

# SHIKA MAHDAVI, PH.D.

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## VP ORGANIZATIONAL EFFECTIVENESS | TALENT STRATEGY | ORGANIZATIONAL DESIGN | ENTERPRISE TRANSFORMATION

Enterprise Organizational Effectiveness and Talent Strategy leader with 15+ years translating business strategy into scalable operating models, talent rhythms, leadership capability, and transformation systems. Trusted executive advisor with deep experience diagnosing organizational and capability gaps, aligning cross-functional stakeholders, and building governance frameworks that improve performance, adoption, readiness, and business continuity. Known for using HR analytics, dashboards, organizational assessments, and performance insights to architect practical solutions across matrixed, regulated environments. Brings Director/VP-level breadth across organizational design, talent strategy and planning, succession management, workforce planning, leadership development, performance management, culture transformation, and enterprise change. Authorized to work in the U.S. without immigration sponsorship.

### CORE COMPETENCIES

Organizational Effectiveness | Organizational Design | Talent Strategy & Planning | Workforce Planning | Succession Management | Leadership Development | Executive Readiness | Performance Management | Talent Rhythms | Culture Transformation | Change Management | HR Analytics & Insights | Enterprise Transformation | Stakeholder Influence | Operating Models & Governance | Executive Consulting

### KEY EXECUTIVE IMPACTS

- Built enterprise capability, governance, and analytics systems for a high-volume platform supporting \$8.9B in annual charitable grants, 1.4M+ transactions, and 155K+ nonprofit partners; improved adoption by 20%.
- Led organizational readiness and change execution through the TD Ameritrade-to-Schwab integration, supporting 7,000+ financial advisors while sustaining business continuity across remote, matrixed teams.
- Designed executive dashboards, operating routines, and AI-enabled enablement frameworks that improved audit readiness by 30%, accelerated time-to-competency by 25%, and lifted execution quality by 15–20%.
- Strengthened leadership pipelines and internal mobility by aligning capability strategy, performance management, role readiness, and development pathways; contributed to a 15% increase in internal promotions.

### PROFESSIONAL EXPERIENCE

#### Charles Schwab & Co. | Westlake, TX | 06/2017 – 08/2025

*Senior Manager, Learning Strategy & Organizational Development | People Leader*

Served as an enterprise organization and talent partner for one of the nation's largest donor-advised fund platforms, connecting business strategy, workforce capability, operating discipline, and measurable performance outcomes across Product, IT, HR, Operations, Risk, Compliance, Analytics, and Business Development.

- Architected an enterprise organizational effectiveness strategy linking operating models, role readiness, onboarding, performance management, internal mobility, and business-critical platform adoption; increased adoption by 20% across regulated workflows.
- Diagnosed organizational capability gaps through adoption data, workflow performance, stakeholder feedback, and readiness indicators; converted insights into leader-ready interventions that improved execution quality by 15–20%.
- Established governance structures, decision forums, and executive dashboards that gave senior leaders real-time visibility into capability risk, adoption barriers, workflow effectiveness, and investment priorities across a 1.4M+ transaction environment.
- Led enterprise change management and workforce readiness during the TD Ameritrade-to-Schwab integration; aligned leaders, communications, workflows, and enablement plans for 7,000+ financial advisors amid shifting priorities.
- Designed scalable leadership development, onboarding, certification, and role-readiness pathways that reduced ramp time and time-to-competency by 25% across distributed teams and advisor-facing operations.
- Partnered with HR, Business Development, Product, and Operations leaders to align talent strategy, performance management, and internal mobility; contributed to a 15% increase in internal promotions and stronger bench readiness.
- Built talent analytics and measurement frameworks integrating engagement, adoption, workflow accuracy, readiness, productivity, and compliance indicators into executive narratives that supported data-driven talent planning.
- Advanced organizational transformation by creating Business Development University and Charitable Consulting Academy; earned three Schwab Charitable Excellence Awards and division-level recognition as the top Advisor Services training program.
- Improved audit readiness by 30% through standardized operating procedures, policy alignment, structured leader briefings, microlearning, and governance routines across risk-sensitive financial services workflows.
- Scaled leadership capability through train-the-trainer, coach-the-coach, and facilitation standards that improved delivery consistency, reduced operational friction, and strengthened performance outcomes across distributed professionals.

