### Josette M Mancini

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**Senior Instructional Designer**

**ELearning Specialist/Singer/Songwriter/Animator**

Knowledge & Skills

* Expert in developing customized computer-based training using Articulate Storyline 360, Camtasia, Captivate, Brainshark, Synthesia Vyond and Powtoons
* Expert graphical design skills in (Adobe Creative Suite) Illustrator, Photoshop, InDesign, Canva
* Change Management (Company Reorganization/Leadership Change Navigation, Software Changes)
* Accessibility Expert (WCAG, JAWS, Paciello for color blindness)
* Project Manager for Learning and Development initiatives
* Sales Enablement Training (Product/Service, Sales Techniques and Strategies)
* Salesforce conversion from Classic to Lightning
* Salesforce Workflows and Content Management Expert
* Salesforce nCino
* Experience with SAS applications for Risk Management, Fraud Detection, and Portfolio Analysis
* 15 years U/X Design experience
* Ability to design and maintain role based national/global curriculums for large organizations from the ground up.
* Knowledge of specific accounting and banking industry applications and workflows
* Expert knowledge of technical tools to develop and facilitate any-time/anywhere learning: Brainshark, Adobe Connect, Degreed, QUMU, Panopto, Zoom, Slack, Microsoft Teams, WebEx, Refract
* Superb Performance Management, Change Management, Leadership Development and Sales Training skills
* ExtensiveKnowledge of Learning Management Systems (LMS): Saba, Sumtotal, Absorb, Cornerstone, Litmos, Skilljar, Docebo and Precipio
* Knowledge of financial Institutions Regulatory Requirements regarding Risk and KYC Management and Information Security “OCC Heightened Standards”
* Knowledge and experience in leadership and organizational development programs
* Knowledge and experience with large change management initiatives
* Experienced trainer on Banking and CPA firm applications (CCH, GoSystems, QuickBooks, Peachtree, Axys/APX/Advent, BNA Tax Planner)
* Behavioral Bias in investing
* Agile Methodology and collaborative tools using Jira, Confluence, and Asana
* Expert in [Jasper AI](https://www.jasper.ai/free-trial?adgroupid=124949426633&campaignid=13479856294&utm_source=google&utm_term=jasper.ai&utm_content=655481868668&utm_campaign=Jasper_Teams_Google_Search_Prospecting_Trials_brand&utm_medium=ppc&hsa_acc=5024544109&hsa_cam=13479856294&hsa_grp=124949426633&hsa_ad=655481868668&hsa_src=g&hsa_tgt=aud-1398186145801:kwd-1627054061004&hsa_kw=jasper.ai&hsa_mt=p&hsa_net=adwords&hsa_ver=3&gad_source=1&gclid=EAIaIQobChMI29-qm5a1gwMV_mBHAR1s-wOcEAAYAiAAEgIoa_D_BwE) for Marketing Campaigns and E-Learning development
* Experienced in AI voiceover technology software such as Wellsaidlabs, LOVO Ai, Murf and Synthesia
* Experienced in ZenDesk and ServiceNow for helpdesk support and online instructional content

**Work Samples:**

Please note that I can share several more work samples if needed but cannot share all in resume.

[Awareness in Customer Interactions](https://360.articulate.com/review/content/adbd8fb8-853c-41a0-96c1-586df562834f/review)

[Uber – Ride Rent Valet Training](https://360.articulate.com/review/content/e8cca276-8549-4d64-86c2-8b47e14a08fc/review) (no audio)

[Uber – Rides Reserve Product](https://360.articulate.com/review/content/2fbfdfff-bf43-4295-ba45-4881356fd64a/review) (no audio)

[Strategic Financial Services Client Journey](https://360.articulate.com/review/content/1d3f32bb-0de1-450b-869a-cb43367e32f5/review)

[Creating a Buyer’s Presentation](https://rise.articulate.com/share/eUjL9w9njhj4z7-_z_i7uhFuu8PxZO3F#/)

[Exploring Investor Profiles](https://360.articulate.com/review/content/5da244f9-8f9c-4c41-8b65-d02c0f04d3a2/review)

[Change Management Training with Facilitator Guide in Last Section](https://rise.articulate.com/share/zBf3jYPLB29BUqJupiV8fpnuW9AzOvx8)

[Save the Client Game](https://360.articulate.com/review/content/ccd513a5-e801-432e-a168-5c255ea4f3bd/review)

