

Alicia Schlosser

Business Analyst & Project & Training Leader

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Accomplished professional offering a wealth of experience engaging with C-Suite executives, outlining learning and development needs, and crafting tailored solutions to propel organizational success in competitive market segments. Expert at: assessing current practices, identifying gaps, and integrating programs to advance corporate objectives. Highly skilled at: delivering and implementing projects per schedule deadlines, coaching, mentoring and leading teams in adopting agile/scrum practices with strong business results. A visionary with the capacity to succeed in a self-directed manner as well as contribute to shared success across the enterprise.

Areas of Expertise

- ◆ Process Improvement
- ◆ Training & Mentorship
- ◆ Servant Leader
- ◆ Coaching Teams
- ◆ Business Analyst
- ◆ Program Development
- ◆ Guides & Templates
- ◆ Financial Services
- ◆ Negotiation & Influencing
- ◆ Facilitating
- ◆ Change Management
- ◆ Agile Project Management
- ◆ System Administration
- ◆ Scrum
- ◆ Software Integration

Professional Experience

FuturePlan by Ascensus Inc., Dresher, PA

2021 – 2023

Project & Training Lead (Remote)

Engaged with stakeholders, assessed needs, and crafted tailored training initiatives for over 1,800 employees. Implemented proven agile and scrum methodologies to augment team performance, increase individual productivity, and drive positive change across the enterprise.

- ◆ Entrusted to lead a strategic transformation that resulted in measurable gains across departments.
- ◆ Developed and integrated holistic strategies to recruit and retain top quality talent across the company.
- ◆ Established credibility with business leaders, defined future objectives, and charted courses of action.
- ◆ Collaborated with Optimization team on process design and organizational improvements using agile/scrum methodologies.
- ◆ Facilitated meetings to remove impediments with the product owner and other stakeholders ensuring a healthy sprint release.
- ◆ Collaborated Product Owner and relevant stakeholders to prioritize projects and mitigate risk.
- ◆ Achieved Certification as Facilitator in Change Capability and 5 Moments of Need Designer during tenure.
- ◆ Analyzed data, generated reports, and submitted information to leadership for review.
- ◆ Architected onboarding program for over 500 associates.
- ◆ Liaised with Marketing and Human Resources regarding communications strategies; assessed message impact, reviewed participation, and engaged internal colleagues regarding learning and experiences.

Goldleaf Partners, Minneapolis, MN

2019 – 2021

Project Training Lead (Remote)

Leveraged advanced project management acumen, scaled complex programs, and created solutions for diverse audience segments. Engaged with multiple business partners, defined organizational needs, and led change management efforts across the enterprise. Entrusted to lead the management and delivery of various projects and programs.

- ◆ Coordinate project meetings, documented progress, and ensured execution of action items.
- ◆ Liaised with departmental leaders, analyzed training materials, and completed periodic updates.

- ◆ Authored and integrated a new onboarding program and a training program for each specialized role.
- ◆ Crafted multiple training curricula, authored supportive materials, and implemented programs.
- ◆ Conducted needs analysis, outlined strategies, and defined performance objectives.
- ◆ Presented innovative programs to executive leadership, highlighted benefits, and obtained approvals.
- ◆ Entrusted to integrate a new and improved LMS system.
- ◆ Identified gaps in retirement training and crafted solutions to solve outstanding issues.
- ◆ Credited for always communicating changes in project and training procedures clearly and efficiently.
- ◆ Oversaw project and training calendar, assigned goals, and ensured achievement of deadlines.
- ◆ Architected a process for annual review of documentation; led a project to update all process guides.

Principal Financial Group, Spokane, WA
Training Associate (Remote)

2015 – 2019

Promoted to expanded levels of responsibility after demonstrating proficiency for leadership and accountability. Oversaw virtual, instructor-led, eLearning initiatives on behalf of the organization. Reviewed knowledge management systems, verified accuracy, and recommended updates. Developed comprehensive training materials for initiatives held across the globe. Additionally, liaised with Product Owner and stakeholders in prioritizing work based on business value and handling of the tasks by the team. Adopted agile best practices such as continuous integration, design reviews, transparency, accountability, and empowerment and role training.

- ◆ Commended for redesigning Client Service Specialist training program.
- ◆ Architected a training program for new hires.
- ◆ Crafted training course outlines, generated assessments, and authored supportive materials.
- ◆ Assisted Training and Education (T&E) with the creation and distribution of materials.
- ◆ Completed detailed research and generated alternative solutions to complex problems.
- ◆ Translated complex business needs into detailed requirements with specific action plans.
- ◆ Conferred with project leaders on identifying cost saving measures across the enterprise.
- ◆ Evaluated issues with system logic, generated reports, and presented prospective improvements.
- ◆ Contributed to technical design solutions, defined user interfaces, and drove performance standards.
- ◆ JIRA tool used for Agile Scrum to track team activities.
- ◆ Mentored teams, leading them to be self-directed with strong accountability, decision-making, conflict resolution, and transparency.
- ◆ Offered insight to UX design sessions, subsequent discussions, and usability testing.
- ◆ Engaged with Product Owner and facilitated team communication during Spring reviews to ensure all stories met the Definition of Done.
- ◆ Performed an active coaching role organization wide for Agile implementation and embracement.

Technological Proficiencies

Methodologies: Agile-Scrum, Waterfall

Tools: Microsoft Office, Visio, Workday (LMS Systems), Confluence, JIRA, SharePoint,

Education & Certifications

Enrolled: Bachelor of Business Administration, Business Administration & Organizational Leadership, 2024
Southern New Hampshire University

Associate of Arts in General Studies, 2011
Community Colleges of Spokane

Certified, Facilitator of Change Capability System • Certified, 5 Moments of Need Designer
Certified Associate in Project Management (CAPM)® • Certified ScrumMaster® (CSM®)