

**Robert J. Miesionczek**  
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## **Professional Milestones**

- Leader in the development of an industry model for small work teams in Financial Services and implemented same in over one thousand business teams. Development responsibilities included design and rollout of training and consulting formats currently in use in Financial Services.
- Authored over 20 training and self-study manuals covering major aspects of people management, business management, sales development and cross-cultural effectiveness.
- Certified in Myers Briggs and Kolbe Assessments, experienced in Kaizen, TQM and related quality and business system improvement practices.
- Developed and conducted a civilian adaptation of US Army “After Action Review” Process.
- Developed Cross-Cultural Programs, including a Global Executive Development Program for a Japanese Fortune 20 company. Coached and conducted training for work teams in Hong Kong, Singapore, Australia, Taiwan, Japan and Mexico.
- Developed numerous web-based 360 assessment instruments for Performance Management and ISO Certifications and co-developed business finance software utilized by Panasonic.
- Managed 3 Training/Organization Development Departments for Merrill Lynch, UBS and Panasonic. Duties included staffing, curriculum development and training center management.
- Extensive experience with performance measurement and Change Process implementation.
- Designed survey instruments and managed data collection for ISO Certification for Johnson & Johnson international manufacturing subsidiaries.
- Excellent presentation skills, comfortable presenting to large audiences, having spoken before groups as large as 500 in Japan, Mexico, Hong Kong, Singapore and the United States.
- Professional Licenses: Securities Industry Series 7, 66, 9, 10, CA Insurance, NJ Real Estate

## **Professional History**

**April, 2007 - January, 2009**

*Branch Sales Manager, UBS Financial Services*

Sales Manager in the Century City, CA Office (9th largest in firm), “Branch of the Year” for 2007 based on revenue and asset growth (\$48mm/\$7.6B). In 2008, our branch was #1 ranked for FA recruitment.

**2005-2007**

*Director, TeamWorks & Sales Development Groups, UBS Financial Services*

Directed development of a training infrastructure (TeamWorks Group) for FA Teams with a staff of 6; and co-developed a coaching infrastructure for FA Practices (Sales Development Group).

**2001-2005**

*Director & Senior Practice Consultant, Merrill Lynch Global Private Client*

Team Leader in development and migration of a new FA Teaming Model to Mountain West, Mid West and Asia Pacific regions and consulted on the full range of practice management competencies.

**1994-2001**

*President & Founder, Action Training International & ActionAPPS Inc.*

My firm was focused on providing advice on business processes. Clients: Alcoa, General Instrument, Merrill Lynch, Motorola, Matsushita (Panasonic), Siemens; projects undertaken in US and Asia. In 1998, we expanded into ActionAPPS Inc., to provide web-based appraisal and assessment services and conducted extensive ISO certification surveys and 360 assessments world-wide.

## **Professional History (Cont'd.)**

**1991-1994**

*Assistant General Manager, Matsushita Education Center, Panasonic Co.*

As senior American training executive, I managed three training centers (CA, Chicago and NJ) for North American operations (22 companies/15,000 employees) and designed a Global Development Program to prepare executives for international rotation, including a cross-cultural assimilation program.

**1984-1991**

*Assistant Vice President, Management Development, Merrill Lynch*

I was responsible for the Management Development curriculum and program schedule for Global Branch Office Operations (professional staff of 11 and 88 training weeks per year). I designed and delivered seminars in numerous business disciplines to branch office Administration and Operations Managers, and Regional Operation Center management.

**1982-1984**

*Account Executive, Merrill Lynch Wayne, NJ Branch*

Maintained 1st quintile ranking in new accounts for two years in direct production.

**1977-1982**

*Secondary School Teacher & Head Coach, Vernon, NJ*

Developed system-wide high school remedial Social Studies program, head coach of track and field.

## **Publications**

Contributing Author: "The Effective Manager" (New York Institute of Finance, 1991)

Author: "The Customer Satisfaction Handbook" (1994) (English and Spanish)

Over 20 Training Manuals and Program Materials on various business topics

## **Speaking Engagements**

The Institute for International Research, "Communicating Across Business Functions"

The Conference Board, "Kaizen Practices"

The New School for Social Research, "Cross Cultural Issues in Business"

American Management Association, "360 Assessment Practices"

Matsushita Overseas Training Center, "Training Practices in the United States"

## **Education and Professional Certifications**

1974 Bachelor of Arts in History Fordham University

1977 Master of Arts in Teaching Fordham University Graduate School of Education

Licenses: Series 7, 66, 9, 10, CA Insurance and NJ Real Estate Licenses

## **Certifications**

Myers Briggs MBTI and Kolbe

Permanent Certification in Secondary Education/Social Studies (NY, NJ)

Kaizen Training, Psychological Associates, Dimensional Interpersonal & Sales Skills Programs; Strategic Management Group, Strategic Thinking & Planning Program; Zenger-Miller, Frontline Leadership Programs; Blessing-White, Managing Personal Growth Series; Forum Corporation, Exceptional Sales Practices Programs

## **Executive Programs and Post-Graduate Study**

Quality (Deming Institute), Operations Management (Columbia University)

Kaizen (Sanno Institute), Systems Management (Index Institute)

Project Management (KepnerTregoe), Multinational Strategy (Wharton)

Dynamics of Organization Program (University of Pennsylvania)

International Finance Program (Fairleigh Dickinson University)

Organization Development & Human Resource Management (Temple University)