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SUMMARY

Accomplished learning, talent and organizational development executive with expertise leading the assessment, design and implementation of those functions in complex, growth organizations. Particular strengths include: needs assessment, formulating strategy and objectives, designing organizational structure and assessing talent.

PROFESSIONAL EXPERIENCE

February 2019 – present *Principal, DeFilippo Leadership, Inc.*

Executive coaching, leadership development and talent management consulting firm.

August 2015 – January 2019 *SUFFOLK, Boston, MA* **Chief People & Learning Officer**

Promoted to lead the human resources function to prepare the business to scale nationally as part of Suffolk's five-year growth plan. Sample results include:

- Conducted needs assessment and external benchmarking to devise revised human capital strategy and multi-year plan within the first 60 days.
- Re-organized human resources structure and team to more effectively serve the operating regions.
- Assessed human resources talent to move and recruit people in the new structure.
- Established new and enhanced processes for the following areas within human resources:
 - Talent Acquisition model
 - Compensation structure
 - Succession Planning process and implementation
 - Business Partner coverage
 - Diversity & Inclusion integration
 - Executive assimilation
 - HR Shared Services process and platform optimization
- Facilitated firm's quarterly Operating Committee meetings.

Chief Learning Officer

Recruited to revamp the Learning & Talent strategy, tactics and team in order to address Suffolk's talent requirements during a significant phase of business growth. Sample results include:

- Conducted needs assessment and external benchmarking to devise multi-year learning and talent strategy.
- Devised and implemented three-year learning and talent plan within first 90 days.
- Designed and carried out programs and processes to align with business growth, including:
 - High Potential Leadership Development Program
 - Executive Development process
 - Executive Coaching practice
 - On-boarding & Acculturation process
 - Role-based Operations & Functional Curriculum
 - Performance & Talent Review process

**July 2007 –
July 2015**

BNY MELLON, New York, NY

Chief Learning Officer

Promoted to lead and implement BNY Mellon's corporate university to address the business objectives and human capital requirements for 50,000 employees globally. Responsible for establishing the strategic business plan, operating model, organizational design and talent requirements to re-constitute learning and talent development for BNY Mellon. Sample results include:

- Devised BNY Mellon University's 100-day plan leading to the three-year learning & development strategy and priorities.
- Charged with strengthening BNY Mellon's Risk Culture, Leadership & Management acumen and Operational Excellence in 2014.
- Created the organizational structure for a globally integrated university.
- Led the talent review process for the University's 200+ global staff in order to align strategy and structure with talent.
- Streamlined financial plan resulting in the reduction of operating plan by 18% (\$6.0M) in first year.
- Integrated learning & development infrastructure to establish consistent and scalable workflows and standards leading to reduction in cycle times.
- Led successful transition of learning & development staff from respective business lines to central university operating model while maintaining business continuity during transition period.
- Member of BNY Mellon Operating Committee, Corporate Social Responsibility and Diversity & Inclusion (Co-Chair) Councils.

Chief Learning Officer, Asset Management Business

Recruited to lead the design and implementation of the Learning & Organizational Development strategy and function for BNY Mellon's Asset Management business. Responsible for defining the global strategy, assessing talent development needs, and building a team to implement annual operating plan priorities. Sample results include:

- Conducted worldwide needs assessment for Asset Management's 20 investment firms.
- Devised three-year learning & organizational development strategy and plan.
- Designed and implemented a high potential Leadership Development program, which was recognized as a *Top 10 Leadership Program* by *Leadership Excellence* magazine in 2012.
- Led the strategy and implementation of business-specific learning and organizational development initiatives including technical skill, on-boarding, graduate recruiting programs.
- Managed the line-of-business implementation of company-wide talent development processes including performance management, mentoring and employee engagement.
- Planned and implemented talent assessment process to facilitate succession and movement.
- Designed and supervised executive coaching engagements based on talent planning outcomes.

- 2004 - 2007** **CAPITAL ONE FINANCIAL**, Global Financial Services Division, Framingham, MA
- Director, Learning & Development***
 Established and led the Learning and Development function for Capital One’s Global Financial Services division. Responsible for the talent development strategy, skill assessment, designing the learning curriculum and delivering against business goals. Served as interim HR Director (2006).
- 1997 - 2003** **COMCAST** (Formerly AT&T Broadband), Wellesley, MA
- National Director, Sales Learning & Development***
 Promoted from Regional Learning & Development Manager to lead and design the National Sales Learning & Development strategy for all sales channels. Responsible for developing and implementing sales and product education programs for 15 markets representing 25,000 customer-facing employees.
- 1992 - 1997** **UNITED PARCEL SERVICE**, Dedham, MA
- Operations, Business Development & Call Center Management***
 Started as delivery driver and then rotated through several management roles as part of the UPS career development process.
- 1988 - 1992** **High School Teacher & Coach**
 Began career as a high school faculty member, teaching Spanish and serving as head cross-country and track coach.
- EDUCATION** **Ed. D., University of Pennsylvania**, Work-Based Learning Leadership, 2013
 Dissertation: “Executive Coach Supervision: The Dynamic & Effects” (Awarded Distinction)
Georgetown University, Leadership Coaching Certificate, Washington, DC, 2006
M.A., New York University, New York, NY, 1991
B.A., Union College, Schenectady, New York, 1988. Study Abroad: Spain & Kenya
- AWARDS**
- Chief Learning Officer Magazine, Trailblazer, Gold Medal, 2017**
 Individually recognized for talent management strategy design and implementation.
- Chief Learning Officer Magazine, Talent Management, Gold Medal, 2017**
 Team recognized for new college graduate program.
- Chief Learning Officer Magazine, Innovation, Gold Medal, 2017**
 Team recognized for rapid curriculum design process.
- Workforce Magazine, Change Management Award, Silver Medal, 2017**
 Team recognized for change management with performance management process.
- Chief Learning Officer Magazine, Business Partnership, Bronze Medal, 2016**
 Team recognized for novel approach for establishing Suffolk Culture program.
- Chief Learning Officer Magazine, Trailblazer, Silver Medal, 2014**
 Individually recognized for deliberate approach to establishing BNY Mellon University.
- Chief Learning Officer Magazine, Global Learning, Gold Medal, 2010**
 Individually recognized for innovative approach to developing global leaders.

