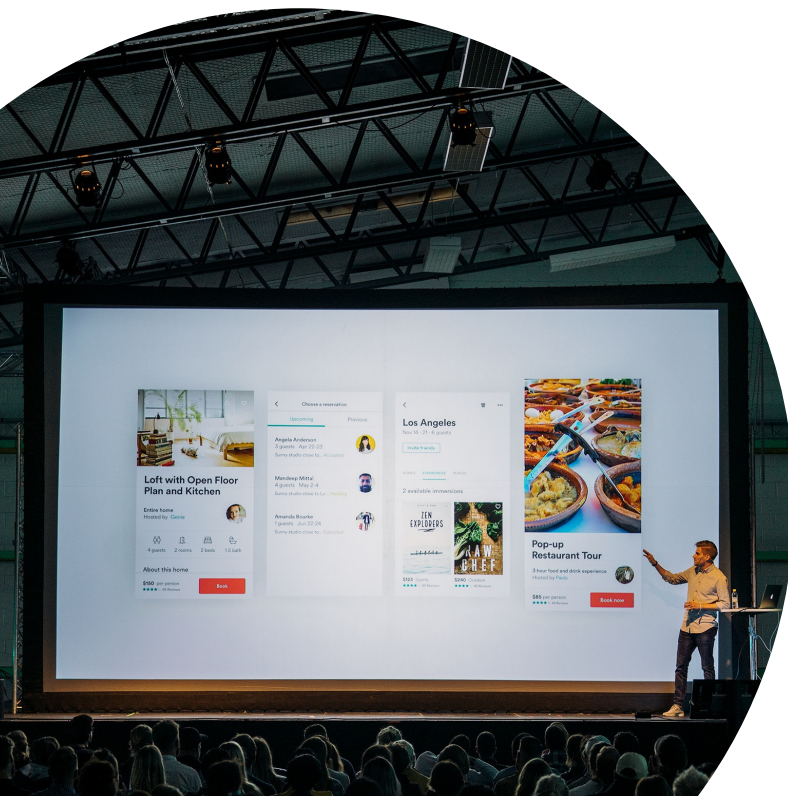


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TELL US ABOUT YOUR CURRENT ROLE?

I am the Assistant Vice President of Organizational Learning and Knowledge Management at Travis Credit Union. I have been in this position for 2.5 years.

I partner with the leadership team to direct and manage the design, development and delivery of skills training and organizational learning that align and support the strategic efforts of the credit union.

What led you to your current role?

I love developing others. Helping people to identify and grow into their potential gives me personal satisfaction. It is such a joy to see people that I have coached succeed and repeat the process with others.

Can you describe to us a current project/transformation you are working on?

Currently, I am working on developing the leaders, managing our organization's knowledge and transforming our employee experience.

What were the key relationships that mattered most?

Senior leaders set the direction for the credit union and knowing their goals/objectives is essential. As my projects cross multiple departments, a good relationship with leaders from all lines of business is also beneficial.

What did you learn from this project?

I learned that you have to continue learning, share ideas and engage others. This helps to gain buy in and successful completion of organization projects.

Can you describe your morning routine?

I start my morning with an inspirational message. This gets me motivated to strategize on my goals for the day. Then, I read the news to stay informed on local and national events. I check my emails to confirm my to do list.

If you could give your younger self one piece of advice what would it be?

Believe in your abilities, take more risks and develop a strategic career plan and follow it.



Delannia Caldwell

AVP Organizational Learning

What is your favourite show to binge watch?

I love to watch The World's Most Extraordinary Homes on Netflix. Seeing how people use innovative and creative design inspires me to think differently.



TELL US ABOUT YOUR CURRENT ROLE?

For the past 4.5 years, I have been working in the position of Senior Director, Learning and Organizational Development for L'OCCITANE, North America. I am responsible for providing strategic direction and execution for the development, integration and facilitation of innovative and disruptive training and people development initiatives for our Corporate and Retail populations of 1,700+ employees and 200+ locations across US and Canada.

Recently I was promoted to Senior Director, Organizational Development and Employer Brand for L'OCCITANE North America, where I will continue to oversee Learning and Organizational Development, along with all communication initiatives, organizational culture building programs and employee engagement across all channels of the business.

What led you to your current role?

