

# CURRICULUM VITAE

## Melissa A. Norcross

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## EDUCATION

### Ph.D., Values Driven Leadership

Benedictine University, Center for Values-Driven Leadership, Lisle, IL (2018), Dissertation: Developing a Measure for Humble Team Culture and Exploring Its Impact on Performance.

### M.B.A., Business

Harvard Business School, Boston, MA (1998), Second year honors.

### B.S., Chemical Engineering

Massachusetts Institute of Technology, Cambridge, MA (1991), Minor in Literature. Awarded Scholars' Prize for Humanities and Social Sciences. 4-year rowing varsity crew member.

### Continuing Education:

Appreciative Inquiry Certificate, Benedictine University (2016). Trained by J. Ludema.

MITx, Big Data (2015)

MITx, Cybersecurity (2015)

University of Chicago, Executive Course for CFOs (2013)

**Languages:** native English; functional French; rudimentary Polish and German.

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### Teaching Interests

Leadership and Management - Strategy - Applied Ethics - Organizational Change  
International Business and Leadership - Process Improvement - Strategic Planning

### Research Interests

Team Humility, Humility in Leadership, Positive Organizational Scholarship, Business Ethics, Values-Driven Leadership, Effective Team Performance, Values-Profit-Performance Connection, Collaborative Leadership, Corporate Social Responsibility, Appreciative Inquiry.

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## PROFESSIONAL EXPERIENCE

### Ad Lucem Group, Optimus Partners, LLC & Eighty Twenty, San Antonio, TX (Independent management consulting firms with clients from Fortune 100 to startups and non-profits.)

#### Co-Founder and Strategic Advisor, 11/2016 – Present

Strategic and operational consulting advisory services for businesses looking to dramatically improve financial performance while improving workforce engagement and doing good in the world.

- Led large scale change initiatives improving response times by up to 50% and customer satisfaction by 15%+.
- Architected transformation of product and technology organization at Global Fortune 100 company with full due diligence, plan of action and go-forward technology strategy in support of CTO. Achieved targets in under 9 months.
- Provided data-based, due diligence-level team and project assessments to structure the turnaround of product development and unlock 80% more innovation capacity for a healthcare company.
- Led workshops producing innovative strategies that boosted employee engagement and delivered 40% growth for mid-sized technology company, while enhancing their cybersecurity posture.
- Facilitated strategy summits for 80+ participants at a large power company delivering operational improvements speeding implementation and boosting efficiency by 20%+, all while increasing employee retention by 10%+.

**The Councils – Collaborative Gain**, New York, NY

(Peer-to-Peer Executive Network)

**Executive Council Moderator & Moderator Manager, 04/2007 – Present**

Sharpen leadership skills and business capabilities of executives by building and managing C-level peer-learning groups. Forge environment of trust, enabling exchange of proprietary information on best practices and latest insights on strategy, operational performance, and customer experience.

- Delivered measurable performance gains for clients and client companies, resulting in consistently top-ranking net promoter score of 90-100 from CEO Council members.
- Improved operational performance of client companies by working with CEO members to leverage knowledge gained from their peer relationships into profit-generating strategies.

**Hyland Software**, Westlake, OH

(Leading software provider of enterprise content management platforms)

**VP, Corporate Strategy & Planning, 08/2022 – 01/2026**

Identified areas of strategic opportunity, setting clear priorities that drove growth and established focus.

- **Strategy:** Identified new areas of opportunity that expanded target addressable market from \$5B to \$16B and raised the intrinsic growth rates by more than 15%. Analyzed internal and external data, to set priorities for target geographies and growth initiatives, while maintaining 97% retention.
- **Market Analysis:** Redefined market segmentation, implementing a highly structured data-based proprietary approach, that undergirded strategy and shifted the focus of 60% of product development.
- **Competitive Intelligence:** Streamlined and automated intelligence gathering, enabling greater analysis and support and growing competitors tracked from 25 to 75+ despite 20% reduction in team. Delivered insights that shaped advisory firm IT benchmark rankings, moving them into higher tiers.
- **Environmental, Social & Governance (ESG):** Crafted first-ever ESG strategy, establishing ESG goals, targets, policies. Navigated ever-changing regulatory and customer requirements to unlock \$10M+ in sales, lower debt costs, achieve top quartile audit results, and earn EcoVadis certification.

**USAA**, San Antonio, TX

(Financial services company offering banking and insurance products to US military-affiliated members)

**Executive Director, Strategy & Planning, 02/2019 – 07/2022**

Built highly diverse team of experts, providing fact-based insights to drive critical business decisions.