[Goals-Based Investing with Animated Cartoon](https://360.articulate.com/review/content/72a4eaec-432b-45da-851f-38930cf73406/review)

[Mobile Device Training](https://www.brainshark.com/apolce/vu?pi=zG9zKPbuIz2EN5z0)

[Mobile Visit Verification Initial Set-Up (brainshark.com)](https://www.brainshark.com/1/player/apolce?pi=zG9zKPbuIz2EN5z0&r3f1=&fb=0)

[Jabber Overview](https://www.brainshark.com/apolce/vu?pi=zFQz3s0vCz2EN5z0)

[CCH Sales Training](https://www.dropbox.com/s/58plip4l4obca2m/Talk%20Tracks%207-19-19.mp4?dl=0)

[Answer Connect Sales Training](https://www.dropbox.com/s/dybpfk0ann8f0wi/AC%20Story%20June%20Final.mp4?dl=0)

[AC Story June Final.mp4 - Dropbox](https://www.dropbox.com/s/dybpfk0ann8f0wi/AC%20Story%20June%20Final.mp4?dl=0)

[Cartoon video for my original music](https://www.youtube.com/watch?v=Z10a5JR7MO4)

[CCH Accounting Research Manager Software Demo](https://www.brainshark.com/apolce/vu?pi=zHEzacYltz2EN5z0)

[BESPOKE Laundry Sales Training](https://rise.articulate.com/share/LXwb5dM6a7gEabJE5-FWz8oAfn30QhnY)

[Vyond Music Video for my original song "Blink"](https://www.youtube.com/watch?v=IhVc9-RiZhM)

[Vyond Music Video for my original song "Perfect Love"](https://www.youtube.com/watch?v=DQ8FurpgTGY)

[Music Webpage I created for my original music and videos](https://jammmedia.com/)

***Fannie Mae (Contract through OpenSystems)***

***Senior Instructional Designer***

***October 2023-October 2024***

* Developed 2 courses on Property Insurance which are designed to provide lenders and servicers an understanding of the key property and flood insurance requirements for one- to four-units, PUDs, condos, and co-ops.
  + [What you need to know about property insurance — one- to four-units](https://rise.articulate.com/share/gwAtxLqxqiOfgtBR6zg3FI8OSHhjzlWM)
  + [What you need to know about flood insurance](https://rise.articulate.com/share/6idkHBNTQfu_pQb3Whur3VGYPVbz5zVX)
* Utilized Articulate Storyline and Rise to create 12 E-Learning templates to be used throughout the entire organization.
* Developed 3 Customer Service modules using a combination of Synthesia avatars, Camtasia and Storyline.

***Elevance Health (Short contract through Clarity Consultants)***

***Senior Instructional Designer***

***December 2022-April 2023***

* Utilized Articulate Storyline and Rise to create 7 E-Learning modules on how to process insurance claims. This included micro-learning videos created in Camtasia as well as software simulations.
* Created job aids in Word to supplement the E-Learning modules.
* Utilized the Adobe Product Suite to create eye-catching graphics for the job aids as well as assets for the E-Learning modules.

***NYLife Insurance (12-month contract through Eclaro)***

***Senior Instructional Designer***

***November 2021-October 2022***

* Met with Subject Matter Experts daily to consult on the best learning approach
* Utilized Articulate Storyline, Rise, The Training Arcade, and Captivate to create E-Learning modules on the following topics:
  + Term Life Insurance
  + Whole Life Insurance
  + Universal Insurance
  + The History of Insurance
  + The Customer Journey
  + Compliance
* Created job aids in Word to supplement the E-Learning modules.
* Utilized the Adobe Product Suite to create eye-catching graphics for the job aids as well as assets for the E-Learning modules.
* **Weekly consultations with key stakeholders to ensure course completions in LMS (Docebo).**
* Sales Enablement Training – Training on customer behaviors, pain points and closing the deal

***Union Bank (3 month contract through Rose International)***

***Senior Instructional Designer***

***October 2021-December 2021***

* Designed/developed/implemented 6 E-Learning modules on Salesforce functionality including opportunity conversions and knowledge management using Camtasia and Storyline.

