

# Pearl Sumathi, Ed.D.

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## Educator, Designer & award-winning leader of Learning & Development programs, effective Talent Management & Organizational Strategies

Ivy League doctorate with hands-on corporate talent/learning and HR management experience and international recognition as award-winning designer of Executive Development programs offered under the auspices of one of the world's most prestigious business schools. Leading and establishing the learning function of a leading Fortune 500 financial services and solutions firm with employee strength of 11,000. Deep expertise in implementing broad, strategic organizational and talent development initiatives as well as in design of focused solutions for immediate impact. Skilled in customized curriculum design, adult learning, and executive coaching. Recognized as a key contributor and trusted advisor to C-suite, problem-solver experienced in change management and organizational transformation. Proficient across the entire spectrum of human resources disciplines and a dedicated driver of organizational excellence.

### CORE COMPETENCIES

- Learning & Development
- Coaching & Facilitation
- Performance Enhancement
- Leadership Development
- Talent Management
- Digital Transformation of workforce
- HR Management
- Reskilling the future workforce
- Change Management

### SELECTED CAREER ACHIEVEMENTS

- **Conducting high impact leadership workshops through Oklahoma State University.** Partner with Center for Executive and Professional Development and delivered strategic leadership workshops for over 600 leaders with a consistent track record of 80-99% satisfaction rates.
- **Established the first Learning & Development Function for Lincoln Financial Group.** As the company's first Chief Learning Officer, established the learning function from its foundations and doubled employee learning participation within a year. Also created the first award-winning holistic curriculum (Trail Blazer Award from the CLO Magazine) for management development with 300% demand to enroll in the course.
- **Honored with global awards for exemplary learning leadership and best in class Learning and Development.** Obtained Trail Blazer Award from the CLO Magazine given to industry leaders who have demonstrated excellence in the design and delivery of employee development programs. Enabled Lincoln Financial to be ranked in the Learning Elite list from the CLO Magazine that recognizes industries with the learning and development function that show cases best practices, principles and strategies that enable top business performance through effective talent development interventions.
- **Improved global talent management for a major employer by strategizing competencies and assessing future needs.** As a key task force member serving a 170,000 employee organization, mapped competencies for all functional areas and defined career progression levels as critical foundation to build the Succession Plan.
- **Designed and led award-winning complex leadership programs for mid- to senior-level executives in the United States, China, India and Europe.** Recognition through **Excellence in Practice Award** from the European Foundation for Management Development and a **WhatWorks Award** from Bersin by Deloitte. Generated \$3 million in revenue for The Wharton School in designing and customizing business-relevant learning programs for a portfolio of strategic corporate clients, ranging from major health insurance carriers and Big Pharma firms to global industrial companies.
- **Mitigated a talent drain with proactive interventions to increase retention.** In response to increasing attrition in a business unit suffering an unstable economic climate, presented a successful business case to leadership to introduce an exclusive retention bonus program and ongoing talent development opportunities.

## PROFESSIONAL EXPERIENCE

### **Oklahoma State University | Stillwater, OK**

**2019-Present**

*Nationally ranked university with more than 35,000 students across five campuses with an annual budget of \$1.5 Billion*

#### **ASSISTANT PROFESSOR OF PRACTICE/MANAGEMENT CONSULTANT**

**Responsible for teaching on-campus and online courses as part of the business school and also actively involved in management consulting by partnering with corporations to meet their talent and learning agenda. Top clients include Federal Aviation Administration, Oklahoma State Department of Health, Zeeco, Community Care, Oklahoma Municipal Clerks & Treasurers Institute and Academy and public offerings for State Officials.**

- Primarily teach human resources and talent development.
- Manage the professional certificate program in human resources geared for working professionals.
- Partner with the Center for Executive and Professional Development to deliver customized workshops for clients to enable workforce reskilling, accelerate innovation and development.
- Successfully developed core workshops around the topics of Design Thinking, Human Centered Design, Developing Employee Centric Teams and Leadership Accountability.
- Annually chosen to contribute content for Essentials in HR Certificate Series which was one of the flagship programs conducted for working HR professionals.

