

Kirk Denniston

Senior Learning Strategist

Executive Portfolio
Resume

kirk.denniston@gmail.com

972.824.1876



Enterprise Expertise:

- AI-Driven Learning
- Change Management
- Fraud Prevention
- Financial Compliance
- Identity Verification
- KYC / KYB
- Learning Analytics
- Learning Strategy
- Performance Assessments
- Risk Operations/Compliance
- Workforce Development

Enterprise Impact:



Enterprise Clients:

Strategic Learning

- ADDIE/Agile Methodologies
- AI-Driven Learning
- Blended Learning
- Curriculum Development
- Instructional Design
- Performance Assessments

Learning Experiences

- Decision-Based Learning
- Gamification
- Interactive Media
- Software Simulations
- Video Tutorials

Workforce Solutions

- Customer Service Training
- Leadership Development
- Knowledge / Skill Transfer
- New Hire Onboarding
- Workforce Upskilling



AI-Enabled Learning:

Understanding Fraud

Why is understanding fraud important in your role?

"It helps protect our customers, our company, and our community by enabling us to recognize risk and take action."



James Carter
Fraud Prevention Analyst

Let's Review!

In the following questions, you will analyze case studies related to **First Party Fraud**.

Watch each scenario and answer the questions. Read each question thoroughly before selecting the best answer.

Read the Case Details box to review any necessary information.

You must achieve a score of at least 80% to pass.

Begin



Case Details

Business Name: iPhone Fix
Business Type: Mobile device repair and resale
Business Location: Austin, TX
Product/Service: Smartphone repair and accessories
Date Opened: January 2022
Business Owner: Alex R.

- Background:**
- Small repair shop specializing in iPhone repairs
 - Recently expanded operations and staff
 - Seeking increased funding to open a second location
- Indicators to Review:**
- Owner uses business funds for personal expenses
 - Invoices and receipts appear altered
 - Unusually high number of warranty claims
 - Minimal documentation for repairs

Synthetic Identity Fraud

Fraudsters create fake identities by combining real and fictitious information to open accounts, obtain credit, and commit financial crimes.



Identity Created

Fraudsters combine real and fake information to create a synthetic identity.



Accounts Opened

The synthetic identity is used to open new accounts and obtain credit.



Credit Built

Fraudsters make small purchases and payments to build credit history and credibility.



Fraud Exploited

Once established, the identity is exploited for large purchases, loans, or other financial crimes.



Maximize your Salesforce investment

Drive adoption and realize the full value of your Salesforce platform.



Streamline workflows and boost productivity

Optimize processes, automate tasks, and empower your team to do more.



Strengthen customer relationships

Deliver connected experiences that improve satisfaction and drive growth.



AI-Enabled Learning:



Laboratory procedures



Quality assessment

Requires planned and systematic monitoring

Sample characteristics



Test characteristics

Policy Findings

The FDA must develop policies and procedures to access records and information, and allow them to check licenses on file and the accuracy of documents.



OverviewwRVUscClinical FingerprintEvaluation & ManagementCollectionsMore Apps

SummaryBy DepartmentBy SpecialtyBy Provider

Net Collection Rate

Net Collection Rate: 62.5 %

Note: These are based on charge entry (Invoice creation) date



Category	Value
Charges	\$378.9k
Payer Contractual	\$171.3k
Charity	\$4.3k
Expected Payments	\$203.2k
Controllable Allowances	\$217
Outstanding A/R	\$75.7k
Patient-Related Bad Debt	\$307
Small Balance Write-Offs	\$-15
Total Payments	\$127.0k
Insurance Payments	\$95.4k
Patient Payments	\$31.6k



- Access & Throughput
- Opportunity Dashboard
- Clinical Activity/Revenue Cycle Su...

Know Your Customer/Business (KYC/KYB)

Review Key Business Details

The **Business Details** section provides important information about the business entity you selected.

- 1 Business Name**
The official name of the business entity as it is registered with the state.
- 2 Business Status**
Shows the current status of the business entity. An **Active** status means the entity is in good standing.
- 3 Expiration Date**
Indicates how long the business entity's registration is valid. **Perpetual** means it does not expire.

TIP
Always review these key details to confirm the entity is active and in good standing.

INBIZ
IN.gov

Business Details
Business Name: **EVERGREEN SOLUTIONS LLC**
Entity Type: Domestic Limited Liability Company
Creation Date: 02/14/2020
Principal Office Address: 100 Market Street, Suite 500 Indianapolis, IN 46204
Jurisdiction of Formation: Indiana
Business ID: 201612345
Business Status: **Active**
Inactive Date: N/A
Expiration Date: **Perpetual**
Business Entity Report Due Date: 02/14/2026
Years Due: 0
Governing Person Information
Title Name Address
CEO John R. Carter 100 Market Street, Suite 500, Indianapolis, IN 46204
Page 1 of 1, records 1 to 1 of 1
Registered Agent Information
Type: Individual
Name: Sarah M. Johnson
Address: 100 Market Street, Suite 500, Indianapolis, IN 46204

BlackBook Tip
Always confirm the **Business Status** is **Active** and the **Expiration Date** is current (or Perpetual) before proceeding to reduce risk.

LexisNexis
RISK SOLUTIONS

LexisNexis Risk Management Solutions®

History | myCart

Search Menu | Favorites | Find a Person | Find a Business | Real Property (Property Assessments, Deeds & Mortgages) | Phones Plus

000-00-2673 | 123456789

Find a Person (2) | Search Terms: SSN: | Bankruptcy Check: Off | Reference ID: 123456789

Search Within | Q | [Icons]

	Full Name	Address	Phone	Actions
1.	Doe, John SSN: XXX-XX-1234 (PA: 1989 - 1991) DOB: 01/01/1990 (Age: 34) Gender: Male LexID#: 1458	101 Main Street Dallas, TX 75001 Dallas County	JAMES MADISON (Current Listing Name) Possible Wireless JAMES MADISON (Current Listing Name) Possible Wireless JAMES MADISON (Current Listing Name) Possible VoIP	LexisNexis Add to Cart
2.	AKA (3) JOHN DOE JIM DOE JAMES DOE			View more AKAs View more addresses

