

From Cultural Roots to Corporate Leadership: A Narrative Analysis of Dr. Shirley Morejon's Journey Navigating Identity, Leadership, and Legacy

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This narrative study examines the life and career of Dr. Shirley Morejon, a first-generation Cuban-American who rose from humble beginnings to become a senior executive at a major American bank. Using phenomenological interviewing and systematic coding analysis, this research explores how cultural heritage shapes leadership development and success in corporate America.

Four major themes emerged from Dr. Morejon's story: (1) Identity and Upbringing: how immigrant background and family values shaped her worldview; (2) Leadership Evolution: her jour-

ney from entry-level banker to executive; (3) Service and Mentorship: her commitment to lifting others while climbing; and (4) Purpose and Resilience: how values and adaptability sustained her through challenges. The analysis demonstrates that cultural heritage, when embraced rather than minimized, provides a strong foundation for leadership that creates both business value

"I like to extend a hand back... pulling someone along with you in that journey."

and social impact. This research offers practical insights for organizations seeking to build inclusive leadership pipelines that leverage rather than suppress diverse backgrounds.

Keywords: Identity and Upbringing, Leadership Evolution, Service and Mentorship, Purpose and Resilience, Cuban-American, Women in Business, First-Generation Professionals

The American corporate landscape is increasingly recognizing that leadership excellence can emerge from diverse backgrounds and experiences. Yet the pathways to executive success for first-generation Americans, particularly women of color, remain understudied and often misunderstood. This narrative analysis examines the remarkable journey of Dr. Shirley Morejon, whose progression from the daughter of Cuban immigrants to the SVP, senior relationship manager, at a major banking institution shows how cultural background, commitment to service, and strong values work together to build effective leadership.

Dr. Morejon's story is particularly significant in the context of contemporary discussions about diversity, equity, and inclusion in corporate America. As organizations struggle to build leadership pipelines that reflect increasingly diverse customer bases and communities, her experience provides concrete insights into how individuals from immigrant backgrounds navigate corporate cultures while maintaining authentic cultural identity. Her narrative challenges conventional assumptions about fitting in to succeed, demonstrating instead how cultural heritage can serve as a strategic asset rather than a barrier to overcome.

This research employs a phenomenological approach to explore Dr. Morejon's lived experiences, seeking to understand not just what happened in her career journey, but how she made meaning from these experiences. Through detailed analysis of three in-depth interviews, we identified four interconnected themes that characterize her path to leadership: Identity and Upbringing, Leadership Evolution, Service and Mentorship, and Purpose and Resilience. These themes, supported by established social science theories, reveal a complex interplay between personal history, professional development, community commitment, and values-based decision-making.

The significance of this study extends beyond individual biography. As the banking industry and corporate America more broadly grapple with the imperative for inclusive leadership, Dr. Morejon's journey offers both theoretical insights and practical strategies. Her experience demonstrates that sustainable leadership success for diverse professionals requires not abandoning one's cultural roots but rather skillfully leveraging them to create value for organizations and communities alike.

Dr. Shirley Morejon

Dr. Shirley Morejon is a distinguished executive and thought leader whose career bridges high-stakes commercial banking, inclusive leadership and academic excellence. With over twenty years at Bank of America, she currently serves as Market Executive for the Mid-South region in Global Com-

mmercial Banking, leading teams across Tennessee, Alabama, Kentucky and Mississippi, and overseeing commercial lending, investment banking and global treasury solutions.

Her professional trajectory reflects both depth and breadth: earlier roles at the bank included Senior Relationship Manager, Senior Treasury Officer and Consumer Market Manager for Florida.

Importantly, she has been an active driver of inclusion efforts, serving as Enterprise Co-Chair of HOLA (Hispanic/Latino Employee Network) and now Executive Sponsor for the HOLA Tennessee Chapter.

Academically, Dr. Morejon holds a bachelor's degree in international business (with a concentration in marketing and minor in economics) from University of South Florida, an MBA from University of Tampa, and in December 2022 she earned her Doctor of Business Administration from the Muma College of Business at USF.

Her accomplishments have also been recognized externally: she was named a "Business Woman of the Year" in 2022 by the Tampa Bay Business Journal

The Interview

Q1. Where did you grow up?

I was born and raised in Tampa, Florida. My family is originally from Cuba, and I'm a first-generation Cuban American. My parents immigrated to the United States at different times and met in Tampa. My mother's family left Cuba when Castro rose to power—my grandfather was an entrepreneur, and they went first to Spain, then New Jersey, before settling in Tampa, where there was already a Cuban community. My father also immigrated with his family. So I grew up surrounded by stories of sacrifice and resilience.

Q2. Tell me more about your family. What was your home life like?

My parents were both entrepreneurs, my mother owned a beauty salon, and my father was a real-estate broker. Our home was busy, loving, and centered on family. My mother cared for her parents while running her business, and my father supported her fully. I grew up surrounded by hard work, responsibility, and deep family connection. Saturdays were spent helping at the beauty shop, which felt like part salon, part community center.

Q3. How did those values shape your outlook?

