

# DANI CHESSON, PH.D.

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Dr. Dani Chesson combines design capabilities and change methodologies with the latest research in neuroscience to help organizations design and drive transformational change. A consultant in the financial services industry, Dani has worked with international banks and Fortune 50 companies around the globe including: Bank of America, HSBC, Westpac, Bank of New Zealand, IAG, and ASB Bank. Dani has 15 years of experience leading geographically dispersed virtual teams through large-scale change efforts. As a faculty member, Dani brings her real-world experience into the classroom to create engaging and interactive learning experiences. As an Affiliate Faculty Member at Antioch University, Dani teaches and mentors doctoral students in research methodologies. Dani is also an Adjunct Faculty Member at University of Denver where she teaches graduate level courses in organizational development, transformational change, diversity & inclusion, and strategic planning. As a researcher Dani continues to explore how Design Thinker capabilities enable solving complex challenge and navigating change.

Dani holds a Bachelor of Arts in Visual Communications with a focus on graphic design. She holds a Master of Science in Business Administration and a Master of Science in Organizational Development from Queens University of Charlotte where her research focused on how designers approach problem solving. As part of her graduate work, Dani also completed a Certificate in Executive Coaching and explored coaching as a technique for preparing teams for change. In 2017, Dani earned her PhD in Leadership and Organizational Change from Antioch University where her research involved identifying and statistically validating the capabilities that enable design thinking. Her research resulted in the Design Thinker Profile – a validated assessment for measuring design thinking capabilities.

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## EDUCATION

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

Antioch University 2017

- Dissertation research focused on identifying and statistically validating the capabilities that enable Design Thinking. The study resulted in the creation of the Design Thinker Profile – a validated assessment for measuring Design Thinking capabilities.
- 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.
- Trained in mixed-methods research (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 professionals and the skills needed for creating new solutions.

**TEACHING  
AND LEARNING  
FACILITATION  
EXPERIENCE**

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.
- 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).

**Adjunct Faculty**

Masters in Organization Leadership, Strategic Innovation & Change  
University of Denver, Denver Colorado, 2019 – Present

- Design and facilitate interactive virtual learning experiences for graduate students. Session topics included: Design Thinking Tools for OD, Leading Through the Change Curve, The OD Process a Case Example.
- Facilitate asynchronous weekly discussions on the applications of theory in real-world practice.
- Developed engaging materials and resources for students including mini-lecture videos, activity worksheets, and online collaborative exercise.
- Course Redesign:
- Committee Work: In response to the Covid-19 pandemic and traditional classroom teaching moving online, the Online Teaching Ambassador Committee was created. The purpose of this committee was to rapidly design a course for faculty to teach them how to facilitate engaging and interactive classes in the virtual classroom.

**Affiliate Faculty**

PhD in Leadership & Organizational Change  
Antioch University, Yellow Springs, OH, 2018 – Present

- Developed a curriculum to help doctoral students build a foundational understanding of statistics in quantitative research.
- The curriculum developed included a three session synchronous series focusing on understanding concepts and the language of statistics
- Created a Master Class for students that needed a refresher or review of foundational concepts in quantitative research

- Served as a faculty mentor working one-on-one with students in a deep exploration of their chosen research method – this mentoring is a requirement for students moving into candidacy

**Part-Time Contract Lecturer**

Diploma in Business Administration (Level 6 and Level 7)  
New Zealand College of Business, Lincoln, New Zealand, 2017 - 2018

- 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.

**PUBLICATIONS**

Chesson, D. (2021). The ethics of design. In E. Elgar (Ed.), *Mastering Ethics in Organizations* (pp. xx-xx). Cheltenham, UK. (Publication due September 2021)

Chesson, D. (2020). Design Thinker Profile: Capabilities for Overcoming Barriers to Change. *Organization Development Journal*, 38(2).

Chesson, D., Steen, R., & Vinard, A. (2020). There is No “I” in Core: Scientists and Administrators Talk. *Journal of Biomolecular Techniques: JBT*, 31(Suppl), S42.

Chesson, D., Kusy, M. (2019). Design Thinker Profile: Capabilities for Driving Change in Healthcare. *Journal of Medical Practice Management*, (Nov/Dec 2019).