The following are potential household members of the subject searched:

Click the "Find a Business" link.
The Find a Person tool displays a list you can filter by name, SSN, and address.

giact
An LSEG Business

Verification Services | Identification Services | Documentation

Single Transaction - gVerify™

Verification Services
Single Entry
gVerify™
gAuthenticate™
Batch Upload

Inquiry Information
Services Ran: gVerify
Submitted By: Kirk Denniston
Check Information
Routing Number: 000000000
Account Number: 111111111
Results
Item Reference ID: 1234567890
Timestamp: 3/19/2024 3:57:43 PM
Bank Name: WELLS FARGO BANK
Date Account Added To Real-Time Network: 10/17/2013
Date Account Information Was Last Updated: 7/24/2020
Verification Results
Account Response Code: 111
Verification Response: Account Verified - The checking account was found to be an open and valid account.
Pass
If the account is valid, the account status will be open or closed.
PDF | Submit Another Transaction

Secretary of State
Elaine F. Marshall

About | Alerts | Contact | Fees | FAQs | News | Search | Sign In

Divisions | Programs | Agency Information | Online Services | Forms | Site Map | Support | Tutorials

Home > Business Registration > Search > Search Results

Search Results
BRD Search: Records Found: 1
Words: Starting with **Organization Name** Blue Ridge Innovations LLC
Key: Organization Name (SOSID)
Status - Organization Type
Search Again
Blue Ridge Innovations LLC
Current - Active • Limited Liability Company
File annual report +
Return to top

Other Agencies
NC.gov
State Board of Elections
Links of Interest
National Association of Secretaries of State
Intellectual Property

Which section of the Secretary of State website provides direct links to external tools and resources for businesses?
A: Online Services
B: Divisions
C: Links of Interest
D: Business Registration Search
Click the answer to continue.

Healthcare Performance and Compliance

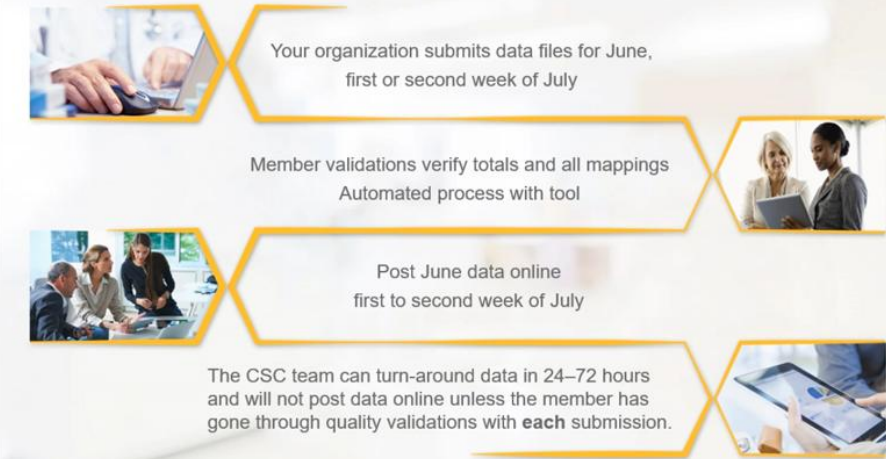
Organization challenges



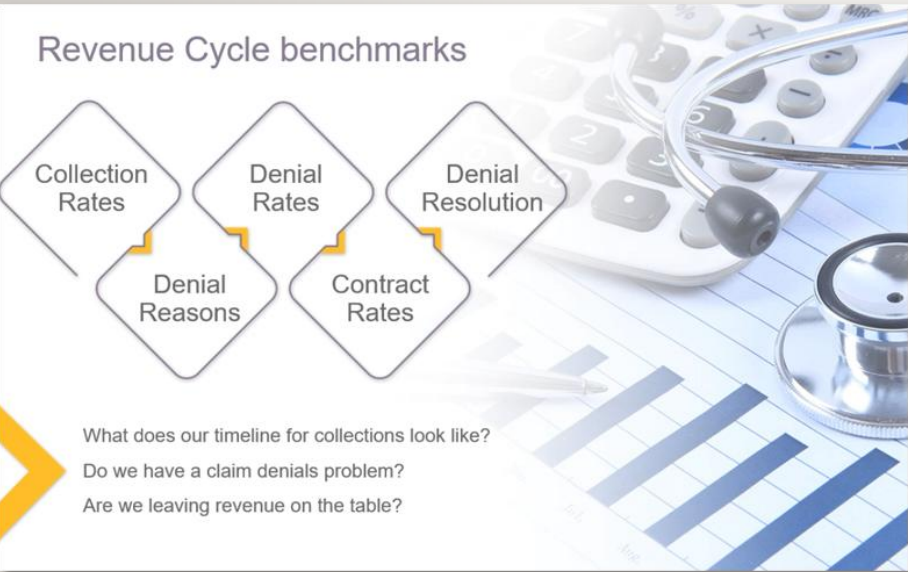
The challenges of the Covid-19 pandemic offered an opportunity for one health care organization to rethink coaching strategies with multiple QI team members

This applies to testing used for diagnosing, treating or assessing laboratory services on human specimens used in assessments of health.

Data management process example



Revenue Cycle benchmarks



Collection Rates

Denial Rates

Denial Resolution

Denial Reasons

Contract Rates

What does our timeline for collections look like?

Do we have a claim denials problem?

Are we leaving revenue on the table?

Accelerate improvement



- Building science-based improvement capability at individual, organizational, and system levels.
- Arming future doctors and nurses and others preparing for careers in health care with quality improvement knowledge.
- Expanding the capability of operational leaders to use advanced improvement methods to guide and support front-line improvement.
- Developing learning networks to accelerate approaches to improving health outcomes.

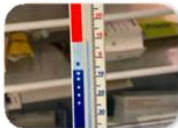
Healthcare Performance and Compliance

Survey findings



When *Helicobacter pylori* is isolated, identification will be confirmed, and susceptibility testing performed.

