

# DANI CHESSON, PH.D.

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As a scholar of design thinking with over 10+ years of experience using design to drive innovation and change in organisations, I am looking to bring this experience into the classroom to prepare students of today to meet the challenges of tomorrow.

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## EDUCATION

### **Ph.D. in Leadership and Organisational Change**

Antioch University 2017

- Dissertation research focused on the development of an assessment instrument for identifying design thinking capabilities in individuals. Design thinking is currently being used as a process for fostering innovation for the purpose of solving complex problems. The instrument developed identifies existing design thinking capabilities in individuals and teams.
- Developed leadership development curriculum for small business owners based on adult learning and action learning theory.
- Extensive research in the use of positive psychology in leadership development. This study resulted in best practices for leadership development programs and approaches for executive coaching.
- Research training: survey-based methods, scale development, factor analysis, interview based research, content analysis, text analysis, thematic analysis.
- Link to dissertation:  
<https://aura.antioch.edu/cgi/viewcontent.cgi?referer=https://scholar.google.co.nz/&httpsredir=1&article=1398&context=etds>

### **Master of Science in Organisation Development**

Queens University of Charlotte 2016

- Research thesis focused on understanding the working practices of design thinking professionals and the skills needed for creating new solutions. Results of this study offer implications for innovation practices in solving complex organisational challenges.
- Certificate in executive coaching with 30 hours of supervised practicum.

### **Master of Science in Business Administration**

Queens University of Charlotte 2012

- Concentration in leadership and organisation development.
- International study explored cultural and leadership challenges in South Africa, Singapore, and China.

**TEACHING  
AND LEARNING  
FACILITATION  
EXPERIENCE**

- Community consulting project involved developing a community awareness campaign by leveraging social media for a local organisation focused on K-12 education (MeckEd).

**Bachelor of Arts in Visual Communication (graphic design)**

State University of New York, Farmingdale 2005

- Concentration in graphic design and web development.
- Bronze winner at Best of Long Island Advertising Campaign Competition Student Category (2004).

Developed curriculum/lesson plans, taught or co-taught, performed student assessments for the following courses in virtual and classroom settings:

**Affiliate Faculty (Quantitative Research Methods)**

Ph.D. in Leadership and Change

Antioch University, Yellow Springs, OH, 2018

- Design engaging, and interactive content related to quantitative research methods for doctoral students
- Facilitate online learning sessions where students engage in discussions and peer learning
- Examples of courses include: Basic statistics for research, Exploratory Factor Analysis in SPSS, Understanding Quantitative Research

**Part-Time Contract Lecturer**

Diploma in Business Administration (Level 6 and Level 7)

New Zealand College of Business, Lincoln, New Zealand, 2017

- Prepared and delivered content for business related courses
- Examples of courses include: Corporate Strategy, Management Information Systems, International Business, Human Resource Management, International Business
- Developed Capstone curriculum for International Business Graduate Diploma to be offered in 2018

**Research Methods (Guest Lecturer)**

Masters in Organisational Development Program

Queens University of Charlotte, Charlotte, NC, 2016

- Plan and deliver course content on various research methods.
- Presented on Survey-Based Research, an end-to-end process for developing the survey, collecting data, and analysing results.
- Lead instruction on 5-Step Scale Development Process for designing appropriate assessment instruments.
- Advise students on selection of appropriate research approach, study design, and alignment of inquiry with methodology.

**Introduction to Organisational Development (Guest Lecturer)**

Masters in Organisational Development Program

Queens University of Charlotte, Charlotte, NC, 2016

- Designed and deliver class presentations on leading change, how to apply theory to practice using real-world examples.

**Virtual Training for Application Processing Team**

Hyderabad and Bangalore, India, HSBC, 2007

Designed and led highly successful virtual training for new associates in India. The course presented a company overview, explored specific roles, and introduced the loan application processing system. Created and administered an assessment to determine associate retention of course content.

**Transition to Digital Format Training**

Garden City Group, 2004

Prepared and delivered in person, hands-on training to assist associates with the transition from paper to digital formatting.

**Understanding Our Team Strengths**

Bank of America, 2015

Leveraged the findings of StrengthFinders 2.0 to enhance development of leaders and teams. Enabled executives, through both virtual and in-person sessions, to utilize results to improve team performance.

**Quality Controls and Risk Management**

Bank of America, 2014

Created, designed, and implemented a Quality Controls and Risk Management skills development course for project managers focused on how to identify risks, develop controls, and manage risk. Delivered content by incorporating various formats including presentation, experiences from the field and hands-on interactions.

**Project Management Best Practices**

Bank of America, 2012-2014

Spearheaded project manager development by creating a reference guide that provides a best practices roadmap for effective project delivery.

**PUBLICATIONS**

Chesson, D. (2018). Meeting 21<sup>st</sup> Century Organizational Challenges with Design Thinking. *Organization Development Journal*, 36(3), 73-81.

Chesson, D. (2017). Design Thinker Profile: Creating and Validating a Scale for Measuring Design Thinking Capabilities.