***Strategic Financial Solutions***

***Instructional Designer***

***January 2020 – September 2021***

* Designed/developed/implemented 14 E-Learning modules on Salesforce conversion from Classic to Lightning. This training consisted of recorded demonstrations using Camtasia and simulations created in Storyline.
* Change Management consulting
* Utilized Prosci ADKAR Change Management Model to support employees through changes in leadership and software applications such as Salesforce and Office 365.
* Designed/developed/implemented New Hire Orientation modules for Sales, Client Services, Litigation, and Negotiation departments using Storyline, Rise, Camtasia and Vyond
* Designed and implemented new hire orientation modules for multiple departments using Storyline, Rise, Camtasia, and Vyond, further illustrating her skill in developing and administering LMS content.
* Designed Legal and Compliance Training modules using Rise, Camtasia, and Storyblocks including own professional voiceover.
* Utilized SAS applications for Risk Management
* Project Management for all learning programs

**Sandata Technologies**

**Training Director of Customer Care/ Instructional Designer**

**December 2018 – January 2020**

* Developed curriculum for all Customer Care Specialists
* Developed training modules on custom mobile applications for Home Health aides to log their tasks, Home Healthcare Agencies to manage administrative tasks (billing, payroll, compliance, HR
* Utilized McKinsey 7S Model Change Management Model to support employees through transition to Zendesk helpdesk software.
* Utilized Camtasia, Captivate, Articulate Storyline, Rise and Zendesk
* **Developed and managed training modules using Articulate Storyline, Rise, and Zendesk, showcasing my ability to effectively utilize LMS tools for educational purposes.**
* Facilitated distance learning using Zoom
* Managed internal and external content in Zendesk
* Utilized Absorb LMS for external and internal training content

**Jefferies Financial**

**Learning Consultant – Contractor through Biz Information Systems (110 Hudson Street Jersey City, NJ)**

**July 2018 – December 2018**

* Led all global information technology learning initiatives for Jefferies Financial Group with a focus on mobile application training development
* Project Manager on all deliverables
* Developed training videos in Camtasia and user guides in PPT on Oracle HCM Cloud, Webex, Jabber, Windows 10, Remote Access, SAP systems.
* **Created online learning portals using ServiceNow, highlighting my capability to integrate LMS solutions into organizational learning strategies.**
* Created online learning portals using ServiceNow.
* Developed training videos and user guides on ServiceNow.

**Citibank**

**Senior Learning Advisor US Commercial Bank October 2011- June 2018 (1 Court Square Long Island City, NY)**

* Ongoing Performance Management Coaching
* Change management consulting
  + Led organization through leadership transitions
  + Developed the new global curriculum for the Commercial Bank
  + Supported the organization through implementation of Salesforce as well as other custom internal applications
  + Led communication plans for all change management initiatives
* Delivered robust learning programs inclusive of classroom, vertical and self-paced eLearning
* Project Manager for many training initiatives
* Designed and delivered comprehensive Cyber Security, Risk Management, and Information Security training programs to a global audience
* Sales Enablement Training
  + Training on Citibank’s Commercial Banking products in terms of customer benefits.
  + Role-Playing Simulation Exercises
  + Sales Process and Best Practices: including prospecting, lead qualification, closing a deal, effective communication and negotiation
* Provided detailed Compliance and Risk Training to ensure training meets all regulatory requirements.
* Utilized SAS reporting applications for Risk Management and Fraud Detection.
  + Developed micro-learning modules on reporting analysis
* Developed and implemented learning strategies for Global National Industries, Middle Market & Business Banking Relationship Managers, Commercial Lending & Product Manager as well as service teams in Business and Commercial Credit Service & Operations.
* Partnered with the Global Learning Management Systems team to manage course delivery and MIS, providing consultation on process improvement and enhancing visibility of training needs, emphasizing my proficiency in LMS administration (utilized Docebo Learning Management System).
* Presented Citibank’s Compliance Training and Risk Management application “Catalyst” to the Federal Government Regulators (Office of Comptroller of Currency “OCC”)
* Partnered with the Global Learning Management Systems team to manage course delivery and MIS. Consult with internal clients to understand business needs, defined audience, evaluated solutions, consulted on process improvement, enhanced visibility of training needs based on priorities and provided guidance to relay training capabilities to business partners. Training support included 40+ software applications. U/X design and UAT involvement on 20+ custom applications including Salesforce and SAP.
* Led over 20 compliance training initiatives to meet our regulatory requirements.
* Tailored product training to include procedures and policies related to service transactions for all liability, cash and treasury, and asset commercial banking products.
* SaaS experience: Created, customized, tested, and trained on proprietary risk management applications.
* Developed a New Hire Orientation program in Brainshark which included video and interactive slides with audio.
* Project Manager on many deliverables
* Managed 3rd Party Vendor Relationships.

