



# ROSALÍA URQUIDY

LEARNING & DEVELOPMENT SPECIALIST  
CORPORATE TRAINER  
TALENT DEVELOPER

## PERSONAL PROFILE

As Learning and Development Professional, I support the planning, development, implementation and evaluation of L&D programs to ensure that people acquire the competencies, knowledge, and skills needed by the business to meet organizational goals. I bring drive and engagement to Adult Learning, persistently looking for strategies to enhance their skills and make the learning experience memorable.

I'm a people person and a creative team player. I genuinely enjoy helping others learn, grow and develop.

I have 15 years of professional experience in L&D and Customer Service, having worked in various industries, including Financial Services, Banking, Wholesale, IT Consulting and Medical Device Manufacturing.

## CONTACT INFORMATION

Location: Charlotte, NC, USA  
Email: [rosalia.urquidy@gmail.com](mailto:rosalia.urquidy@gmail.com)  
Mobile: +1 657-294-6741  
LinkedIn: [Rosalía Urquidy](#)

## CERTIFICATIONS

### Instructional Design

California State University, Fullerton | 2020-2021

### Total Trainer: Delivering Training

### Total Trainer: Creating Training

Association for Talent Development (ATD) | 2019-2020  
Orange County Chapter

## EDUCATION

### MBA, Global Business and Strategy

University of North Carolina, Charlotte | 2012-2014

### Bachelor of Science, Management and Business Administration

Universidad de Monterrey, Mexico | 2002-2008

## SKILLS & ABILITIES

- Adult Learning
- Instructional Design
- Virtual and In-Person Instructor-led Training
- Curriculum Development
- Training Facilitation
- Training Evaluation
- Leadership Development
- Employee Engagement
- Customer Service
- Detailed-oriented
- Bilingual in Spanish
- eLearning Authoring Tools: Articulate Storyline, Camtasia, SnagIt, Canva, etc.
- Cornerstone LMS
- Salesforce & SAP CRM
- Video Conferencing Tools: Teams, Zoom, WebEx, Google Meets
- Project Management Tools: Asana, ClickUp
- MS SharePoint
- MS Office Suite

## EMPLOYMENT HISTORY

### **Sr. nCino Trainer, Commercial Banking Change Implementation**

Wells Fargo, Charlotte, NC | 2024

As Sr. Trainer in the Change Implementation Team within the Commercial Banking division; I provided training and support on the dynamic and constantly changing software program called nCino (built into Salesforce) to internal employees at Wells Fargo, ensuring successful adoption of the system.

Main responsibilities:

- Design and facilitate engaging nCino training programs, both in large virtual sessions with screen shares of the platform, and in-person ad-hoc training workshops for diverse audiences.
- Leverage instructional design best practices to create comprehensive training materials such as job aids, eLearning modules, user guides, and presentations.
- Conduct training needs assessments to identify gaps in knowledge and performance, and create tailored training programs and documentation that align with business goals.
- Collaborate with stakeholders to gather and document business requirements, focusing on Middle Market Banking and Corporate Investment Banking processes within the nCino and Salesforce platforms.
- Partner with SMEs and Product Owners to learn about frequent updates and enhancements to the system features, and disseminate that information through various training formats.
- Develop data staging for hands-on training activities, assign permissions and test logins, design FAQ handouts, create detailed participant guides, and record sessions to build a reference database.
- Lead office hours sessions to address any user questions providing timely, accurate responses and up-to-date information.
- Implement assessment strategies to evaluate the effectiveness of training programs.
- Participate in meetings to provide insight on monthly enhancements to continue building out minimal viable product in an agile manner.
- Lead and manage multiple training projects simultaneously.
- Demonstrate adaptability to a very agile training environment.
- Bring energy, engagement and creativity to complex technical training sessions.

### **Learning Specialist, Global Clinical Operations Learning and Development**

Novocure, Remote | 2023

As Learning Specialist I supported the planning, developing, implementing and evaluating Learning and Development (L&D) programs to ensure Global Clinical Operations personnel acquire the skills, knowledge, and competencies required by Novocure to meet organizational objectives.

