

SOPHIA MEZA

Seattle, WA | smeza115@gmail.com

LEARNING & DEVELOPMENT SPECIALIST | INSTRUCTIONAL DESIGN

Learning & Development professional with experience designing, developing, and delivering technical training and learning solutions that build employee skills, support technology and process adoption, and improve on-the-job performance. Skilled at partnering with subject matter experts and cross-functional stakeholders to translate complex operational workflows and technical processes into practical, learner-centered training. Experienced developing curriculum, instructor-led and virtual learning, self-paced multimedia resources, job aids, and technical documentation while selecting formats based on learner and business needs. Uses performance data, quality findings, stakeholder input, and learner feedback to identify skill gaps, evaluate learning effectiveness, and continuously improve training solutions. Experienced coordinating multiple training-development priorities and adapting content as processes, systems, and business needs change.

AREAS OF EXPERTISE

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| • Instructional Design | • Adult Learning Principles |
| • Curriculum Development | • Job Aids & Performance Support |
| • Technical Training | • Training Evaluation |
| • Learning Content Development | • Training Needs Analysis |
| • Multimedia Learning Development | • Training Project Coordination |
| • Facilitation (ILT & VILT) | • Stakeholder Engagement |
| • Blended Learning | • New Hire Onboarding |
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KEY ACHIEVEMENTS

- Redesigned Baker Tilly's onboarding program for its first India Billing team, condensing a traditional 3–4-month curriculum into four weeks by prioritizing foundational skills and sequencing content around role readiness, then independently traveled to India to deliver the program.
 - Designed instructional resources and facilitated technical training for more than 100 employees across the U.S., India, and the U.K. through instructor-led and virtual formats, supporting employee development and 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.
 - Established performance-based readiness measures for new trainees, tracking accuracy against a 95% standard and production pace toward 1,000 monthly transactions to identify skill gaps, guide targeted coaching and retraining, and inform readiness recommendations.
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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 learning solutions supporting more than 100 employees during the firm's Workday implementation and ongoing financial operations training. Partnered with subject matter experts to translate complex operational processes and technical workflows into learner-centered instructional materials, job aids, facilitator resources, technical documentation, and performance-support resources.

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 trusted resource for Billing Coordinators and the department's Priority Team, providing guidance and helping resolve complex billing issues.

- 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, absorbing increased 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, in-person guidance to accountants and assistants on project setup, time entry, client information, WIP, and billing data, helping employees navigate the new system and resolving 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 | 2015

TECHNICAL SKILLS

Articulate Rise 360 | Clipchamp | Microsoft PowerPoint | SharePoint | Microsoft Excel | Microsoft Word | Microsoft Teams | Workday | OneNote | Zoom | Epiplex | Generative AI (ChatGPT)

LANGUAGES

English | Spanish (Conversational)