### **Lincoln Financial Group | Radnor, PA**

**2014- 2019**

*Fortune 500 company offering a diverse range of financial services and solutions with assets under management of \$207 billion*

#### **HEAD OF TALENT DEVELOPMENT (Chief Learning Officer)**

**Responsible for establishing the first learning and development function by spearheading and leading the strategy and execution of Lincoln Financial Group's (LFG) talent development agenda, which is focused on building organizational capability, reskilling the future workforce, strengthening the leadership pipeline, and enhancing employee engagement through high quality talent development offerings.**

- Created a talent development strategy for the organizations and establishes the enterprise learning function.
- Provided strategic consultation and thought leadership to senior management and key business stakeholders around talent development.
- Conducted needs assessments with senior leadership to understand and address skill gaps in the management talent bench across the enterprise.
- Worked directly with senior managers and external subject matter experts to devise creative and impactful ways to deliver and develop training content.
- Developed, drove and implemented strategic talent development programs and initiatives aligned with organizational capability needs and established Career Frameworks.
- Created a curriculum architecture and program delivery methodology for all talent development initiatives.
- Partnered with the business units to reskill workforce and build next generation capabilities to close skill gaps.
- Strategic learning partner to the business in enhancing digital transformation by preparing the workforce through targeted learning solutions.
- Helped integrate learning and development workstreams because of a recent merger and acquisition.
- Successfully integrated centralized and de-centralized learning structures at the enterprise and business unit levels.
- Championed social learning strategy for the enterprise.

### **Aresty Institute for Executive Education, The Wharton School | Philadelphia, PA 2011 – 2014**

*Global leader in executive development for corporations with a portfolio of \$38 million+*

#### **DIRECTOR**

**Strategic partner and advisor to corporate clients across several industries globally, responsible for design and delivery of core customized solutions in leadership and career development programs aligned with clients'**

**learning/talent management and business strategies. Managed staff and budget and build program revenue. Top clients include Merck, GlaxoSmithKline, BP and UnitedHealth Care.**

- Consulting partner with C-Suite, senior management and HR leaders on the design, implementation and standardization of various global HR and/or unit-specific initiatives supporting current/future business needs.
- Worked closely with internal training experts as well as external practitioners to deliver the learning experience.
- Created blended program experiences to suit client needs.
- Evaluated programs and recommend ongoing continuous improvement measures to ensure content remains current and aligned to the client's business needs.
- Researched best practices and latest trends in business and executive development areas with a particular focus on talent management.
- Managed a program delivery team of 10 professionals.
- Responsible for approx. \$3.0 million portfolio and budget preparation.

**Among FLAGSHIP PROGRAMS authored for clients:**

**Merck Pharmaceutical:** Designed a 10-month Executive Development program for company's senior executives and emerging leaders around the globe. Program provides global learning journeys and action-learning projects to help Merck strengthen its talent pipeline. The Wharton School received an Excellence in Practice Award, Executive Development category, from the European Foundation for Management Development (EFMD) for this program.

**GlaxoSmithKline:** Designed a boutique Leadership Development program for the company's Marketing Academy to improve leadership and people management skills. Designed a Marketing Continuing Education module for 400 marketers.

Other programs include Leadership Development programs for United HealthCare Group, British Petroleum (BP), and pioneering companies in China in real estate and ship-building.