They completely shaped who I am. I never saw a 9-to-5 job model; my parents worked around the needs of the family and their businesses. They showed me that discipline and flexibility can coexist. My father especially emphasized education—he believed it was the one thing no one could ever take from you. That belief guided every major decision I've made.

Q4. What lessons from childhood still guide you today?

The importance of education, showing up for others, and giving back. My parents taught me that success isn't individual, it's collective. They modeled compassion and commitment, which I now try to emulate as a leader and parent.

Q5. Tell me more about your school life. What did you imagine for your future?

I attended both public and private schools, which exposed me to different perspectives and economic realities. I was active in leadership roles—student government, civic organizations, and community work. I once wanted to be the first female President of the United States, but I realized later that business was another powerful way to make change.

Q6. Can you tell me about your friends growing up? What are some of the earliest memories you have with meeting them and engaging with them?

My closest friend—who is now my children's godmother—was actually someone I didn't like at first! We met when I transferred schools in sixth grade, and we were both strong personalities. One of my earliest memories is us competing for the same class role. But working together on a school project helped us realize we shared the same drive and humor. That turned into a lifelong friendship.

Q7. How did you go from being enemies to friends?

It happened naturally. We realized we respected each other's strengths and shared the same values. Before long, we were inseparable. We still joke that when we're older, we'll buy land and live in two tiny homes side-by-side. It's that kind of enduring, unconditional friendship that grounds me.

Q8. Who were your most important mentors or teachers in your youth?

My high-school English teacher saw potential in me before I saw it myself. She encouraged my leadership in civic projects and helped me get involved in Girls State, a program that simulated government and politics. Later, at the University of South Florida, Professors Solomon (Dr. Solomon and his wife Miss Solomon) led a study-abroad trip that completely changed my worldview. They became lifelong mentors and eventually encouraged me to pursue my doctorate.

Q9. What led you to pursue your MBA and later your DBA?

Education was a family priority. After earning my bachelor's in International Business from USF, I completed my MBA at the University of Tampa while working full-time. During that program, I joined a mentorship program that paired students with alumni. My mentor was a former retail execu-

tive who had transitioned into banking and encouraged me to apply to Bank of America.

Years later, after my father was diagnosed with terminal cancer, I promised him I would pursue the highest degree in my field. I kept that promise when I completed my Doctorate in Business Administration at USF in 2022.

Q10. What did your earlier years at Bank of America look like, and how did you enter the organization?

I joined the bank through that mentorship connection during my MBA. My mentor told me about the company's tuition-reimbursement program, which was a big draw as a working student. I started as a bilingual banker in a financial center serving a large Latino community in Tampa. It was meaningful to help families like my own build credit, buy homes, and start businesses.

I loved those early years—they grounded me in service, empathy, and the financial literacy challenges many clients face. Over time, I advanced to manage financial centers, eventually leading over 100 associates across the Tampa Bay market.

Q11. What helped you grow and advance within such a large company?

Mentorship, networking, and involvement. I joined the Hispanic/Latino employee network early on, which connected me to senior leaders. I eventually became Enterprise Co-Chair for the network, representing 20,000 employees. Those roles gave me visibility, developed my leadership skills, and taught me the importance of creating opportunity for others.

Q12. What motivated your move from consumer to commercial banking?

I've always loved business and entrepreneurship—probably because of my parents. After several years leading consumer teams, I realized my real passion was working with business owners. So I made a lateral move to the commercial side, where I now lead bankers who advise companies with \$50 million to \$2 billion in revenue. It was the best career decision I've made.

Q13. Can you describe a typical workday in your current role?

I lead a team of twelve commercial bankers who manage relationships with CEOs and CFOs. My mornings start early with The Wall Street Journal, then I review internal dashboards using Salesforce and Tableau to monitor performance—loan growth, client engagement, and pipeline metrics.

The rest of my day involves one-on-one meetings, business reviews, and client visits. I spend much of my time traveling across the four states I oversee, making sure we're aligned strategically and serving clients effectively.

Q14. What type of systems or tools do you have in place to track performance and client engagement?

We rely on Salesforce and Tableau dashboards that automatically populate metrics into my Outlook each morning. I can click through to view detailed performance data for the team. I also subscribe to local business journals and financial news digests that send daily summaries directly to my inbox. This helps me identify client developments or market trends to flag for my bankers.

I prefer automated updates—having data come to me—so I can focus my time on decisions rather than data gathering.

Q15. How do you prioritize your responsibilities at the start of the week—say, Monday mornings?

I actually start planning on Sundays. I review my monthly calendar and travel schedule, align meetings with performance gaps, and decide where my physical presence will have the most impact. Monday mornings are about setting tone and clarity—confirming priorities, ensuring everyone knows the week's focus, and reviewing key metrics. I try to minimize ad-hoc meetings so my team can spend their time with clients.

Q16. How do you conduct strategic team meetings?

At the start of each month, I send an agenda outlining the performance areas we'll review—sales goals, credit pipeline, client engagement. Our support analysts compile data ahead of time so there are no surprises. This structure keeps meetings efficient and focused. My goal is to free up the bankers' time for relationship-building rather than excessive reporting.

