

KAREN J. HALMAN

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DIRECTOR: TRAINING & ORGANIZATIONAL DEVELOPMENT

More than 20 years of creating, implementing, and facilitating comprehensive training programs that support corporate mission, vision, strategy, and objectives.

Career marked by spearheading strategies to design, implement, and evaluate learning and OD programs. Assess training needs, define program metrics, and introduce training curriculum, sessions, and events that develop skills, competencies, and capabilities of diverse adult learners ranging from front-line staff to senior leaders.

Known for partnering with C-suite executives and SMEs to elevate employee engagement and success. Work with CEOs, COOs, and other key stakeholders to define learning needs and inform creation of innovative opportunities for professional / organizational development, continuing education, and career progression.

Proven success in creating and facilitating online and classroom training. Topics have included public speaking, supervisor / management training, leadership, goal setting, leveraging change for success, becoming a great facilitator, train the trainer, delegation, customer service, problem solving, decision making, and developing a strategic plan, mission statement, and business principles.

- **Grew training program 10-fold from four trainings to more than 40 in six years at Liberty Tax Service.**
- **Orchestrated and executed day-long / multi-day training events for as many as 300+ attendees.**
- **Built and led team of as many as 80 trainers to deliver impactful, effective programs.**
- **Created certification program focused on customer service for 25K+ Liberty Tax Service tax preparers.**

Areas of Expertise:

- ◆ Training Program Development
- ◆ Training Needs Assessments
- ◆ Instructional Materials Design
- ◆ Staff Recruitment, Hiring & Onboarding
- ◆ Training Event Planning & Management
- ◆ Surveys, Testing Instruments & Metrics
- ◆ Talent Training & Development
- ◆ Performance Management
- ◆ Coaching & Mentoring

PROFESSIONAL EXPERIENCE

GREEN OAK CONSULTING, LLC - Norfolk, VA

January 2015 - Present

Managing Director, Training and Organizational Development

Consult with corporate clients to assess their organizations' training needs and develop training programs accordingly. Create both online and classroom instructional programs and materials. Organize client events encompassing strategic planning sessions, conferences, and team building exercises.

- **Created first franchise training program** for Opportunity Tax Service. Facilitated training at 20 locations.
- **Wrote training manual, policies and procedures manual, and operations manual** for start-up company.

LIBERTY TAX SERVICE - Virginia Beach, VA

June 2006 - January 2015

Assistant Vice President, Training and Field Communications | November 2013 - January 2015

Promoted to direct all training and field communications for employees, franchisees, and area developers throughout the United States and Canada. Promoted, facilitated, and coached employees in professional and career development opportunities. Led 24-member team through seven direct reporting department managers and project managers. Managed \$1.1M annual budget.

- **Optimized development of new training programs** by creating departmental liaison program to interface between training staff and corporate departments for accurate, expedient needs sharing.
- **Enhanced and streamlined access to online training offerings** by partnering with staff to redesign intranet site for more intuitive navigation and better search accuracy.
- **Transitioned live training programs to web-based delivery** for \$100K annual cost savings.
- **Increased attendance 50% in advanced training** by creating compelling marketing campaign.
- **Planned annual training and development events** including one-day Area Developer Convention and three-day Area Developer Retreat for 200 participants.
- **Established consistent, cohesive company communications** by working with AVP of Operations to restructure organization and personally creating, building, and staffing Department of Field Communications.

Director of Training and Tax School | October 2009 – November 2013

Transitioned to expanded role to direct all corporate, franchise, and area development training in the United States and Canada as well as tax school operations. Facilitated training on intermediate and advanced topics. Led team of 13 direct and two indirect reports. Managed \$1.2M budget annually.

- **Created Customer Service Certification program** for more than 25K tax preparers nationwide.
- **Designed and promoted** Guerilla Marketing Training Bootcamps across the United States and Canada.
- **Directed development and implementation of training materials** for online U.S. and Canadian tax school.
- **Planned, developed, and delivered elite training events** for 100 representatives from top 25 franchisees nationwide. Engaged corporate executives and SMEs to teach and train in each session.
- **Orchestrated annual, offsite, invite-only strategic planning meeting** for 50 senior executives of the company. Created meeting agenda, facilitated team building sessions, and conducted SWOT analysis.

Director of Training | November 2007 – October 2009

Promoted from Trainer (June 2006-November 2007) to direct training operations for employees, franchisees, and area developers throughout the United States and Canada. Assessed training needs and worked with SMEs to develop content for classroom and online training via WebEx. Taught intermediate and advanced training sessions. Built and led team of five trainers. Managed \$1M annual budget.

- **Expanded training programs more than six-fold from four to 25+ in two years** by reviewing post-session evaluation data to identify training needs and creating, implementing, and facilitating all new programs.
- **Optimized training programs** through frequent evaluations and improvements involving staff restructuring, classroom activities, and online segments.
- **Coordinated off-site training events nationwide** for top-performing franchisees and area developers.
- **Kept corporate staff, franchisees, and area developers informed** of new training offerings by creating training newsletter.

Additional Experience:

Virginia Wesleyan College – Assistant Director, Career Services | Adjunct Instructor

- **Created, secured Academic Dean approval for, and taught curriculum** for courses on externships, industry trends, and life after college.
- **Designed/revamped and facilitated workshops** on topics such as interviewing, resume writing, and job search methods based on current best practices at that time.
- **Established college's first externship program**; still in use today.

EDUCATION

OLD DOMINION UNIVERSITY
Master of Science in Education, Concentration in Counseling
Bachelor of Arts in Psychology

CERTIFICATIONS

Type Resources, Inc.: Myers Briggs Type Indicator Certification
Association for Talent Development (ATD): Instruction Design Certificate | Business Consulting Certificate

AFFILIATIONS

Association for Talent Development (ATD) | ATD Southeastern Virginia Chapter (SEVA ATD)