#### Chief Learning Officer / Training Architect – Consulting | Dallas-Fort Worth, TX (Remote) | 08/2025 – Present

*Independent Consultant | Organizational Effectiveness, Talent Strategy & Business Automation*

Advise executive teams on organizational effectiveness, operating model design, talent strategy, workforce capability, AI-enabled operations, governance, and business automation in regulated and matrixed environments.

- Designed OpenClaw operating dashboards, governance frameworks, and executive reporting routines that improved audit readiness by 30% across multi-state operations and strengthened leadership visibility into risk.
- Built AI-assisted knowledge systems, enablement architecture, and workflow playbooks that accelerated time-to-competency by 25% while improving workforce readiness and reducing ramp friction.
- Develop HR analytics-style scorecards, capability assessments, adoption dashboards, and performance KPI frameworks that help leaders identify skill gaps, talent risk, readiness priorities, and intervention ROI.
- Guide senior leaders through organizational design, stakeholder alignment, change adoption, and governance practices that mirror enterprise talent planning, succession-readiness, and performance management rhythms.
- Translate complex operating requirements into leader-ready roadmaps, decision tools, and implementation plans that support workforce planning, internal mobility, business continuity, and measurable adoption.

#### Navarro College | Gracelyn University | Bakke University | Tarrant County College | Hybrid / Remote | 2008 – Present

*Associate Professor & Program Director | Leadership Development, Curriculum Governance & Organizational Change*

- Led large-scale organizational learning, curriculum governance, and program effectiveness across hybrid and remote environments; increased engagement and retention by 15% through adaptive, data-informed design.
- Directed program leaders and faculty through change initiatives tied to performance outcomes, quality standards, evaluation, stakeholder experience, and continuous improvement across distributed teams.
- Built assessment, feedback, and program evaluation practices that strengthened leader visibility into outcomes, improved learner progression, and created repeatable governance across academic operations.

- Coached doctoral candidates and professional audiences through advanced research, leadership development, executive presentations, and evidence-based behavior change methodologies.

## ROLE ALIGNMENT

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- Organizational design and effectiveness: Brings a systems-thinking approach to diagnosing capability gaps, designing operating models, aligning governance, and improving enterprise performance in complex environments.
- Talent strategy and planning: Converts workforce data, leader feedback, readiness signals, and performance trends into actionable talent strategies, succession-readiness plans, and capability investment decisions.
- Talent rhythms and performance management: Builds practical cadences for talent reviews, calibration, performance insights, development planning, and continuous improvement so talent processes drive business outcomes.
- Executive stakeholder influence: Advises senior leaders across HR, business, technology, operations, compliance, and analytics; translates ambiguity into crisp decisions, scalable tools, and measurable transformation outcomes.

## ORGANIZATIONAL EFFECTIVENESS TOOLKIT

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- OE diagnostics: Uses organizational assessments, stakeholder interviews, adoption trends, performance data, capability mapping, workflow analysis, and leader feedback to identify root causes and prioritize interventions.
- Organizational design: Shapes role clarity, operating models, decision rights, governance routines, capability frameworks, and process alignment to improve speed, accountability, scalability, and execution quality.
- Talent rhythms: Builds repeatable practices for talent strategy and planning, succession management, talent reviews, calibration, performance management, development planning, and leadership readiness.
- Transformation enablement: Creates leader toolkits, communication frameworks, adoption plans, training systems, and measurement routines that help organizations absorb change and sustain new ways of working.
- Develop once, replicate often: Converts successful interventions into reusable playbooks, templates, dashboards, facilitation guides, and governance routines that can scale across functions and distributed teams.