Daily temperatures are logged as required in the Lab Policy stating "Read, record, and initial temperatures and humidity (min/max) in the waived testing areas."



The standard that pertains to this finding:

WT.05.01.01
Instrument records and maintenance

Finding #2

The hospital could not show evidence that it had established an assessment method to determine competency of the dietitian.



Referral of all individuals whose death is imminent or who have died in the hospital



Referral by a hospital to an OPO as soon as it is anticipated that a patient will meet the criteria for imminent death, agreed to by the OPO and hospital, or as soon as possible after a patient meets criteria



Referral prior to the withdrawal of any life sustaining therapies (i.e., medical or pharmacological support)

Finding #1

Finding #2

Phlebotomist – no documentation

Social worker and occupational therapist

Precautions

Laboratory regulatory requirements:



Handwashing is a precautionary requirement.



Provide equipment for safely handling and disposing of biohazardous waste.



Laboratory samples are collected and tested in secure environments.



Do not store food in refrigerators with testing supplies or samples.

Strategies

Define competencies

Assessment

Review

Develop audits

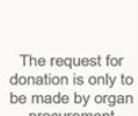
Know the requirements

Review

Review initial competencies and requirements frequently, because equipment and processes sometimes change.



The family of the potential donor is informed of donation options and may decline.



The request for donation is only to be made by organ procurement representative or designated requestor.



The designated requestor must have completed training offered or approved by the OPO.

The OPO provides the methodology for addressing donor families.



Presentation Development



Digital Transformation & Customer Experience:

Digital TRANSFORMATION

00:02 | 00:06

Start

Digital Transformation

About This Course

The goal of this course is to understand **how** and **why** we are evolving to create and industry-leading customer experience across all touch points.

This course should take approximately 30 minutes to complete.



00:03 | 00:16

←

→

Page 2 of 20

Digital Transformation

Consumer Preferences

Take a moment and think about all the different ways consumers interact with companies.

With online retail and customer services easier to navigate through and more convenient than ever, consumers expect options to be available in a wide variety of styles.

Depending on their needs and situations, they may prefer to contact your company online, by text, or social media—whatever works best and expect to receive the same level of service, provided that their concerns about privacy and their ease-of-use are met.



00:03 | 00:32

←

→

Page 5 of 20

Select Next to continue.

Digital Transformation

Rethinking the Customer Experience

Industry research shows online sales are on the rise. To improve the customer experience, retailers are rethinking their store footprint, formats and overall experience to meet the needs of customers.

Rethinking:

Footprint

Format

Experience





Average new store sizes (square feet, thousands)		% Change	
	2008	2013	
Bloomingdale's	128	229	-42%
Wal-Mart	105	166	-37%
Kohls	85	62	-27%
Toys "R" Us	68	35	-49%
Office Depot	33	15	-55%
Old Navy	25	17	-32%

00:04 | 00:14

←

→

Page 7 of 20

Select Next to continue.

© 2017 AT&T Intellectual Property. All Rights Reserved.

Leading Organizational Change:



Change Leaders

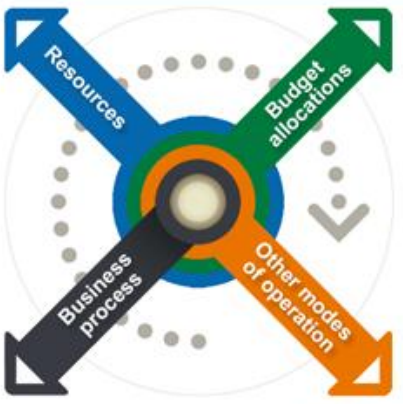


00:00

00:00

Start

Change Leaders



Characteristics

Any approach to transitioning individuals, teams, and organizations using methods intended to re-direct the use of...

Page 9 of 28

Select Next to continue.

Change Leaders

Why is Change Management Important?

Select the icons for more information.



You

- Successfully lead yourself and your team through new changes.
- Learn, grow, and create a personal development plan as you improve on your journey



The Team

- Encourage collaboration and teamwork to meet common goals.
- Provide a simple and seamless customer service experience.
- Develop trust between each other, and empower our team members.



Your organization

- Bring together as one organization and a strong competitive industry leader.
- Incorporate our best practices/processes and establish a common language and culture to operate as one.

Page 10 of 28

Select Next to continue.

Change Leaders

Change Wheel Summary



Implement: Provide Reinforcement

- Collaborate across business unit boundaries
- Keep dialogue going; communicate, communicate, communicate



Investigate: Provide Encouragement

- Reward risk taking
- Support those stuck between reacting and investigating



Acknowledge: Provide Information

- Provide clear, honest, and consistent information
- Explain risk of not changing and why we need to change now



Reacting: Provide Support

- Acknowledge their feelings with empathy but steady in setting expectations
- Identify parts of business and job that are not changing



Page 21 of 28

Select Next to continue.

Learning Interactions:

Questioning Activity

Probing questions encourage customers to respond with an answer, and often start with Who, What, When, Where, Why, and How.

Click the **Remote Control** buttons to review questions to help uncover customer's need.

How do you feel about your current plan?

This question encourages the customer to expand on their feelings about their current plan.

The customer's answer can help you uncover their actual needs.



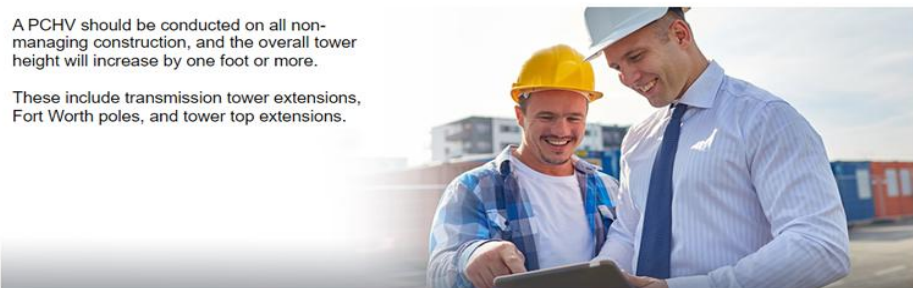
2/19 Preventing Repeat Calls

Post Construction Height Verification Task 4127

Click each image below for a closer look on post-construction height verification methods.