Established highly efficient, seamlessly executed, repeatable processes that:

- **Strategy:** Delivered mission-critical strategy work, providing actionable insights for Line of Business General Managers that drove 2x industry growth.
- **Competitive Intelligence:** Led competitive and business analysis, translating competitive, market, consumer, segmentation, economic and financial insights into strategic decisions and operational improvements that increased speed to market and pricing precision, driving profitable growth by 11%.
- **Strategic Planning:** Produced 3-year Integrated Strategic Plans, ensuring executive alignment and compliant, cohesive board-level artifacts that cascaded to operational plans with supporting KPIs, dashboards, and division targets. Model set the standard across USAA's business units and functions.
- **Governance:** Streamlined strategy governance and operating rhythms in line with Board timelines and standards that accelerated goal attainment and met 100% of newly added risk and compliance requirements, while reducing management meetings by 25+%.
- **M&A / Innovation:** Identified and prioritized acquisition opportunities, with data-based weighted model and build-buy-partner decision criteria. Effectively narrowed field of hundreds of acquisition targets to three well-defined target areas. Laid groundwork for a divestment, two external consulting partnerships, and internal lab relationship that improved innovation ROI and speed to market by 30%.
- **Transformation:** Directed talent strategy for \$600+M division with over 2200 staff. Strengthened employee engagement and culture programs, raising eNPS 10%+ despite recent divestiture. Actively mentored 30+ staff across the organization, and architected forums to share best practices and raise the strategic capabilities and competencies across business units.
- **Business Architecture:** Established Business Architecture discipline, meeting governance and regulatory requirements with 40% less effort than forecasted, while improving strategy realization.

**United States Naval Academy**, Annapolis, MD

(Four-year service academy providing higher education and research for the U.S. Navy and Marine Corps)

**Post-Doctoral Fellowship - Class of '67 Leadership Research Fellow, 07/2018 – 01/2019**

Developed leadership and ethics concepts in collaboration the academic cadre of the Naval Academy.

- Published research and academic papers on team performance, leadership development and organizational change.
- Developed partnerships with other academic and research institutions that shared a focus on leadership capability development.
- Conducted team-based research focused on understanding the drivers of sustainable, exemplary performance.

**Finvi (formerly Ontario Systems)**, Muncie, IN

(Software system provider for revenue cycle management in financial services, healthcare & government)

**VP & Chief Strategy Officer, 05/2015 – 12/2017**

Transitioned from perpetual to software as a service (SaaS) subscription-based model, recapitalized under private equity partners, and acquired the largest competitor.

- Managed post-recapitalization company-wide initiatives to improve profitability of the business and growing EBITDA by 50% while supporting revenue growth of 35%.
- Acquired and successfully integrated the largest competitor, creating a combined business adding \$32M to the existing \$55M business.
- Successfully transitioned business planning processes and cash constraints to make the transition to a primarily SaaS-based go-to-market model.

**VP, Finance & Strategy, 02/2013 – 04/2015**

Drove the financial growth of the business from \$37M to \$55M (59%) in total revenues through a period of near financial distress and recapitalized it under private equity. Simultaneously grew earnings by 79%.

- Led M&A initiatives that successfully recapitalized the business under new private equity financing.
- Restructured the business, provided critical leadership, and tightened financial management. Cut the cost structure by over 20%, realigned workforce, and returned company to debt covenant compliance.
- Established finance and strategy processes for the business including financial controls, frameworks, operational data requirements, and decision-making structures reducing time to close by 8 days.
- Added discipline and rigor by augmenting decision-making across the business with newly developed analyses, dashboards, and data-driven profit-based reports.

**VP, Strategy & Business Development, 12/2010 – 1/2013**

Identified and developed new partnerships to act as productivity and profitability multipliers. Provided leadership in determining the forward-looking strategy for both existing products and new markets.

- Established strategic partnerships in telephony, data analysis, and business services that redefined the technology base and cost structure of the business.
- Integrated competitive market and consumer trend analysis into decision-making process of the business including managing the collection, evaluation, and dissemination of information on rapidly changing competitive, regulatory, and partner positions.
- Collaborated with industry and federal entities to understand and respond to the evolving landscape.

**Homeschool, Canada & France**

**Teacher, 02/2000 – 09/2010**

Designed and administered homeschool program for three children with differing educational needs, while simultaneously supporting their development of fluent French, through grade six. All three successfully transitioned into challenging academic formal school settings with well-developed social skills and above-grade level capabilities.

- Researched a variety of curriculum, ultimately creating a unique pedagogy designed to meet the needs of each student and maximize engagement and knowledge acquisition.