## BOARD-LEVEL VALUE PROPOSITION

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- Performance orientation: Frames talent and OE work around business outcomes, including productivity, adoption, operational efficiency, risk reduction, audit readiness, internal mobility, and leadership capacity.
- Enterprise consulting: Operates as a strategic partner to executives and People Team stakeholders, bringing structure to ambiguity, surfacing organizational tradeoffs, and aligning solutions to strategy execution.
- Global-scale readiness: Experienced supporting remote, hybrid, regulated, and matrixed stakeholder environments where leader alignment, repeatable governance, and data-backed decisions are required to execute at scale.
- Culture and engagement: Connects employee experience, capability building, coaching, feedback loops, and change adoption to stronger engagement, retention, and organizational health outcomes.
- Future-ready workforce: Builds capability systems that prepare leaders and teams for AI-enabled operations, digital transformation, evolving workflows, and emerging market demands.

## PEOPLE TEAM & COE PARTNERSHIP

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- Integrated HR partnership: Works across HR Business Partners, talent development, compensation, analytics, operations, technology, and business leadership to ensure talent practices are implemented consistently and adopted in the flow of work.
- Talent solutions activation: Translates COE-designed initiatives into business-ready tools, leader routines, communication plans, adoption measures, and operating practices that strengthen execution at the functional level.
- Organizational health insights: Monitors engagement, readiness, adoption, quality, productivity, performance, and risk trends to identify where organizational interventions will have the greatest enterprise impact.
- Executive facilitation: Designs and facilitates leader discussions, working sessions, retrospectives, talent conversations, and decision forums that move stakeholders from diagnosis to aligned action.
- Change adoption discipline: Establishes practical reinforcement mechanisms, feedback loops, metrics, and accountability routines that make transformation stick after launch.

## TRANSFORMATION LEADERSHIP THEMES

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- Scales complex change by sequencing strategy, stakeholder alignment, governance, enablement, communication, measurement, and reinforcement across hybrid, remote, and highly matrixed organizations.
- Improves organizational performance by reducing ambiguity, clarifying decision rights, strengthening leader capability, and aligning talent investments to the business capabilities required for growth.
- Connects culture transformation to everyday leader behaviors, talent routines, operating norms, and performance expectations so employees experience change as a coherent system rather than isolated programs.

## STRATEGIC VALUE

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- Can immediately support a new OE function by building repeatable frameworks, executive-ready materials, and talent practices that scale across global business units without creating unnecessary process burden.
- Brings digital infrastructure-relevant strengths in operating discipline, risk awareness, analytics, cross-functional execution, and transformation enablement from complex financial services and technology-enabled environments.
- Positions organizational effectiveness as a growth lever by connecting talent strategy, leadership capability, org design, culture, and performance management to customer value, innovation, and strategy execution.
- Balances strategic thought leadership with hands-on delivery, moving quickly from diagnosis to solution architecture, stakeholder alignment, implementation, measurement, and continuous improvement.

## EXECUTIVE OE DELIVERABLES

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- Creates enterprise-ready deliverables including organizational assessment summaries, talent strategy roadmaps, operating model recommendations, leader decision briefs, governance charters, and transformation scorecards.
- Builds integrated talent planning infrastructure that turns succession, workforce planning, performance management, calibration, leadership development, engagement data, and adoption measures into executive-ready recommendations.

## EDUCATION & CERTIFICATIONS

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**Doctorate, Education Administration, Law & Policy** | Texas A&M University | Summa Cum Laude, 4.0 GPA

**Master of Arts, Learning & Development** | Stephen F. Austin State University | Summa Cum Laude

**Master of Arts, Adult Literacy & Learning** | Kansas State University | Summa Cum Laude

**Bachelor of Arts, Communication** | University of Texas | Summa Cum Laude

**Certifications:** Donor-Advised Fund Professional Certificate | Texas Teacher Certification EC-12 | Principal Certification