A PCHV should be conducted on all non-managing construction, and the overall tower height will increase by one foot or more.

These include transmission tower extensions, Fort Worth poles, and tower top extensions.



51/62 Property and Due Diligence

Post Construction Height Verif



Practice Activity 1

Select the **three** correct statements on endeavor to evolve backhaul to prepare for network growth and 5G.

- ☒ Building a new backhaul network on the lowest possible cost structure.
- ☒ Testing an IP/MPLS (Multiprotocol Label Switching) end-to-end (Seamless MPLS) design.
- ☐ Increasing CSR unit costs as compared to current CSR vendors.
- ☒ Coupling IS-IS with LDP and MP-IBGP to provide end-to-end MPLS L3VPN services.



Understanding Financial Policies

Review each scenario below and determine if it represents a potential violation or appropriate adherence to our financial policies.

Drag each item to the correct category.

Employee uses corporate debit card for personal vacation expenses

Employee accepts a gift from a client over the policy limit

Employee reports suspected fraud through the proper channels

Employee shares customer data without authorization

Employee reconciles accounts in accordance with policy

Policy Violations

Drop item here

Drop item here

Drop item here

Policy Adherence

Employee follows approval process for expense reimbursement

Drop item here

Drop item here

User Interface Design:



Workforce Software Simulations:

Home

ANALYTICS

Overview

Activity

Trends

Insights

ACCOUNTS

Accounts

Transactions

Transfers

Beneficiaries

TOOLS

Reports

Alerts

Documents

Help & Support

PORTFOLIO

Corporate Portfolio

RISK PROFILE

Moderate

LINKED ACCOUNTS

42

LIQUID FUNDS

\$18,250.00

INVESTMENTS

\$124,680.45

CREDIT LINE

\$35,000.00

Chargeback Analysis

Review and analyze chargeback activity to identify potential fraud.

Overview

Chargebacks

Refunds

Trends

Filters

Time Period

Last 12 Months

View By

Amount

Count

Sales Summary

Total Sales

\$8,945,210

↑ 12.4%

vs prior period

Card Sales

\$5,612,420

↑ 8.7%

vs prior period

ACH Sales

\$2,981,350

↑ 15.3%

vs prior period

Other Sales

\$351,440

↑ 5.9%

vs prior period

Chargeback Overview

Total Chargebacks

\$156,840

Chargeback Count

256

Chargeback Rate

0.62%

Recovery Rate

28.4%

Chargebacks Over Time

Chargeback Analysis:

- Helps analysts compare fraud and non-fraud chargebacks
- Provides key metrics and trends over time
- Supports faster identification and informed decision-making

Home

ANALYTICS

Overview

Activity

Trends

Insights

ACCOUNTS

Accounts

Transactions

Transfers

Beneficiaries

TOOLS

Reports

Alerts

Documents

PORTFOLIO

Corporate Portfolio

RISK PROFILE

Moderate

LINKED ACCOUNTS

42

LIQUID FUNDS

\$18,250.00

INVESTMENTS

\$124,680.45

CREDIT LINE

\$35,000.00

Documents

Document Library

Verified Documents

Compliance Center

All Files

Relevant to This Case

Search documents

File Name

Bank Statement - Nov 2024.pdf

Uploaded on May 10, 2024

Business Registration Certificate.pdf

Uploaded on May 10, 2024

This dashboard provides the most detail to review fraud versus non-fraud chargebacks.

Which area of the dashboard provides the most detail to review fraud versus non-fraud chargebacks?