I am extremely passionate about embedding a positive and thriving culture within the organization that encourages and motivates people to do great work, and fosters an understanding of how you, as an individual, are contributing to the success of the business. Seeing people grow and develop within their role, and see things from a different perspective also really excites me. This is what gets me out of bed in the morning! I think you are naturally drawn to what you are most passionate about.

Can you describe to us a current project/transformation you are working on?

The launch of a companywide social intranet named Sociabble, that will transform the way we communicate to our employees by capturing three essential streams of communication; Company to employees, Employees to company and Employees to each other. Sociabble is a platform where we can showcase our culture, corporate identity and values, enabling us to increase employee engagement and employee advocacy, empowering employees to be ambassadors of the brand.

What were the key relationships that mattered most?

Gaining buy in from Senior Leadership, Corporate people managers and our Retail Field District Managers and Market Directors was crucial in order to successfully encourage people to use and contribute to the platform daily.



L'OCCITANE
EN PROVENCE

Lucy Primrose
Senior Director

When team members recognized that their Manager was actively using the platform, it naturally cascaded throughout the organization.

What did you learn from this project?

Focusing on a 'pull' strategy as opposed to a 'push' strategy was key, in order to drive people onto the platform and encourage consistent, engaging and brand appropriate content. Identifying, highlighting and leveraging champions (ambassadors) of the platform early on in the launch was also fundamental to the success launch of Sociabble.

Can you describe your morning routine?

Starting the day off right is key for me. I allow time in the morning so that I am not starting my day rushing out the door. I start each morning with a glass of water and freshly squeezed lemon juice. I check my emails to see if there is anything pressing that needs an urgent response. Following this, I put my phone away, sit down and enjoy breakfast. Over breakfast, I reflect and write down three things that I am grateful for, followed by three things that will ensure I have a successful day. This always puts me in a positive frame of mind and ensures that I stay focused on what I have to achieve for the day.

If you could give your younger self one piece of advice what would it be?

Don't allow yourself to get too comfortable. As soon as you are in your comfort zone, it is time to move onto the next big challenge.

What is your favourite show to binge watch?

I would have to say Game of Thrones. While Season 7 seems like a lifetime ago, I can't wait until they release the final season in April!

TELL US ABOUT YOUR CURRENT ROLE?

ASM Director, Global Training and Development 1.5 years. I lead the global training function with a heavy focus on equipment operation and maintenance certifications for employees and customers who put home our semiconductor manufacturing equipment. My organization includes the corporate university which supports the enterprise.

What led you to your current role?

I was in various learning leadership roles over the span of 20 years at Intel Corporation, so it was a natural progression to work for a supplier in that industry.

Can you describe to us a current project/transformation you are working on?

We are implementing external customer and supplier portal capabilities in our Learning Management System which will enable us to expand our delivery of learning products and services. This includes a social learning component which we hope will support the learning culture for the company. 2019 is the year of video infrastructure investment which is so important for hands on procedural content.

What were the key relationships that mattered most?

Partnerships with IT, IP/legal, engineering experts and of course customers and suppliers are critical for a solid implementation that adds value.

What did you learn from this project?

I re-learned that my own expertise is important for decision making but that my team leaves no stone unturned and is highly committed to exceeding expectations and find creative ways around technical limitations.

Can you describe your morning routine?

We have 3 shifts of equipment training in the Phoenix Global Training Center, so at least 2-3 days a week I get into the office around 6:30 to be available to shift 3 instructors and students. Our corporate headquarters is in the Netherlands, so I often have morning phone meetings. We recently adopted puppies, so now morning dog walks are in the mix. The only constant is coffee!



Kristi Conlon

Director of Global Learning and Development

If you could give your younger self one piece of advice what would it be?

Find great women leader mentors earlier. I was lucky to have a couple of great ones but could have been more proactive in seeking them out.

What is your favourite show to binge watch?

Unbreakable Kimmie Schmidt. I mean it's by Tina Fey...and I'm looking forward to this last season. I also binge watch movies on international flights.



TELL US ABOUT YOUR CURRENT ROLE?

CEO, Actionable Analytics Group
Support HCM, HR Tech & Ed Tech startups and venture capital firms.

What led you to your current role?

25 years in HCM Sales, HCM Services and as an HR Practitioner makes me uniquely qualified for this highly specialized role.