Chesson, D. (2018). Meeting 21st Century Organizational Challenges with Design Thinking. *Organization Development Journal*, 36(3).

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

## PRESENTATIONS

### **There is No “I” in Core**

The Association of Biomolecular Research Facilities, Palm Springs February 2020  
Session on the importance of Design Thinking capabilities to facilitate teamwork in core sciences. ([Link](#))

### **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](#))

### **Virtual Training for Application Processing Team**

Hyderabad and Bangalore, India, HSBC, 2007  
Delivered the opening session for newly hired frontline teams, presenting the purpose, mission and vision of the organization and their individual roles.

### **Understanding Our Team Strengths**

Bank of America, 2015  
Designed and delivered an engaging virtual presentation to leadership teams on how to leverage team strengths to drive organizational outcomes based on StrengthFinders 2.0 assessment.

### **Project Management Best Practices**

Bank of America, 2012-2014  
Presented at project management forum on best practices for effectively delivering projects while managing risks.

## EXECUTIVE MANAGEMENT EXPERIENCE

### **ORGANIZATION DEVELOPMENT LEAD – TALENT EXPERIENCE**

#### **ASB BANK, 2021 - Present**

Responsible for the bank’s end-to-end talent lifecycle which includes attraction, acquisition, development, progression, and retention.

### **FOUNDER & PRINCIPAL CONSULTANT**

#### **DESIGN THINKER INSTITUTE, 2010 – Present**

Conducting research to help organizations understand how to unleash their human capabilities to drive strategic outcomes. Develop various leadership development programs for client organizations to support new leaders adapt to the next level of their careers. Supported leaders navigate emerging challenges through one-on-one executive coaching sessions leveraging strength based and cognitive based coaching methods.

### **VICE PRESIDENT, SMALL BUSINESS LENDING PRODUCT STRATEGY**

#### **Bank of America, 2014-2017**

Led the development and implementation of strategies to support the delivery of new products and services to market. Established product metrics and launching market response strategies for low performing products. Assembled cross-

functional teams to gather data, perform analysis, and design solutions. Created talent development programs to increase change management capabilities within the change management team.

**ASSISTANT VICE PRESIDENT, REGULATORY COMPLIANCE**

**Bank of America, 2011-2014**

Led the planning and execution of regulatory compliance change initiatives impacting cross-functional business operations. Ensured compliance with regulatory agencies by analysing business processes, developing strategies, and establishing routines to manage regulatory reporting. Managed the mobilization of project teams to support project execution.

**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 2007-2009**

Managed organisational readiness assessments supporting the implementation of technology change initiatives to meet regulatory compliance. 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

**MARKETING COORDINATOR/GRAPHIC DESIGNER**

**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.

**HIGHLIGHT OF  
CORPORATE  
ACHIEVEMENTS**

- ▶ Developed a framework to support frontline employees to understand and comply with privacy and data protection laws. ~Bank of New Zealand, 2020

- ▶ Designed and delivered a development program to support frontline employees take a human-centered approach to caring for customers experiencing financial hardship. ~Westpac, NZ 2019
- ▶ Redesigned training programs for frontline employees in the lending space using a customer-centric framework that moved away from sales goals and instead focused on creating best customer outcomes. ~Bank of America, 2011
- ▶ Led the embedding of human-centred design practices within product management teams to align with the organization's strategic priority to be a customer-led bank. Developed the capability roadmap and worked with product teams to operationalise design practices. ~Bank of America, 2016
- ▶ Designed the capability building program that enabled 300+ frontline employees to transition into digital ways of working. Helped drive the development of cultural competencies that enabled teams across the globe to work collectively in delivering customer outcomes. ~ HSBC 2007
- ▶ Led the redesign of the sales and service delivery business model to align with the organization's strategic priority to be customer-led. This change resulted in \$3M operational cost savings per annum and a 15% reduction in customer complaints. ~Bank of America, 2015
- ▶ Led the design and implementation of a programme to build change management capabilities within the organization. After a 6-month pilot the program generated 4 candidates that were officially moved into change management positions. ~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 frontline teams' capabilities for associates to identify Anti-Money Laundering activities. (Carlisle & Gallagher Consulting, 2010)

## 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