A

The Overview metrics

B

The Chargebacks tab

✓

C

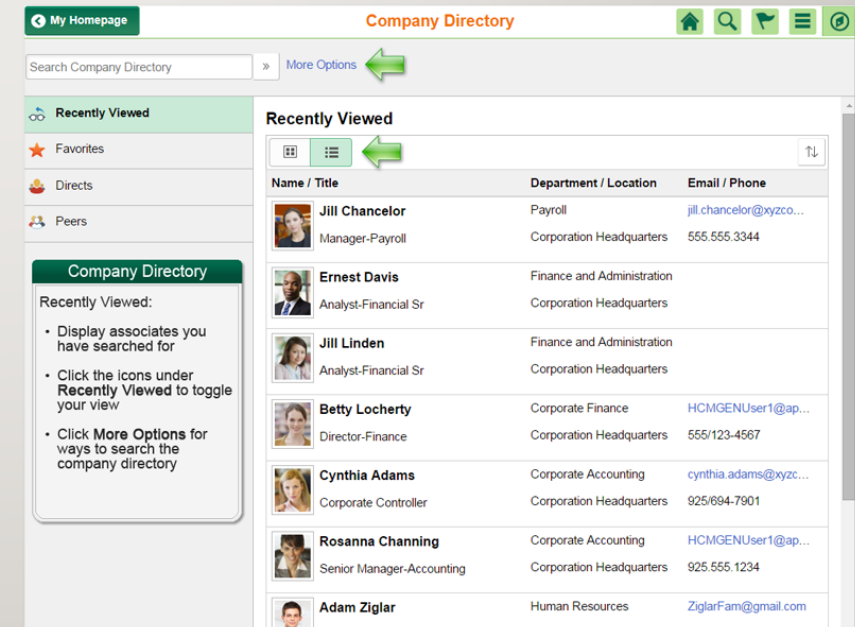
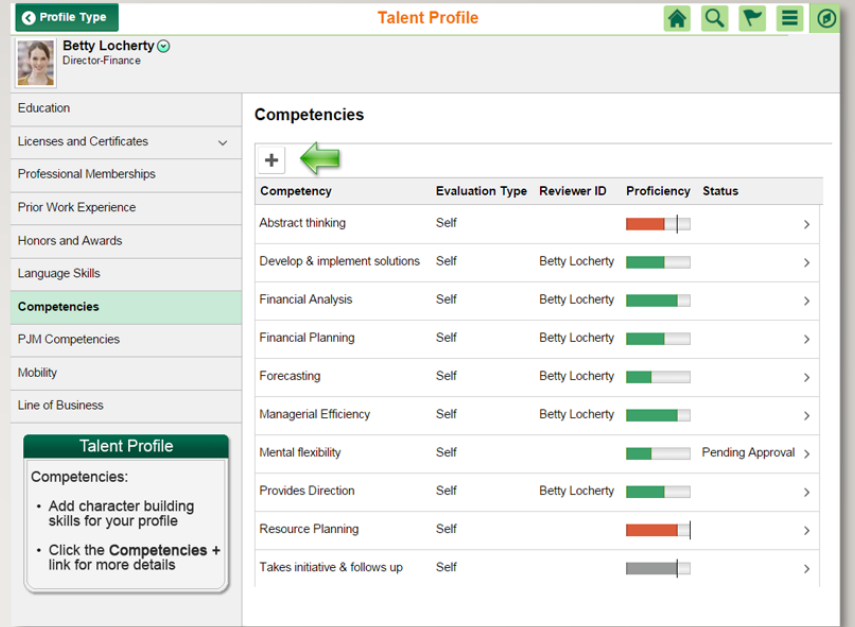
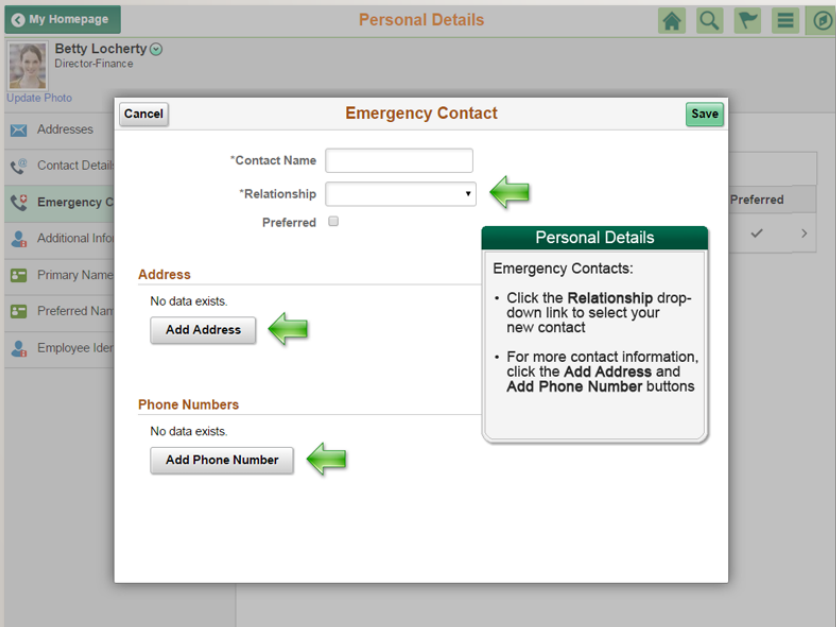
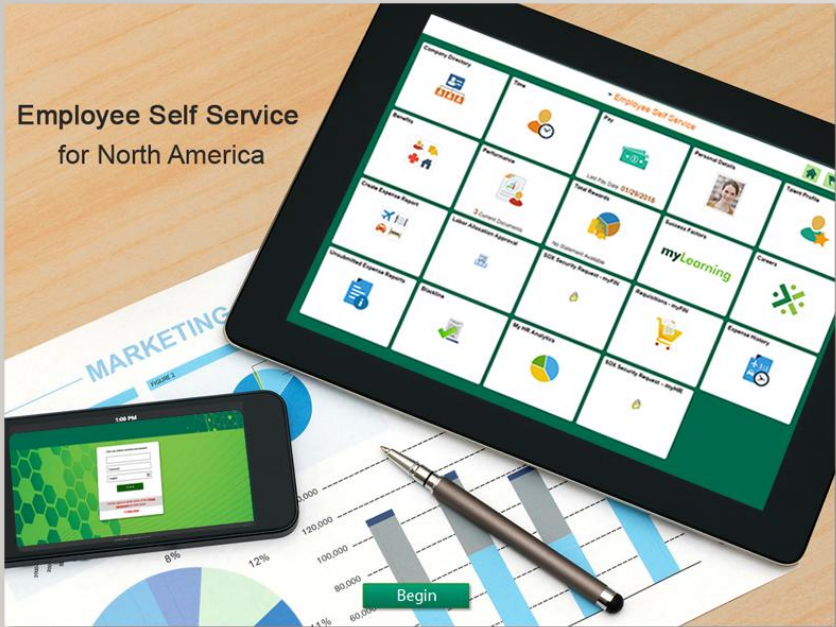
The recovery rate

D

The time period filter

Let's try another question.

Workforce Software Simulations:



Interactive Video Learning:



Animated Instructional Video:



And can you tell me what are the last four digits of your social security number?



Instructional Broadcast Productions:

What's in this for me?

What are the 5 actions associated with Step 1?

- 1 What are the key performance areas you are focusing on?
- 2 What is your plan of action?
- 3 Who would you be working with?
- 4 What behaviors would you be focusing on?
- 5 What is your expected outcome?

Develop Rapport

Indicate Focus

Reinforce / Recognize

Engage in Self Discovery

Cause of Gap / Create a Plan

Test / Tweak / Timeline

Prepare

Observe

Coach

Document

Follow Up

ESS Q1 Business Results

	Global Solutions: Energy & Sustainability Services			
5 locations	EEP	EPC	YTD total	Q1 Target
ORDERS	14	39.3	53.3	47.6
Variance Target	-20%	41%	+11.9%	+11.9%
OG SALES				
Variance Target				
GROSS MARGIN GM%				
Variance Target				
Business SFC SFC%				
Variance Target				
CCOCM CM%				
Variance Target				

Classroom Gamification:

GAME SHOW

1500

Add/Remove Services 100	Voicemail 100	Messaging 100	Mobile Hotspot 100	Global Roaming 100
Add/Remove Services 300	Voicemail 300	Messaging 300	Mobile Hotspot 300	Global Roaming 300
Third Party Email 500	Voicemail 500	Messaging 500	Mobile Hotspot 500	Premium Services 500
Premium Services 700	Voicemail 700	Consumer Email Tool 700	International Roaming 700	International Roaming 700

GAME SHOW

300

Which icon in CST would you click to find the Consumer Email Solution tool?