- Designed and implemented a rigorous program that provided sufficient academic challenge for a Genius-level IQ while simultaneously accommodating learning challenges associated with severe ADHD, delayed speech development, and motor skill deficits.
- Sought out and integrated the skills of experts with unique capabilities and supplemental specialized programs to augment learning and growth opportunities.

**McKinsey & Co.**, Warsaw, Poland

(Premier global management consulting firm serving the world's leading companies)

**Senior Associate, 07/1999 – 01/2000**

Charged with critical HR components of multifaceted project designed to turn around an underperforming bank. Achieved "impossible" profit results through organizational and operational improvements.

- Restructured organization to reduce costs, improve operations and enable profitability.
- Developed a data-driven dashboard that facilitated an analytical approach to HR by using key metrics to strengthen workforce planning.
- Learned the Polish language from zero in order to build relationships and operate in native language.

**Integral**, Cambridge, MA & Cambridge, UK

(Academic-based management consulting firm specializing in innovation and operations strategy)

**Engagement Manager, 04/1993 – 06/1999**

Launched new UK office as member of 3-manager team with strategic, operational, and P&L accountability. Steered product development planning process for clients in multiple industries.

Trained new analysts and associates in proprietary methodologies. Managed case teams in the US and UK simultaneously. Promoted from analyst to associate to manager prior to earning MBA, an industry rarity.

- Delivered 80% of UK office's total revenue, achieving 100% customer satisfaction, and consistently selling follow-on work to produce \$250K in monthly billings.
- Invented portfolio planning methodology for Fortune 100 pharmaceutical client.
- Delivered proprietary valuation strategy that accurately identified high-potential products.
- Achieved 30%-50% overhead cost savings for manufacturer by creating a coherent operations strategy.

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## BOARD ADVISORY ROLES

**Amedea Pharma**, Westbury, NY

(Technology-driven pharmaceutical, medical affairs and strategic planning consultancy)

**Board Member, 04/2023 – Present**

**Medical Innovation Olympics**, Westbury, NY

(Global innovation competition focused on high-impact technology-driven healthcare innovation)

**Board Advisor, 04/2023 – Present**

**Girls on Wall Street**, Chicago, IL

(Student-led non-profit equipping middle-school girls with foundational literacy in business and finance)

**Board Member, 09/2025 – Present**

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## TEACHING

### **Courses**

Naval Postgraduate School: "*Strategic Management*" Online, Fall & Winter, 2019–Present. Masters level course. Student course evaluations average 4.8/5.

World of Business Reading Group: "Business Insights via the Berkshire Hathaway Shareholder Letters of Warren Buffett", Online, 2020–Present. High School, Undergraduate and Adult pro-bono courses.

MIT xPRO / EMERITUS Institute of Management: "*MIT Artificial Intelligence for Senior Executives Program*" Online, 2023–Present. Course Leader and Learning Success Coach.

MIT xPRO / EMERITUS Institute of Management: "*MIT Chief Operating Officer Program*" Online, 2022–Present. Learning Success Coach.

MIT Sloan Executive Education / EMERITUS Institute of Management: "*Leading High Velocity Organizations*" Online, Spring, Summer, Fall & Winter, 2022–Present. Learning Success Coach. Student evaluations average 4.2/5.

MIT Sloan Executive Education / EMERITUS Institute of Management: "*Smart Teams*" Online, 2020–2021.

Emeritus Institute of Management: "*Leading Organizational Change*" Online, Spring, Summer, Fall & Winter, 2018–Present. Student course evaluation scores among the highest for the program, consistently above 4.6/5.

Eruditus Executive Education: "*HR: Organizational Change and Transformation*" Online, Winters 2018 & 2019.

Emeritus Institute of Management: "*HR Data & Analytics*" Winter 2018, Winter 2019.

Universidad Panamericana, International Business Undergraduate Summer Course: "Strategy" with P. Farran, Aquescalientes, Mexico, Summers 2017 & 2018.

### **Other**

Homeschool, Pre-School through Grade Six, 2000-2010, St. Catharines, ON, Canada & Strasbourg, France.

## PUBLICATIONS

### **Book**

Norcross, M. & Farran, P. (2025). *The Intentional Executive: A Purpose-Driven Playbook to Transform Your Leadership, Your Team, and Your Results*.

### **Dissertation**

Norcross, M. (2018). *Developing a Measure for Humble Team Culture and Exploring Its Impact on Performance* (Doctoral dissertation). Benedictine University, Lisle, IL.