Main responsibilities:

- Supported the design and implementation of the L&D framework and strategy, supporting the achievement of operational goals and requirements
- Provided creative, modern, and engaging instructional design support utilizing adult learning theory; employed varied methods of learning delivery, tools, concepts, and practices to accommodate multiple learning styles and information needs
- Developed and maintained learning content and materials, including training plans and manuals
- Participated in the development, support, and follow-up of in-person, virtual, and online learning programs, including workshops, meetings, demonstrations, and conferences
- Facilitated group and individual trainings, both in-person and virtual
- Provided support to plan, monitor and perform ongoing evaluation and assessment of training quality and effectiveness; review and modify training objectives, methods and course deliverables
- Supported the Global Clinical Operations onboarding program, developing and implementing role-based training plans
- Monitored, tracked, and followed-up with employees and supervisors to ensure that team members complete required training and training documentation
- Supported the development and reporting on actionable L&D metrics and performance indicators
- Collaborated with system stakeholders to submit and report on training courses in LMS and other delivery platforms
- Liaised with external training providers to arrange delivery of specific training and development programs as per identified training needs
- Participated in the implementation of departmental Objectives and Key Results (OKRs); recommend process improvements and initiatives to enhance L&D

## **Senior Learning Consultant**

**Revolent Group, Remote | 2022-2023**

I facilitated the effective delivery of the Deployment Readiness Program, providing high-quality training, coaching and support to IT Professionals (aka Revols) across each part of their journey.

I delivered the core training during their Professional Skills weeks as well as implementing custom-made development plans during their time on client site.

Main areas of responsibility in my role:

- Delivery of Professional Skills courses with a focus on experiential learning, following the Do, Review, Learn, Apply methodology; and completion of relevant reporting information
- Deliver best-in-class learning interventions that match the client and Revol's requirements
- Complete internal Training Needs Analysis to understand behavioral requirements
- Design of new training initiatives in line with Revolent and client needs
- Providing timely feedback to key stakeholders on Revol performance during training, identifying any issues, and escalating these accordingly
- Design best-in-class coaching and blended learning events
- Working on a 1:1 basis where necessary with Revols to further develop their non-technical skills before their placement beginning
- Attendance at client feedback calls to ensure all Revol feedback is captured accurately
- Creation of Revol Development Plans with customized development goals, and management of the sign-off process from all parties
- Regular development plan calls with each Revol to enable to their continuous development and access on-demand support
- Collaborating with other departments across Revolent, ensuring that we have alignment and regular feedback is being provided
- Providing on-demand support, coaching and signposting to Revols when they reach out
- Identification of trends across the Revol community
- Managing and updating the Global Revol Development Plan Tracker to ensure that the most up-to-date information is displayed
- Supporting ongoing L&D projects and initiatives

## **Internal Training Lead**

**Revolent Group, Remote | 2021-2022**

Responsible for the overall success of the internal training program RISE. I implemented company strategy effectively and efficiently, developing the next generation of leaders and positively impacting the organization's culture.

RISE Program - Internal Training:

- Scheduling and reporting for all program initiatives
- Creating and owning content for all internal training programs
- Ensuring all Revolent internal employees attend their training (implement a tracking system)
- Rebranding content
- Creating org charts
- Implementing onboarding plans for all departments
- Implementing Management training
- Finding opportunities to build Revolent employees' support
- Finding learning needs in Revolent and creating solutions

I managed the overall internal training at Revolent, including new hire onboarding and all future training:

- Motivating the team to achieve the best results possible by setting goals in support of broader organizational goals.
- Continual development of all team members.
- Responsibility and selection for my team, ensuring that the team is fully resourced to deliver the goals and targets set.
- Collaborating with other departments across the organization, ensuring that initiatives are implemented and aligned with overall business goals and objectives