Can you describe to us a current project/transformation you are working on?

Preparing for the Future of Work

What were the key relationships that mattered most?

Family, Friends & Liquor

What did you learn from this project?

Lifelong Learning is key

Can you describe your morning routine?

- > Spinach protein shake
- > 5 mile run
- > Shower
- > Start my day

If you could give your younger self one piece of advice what would it be?

Good nutrition always, 8 hours of sleep each night, exercise everyday.

What is your favourite show to binge watch?

The Crown



Jenny Dearborn
CEO

Chief Learning Officers and Influencers Forum, Spring.

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TELL US ABOUT YOUR CURRENT ROLE?

I am currently the Director of Learning and Development at Withum, a leading national Advisory Services, Audit and Tax firm. In my role (which I have held for just under two years) I lead internal learning and development for our 1200 team members and work with our leadership on ensuring that our learning meets our compliance and competency requirements but also constantly seeks out new ways to innovate and support the firm's mission.

Withum strives to be a Catalyst for Growth and Change, for our team members and our clients-- that is our purpose statement actually. My purpose with respect to internal learning is to ensure that our courses empower our people to be that catalyst. I also lead our external learning and development initiatives in which we offer courses to the public and consulting services to clients with the goal of both monetizing our learning infrastructure and sharing the exceptional talents of our instructors with a broader audience.

What led you to your current role?

I spent the majority of my career until joining Withum on the for-profit side of the learning space, working with companies and associations developing learning content and delivery systems to be sold in B2B and B2C channels, as well as consulting with vendors in that space on content strategy and innovation.

I loved my work but found myself really wanting to see what it would be like to focus on content quality and delivery effectiveness exclusively, rather than in the context of a profit goal. My role at Withum gives me the opportunity to develop and refine concepts with our internal audience and see the learning impact, but then also to use my skills in monetized learning products when we take those concepts and offer them up through our product and consulting services channels. It's a perfect fit and I'm so grateful to have this opportunity, and to have it at such an amazing, innovative firm.

Can you describe to us a current project/transformation you are working on?

We are working on a number of platform concepts that I am really excited about and that I think will integrate learning and workflow for our team members and our clients in a fun, efficient way.

I can't say very much more than that at this time, but stay tuned!



withum⁺
AUDIT TAX ADVISORY

Amy Plent
Global Learning Director

What were the key relationships that mattered most?

All of them. Our team is generous with its input and we've solicited that on a 360 degree basis, which I think is going to position us for success.

What did you learn from this project?

I don't know that I can answer that yet. I'm still learning from it.

Can you describe your morning routine?

I have an espresso machine in my bedroom. Weekdays that I am not travelling, I am up early for espresso and a quick read of the news. After that I take my dogs for a walk and then head to the gym and then to the office where I try to take a look at my priorities and get a plan for the day in place before checking email or teams.

If you could give your younger self one piece of advice what would it be?

Focus on doing work you are proud of and excited to do, and don't worry about whether you are moving up the ladder fast enough. I think my competitive spirit got in the way of my ability to be gratified by just doing good work when I was younger. I'm better at not letting that happen now, and my work brings me so much more happiness as a result.

What is your favourite show to binge watch?

I'm not a huge TV watcher but when I do it is usually some sort of historical drama. I loved The Tudors a few years back, that was a definite binge fest. Right now if I am going to binge watch anything it's probably going to be whatever episodes of The Handmaid's Tale I haven't gotten through yet. I also love re-watching old episodes of The West Wing.

TELL US ABOUT YOUR CURRENT ROLE?

President – AVADO. Just over a year. I oversee our North America business, and work with the global CEO to set our global strategy. Member of the board. Within North America, I help to build our approaches to learning solutions and work with our clients like Merck and Estee Lauder to maximize the effectiveness of our programs.

What led you to your current role?

I sold the business that I founded – The Knowledge Engineers (TKE) – to AVADO in 2016. I ran TKE for 9 years, working with clients like Google, Tencent and Time Warner. Before that I worked as a marketer with a strong interest in learning and development, most recently as CMO of Travelocity Europe.

Can you describe to us a current project/transformation you are working on?

AVADO is currently rolling out Squared Online – our digital marketing leadership course developed with Google – to the US market. This program transforms the capability of marketers to integrate digital into the DNA of their marketing activities. Most of our client-specific engagements are very much top secret!