Results

Account

Network

Tools

5 ♦ \$1 Million

4 ♦ \$500,000

3 ♦ \$100,000

2 ♦ \$10,000

1 ♦ \$1000

50 - 50

A recommitment to "higher of" pricing occurs when _____.

A: The BM reduces the original price.

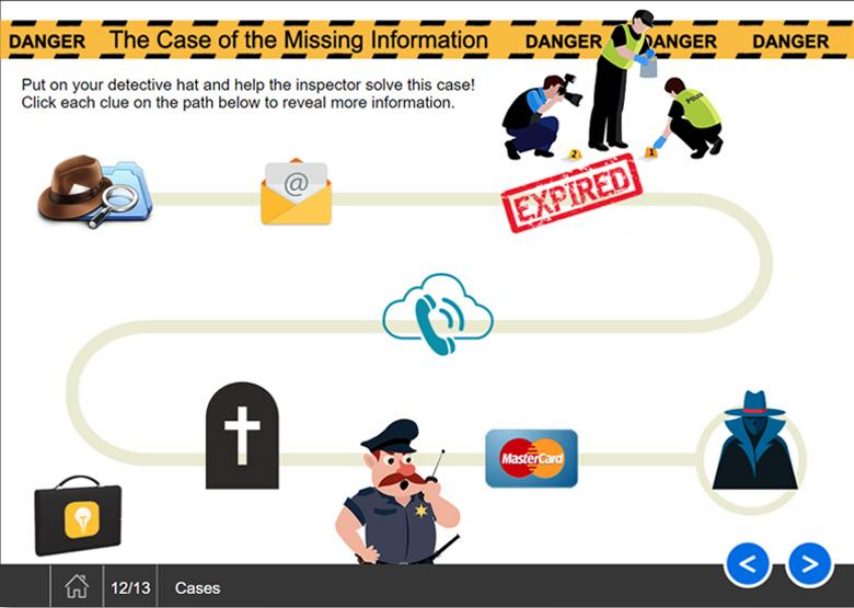
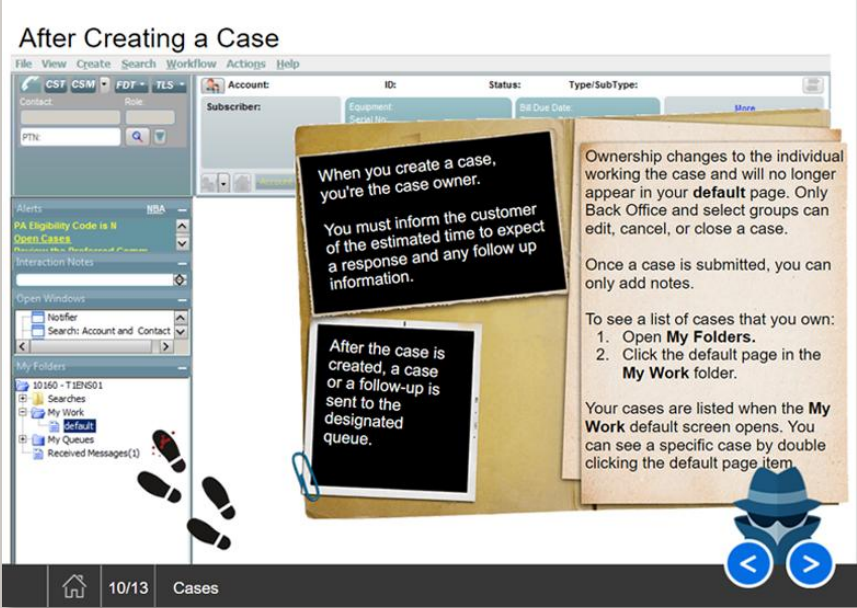
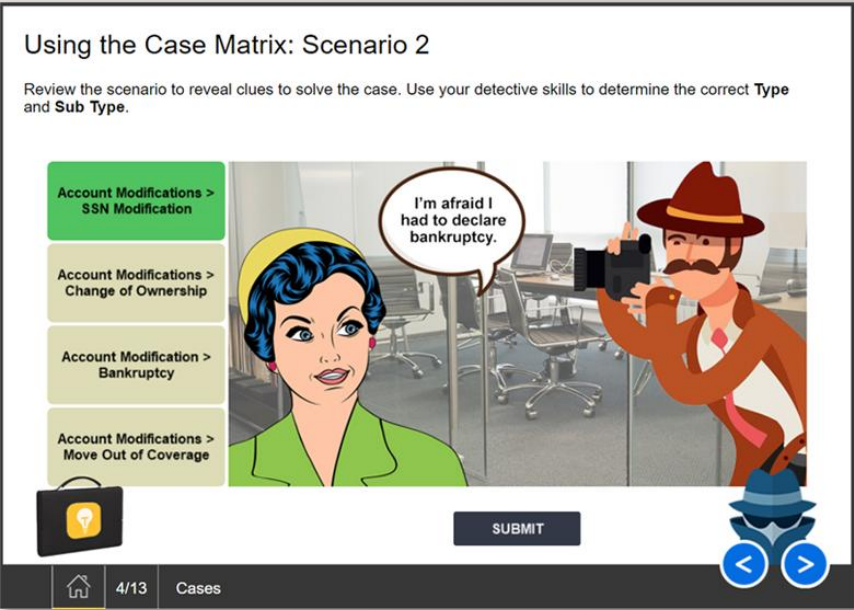
B: There is a change in the terms of the loan.

C: When no pass through fees are collected.

D: No non-pass through fees are charged.