SPEAKING

Example presentations and panelist sessions over the past 10+ years:

- “Building Culture: We Are Suffolk”, Conference Board, San Diego, CA, 2018
- “Building Smart: Suffolk’s Approach to Leadership Development”, IPMI Conference, 2017
- “Career Start: Building Suffolk’s Leadership Pipeline”, Conference Board, New York, NY, 2017
- “Learning Science, Structure & Solutions”, HCI Conference, Boston, MA, 2016
- “Charting the Future of Learning”, Association for Talent Development, Boston, MA, 2016
- “The Future of Corporate Learning”, Northeastern University, Boston, MA, 2016
- “The Future of Learning & Talent”, Association for Talent Development, New York, NY 2015
- “Global Leadership”, Northeastern University Global Leadership Summit, Boston, MA, 2015
- “Reinventing Learning & Development”, Bersin by Deloitte Conference, Miami, FL, 2015
- “The Next Big Conversation in Executive Coaching”, Conference Board, New York, NY, 2015
- “From Idea to Implementation: BKU”, Corporate Learning Week West, San Jose, CA, 2014
- “Unpacking Executive Coaching”, Workforce Live, Boston, MA, 2014
- “Finding the Next CLO”, CLO Conference, Laguna Niguel, CA, 2014
- “CLO Point- Counter Point”, Human Capital Institute Conference, Boston, MA, 2013
- “Executive Coach Supervision” Oxford-Brookes University, Oxford, UK, 2013
- “New Rules for Leading Talent”, Commonwealth of Massachusetts, Boston, MA, 2011
- “Coaching: Not Just for Athletes”, CLO Conference, San Diego, CA, 2010
- “Leadership Development”, Irish Learning Alliance Showcase, Dublin, IR, 2010
- “Learning Innovation”, Bersin Executive Learning Forum, Boulder, CO, 2009
- “Leadership Development”, Bersin Conference, St. Petersburg, FL, 2009
- “Leadership Development: Trends & Insights”, Financial Services Forum, Boston, MA, 2009
- “Sales Force Development & Coaching”, LearnShare Conference, Atlanta, GA, 2006
- “Becoming a Learning Organization”, LearnShare Forum, Philadelphia, PA, 2005

PUBLICATIONS

Example articles and research from the past 10+ years:

- “The Education of a CLO”, CLO Magazine Column, January 2017
- “A Day in the Life of a Learning Objective”, CLO Magazine, October 2016
- “HR Will Seat You Now”, CLO Magazine, February 2016
- “Coach, Keep it Professional”, CLO Magazine, June 2015
- “Where Science Meets Art”, CLO Magazine, December 2014
- “Mentoring vs. Coaching: When to Use Each”, Talent Management Magazine, July 2014
- “Building a High Performance Team”, CLO Magazine, September 2013
- “Invest Now or Pay Later: The Case for Long-Term Learning”, CLO Magazine, April 2013
- “Address Learning Needs Not Wants”, CLO Magazine, December 2012
- “Back to School”, CLO Magazine, October 2012
- “Building Leadership Development Programs”, Leadership Excellence, August 2011
- “Talent Planning”, Talent Management Magazine, November 2010
- “Coaching in Context”, Talent Management Magazine, June 2010
- “Leadership Development: Strategy Centerpiece”, Leadership Excellence, Sept 2009
- “Do You Believe in Magic?”, Training Industry Quarterly, July 2009
- “First Line Manager Coaching”, Sales Executive Council, 2006

VOLUNTEER ACTIVITIES

Volunteer activities:

- Chief Learning Officer Magazine, Accelerator Course Faculty, 2018 – present
- Chief Learning Officer Magazine, Columnist & Editorial Board, 2017 – present
- Adjunct Faculty, University of Pennsylvania, GSE, 2013 – present
- Adjunct Faculty, University of Massachusetts (Boston), ELP Program, 2010 – present
- Youth Mentor, Year Up Boston, 2008 – present