### **Book Chapters**

Farran, P. & Norcross, M. A. (2020). "*Improving Engagement During Times of Change*" in *The Palgrave Handbook of Workplace Wellbeing*. Dhiman, S. (Eds). Palgrave McMillan, Cham.

Norcross M.A., Farran P. (2020). "*Improving Engagement During Times of Change*" in *New Horizons in Positive Leadership and Change: A Practical Guide for Workplace Transformation*. Dhiman S., Marques J. (Eds). Springer, Cham.

Norcross, M. A. & Manning, M. (2019). "Humility as an Enabler of Organizational Growth and Change" in *Research in Organizational Change and Development*. Shani, A. B. & Noumair, D. A. (Eds). Emerald Group Publishing Limited.

Manning, M. & Norcross, M. A. (2018). "Eliciting Group Affect and Emotive Tone: The Mads, Sads, and Glads, Exercise" in *Preparing for High Impact Change: Experiential Learning and Practice*. Adams, S. Buono, A. & Schwarz, G. (Eds.). Cheltenham, UK: Edward Elgar.

### **Papers**

Norcross, M. A. (February 2019). "The Power of Enabling Humility in Teams." *Journal of Character and Leadership Development*.

Norcross, M. A. (2018). "Humility as a Foundational Strategic Capability." *International Society for the Study of Work & Organizational Values*, Trieste.

### **Blog Posts**

Norcross, M. A. (2019). The "Real Work" of Work. Center for Values-Driven Leadership, Benedictine University, Lisle, IL.

Johnson, A. A. (November 27, 2017). [Books for Women in Leadership: Recommended Book List](#). Center for Values-Driven Leadership, Benedictine University, Lisle, IL.

Norcross, M. A. (August 3, 2015). [Become a Storyteller and Boost Your Bottom Line](#). Center for Values-Driven Leadership, Benedictine University, Lisle, IL.

## **ACADEMIC CONFERENCES**

Symposium Presentation: "Humility as an Enabler of Organizational Growth and Change," with Michael R. Manning. Annual Meeting of the Academy of Management, Boston, MA 2019.

Symposium Presentation: "How A Humble Leader Can Improve Performance." International Leadership Association, West Palm Beach, FL, 2018.

Symposium Presentation: "The Impact of Humility" as part of the symposium, "Virtues-Based Leadership, Personalism, Humility, and Loosely Coupled Systems," International Society for the Study of Work & Organizational Values, Trieste, 2018.

Symposium Presentation: "Responding with Humility in a Dog-Eat-Dog Culture" as part of the symposium, "Case Studies in Radical Leadership Responses to Turbulent Times (Spoiler Alert: They're not what you Expect.)," International Leadership Association, Brussels, 2017.

Symposium Presentation: "Humble Leaders in Turbulent Times" as part of the symposium, "Humility + Compassion = More Impactful Leadership for Turbulent Times," International Leadership Association, Brussels, 2017.

Panel Moderator: "Building a Diverse Technology Community," Indy Women in Technology Conference, Indianapolis, September 2017.

Symposium Presentation: "Keep your Eye on the Values: Honesty is the Profitable Policy" as part of the symposium, "Culture & Values: Common Ground in a Diverse Workforce," International Leadership Association, Atlanta, 2016.

Symposium Presentation: "*MISO Energy: A Case Study in Utilizing Appreciative Inquiry to Achieve 'Amped-up' Leadership*," with P. Farran and K. Seale, Indiana University Tobias Leadership Engagement and Discovery Conference, Indianapolis, 2016.

## **RESEARCH, CONSULTING AND RELATED PROFESSIONAL PRACTICE**

Workshop (three days): "Practical Applications of AI for Organizational Success" General Management Summit, Collaborative Gain Councils, Chicago, IL, September 2025.

Workshop (three days): "Failing Well" General Management Summit, Collaborative Gain Councils, Boston, April 2025.

Workshop (three days): "Transformative Change Leadership" General Management Summit, Collaborative Gain Councils, Los Angeles, September 2024.

Workshop (three days): "Leveraging AI for Transformative Change" General Management Summit, Collaborative Gain Councils, Philadelphia, April 2024.

Workshop (three days): "Crowdsourcing Leadership Help" General Management Summit, Collaborative Gain Councils, La Jolla, October 2023.

Workshop (three days): "Best Practices for Business Leadership" General Management Summit, Collaborative Gain Councils, Chicago, April 2023.

Workshop (three days): "Positive Politics" General Management Summit, Collaborative Gain Councils, La Jolla, September 2022.

Workshop (two days): "The Future of Work" General Management Summit, Collaborative Gain Councils, Chicago, April 2022.