ARM TEAMS	RISK OPS ORG	EM TEAMS	T-RISK TEAMS	FFI TEAM
\$200	\$200	\$200	\$200	\$200
\$400	\$400	\$400	\$400	\$400
\$600	\$600	\$600	\$600	\$600
\$800	\$800	\$800	\$800	\$800
\$1000	\$1000	\$1000	\$1000	\$1000

Classroom Gamification:



Prime Learning

New Employee Orientation

Exit

Menu | Glossary | Resources

Human Resources

Course Help | Print Page

ExponentHR Time Entry, continued

Here is how to edit Time Worked for a Previous Entry:

Step	Action
1.	Click Edit next to the hours you wish to edit.
2.	In the Time Punch table, edit hours as necessary.
3.	If necessary, enter notes then click Add Note .
4.	To delete a punch, click Delete .
5.	Click Save when complete.

If you need further assistance with ExponentHR, refer to the Course Help link at the top of the page or contact the ExponentHR Customer Support desk at 866.612.3200.

Click **Next** to continue.

January - 2012

February - 2012

March - 2012

Hours Worked

Other/Multiple

Holiday

Day	IN	OUT	Time	Hours	Rate	Total	Status
Wednesday	2/1/2012 8:24 AM	2/1/2012 12:39 PM	Hours Worked	04:15			Pending
Thursday	2/1/2012 1:30 PM	2/1/2012 5:31 PM	Hours Worked	04:01			Pending
Thursday	2/2/2012 8:51 AM	2/2/2012 12:33 PM	Hours Worked	03:42			Pending
Thursday	2/2/2012 1:21 PM	2/2/2012 7:00 PM	Hours Worked	05:39	09:21		Pending

Time Punch Edit

Selected Pay Period: 02/01/2012 thru 02/15/2012

Pay Date: 02/29/2012

Pay Period Status: Open

Save

Delete

Cancel

Time Punch

Type	Date	Punch Time	Source	Actual Time
Clock IN:	02/01/2012	8:24 AM	Employee	2/1/2012 8:24 AM (CST)
Clock OUT:	02/01/2012	12:39 PM	Employee	2/1/2012 12:38 PM (CST)
Payroll Export Status: Pending				Total Time: 04:15 (Value: 4.2500)
Notes:				Add Note

Page

Back

Next

Creating and Adding Favorites to Your Homepage in PeopleSoft 9.2

11. Click the Home button to return to your Manager Self Service page.

Favorites

Main Menu

Reporting Tools

Query

Query Manager

Home

Sign out

Add To

Notification

NavBar

New Window | Help | Personalize Page

Query Manager

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Query

Create New Query

*Search By

Query Name

begins with

Search

Advanced Search

12. On the Manager Self Service page, click the drop-down arrow to reveal your homepage links. Click the My Homepage link to access the new page.

Manager Self Service

Approvals - myHR

My Homepage

Manager Self Service

Employee Self Service

WorkCenters

Team Time

13. The Query Manager link now displays savings steps on jumping back and forth between the 9.2 and classic menus.

My Homepage

Query Manager

Please contact your local HR representative or HR Service Center for questions.

Creating and Adding Favorites to Your Homepage in PeopleSoft 9.2
pg. 6

Performance Assessments:

Building Your Brand: Scenario 1

Listed below are behaviors for building your brand. Select the correct trait that matches the behaviors.

Integrity

Holding Others Accountable

Transparency

Communication

- Be honest, reliable, responsible, present, and available.
- Honor your commitments by doing what you say you are going to do.
- Always follow through, and admit to and own your errors.
- Do the right thing. Stay focused on the end goal while navigating the path to completion.



Correct!

Staff and practitioners are competent to perform waived tests. When should competency be evaluated? Click the Submit button.

☐ Orientation

☐ Annually

☐ Orientation, prior to performing tests, annually

☐ Orientation and annually



Question 10 of 12

Identify the type of fraud happening in this scenario. Select the best answer.

Case Details

Background:

- Customer: ABC Construction LLC
- Industry: Commercial Construction
- Location: Phoenix, AZ
- Account Type: Business Line of Credit
- Credit Limit: \$500,000
- Date Opened: March 2022

Indicators:

- Opened multiple new credit accounts in a short period
- Maxed out available credit on all accounts
- Made large purchases of non-business assets
- Transferred assets to a new entity/insider
- Stopped making payments to vendors
- Significant drop in revenue despite high credit usage
- Filed for bankruptcy shortly after maxing credit lines

☐ First Party Fraud

☐ Third Party Fraud

☐ Account Takeover

☒ Planned Bankruptcy

Seasonal Standby

Knowledge Check 2 of 4:

Correct! Great work!

Ms. Lamar has several business lines not being used and is interested in the the **Seasonal Standby** plan. She would also like to know what would happen to her service agreement expiration date.

Select the **three** best actions action.

☒ Service may be suspended for a short amount of time at a low monthly cost while keeping their account.

☐ **Seasonal Standby** is eligible for autopay discounts

☒ Consumer / individual lines are good for only 6 months.

☒ Customers are responsible for billing payments if the device was purchased using monthly installments or lease payments.

☐ Customers do not have to pay taxes, surcharges, or fees when the account is in **Seasonal Standby**.

CONTINUE

3/7

Plan Information

Facilitation Guides:

Leading Icons

Throughout this document you will notice graphics that identify facilitation notes and content reinforcement activities, which include:

	Speaking Point: This icon highlights a note that has instructions only for the instructor to see. It usually reflects a guideline, or a tip needed to facilitate the course.
	Power Point Slide Number
	Key Point: This icon highlights a note that has instructions only for the instructor to see. It is meant to highlight a point that is critical to the participant's success on the job.
	Knowledge Check: This icon highlights an area of measurement.
	Activity: This icon highlights instructions for a classroom activity.

Course Overview



1

Display Introductory Screen

Ice Breaker Activity 1: Suggested for Virtual Classroom

Say: Let's introduce ourselves by giving names, professional experience, and expectations for this course.

Facilitator, kick off this activity by going first.

Introduction



2

This course is designed to assist you in beginning your career through knowledge and skills in:

- Leadership
- Core Values & Purpose
- Products
- Process Flow
- Getting Your Name Out There
- Human Resources Policies Overview

Course Outline



3

The course is presented in the following modules:

- Module 1: Our Company
- Module 2: Marketing
- Module 3: Human Resources
- Module 4: Technology Assistance

Introduction to Our Company

Overview



4

This module will introduce you to "Our Story", including a look at our Mission, Purpose, Core Values, Leadership, and even our mascot.

