

Contact

The Cedars, Dallas, TX
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www.linkedin.com/in/zakwaddell
(LinkedIn)
merchantmonks.co (Other)

Top Skills

Financial Industry Regulatory
Authority (FINRA) - Series 7, 63, 66

Alliance Mud School – 3 Months
Classroom & 4 Months Field

Investments

Certifications

Lean Bronze Certification

Lean Six Sigma Green Belt Certified

Licensed Real Estate Agent

Series 7, 63, 66

Publications

Thoroughly Modern Management

Off the Axis – Moving from Theory X/
Y to a Delta Model

2017 Manifesto (seeking editor/
coauthor)

6 steps to Cultural Innovation

Meet Zak Waddell of nada in all of it

Zak Waddell

a productivity-minded, Innovation & Improvement Manager
Dallas, Texas

Summary

Interested in aligning my efforts with an organization dedicated to making a positive impact.

Experience

Merchant Monks

Business Development Consultant

May 2019 - Present

Dallas/Fort Worth Area

Over the last couple months, I have given my time to selected collaboration projects with the goal of developing and refining certain skills:

- Cognitive Interviewing under the direction of the Interdevelopmental Institute
- Financial Modeling and Market Analysis
- Business Plan Design and Fundraising Strategy

nada

Startup Founder

May 2018 - May 2019 (1 year 1 month)

Dallas/Fort Worth Area

Envisioned as an organization solving complex cultural issues:

- bringing humanity back to the experience of real estate
- liberating consumers from unfair commission structures
- creating developmental progress for a modern workforce
- guarding communities against extraction

...exited May 2019

Pacific Union Financial, LLC

Director of Strategy, Innovation & Improvement

April 2016 - June 2018 (2 years 3 months)

Irving, Texas

- Integrated Customer Experience, Data Architecture & Employee Experience through a unique adaptation of Lean Value Stream Mapping that propelled

process improvement and innovation in both Mortgage Origination and Loan Servicing

- Founded and lead a series of cross-functional improvement teams fashioned from components of Toyota's "kaizen blitzes" and Amazon's "20% time"
- Served as internal consultants for both enterprise innovation management & sustainable market strategy
- Participated in the launch of two start-ups incubated in-house (1. new operations department, 2. direct-to-consumer brand)
- Formed important relationships with Vendors to create a shared vision around "a partnership of continued supply chain improvement"

Newpark

Executive Sales Manager

April 2014 - March 2016 (2 years)

Dallas/Fort Worth Area

Managed and grew multi-million dollar accounts in the Dallas, Fort Worth, Wichita Falls territory. Formed relationships with C-suite executives at top ten drilling & production companies.

AIPC Energy

Executive Sales Manager

February 2013 - April 2014 (1 year 3 months)

San Antonio, Texas

Formed relationships with mid-level and executive leadership at top ten drilling and production companies. Grew revenue by several multiples by expanding service offering through innovation.

Newpark

Process Engineer

February 2011 - February 2013 (2 years 1 month)

Eagleford Shale

Managed drilling fluid operations for several top producing rigs in south Texas.

M.D. Sass

VP of Business Development

July 2008 - July 2009 (1 year 1 month)

New York City, NY

Lead business development for a distressed hedge fund specializing in accounts receivable protection (mostly in the Retail space)

Fidelity Investments

Investment Consultant

January 2007 - July 2008 (1 year 7 months)

Dallas/Fort Worth Area

Series 7, 63, 66 Certifications

United States Senate

Congressional Liaison

January 2006 - February 2007 (1 year 2 months)

Dallas/Fort Worth Area

Served as Liaison for Congressional Affairs Related to the Federal Deposit Insurance Corporation (FDIC), Federal Reserve System, Securities Exchange Commission (SEC), Social Security Administrations (SSA), the Centers for Medicare and Medicaid (CMS), and the Food & Drug Administration (FDA)

What I learned: formal, polished communication.

Harvard Business School

Faculty Assistant - HBR Case Study Office

March 2003 - February 2004 (1 year)

Cambridge, MA

The greatest perk of this role was time and access to a wealth of knowledge. Between coordinating with professors and delivering the course material to students, I was able deep-dive into a sea of case studies.

Education

The University of Dallas

Masters of Humanities, Philosophy and Psychology · (2005 - 2007)

Texas A&M University

Bachelor of Science (BS), Psychology & English · (1999 - 2003)

Interdevelopmental Institute

Critical Faciliator, Applied Dialectics · (2019)