**PRESENTATIONS**

**Data, Design, and the Why**

Charlotte American Market Association, Charlotte, NC, May 2015

Helped participants understand how to cut through the clutter of data, avoid analysis paralysis, and make meaningful decisions using data. ([Link](#))

**Design Thinking, So What?**

HR Leadership Summit, Charlotte, NC, October 2016

Shared personal research on design thinking and how organisations can help develop these capabilities in their workforce. ([Link](#))

**EXECUTIVE  
MANAGEMENT  
EXPERIENCE**

**VP, SMALL BUSINESS LENDING STRATEGY INITIATIVES**

**BANK OF AMERICA, 2014 – 2017**

Led global cross-functional business management teams ranging from 5 to 50 individuals to develop and deliver new solutions to market. Created business strategies to reduce operational costs, improve performance, minimize risk, and increase revenue. Introduced techniques such as journey mapping and prototyping to facilitate designing customer-centric solutions that added value and increased profitability. Developed launch strategies for bringing new products and services to market, including people, process, and technology performance plans to support success. Created and delivered talent development programs to increase innovation and change management capabilities within management teams. Provided coaching to project managers and business leaders as needed.

**AVP, SENIOR CHANGE MANAGER – REGULATORY COMPLIANCE**

**BANK OF AMERICA, 2011 – 2014**

Led operational teams in the redesign of business processes to deliver operational excellence and support regulatory compliance following the 2008 Mortgage Crisis. Conducted business assessments to identify high risk and underperforming functions and led process improvement projects to address underperforming areas. Established routines to ensure business processes were compliant with regulatory requirements and developed strategies to improve non-compliant processes. Developed key performance indicators and prepared scorecards for reporting to senior leadership and external regulators. Responsible for training new project managers and providing coaching to as needed.

**SENIOR MANAGEMENT CONSULTANT**

**Carlisle and Gallagher Consulting, 2009-2011**

Managed a portfolio of change initiatives supporting the delivery of new consumer products to market. Implemented process capabilities to increase risk detection and improve response time. Engaged stakeholders, facilitated design sessions with technology managers, performed organisational readiness analysis, and developed strategic execution plans. Established management routines to ensure successful launch of new products and services.

**CHANGE CONSULTANT**

**SHERPA, LLC, 7/2007 – 8/2009**

Managed organisational readiness assessments supporting the implementation of technology change initiatives. Performed current/target state analysis to identify process gaps and associate training needs. Engaged business partners to design new processes and developed adoption plans to implement changes.

**PROJECT MANAGER - GLOBAL OPERATIONS**

**HSBC, 2006-2007**

Led strategic change initiatives targeting the integration and transformation of business services across global sites to improve quality of services across the enterprise. Responsible for the delivery of large scale change efforts including technology deployments, training, communications, reporting, and regulatory compliance.

**MARKETING COORDINATOR/GRAPHIC DESIGNER**

## HIGHLIGHT OF CORPORATE ACHIEVEMENTS

### **I.J. White Systems, 2004-2005**

Supported the Vice President of Sales in managing new product launches. Managed end-to-end tradeshow participation. Designed ad layouts and edited articles for industry publications. Coordinated customer engagements with sales team.

### **PROJECT SUPERVISOR/GRAPHIC DESIGNER**

#### **Garden City Group, 2000-2004**

Designed comprehensive range of marketing materials. Coordinated services between graphic design, marketing, and business operations. Managed a team of project administrators to deliver consistent management of projects.

- ▶ Led the design and delivery of two lending products featuring electronic signature functionality improving the credit delivery cycle by 15 business days (Bank of America, 2016)
- ▶ Implemented a strategic framework to support the integration of products and services following acquisition of boutique lending practice (Bank of America, 2015)
- ▶ Implemented a mentoring program to develop talent and increase project delivery capabilities of the organisation. (Bank of America, 2014)
- ▶ Developed and implemented training to improve compliance with project risk assessment requirements, resulting in a compliance rate increase of 45%. (Bank of America, 2013)
- ▶ Designed a framework to deliver risk management training to onboarding project managers resulting in a 33% increase in consistency in risk management across a project delivery portfolio. (Bank of America, 2012)
- ▶ Implemented strategies to increase transparency and improve compliance with new mortgage regulations following the 2008 Mortgage Crisis, resulting in the resolution of six audit issues. (Bank of America, 2012)
- ▶ Led 50-member design teams in the successful development of consumer products targeted exclusively to high net worth clientele. (Carlisle and Gallagher Consulting, 2011)
- ▶ Led an exploratory pilot study to understand strategies for improving customer loyalty and satisfaction. Study resulted in a strong business case for expanding efforts in six focus areas. (Carlisle and Gallagher, 2010)
- ▶ Developed and implemented a reporting protocol to enable rapid reporting of operational risk that resulted in 30% decrease in response time. (Carlisle & Gallagher Consulting – 2010)
- ▶ Led the development of a program to improve capabilities for associates to identify Anti-Money Laundering activities. (Carlisle & Gallagher Consulting, 2010)
- ▶ Managed successful planning and execution of new technology rollout to all US retail outlets by steering collaboration of focus group leaders, design architects, legal, operations, and deployment teams. (Carlisle and Gallagher Consulting, 2009)
- ▶ Managed \$3M Image Technology product pilot program whose success led to immediate deployment throughout entire US system. (Sherpa, LLC, 2007)
- ▶ Successfully researched, developed, introduced, and rolled out four high-visibility products that effectively retained high-revenue clients during and following major corporate acquisition. (Sherpa, LLC, 2007)

## CERTIFICATIONS

**Six Sigma Green Belt** – Central Piedmont Community College, 2008

**Certificate in Executive Coaching** – Queens University of Charlotte, 2015

**Immunity to Change Workshop Facilitator** (Kegan & Lahey, 2009) – Diamond Consulting Group, 2015

**DiSC & Values Assessment Communication Coach** – International Coaching Federation and Carolina Business Coach, 2016