Workshop (two days): General Management Summit, Collaborative Gain Councils, Chicago, October 2021.

Workshop (two days): "Upskilling the Workforce" General Management Summit, Collaborative Gain Councils, Virtual Meetings, April 2021.

Webinar Series (four days): "Driving Growth in a Remote Reality" General Management Summit, Collaborative Gain Councils, Virtual Meetings, Fall 2020.

Webinar Series (two months): "Leaning into a New Reality: Organizational Transformation and Resilience" General Management Summit, Collaborative Gain Councils, Virtual Meetings, Spring 2020.

Workshop (two days): "Digital Transformation and Organizational Shifts" General Management Summit, Collaborative Gain Councils, Chicago, October 2019.

Workshop (two days): General Management Summit, Collaborative Gain Councils, San Francisco, April 2019.

Workshop (two days): CTO General Management Summit, Collaborative Gain Councils, Austin, October 2018.

Workshop (two days): CTO Summit, Collaborative Gain Councils, Minneapolis, April 2018.

Workshop (two days): CTO Management and Leadership Summit, Collaborative Gain Councils, San Francisco, October 2017.

Workshop (two days): "Appreciative Inquiry Summit: Creating the Finance of the Future" with P. Farran, at Ontario Systems, Muncie, Indiana, May 2017.

Workshop (two days): "Developing a Culture of Getting the Right Things Done," CTO Summit, Collaborative Gain Councils, Chicago, April 2017

Workshop (two days): "Appreciative Inquiry Summit" with A. Johnson and P. Farran, at Magnetrol, Chicago, April 2017.

Workshop (three days): "Appreciative Inquiry Summit: Amped Up Automation" with J. Ludema, P. Farran, and A. Johnson at MISO Energy, Indianapolis, February 2017.

Workshop (two days): "Appreciative Inquiry Leadership Summit," with J. Ludema, P. Farran, and A. Johnson, at MISO Energy, Indianapolis, January 2017.

Workshop (two days): "Technology Leadership" CTO Summit, Collaborative Gain Councils, New York, October 2016.

Workshop (two days): "Leading and Managing Growth" CEO & GM Summit, Collaborative Gain Councils, April, San Francisco 2016.

Workshop (two days): CEO & GM Summit, Collaborative Gain Councils, Chicago, October 2015.

Workshop (two days): CEO & GM Summit, Collaborative Gain Councils, San Francisco, October 2007-2014.

Workshop (two days): CEO & GM Summit, Collaborative Gain Councils, New York, April 2007-2015.

Consulting (seven months): Restructure of Organization, McKinsey, Bank, Warsaw Poland, 1999-2000.

Consulting (four months): Innovation & Portfolio Management Methodology, Integral UK, Telecommunications Conglomerate, South Africa, 1999.

Consulting (eight months): IT Project Planning, Integral UK, Multinational Bank, London, 1998-9.

Consulting (six months): Strategic Portfolio Management Methodology, Integral UK, Pharmaceutical Multinational, Switzerland, 1996.

Consulting (fourteen months): Redesign of Research, Innovation and Product Development Approach, Integral UK, Consumer Products Multinational, Western Europe, 1995-6.

Consulting (three months): Project Planning Restructure, Integral, Oil Producer, Canada, 1994-5.

Consulting (ten months): Strategic Product Development Assessment and Restructuring, High Technology Hardware Company, Austin Texas, 1993-4.

## **KEYNOTES, WORKSHOPS AND CONFERENCES**

Speaker: "*Disrupting Yourself*," Women Working in Technology Conference, Muncie, IN, March 2014.

## AFFILIATIONS

### **Professional Affiliations**

International Leadership Association  
MENSA (Lifetime Member)  
Society of Business Ethics (Lifetime Member)  
Society of Women Engineers (Lifetime Member)  
Collaborative Gain Councils (since 2007)  
International Society for the Study of Work and Organizational Values (Lifetime Member)

### **University Affiliations**

William Barton Rogers Society / Leadership Circle, MIT Alumni Association  
Association of MIT Alumnae  
Harvard Business School Donor and Women's Circle Member  
Michigan Technological University, Donor and Fundraiser, Skate Rental Program  
MIT, Donor, Alumni Volunteer and Fundraiser, former Crew Board Member

### **Community Service**

FIRST Robotics Mentor  
Active Community Food Bank and Service Project Volunteer  
Co-Founder WBRG Financial Literacy Program  
Founder College Care Project  
Wounded Warrier Project, Advance Guard  
World Vision Donor and Volunteer