

# Karen Martin

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## SUMMARY

- Seasoned training specialist and business analyst with over 5 years of varied experience in the financial services industry
- Proven ability to quickly master new technologies and processes, having learned several dozen topics and trained more than 70 employees under tight deadlines (many as tight as a week or less)
- Keen eye for potential process improvements, several of which have resulted in new department- or unit-wide best practices and significant savings of cost & man hours
- Excellent communication skills, having made a high number of very effective presentations & recommendations to various levels of staff, management & internal/external contractors

## EMPLOYMENT

### ***Manulife Financial, Kitchener, ON***

*Business Analyst, Group Benefits Business Integrity* *2008-current*

- Monitor, measure and report on services being provided by 2 multi-billion dollar service providers and 8 administrators contracted by Manulife, ensuring that appropriate steps are taken to maintain a functional business relationship with them
- Identify new ideas, techniques and opportunities for improving reporting processes, ensuring that these are implemented
- Present findings and recommendations to group benefits management, several of which have been implemented as unit-wide best practices and/or resulted in cost savings for the department
- Support department through providing analysis & assessment of business risk and performing regular audit tests to assess strengths, weaknesses and compliance

*Training & Documentation Specialist, Manulife Business Processing Services* *2006-2008*

- Planned, designed, delivered, and evaluated training initiatives and materials on administrative systems, client documents and contracts, and related processes and practices to upwards of 40 different trainees responsible for a high number of corporate accounts totalling billions of dollars of business
- Prepared, conducted, interpreted, and presented needs analyses to determine training requirements for a wide variety of staff in many different roles
- Achieved such measurable success in developing and delivering training programs as to be chosen to be the department's training representative in Manila on a 3 month assignment
- Developed project management skills and was able to successfully implement creative training programs while still meeting and exceeding pre-existing production demands and negotiating timelines and allocated resources when necessary

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*Customer Service Representative, Individual Life Centre* *2002-2004*

- Provided customer service to policyholders of individual insurance products, having been cross trained on all other systems and blocks of business within a few months of start in department
- Peer trained approximately 10 new CSRs, 2 of whom went on to take supervisory roles

## ***Equitable Life of Canada, Waterloo, ON***

*Training Specialist, Individual Insurance Products* *2006*

- Researched, designed, implemented, and executed comprehensive and meaningful product and process training courses to approximately 30 different staff members
- Performed quarterly needs analysis for departments within the Customer Service division, determining where training gaps existed and proposing a variety of training solutions
- Drew up on extensive knowledge base of all areas of customer service to regularly act as support to various departments in need of temporary staffing relief
- Evaluated training effectiveness through measurement of skill improvement, service levels and staff development

*Field Compensation Analyst, Compensation and Benefits* *2004-2006*

- Provided unparalleled service to external insurance agents, ensuring their compensation was correct and timely by verifying accounting entries were processed accurately and in accordance with company reporting guidelines
- Coordinated systems release and implementation and followed through with validation to ensure the systems generated the expected results
- Participated in projects and testing affecting business areas including writing project specification documents and test plans
- Prepared, verified, and presented monthly and annual accounting reports

## **EDUCATION**

Business Administration, Conestoga College, graduated 2002

## **SKILLS**

- Expert level technology skills in Adobe Professional & Microsoft Office
- Completed Conestoga College's "Train the Trainer" program
- TESOL (Teacher of English to Speakers of Other Languages) certified
- Working knowledge of several online training tools, including WebEx and Captivate