

Dani Chesson, PhD

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Quantitative Research Methods | Human-Centred Design | Behavioural Science

As a researcher, my career has been anything but traditional. My first exposure to research was as a management consultant, where I used survey-based research to help clients understand their customers. In this role, I became fascinated with the idea that within each dataset was a story, and analytical methods were the key to unlocking the stories – this sparked a curiosity to learn more about research. After gaining practical industry experience in research, I decided to pursue tertiary qualifications in research. I trained in mixed-methods research, learning to blend quantitative and qualitative methods. My research background is complimented by my background in human-centred design and behavioural science as it allows me to turn insights into actions.

Software Skills: Qualtrics, SurveyMonkey, MS Forms, SPSS, MiniTab, AMOS, MAXQDA, Condense, Dovetail, Optimal Workshop

Data Collection Methods: survey, interview, focus groups, action research, participatory research

Data Analysis Methods: quantitative – correlation, regression, factory analysis, qualitative – thematic, situational, narrative

RESEARCH RELATED EXPERIENCE

Organisational Research (project consultant) | Fonterra | Apr 2024 – Jul 2024

To understand the needs, wants and pain points of the aging workforce, I designed the research protocol to carry out interviews with individuals approaching retirement age. Findings from this research were used to inform employee experience improvement initiatives.

Research Lead (contract) | Te Whatu Ora, Health New Zealand | August 2022 – June 2024

In this role I had two main responsibilities. First was to lead research needs across various programmes of work. The second was to establish research capabilities within the Design Practice for Digital Sector Channels.

- **Consumer Whānau Research:** Led the nation-wide research project to understand the views, expectations, and barriers when it comes to accessing digital health technologies. Co-designed the research approach to meet the needs of diverse communities across NZ. Established research protocols for obtaining informed consent, analysing data, and sharing insights. Findings from this research have been used to inform the development of digital technologies within the health system.
- **Establishing Research Capabilities:** Enabled programmes to carry out research in communities in a coordinated and cohesive way. The scope of this work included establishing consistencies in informed consent, data storage, collection methods, analysis methods and tools, as well as collaborative practices across programmes of work.
- **Healthcare Provider Research:** Developed the research plan and approach to conduct research with healthcare providers across New Zealand. This qualitative research used semi-structured interviews to understand the experiences of healthcare providers specific to the challenges they face in accessing patient information and its impact on healthcare outcomes. The research findings were used to develop healthcare provider personas that informed the technical design of systems.

Research Consultant (project consultant) | Public Trust | Feb 2023 – Jun 2023

Supported the HR team in developing the research process and interview guide to carry out research within the organisation to develop the employee value proposition. Coached team members in how to carry out empathy interviews. Analysed data to identify key themes to formulate the employee value proposition.

Organisation Development Lead – Talent Experience | ASB Bank | Mar 2021 – April 2022

Carried out empathy interviews, discovery workshops, and survey data analysis to inform improvements to the talent experience.

- **The People Dashboard:** Carried out empathy interviews with stakeholder to understand pain points with current reporting and future needs, then worked with data analyst to design a monthly dashboard to meet stakeholder needs.
- **Insights Driven Initiatives:** Enabled the funding and prioritisation of people related initiatives to be driven by insights. Analysed engagement survey, exit survey data, and held focus groups to identify hot spots for improvement. The analysis was combined with industry research to provide recommendations for funding prioritisation.
- **The Talent Experience** Held discovery research sessions with talent across the business to understand their current experience. Carried out design workshops to develop talent experience journey.

Senior Change Manager (contract) | Westpac NZ | Oct 2018 – Jul 2019

Partnered with the Customer Experience Lead to co-design the employee experience to deliver the customer experience to support customer going through financial hardship. Conducted focused groups with customer-facing employees and interviews with customers impacted by financial hardship to understand needs, wants, and pain points.

Affiliate Faculty in Research Methodology (part-time) | Antioch University | 2018 - 2025

As a member of the faculty at Antioch University's PhD programme, I have two roles in helping doctoral students develop their quantitative research capabilities.

- **Intro to Quantitative Statistics:** This is a programme I developed to help first-year doctoral students build a foundation in quantitative research statistics.
- **Methodology Supervisor:** Third-year doctoral students who are approaching pre-candidacy require supervision as they work to gain proficiency in their chosen research methodology. In this capacity, I work with students to design their research project, develop their research approach and plan, and supervise their research from data collection through to analysis.

Vice President, Small Business Lending Product Strategy | Bank of America | Apr 2014 – Feb 2017

Conducted quantitative and qualitative research to understand customer pain points and expectations. Insights from analysis informed the prioritisation and funding of enhancement initiatives. Insights from this research informed programmes of work such as

- **Digital Signature for Lending:** Physically signing loan documents was identified as a key pain point for small business customers. Based on customer insights, introduced digital signature within the lending process which reduced the new lending application cycle. In 2017, this was the first instance of this technology to be introduced at Bank of America.
- **CX Redesign:** The product-based sales operating model was confusing for customers and presented a barrier for customers wanting to bundle products. Carried out discovery workshops to understand the desired state for customers and based on these insights developed a proposal for moving away from product-based value streams to customer-based value streams. Set up a pilot to test this new approach with clear metrics, success of the pilot, led to approval for a full rollout.

Assistant Vice President, Regulatory Change | Bank of America | Sep 2011 – Apr 2014

Led the transformation of home loan processes to align with regulatory changes introduced following the global financial crisis.

Planned and carried out community research to understand the impacts of new regulations on communities.

- **Simple Language Loan Documents:** Insights from research informed redesigning loan documents to be customer friendly.
- **Best Customer Outcomes Training:** Redesigned lender training to focus on creating positive customer outcomes.

Senior Management Consultant | Carlisle & Gallagher | Oct 2009 – Sept 2011

Gathered customer experience data through surveys. Analysed data to develop recommendations for viable product options. Specific programmes of work supported:

- **Customer Loyalty Programme:** This work looked at identifying the key motivators that drive loyalty and retention.
- **Platinum Rewards:** This research was commissioned by a retail financial institution to understand the viability of introducing a tiered rewards program for high value customers. Findings informed the launch of a nationwide pilot.

EDUCATION

Post-Doctoral Studies in Applied Behavioural Economics | 2023 | Texas A&M University Human Behaviour Laboratory |

Experimental research design for shaping behavioural change.

PhD Organisational Leadership and Change | 2017 | Antioch University

Mixed methods research, survey design, scale development. Supervised research projects included: narrative inquiry of educators in the charter school system; phenomenological research of small business owners during the global financial crisis; mixed-methods survey to explore problem solving capabilities within organisations. Thesis identified and validated a scale for measuring design thinking capabilities in the context of problem solving.

Master of Science in Organisational Development | 2015 | Queens University of Charlotte

Focus area behavioural science, capability development, research methods. Completed a 30-hour supervised practicum in coaching for behavioural change. Supervised research projects included: Exploratory research to understand the work patterns of design professionals; qualitative survey research using critical incident theory to explore the emergency design capabilities in problem solving.

Master of Science in Business Administration | 2012 | Queens University of Charlotte

International study to explore business climate, cultural and leadership challenges in South Africa, Singapore, and China.

Bachelor of Arts in Communication – Graphic Design | 2005 | State University of New York, Farmingdale

Concentration in graphic design and web site development.