Objectives



5

At the end of this module, you will be able to:

- State our Mission
- State our Purpose
- Demonstrate our Core Values
- Identify our Leadership Team
- Identify Products & Programs

Introduction



6

Headquartered in Dallas, Texas, our company has grown from a staff of 20, producing \$80 Million in annual closed volume, to a staff of 2400 producing in excess of \$7.7 Billion annually.

In addition to the corporate office located in North Dallas, our company has expanded to over **225** offices across the United States and is licensed to provide tax and accounting services in all **50** states and District of Columbia (DC).

Our goal is to provide unsurpassed quality service and support throughout the entire process for every client and referral source. These proactive operational philosophies simplify and accelerate our processes at all levels. Our company's experienced professionals are dedicated to making every customer's experience a positive and successful one.

Technology & Learning Ecosystem

- **AI & Emerging Technology:** ChatGPT, Microsoft Copilot, Claude, NotebookLM, Synthesia, WellSaid Labs, Transkriptor, Adobe Firefly
- **Know Your Customer/Business (KYC/KYB):** Salesforce, Accurint, LexisNexis, Black Book, Taxport, Giact, GuideStar, Kount, Secretary of State
- **Authoring:** Articulate 360 (Storyline, Rise), Adobe Captivate, Lectora, iSpring Suite
- **Learning Platforms:** Cornerstone, Saba, Docebo, PeopleSoft 9.2
- **Design:** Adobe Creative Cloud, Canva, Photoshop, Illustrator, Acrobat Pro, InDesign, Snagit
- **Media:** Premiere Pro, After Effects, Camtasia, Vyond, Media Encoder, Adobe Audition
- **Office:** Microsoft Office 365, Google Workspace (Docs, Sheets, Slides), SharePoint
- **Collab:** Jira, Betterworks, Slack, Microsoft Teams, Webex, Zoom, LeanKit



Awards / Commendations



Recognized for Energy Management Lifecycle training contributing to **\$250M in new revenue** by enabling field teams to identify performance contracting opportunities.

Bank of America



Received **Global Recognition Gold and Silver Awards** for simulation-based learning that accelerated loan system adoption and streamlined loan origination workflows.



**Countrywide
Financial**

One of five company-wide recipients of the **Center for Learning Award** for establishing an in-house training organization, reducing development time by 70% and vendor costs.



Received the **Outstanding Achievement Award** for developing end-to-end process maps and workflow solutions that streamlined customer service and technical support operations.



Recognition for developing the University's first online education program to reduce classroom instructional costs.

August 18, 2023

To whom it may concern,

I am writing to recommend Kirk Denniston for the position of Senior Instructional Designer. I had the pleasure of working with Kirk for over two years at Vizient, Inc. on the Learning and Development team.

Kirk and I worked closely together on over 175 projects. He managed anywhere from three to five projects simultaneously, always meeting his deadlines and even worked late into the night to ensure the job was done on time.

During his time at Vizient, Kirk consistently demonstrated his enthusiasm and dedication. He is a highly motivated and results-oriented individual who is always willing to go the extra mile. He is a team player who worked closely with Subject Matter Experts and was always willing to help his colleagues.

Kirk introduced new methodology training practices and AI software to streamline processes for smoother operational practices. His Just-In-Time training helped support thousands of medical staff during a critical pandemic and supported nursing with comprehensive accreditation programs. His instructional design modules helped our organization support loss prevention and improved profits.

Kirk has a strong technical background and is proficient in a variety of software applications. He is a quick learner and is always eager to take on new challenges.

Kirk's expertise in Storyline authoring, simulation assessments and interactive video training would bring new learning strategies to any training department.

In addition to his technical skills, Kirk also has excellent communication and interpersonal skills. He can clearly articulate his ideas and work effectively with others.

I have no doubt that Kirk would be an asset to your company. He is a highly skilled and motivated individual who would be a valuable addition to your team.

Sincerely,

Susan Lozano
Learning Systems Manager
Vizient, Inc.
290 E John Carpenter Fwy
Irving, TX 75062
vizientinc.com



June 1, 2020

To: Prospective Employers

Re: Letter of Recommendation for Kirk Denniston

I had the pleasure of working with Kirk for almost two years within the training department at Sprint University.

Kirk was involved with two divisions, the Retail New Hire Customer Service Care group, and the Network deployment division. Kirk was extremely thorough in his work and often shared his ideas and thoughts to help everyone else improve their training capabilities. He was always willing to share ideas and was never afraid of taking risks.

I always appreciated Kirk sharing the best development strategies and providing constructive feedback. He was a fantastic teammate and would be a great asset to any company that wants to have a top-level senior instructional developer to create innovative designs.

If I can be of further assistance, please do not hesitate to contact me at (913) 484-4658.

Sincerely,

Chris Reeves – Training and Development

Sprint World Headquarters Campus
6100 Sprint Parkway
Overland Park, KS 66211



AT&T
University

Kimberly Valentine
AT&T Services, Inc.
6301 Colwell Blvd.
Irving, TX 75039

June 1, 2018

To Whom It May Concern:

It is my pleasure to recommend Kirk Denniston for a Senior Instructional Developer position. Kirk has worked as a private contractor for AT&T University for the past 18 months. He has excellent skills in course design and development, simulation training, and video production.

Kirk looks for fresh ideas and explores new, creative ways to do things. His expertise in Mobile Training brings a high level of standards to the Leadership Organization and AT&T's Retail Division. He is exceptional at writing, producing and editing dynamic training videos, and is often the go-to person when co-workers have a question or need a second opinion.

Kirk will be an asset to any organization. He is open to learning new skills, adapts to change, and leads team members to do the same. He has a strong work ethic and can be counted on to consistently exceed expectations and beat project deadlines.

If you need any additional information, please feel free to contact me at (214) 901-8144.

Sincerely,

Kimberly Valentine
Senior Training Manager, Design
Human Resources, AT&T University Operations Training