SOPHIA MEZA

Seattle, WA | smeza115@gmail.com | SophiaMeza.com

LEARNING & DEVELOPMENT SPECIALIST | INSTRUCTIONAL DESIGN

Learning & Development professional experienced in designing and delivering onboarding programs, technical training, and performance-support resources for employees across the U.S. and internationally. Skilled in instructional design, curriculum development, ILT/VILT facilitation, and translating complex processes into practical, learner-centered instruction. Partners with subject matter experts and stakeholders to identify learning needs, support organizational change, and develop training that helps employees build skills and apply them on the job.

AREAS OF EXPERTISE

- Instructional Design
- Curriculum Development
- Technical Training
- Learning Content Development
- eLearning Development
- Facilitation (ILT & VILT)
- Systems Training
- Adult Learning Principles
- Job Aids & Performance Support
- Training Evaluation
- Training Needs Analysis
- Training Project Coordination
- Stakeholder Engagement
- New Hire Onboarding

KEY ACHIEVEMENTS

- Collaborated with the training team to adapt Baker Tilly's traditional 3–4-month onboarding curriculum into a four-week accelerated program for its first India Billing team, prioritizing foundational skills and role readiness. Traveled independently to India to deliver in-person training.
- Designed instructional resources and facilitated technical training for more than 100 employees across the U.S., India, and the U.K., including training supporting a major Workday implementation and the adoption of new systems and workflows.
- Created and maintained a centralized library of reference guides and demonstration videos, providing employees with consistent performance-support resources for onboarding, continued learning, and on-the-job application while reducing duplicate work.
- Evaluated trainee performance against established readiness standards, including 95% accuracy and a target pace of 1,000 monthly transactions. Used performance data to identify skill gaps, guide targeted coaching and retraining, and inform readiness recommendations.

PROFESSIONAL EXPERIENCE

Baker Tilly (formerly Moss Adams LLP), Seattle, WA, Oct 2018 – Aug 2026

Financial Operations Training Senior Associate | Dec 2021 – Aug 2026

Designed, developed, and delivered instructor-led (ILT), virtual instructor-led (VILT), and self-paced technical training for employees across the U.S. and internationally, including training supporting a major Workday implementation. Partnered with subject matter experts to translate complex processes and technical workflows into practical learning materials, facilitator resources, job aids, and performance-support documentation.

Evaluated trainee performance against defined readiness standards, including 95% accuracy and a 1,000-transaction monthly pace, using quality reviews and production data to identify skill gaps, guide targeted coaching and retraining, and inform readiness recommendations.

- Designed, delivered, and improved onboarding programs for approximately 30 employees across the U.S. and India, sequencing instruction, demonstrations, hands-on practice, and feedback around foundational skills and role readiness.
- Partnered with managers and stakeholders to identify training needs through performance trends, employee questions, and quality findings, developing and adapting learning solutions to address skill gaps, process changes, and evolving business needs.

- Coached and mentored a new trainer on lesson workflows, learner practice and review processes, and methods for tracking trainee progress.
- Developed multimedia learning resources in Clipchamp, including narrated screen-recorded process demonstrations with visual callouts, key concept highlights, and summaries to reinforce technical instruction and support self-paced learning.
- Coordinated concurrent training and content-development activities, using shared Excel trackers and OneNote to track trainee progress, project tasks, deadlines, and updates.

Billing Specialist | Jul 2021 – Dec 2021

Managed complex billing operations while serving as a resource for Billing Coordinators and the Priority Team, providing guidance, troubleshooting issues, and supporting consistent billing practices.

- Led recurring billing training for newly promoted accountants, teaching them how to interpret and complete billing worksheets and providing ongoing support for follow-up questions.
- Supported billing accuracy by analyzing transactions, investigating discrepancies, and helping team members resolve billing questions and issues.
- Maintained shared process documentation in OneNote, adding guidance for specific billing situations and escalating procedural issues to managers when identified.

Billing Coordinator | Oct 2018 – Jul 2021

Managed billing transactions and workflows for two assigned offices while providing additional support to Accounts Receivable and Accounts Payable teams as needed.

- Supported internal teams during a major billing system transition, taking on additional billing responsibilities while colleagues participated in system testing and adapting to changing workflows during a period of record-high volume.
- Supported a multi-office billing system rollout by traveling to Fresno and Albuquerque to provide hands-on guidance to accountants and assistants on project setup, time entry, client information, and billing workflows. Helped employees navigate the new system and resolve questions in real time.

Mr. Handyman, La Mesa, CA

Customer Service Representative | Nov 2017 – Apr 2018

Served as the first employee of a newly opened franchise location, helping establish office workflows and tracking processes while managing customer communication, technician scheduling, and dispatch.

A+ Family Dentistry, Poway, CA

Insurance Coordinator | Feb 2016 – Nov 2017

Managed insurance verification and benefits coordination; redesigned and continually refined the team's insurance verification form to capture coverage details upfront, reducing the need for follow-up verification when preparing patient estimates.

EDUCATION

University of California, San Diego (UC San Diego)

Bachelor of Arts (B.A.), International Studies (Economics), Secondary Track: Political Science

TECHNICAL SKILLS

Learning & Content Development: Articulate Rise 360, Clipchamp, Epiplex, Microsoft PowerPoint, Microsoft Word

Learning & Collaboration Platforms: SharePoint, Microsoft Teams, Zoom, OneNote

Business Systems & Data: Workday, Microsoft Excel

AI Tools: ChatGPT, Microsoft Copilot

LANGUAGES

Spanish