BRUCE KATLIN

LEARNING AND DEVELOPMENT PHILOSOPHY

I use a holistic approach to Learning and Development (L&D) understanding how adults learn based on best practices and brain-based science. Adult learners require that training be engaging, succinct, timely, meet their professional and personal needs along with having choices on how and when they learn.

I incorporate sixteen years program project management, design, implementation, and analysis, theatrical performance and fine arts techniques that drive skills synthesis, employee satisfaction and engagement, and organizational efficiency, productivity and overall success.

COMMITMENT
1. My responsibility is to help grow and develop the Business and the people who operate it by providing need-to-know, effective and timely learning initiatives.
2. My responsibility is to provide the resources in which team members can be highly effective, productive, engaged and fulfilled.
3. I respect individual learning preferences and the curriculums and programs that I develop, reflecting learning diversity and individual learning styles.
4. I am innovative - I create, plan, design and test all levels of our programs using best practices cutting-edge learning theories, methodologies and a background in film, TV, and theatre performance and production.
5. I stay current with the Business' products, services and customers, and the Industry.
6. I strive for excellence and base my decisions on what's best for the Business and its employees demonstrating commitment, honesty, openness and collaboration.
7. I am committed to continuous staff improvement that enhances career and personal development.
8. I practice what I teach.
9. I am committed to providing quality programs by:
   a. Listening to and involving stakeholders and learners.
   b. Constantly asking myself, "How can I improve my services?"

MYTHOLOGY (A combination of intuition, *Knowles, NeuroLeadership/Dr. David Rock, SCARF and AGES models*)
- Teach to the whole person.
- Bottom up/Top down; left to right (entering and existing the business).

- Adults become ready to learn when they experience in their life situations a need to know or be able to do in order to perform more effectively and satisfyingly.
- Learning needs to be flexible.
- Chunk/space learning.
- Always keep in mind that have a need to know why they should learn something and have a deep need to be self-directed.
- Adults enter into a learning experience with a task-centered (or problem- centered or life-centered) orientation to learning.
- Adults are motivated to learn by both extrinsic and intrinsic motivators. Extrinsic motivators - promotion, bonuses, etc. - up to the point that they are reasonably well satisfied. More potent and persistent motivators are the need for self-esteem, broadened responsibilities, knowledge that they're making a difference, and achievement. Learning activities should clearly demonstrate to the learner where he or she would benefit in their jobs.

TOOLS/RESOURCES

- Employee and Stakeholder face-to-face/focus groups and electronic Training Needs Analysis.
- NeuroLeadership/brain-based design and facilitation methodologies.
- Engaging learners – visual, creative, artist, performer, and athlete, and an L&D professional.
- Completing pre and post program analysis.
- Consistently evaluating programs and services.
- Partnering (Job shadowing).
- Group/cohort participate in the design and implementation of learning programs.
- Classroom.
- Mentoring.
- Coaching.
- Train-the-Trainer.
- Virtual (Teacher and student in different locations).
- Self-study (Books, periodicals, CBTs).
- 360's/180's.

INTERVENTION EXAMPLES

Ex. #1 Creating the Employee Learning Initiatives Strategy at CME Group, Inc.

THE NEEDS

- Create, vision, mission and values statements aligned with the Department and Business.
- Enhance Leadership cooperation and cohesion.
- Reduce employee attrition rate.
- Develop Function and job competencies.
- Increase employee engagement and job satisfaction.
- Create Supervisory & Leadership development program.
- Increase trust and cooperation.
- Enhance teamwork.
- Develop more effective and efficient recruitment process.
- Develop tech/Systems' knowledge and application consistency.
- Scalable, repeatable learning products.
- Enhance Departmental efficiency.
- Create Departmental branding.

RESOURCES & TOOLS

- Partnership with the Functional Dept. SME's and staff.
- SME and employees analysis – T.N.A., 360's & 180's.
- SME & staff dedicated training partners in the design, implementation, facilitation.
- Analysis of process, procedures of the Department and Corporate business.
- AGILE design methodology.
- Adapt AGES (Dr. Rock's Model to design and delivery).
- Competencies diagnostic tools – Lominger, SHRM.
- E-Learning Authoring software: Articulate, Camtasia, Captivae9.
- LMS – Adobe.

RESULTS/OUTCOMES (Partial listing)

- 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.
- 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.
- Staff, Supervisors, and Managers became an integral part of the L&D team lending their SKA's to the design and implementation of learning products.
- 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, 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.
- Designed Corporate-wide role competencies, which resulted in a significant competitive advantage within the Financial Services industry.
- Streamlined recruiting process that reduced interviewing process by 30% while increasing better hires by 20%.
- Created wellness awareness programs and resources to enhance employee satisfaction and overall well-being.

Ex. #2 Manager and Leadership Program at CME Group, Inc.

THE NEEDS

- To expand supervisor, manager and leadership operational and people skills that drive efficiency, productivity, creative thinking, innovation, business results, and employee engagement.
- Create two-way trust and cooperation.
- Inspire teamwork.

RESOURCES & TOOLS

- SME analysis.
- 360's & 180's.
- Situational Leadership model.
- Individual and group coaching.
- Senior Leadership mentoring.
- Conflict interventions.
- Classroom, self-study, webinars, guest speakers.
- Trust evaluations.
- Participant generated learning sessions.
- Departmental projects implementation tools (4DX.)
- E-Library of resources.

RESULTS/OUTCOMES (Partial listing)

- 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.
- Through the creation of the **EPIC** Program (Engage, Produce, Innovate, Collaborate), which provided a new perspective to current Market Regulation strategy.
  - o Developed strategic and critical thinking skills.
  - o Fostered cross-functional collaboration.
  - o Developed internal network of high performers and senior leadership.
  - o Engaged thought leadership discussions with senior leadership.
  - o Developed high impact presentation creation and delivery.
  - o Created mentoring with C-Suite leaders
- Increased Manager and Leader's trustworthiness ratings 45%.
- Increased employee accuracy and productivity 10%.
- Enhanced Corporate-wide awareness of Market Regulations' integrity and value add.