**Fujitsu America | Edison, NJ**

**2008 - 2010**

*\$54 billion information & communication technology (ICT) company with 170,000 employees*

**MANAGER, HR**

**Responsible for strategic and tactical execution of performance and skills management from front-line staff to executive levels. Created a culture of continuous learning. Change agent, leader of OD and business transformation during a major merger. Advanced through several roles of increasing responsibility.**

- Spearheaded and delivered global talent & skills management programs. Created an Employee Value Proposition initiative: Identified career frameworks to promote employee role-mapping and advancement. Identified high-potential employees and built leadership pipeline for Succession Planning.
- Drove and promoted talent review process by partnering with business units; ensured 100% completion across units. Consolidated talent review ratings and promotion inputs to improve year-end compensation process. Responsible for decisions on merit increases and bonuses.
- Implemented 360-degree assessments for all employees, with particular focus on high-potential staff. Consulted with managers to shape development strategies & career paths for high potentials. Introduced specific retention strategies to minimize attrition.
- Designed, managed and implemented large-scale restructuring and change management programs to support strategy/direction of organization in transition through merger. Planned and directed stakeholder management, transition and communication activities to ensure buy-in and support for overall change efforts. Led standardization of critical HR processes and programs.
- Coached executives, managers and staff on organizational, leadership, and specific career development issues.

**Mphasis, an HP company | New York, NY**

**2003 - 2008**

*Global IT Consulting company with a workforce of 40,000*

**HUMAN RESOURCE SPECIALIST**

**Solid generalist providing HR leadership to diverse groups; used L&D, Talent Management and OD skills to transform and unite culture after a major acquisition.**

- Supported 1200 employees. Coached managers on issues pertaining to employee relations, managed talent and performance management processes, compensation, policies and organizational effectiveness.

- HR's key task force member during acquisition. Planned and directed transition and communication activities to ensure buy-in and support for overall change efforts. Standardized HR processes.
- **Strategic Advisor:** Contracted to represent Mphasis in prestigious global Identity and Access Management project with Pfizer Incorporated (2003 – 2005).

*Earlier career experience 1995-2002 with technology and software firms in India and Singapore in Human Resources & Administration roles. Broadly worked on mergers and acquisitions support, Learning & Development functions, HR generalist activities and supervision of staff members.*

## EDUCATION

**Ed.D.** | Education, Organizational Learning  
The University of Pennsylvania (curricula: The Wharton School)

**MS** | Education, Organizational Learning  
The University of Pennsylvania (curricula: The Wharton School)

**M.Phil and MS** | Organizational Behavior & Research Methodologies

**BA** | Psychology (Gold Medalist)  
University of Madras, Tamil Nadu, India

**Executive Certificate in Design Thinking**, Harvard University  
**Hogan Assessments Certification**, Hogan Assessment Systems (in progress)

## AWARDS, CERTIFICATIONS & AFFILIATIONS

Awarded Bronze Medal, Trail Blazer Award by the CLO Magazine that recognizes industry leaders who have demonstrated excellence in the design and delivery of employee development programs.

Lincoln Financial Group was 2018 Learning Elite Finalist, a recognition that honors best companies in Learning & Development by the CLO Magazine.

Awarded 'Best Dissertation Award' in 2015 by the Association for Talent Development for my doctoral dissertation titled 'Branding the Learning Function.' This award recognizes an outstanding dissertation that holds major implications for practitioners of workplace learning and performance.

Certified Professional in Human Resources (PHR) - Society for Human Resources Management (SHRM)

Certified Executive Coach - Certified Coaches Federation

Nat'l member: Society for Human Resources Management (SHRM)

Business Intelligence Board, Chief Learning Officer (CLO) magazine

## SAMPLE ARTICLES

[Learning Needs a Makeover](#), CLO Magazine, February 2016

Co-author, "[Learning's External Brand](#)," CLO Magazine, April 2012

[Press release](#), program designed for leaders in health care, September 2012

[What's you Learning Brand?](#), CLO Magazine, June 2016

## SKILLS & PLATFORMS

Microsoft Office Suite & Virtual Learning (Adobe Connect)  
Hybrid learning platforms including customized designs for traditional delivery and e-learning components, online tools, Webinars, podcasts