**Citibank**

**Applications Trainer - Contractor through Experis April 2010-October 2011 (111 Wall Street NY, NY)**

* Developed and delivered webinars via Webex Meeting Center offered to a global audience on all Risk Management/Information Security and Continuity of Business applications fundamental for Citi meeting regulatory, legal, and policy requirements.
* U/X design and UAT involvement on 5 custom applications
* Utilized eLearning authoring tools such as Camtasia, Captivate, and Articulate
* Designed and delivered comprehensive Cyber Security, Risk Management, and Information Security training programs to a global audience
* Presented our Risk Management custom application “Catalyst” to the Federal Regulators (OCC)
* Equipped staff with the necessary skills to respond effectively to potential threats and manage risks to computer systems. These courses covered essential topics such as identifying and mitigating risks associated with cyber attacks, data hacks, and phishing activities. Additionally, participants learned protocols for assessing the risk level, reporting incidents, and implementing corrective measures to prevent future occurrences.

**JMD Consulting April 2009 – April 2010**

President (Self-Employed)

* Owned and operated an eLearning, Marketing and Communications Company specializing in the Financial Services Industry. Clients include Capital One Bank, Baker Communications, Pulse Learning, and Brainshark
* Developed and conducted highly interactive sales training via webcast and live for Capital One Bank’s associates
* Contract trainer for Baker Communications on various Sales Training Modules
* Developed Facilitator Guides for Bank of America’s Overdraft Collection Training
* Developed Training on Wolters Kluwer’s Accounting Research Manager and AnswerConnect
* Developed Training on Electronic Visit Verification Systems for Home Health Aides.
* Developed eLearning content for Brainshark on how their eLearning/communications tool can be integrated with other authoring tools such as Camtasia and Captivate. Provided consulting on eLearning development best practices
* Compose, and record music for client marketing presentations.

**AMERICAN EXPRESS TAX & BUSINESS SERVICES / RSM McGladrey (acquisition 8/05),** NY, NY **10/98 – 4/09 (1185 Avenue of the Americas NY, NY)**

Supervisor of Training/Applications Trainer

**Summary**:

* Collaborated with national curriculum advisory teams to ensure the training curriculum paralleled the business needs of the organization.
* Monitored results of employee progress and maintained records of training attendance to determine program effectiveness.
* Developed a New Hire Orientation program in Brainshark which included video and interactive slides with audio.
* Utilized Brainshark for over 40 accounting software demo videos followed by assessments.

**Operations**:

* Ongoing Performance Management Coaching
* Conducted and developed training sessions such as employee orientation, beginning and advanced technology tool techniques (Lotus Notes, MS Office 2007, QuickBooks, Quicken, ERP Systems such as SAP, Sage, Go Audit, BNA Tax Planner, IDEA, ACL, CCH, XCM, Thomson Products, Wolters Klewer Products, Practice Management Systems, Engagement Manager, Digital Office Tax Tools, Auditor Assistant, Help Desk Management Software, HR Admin PeopleSoft Applications) and general instructional sessions
* Maintained records and prepared statistical analyses to evaluate performance of instructors and monitored progress of trainees, Prepared and monitored training budgets
* Maintained an online library of educational materials and access to training schedules.
* Conducted training sessions via WebEx and MS Live Meeting, developed online tutorials and determined other ways to manage distance learning.
* Identified organization's strengths and weaknesses and suggested areas of improvement.
* Reviewed and edited requirements, specifications, business processes and recommendations related to proposed solution.
* SaaS experience: Created, customized, tested, and trained on proprietary time, expense and billing applications.
* U/X design and UAT involvement on 10+ custom applications. Assisted in developing functional specifications and system design specifications for client engagements.
* Ensured issues were identified, tracked, reported on and resolved in a timely manner.

## EDUCATION & OTHER

**BS – SUNY Cortland – 1996**

**Attended numerous ASTD, eLearning Guild and other org seminars such as:**

* Designing Collaborative E-Learning for Results
* Principles for Effective Virtual Teamwork
* Articulate for creating eLearning Development.