What were the key relationships that mattered most?

Most digitally-delivered programs fail because staff are insufficiently motivated to start, and then complete them. When we roll out our programs we have found that CEO and functional leadership support is the key to gaining the motivation and time required to get people started. Then the training should take over and get people inspired to complete it!

What did you learn from this project?

Rolling out Squared Online made us appreciate the benefits of strong program partners like Google - who can bring expert content and frameworks to the table.

Can you describe your morning routine?

Woke up, fell out of bed
Dragged a comb across my head
Found my way downstairs and drank a cup
And looking up I noticed I was late
Found my coat and grabbed my hat
Made the bus in seconds flat



AVADO 

Niall McKinney
President

If you could give your younger self one piece of advice what would it be?

Talk less; listen more.

What is your favourite show to binge watch?

The West Wing. On my third time round.



TELL US ABOUT YOUR CURRENT ROLE?

Head of Sales, US for GoodPractice. I've been in this role for 16 months. I consult with clients around how to create a more modern learning culture, one where employees proactively seek out resources and courses to continuously keep their skills relevant and find useful information to overcome challenges in the moment of need. We've all become wired to seek out information to learn and answer questions in our personal lives on demand and corporate L&D needs to adapt to the changing preferences of their employees of how they learn everyday.

What led you to your current role?

In my previous role, I worked with clients to implement classroom and webinar-based learning solutions. Over the past 5 years, I saw a significant shift in what employees were asking of their L&D team- more microlearning, mobile, interactive learning experiences and less time spent formally in the classroom. Blended learning drives behavior change and embeds new skills more effectively and I am excited to bring my insights to clients who are looking to do this more effectively.

Can you describe to us a current project/transformation you are working on?

I am working with a large healthcare system in MA who seeks to improve caregiver engagement and patient satisfaction through a system-wide adoption of 6 key standards of respect. GoodPractice has branded a digital learning platform that will be easily accessible from any device (laptop, tablet, mobile) at any time. Descriptions, sample interactions, job aides for managers, and related content of the 6 key standards of respect are highlighted on the learning platform. Specific content on the standards will be emailed to employees each week. GoodPractice is also creating an interactive eLearning course with several sections: why each standard is important, what a good/bad example of the standard looks like, skill building around the standard, practice scenarios with branching results based on choices the participant makes, and reflection/action plan for how to improve. Success will be measured based on caregiver engagement surveys and patient satisfaction results.

What were the key relationships that mattered most?

Relationship with the Chief Learning Officer to talk about the business needs and key drivers for success to gain executive buy-in.



 **GoodPractice**

Diane Mullins

Head of Client Services

Detailed planning and execution work was done with the Director of Performance, Learning & Education and her team to understand how best to drive adoption within their culture and tailor the site to drive significant engagement.

What did you learn from this project?

It's extremely important to know who all the stakeholders are for a project and what their particular objectives/obstacles will be. A large healthcare system is one of the most complex working environments, with life and death outcomes, and understandably the time it takes to hear all concerns and resolve issues adds to the scoping, design, and launch process project timeline.

Can you describe your morning routine?

I check to see if there is any critical issue to resolve first thing in the morning, work out, have breakfast and then get on with the day. I take 10 minutes when I sit down at my desk to plan the day ahead.

If you could give your younger self one piece of advice what would it be?

It's OK to fail. I heard someone recently say that the need for perfection is actually fear. If you're not failing occasionally, you're not stretching your capabilities. Don't fear not being the best every time out.

What is your favourite show to binge watch?

House Hunters International- I'm a total real estate geek and love seeing what type of housing is available and at what price all over the world. It's kind of a hybrid travel show and real estate show and I inevitably would choose a different house than the one the featured buyers on the show choose!

Meet the team



Hannah Mitchell
Production & Conference Director
Corinium Global Intelligence | CLO Portfolio



Rose Fava
Marketing Manager
Corinium Global Intelligence | CLO Portfolio



Jess Karia
Digital Marketing Manager
Corinium Global Intelligence | CLO Portfolio



Chris Hatzakis
Sponsorship Director
Corinium Global Intelligence | CLO Portfolio



Delia Mulvihill
Senior Operations & Customer Service Director
Corinium Global Intelligence | CLO Portfolio



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