## **Learning and Development Specialist**

Orange County's Credit Union, Santa Ana, CA | 2019-2021

- Developed, designed, and delivered organization-wide learning and development programs, both technical and soft skills training. As a Learning and Development Specialist, I advocated the corporate mission, vision, and values while supporting the achievement of strategic goals.
- Facilitated instructor-led training and other L&D programs such as the New Hire Orientation, Customer Service, Sales, L&D Ambassador, LIFE Game Plan, among others; and partnered with HR on the New Hires Onboarding process.
- Delivered a high level of service in meeting the learning and development needs of the organization.
- Produced and maintained e-learning modules, facilitator manuals, participant guides, quick-reference guides, activities, and job aids to support all training delivery.
- Collaborated with Subject Matter Experts and trainers to develop, update, and maintain training content.
- Developed strong work relationships and collaborated with Associates at all levels in support of the Credit Union's mission, values, strategic goals, and culture.
- Conducted needs assessments to evaluate program effectiveness and seek ways to enhance existing programs.
- Provided administrative support to the Learning Management System (Cornerstone), managing Associate enrollment, e-learning courses design, upload and maintenance, user support, and data reporting.
- Oversaw and maintained the Learning and Development Requisition process.
- Utilized tact and good judgment to resolve issues and support associates with difficult interpersonal situations.
- Collaborated as Peer Leader in the 'Leaders in Action' program to enhance the leadership capacity of our Associates within the Credit Union. The program built skills and knowledge around the four Leadership Fundamentals (Strategic Thinking, Executing for Results, Leading talent, and Develop Personal Proficiencies) and provided a safe environment for peer-to-peer learning.
- Managed the launch, content development, and administration of the employee engagement platform (Workplace).
- Member of the Associates' Activities Committee as the Vice President, participating in year-round planning and coordination of fun educational activities for all Credit Union Associates to enhance employee relations and employee engagement.

## **Loan Servicing Representative**

Orange County's Credit Union, Santa Ana, CA | 2016-2019

- Handled negative share accounts and negotiated payment arrangements.
- Contacted members by telephone and written correspondence to collect delinquent loan payments.
- Utilized strong knowledge to establish effective payment plans that will bring accounts current.
- Charged off aged overdrawn accounts based on account analysis.
- Managed account records on ChexSystems.
- Collaborated with Risk Management on reviewing accounts suspected of abuse, fraud, or negligence, taking appropriate action to restrict and/or remove services accordingly.
- Reviewed, reported, and restricted as appropriate, check returns to mitigate loss due to fraud.
- Acted as a Credit Union liaison with members to respond and remedy issues; worked cooperatively with other departments to correct undesirable account conditions and assisted in finding timely solutions to problems.
- Performed skip-tracing, asset location, and collateral location.
- Researched closed accounts, verified employment and personal information, and death certificates when applicable.
- Supported and provided backup to Mortgage Servicing and Bankruptcy cases.
- Worked knowledge of the Fair Debt Collections Practices Act (FDCPA), Fair Credit Reporting Act (FCRA), Bankruptcy Laws, Consumer Financial Protection Bureau (CFPB), and Collection Regulations/Guidance.
- Board Treasurer of the California Credit Union Collectors Council (CCUCC).
- Participant of the Leaders in Action program.
- Active member of the Associates' Activities Committee.

## **Client Support Specialist - Accounts Receivable**

Allergan, Irvine, CA | 2016

This was a temp position where I managed, analyzed, and collected Accounts Receivable balances for domestic and international customers.

- Handled inbound and outbound calls and acted as the Finance department's point of contact for all Spanish-speaking inbound calls.
- Excelled in a fast-paced and dynamic environment communicating professionally and concisely with customers and parties within the organization.
- Utilized effective time management, organizational and interpersonal skills to assist in meeting set departmental objectives while maintaining a steady workload.
- Created training manuals for various procedures within the Accounts Receivables department.
- Reconciled older past due accounts – researching, analyzing history, negotiating, and attempting to resolve.

## **Credit Analyst**

Uline Shipping Supplies, Monterrey, Mexico | 2015

- Supported credit and collections functions for Mexico's region.
- Ensured quality and adherence to corporate performance standards.
- Monitored cash applications and partnered with the Cash Applications team to resolve outstanding issues.
- Monitored and made recommendations to reduce errors and complaints.
- Assisted collectors with complex cases.
- Actively monitored credit exposures, adjusting credit limits as needed based on payment history and other available information.
- Used available credit information and tools to establish or adjust credit limits based on customer requests.
- Reviewed and resolved issues with customers on credit hold.
- Handled on average 100 outbound and 35 inbound calls on a daily basis.
- Collaborated regularly with the Billing and Cash Applications departments providing additional support to their teams.

## **Wealth Management Associate**

Vector Casa de Bolsa, Monterrey, Mexico | 2010-2014

- Managed relationships with clients on behalf of the wealth manager.
- Provided support on products and services to the wealth manager and our clients, managing their investment portfolios operating stocks, money market, mutual funds, and foreign exchange market investments.
- Resolved the issues and concerns of clients with input from the wealth manager.
- Completed and submitted investment-related documents, including applications and withdrawal forms.
- Managed new accounts onboarding process.
- Performed day-to-day administrative tasks, such as responding to client emails and requests.