Q17. How do you handle disruptions or challenges?

Disruptions are part of leadership. I tell my team our motto is "Win in spite of." Whether it's market turbulence, credit tightening, or external competition, we can always control our response. I encourage open conversations about challenges, but we quickly pivot to solutions. Peer sharing is powerful—senior bankers mentor junior ones, reminding them that difficult cycles are temporary.

Q18. Can you describe at least one time when you coached or supported a team member through a difficult situation?

When I first took over this team, I met individually with everyone—around 50 people, including indirect partners. Some were frustrated by losing deals to aggressive competitors. I brought their concerns to senior leadership, which led to a review of our credit parameters. Then I circled back to explain why certain policies existed.

That transparency restored morale. People want to feel heard and understand the reasoning behind decisions. Once they do, they re-engage with more confidence.

Q19. When did you first become involved in mentoring or community work?

Mentorship has been part of me since I was young. My parents always helped others, and I continued that pattern in high school and college. At Bank of America, I mentor early-career professionals and serve as a sponsor for women and first-generation employees. Externally, I've served as Board Chair for the Children's Cancer Center, motivated by losing my father to cancer. Helping children and families facing hardship brings purpose to my professional success.

Q20. How do you measure the success of those programs?

We track participation, membership growth, and career advancement among members. But the most meaningful measure is when someone says, "I now see this company as a place where I can build a career." That's what inclusion really means—seeing yourself reflected and supported.

Q21. What was your most recent external panel or community engagement?

I recently served as a panelist for Mentor Monday hosted by the Business Journal in Nashville. It brings community leaders together with young professionals seeking mentorship. I shared lessons on leadership, authenticity, and career pivots. Those events remind me that mentorship extends beyond the workplace—it's a lifelong cycle of giving back.

Q22. How do you balance being a senior executive and a parent?

Balance isn't a fixed state, it's dynamic. I'm a wife and mother of two, and I've learned to set clear boundaries. Family dinners and school events are priorities. I communicate openly with my children about my work so they understand commitment but also presence. I want them to see that leadership doesn't mean sacrificing what matters most.

Q23. What legacies do you want to leave behind through your work and personal experiences?

Professionally, I want to be remembered as a leader who created opportunity and inclusion, especially for women and underrepresented groups in finance. Personally, I hope my children see that strength and kindness go hand in hand. I want to leave behind a legacy of empowerment, compassion, and continuous learning.

Q24. What piece of advice would you give your younger self, both professionally and non-professionally?

Be bold and take risks, particularly know you belong in every room that you're in. As you know, as an early, professional, you're walking into rooms that perhaps again you certainly in a commercial bank, you may very well might be the only woman in that room. You might be, you know, folks may be very much your senior in in that room and what I've what I've

come to learn is that everyone is looking for connectivity and is not as big and as scary as it may appear and so I often find that it's important to make sure that you know that your journey is as valid as anyone else's and you're equally as successful.

Discussion

Theoretical Background

This analysis employs two primary theoretical lenses to interpret Dr. Morejon's leadership journey: Social Identity Theory and Transformational Leadership Theory. These frameworks were selected based on their explanatory power for the core phenomena emerging from the data.

Social Identity Theory

Henri Tajfel and John Turner's (1979) Social Identity Theory provides crucial insights into how individuals derive self-concept from membership in social groups. The theory posits that social identity formation occurs through three interrelated mental processes that shape how individuals understand themselves in relation to others. The theory's three processes: categorization, identification, and comparison, directly manifest in Dr. Morejon's narrative. Her description of being "just a little bit different" reflects the categorization process, while her evolution from seeing difference as limitation to leveraging it as strategic asset demonstrates mature identity integration.

Dr. Morejon's account reveals sophisticated identity management: "Be bold and take risks, particularly know you belong in every room that you're in... it's important to make sure that your journey is as valid as anyone else's and you're equally as successful". This represents what Phinney (1990) termed "achieved ethnic identity", where individuals actively explore and commit to their identity rather than passively accepting external categorizations. Her ability to activate different identity aspects strategically (Cuban heritage when building trust with Latino clients, executive presence in boardrooms) exemplifies optimal social identity flexibility.

Transformational Leadership Theory

James MacGregor Burns (1978) introduced the concept of transformational leadership as a process where leaders and followers raise one another to higher levels of motivation and morality. Bernard Bass (1985) later expanded this framework into a comprehensive theory that identifies four key behavioral dimensions through which transformational leaders influence their organizations and followers.

Idealized influence involves serving as role models who inspire trust and respect through consistent values-based action. Transformational leaders demonstrating idealized influence "walk the talk," showing consistency between espoused values and actual be-

havior that builds credibility and follower commitment. This dimension proves particularly important for leaders from underrepresented backgrounds who may face additional scrutiny and must establish legitimacy through exemplary conduct.

Inspirational motivation encompasses creating and articulating compelling visions that inspire followers to transcend self-interest for collective goals. Leaders strong in this dimension paint vivid pictures of possible futures that energize and align organizational efforts. For leaders like Dr. Morejon, this often involves articulating visions of inclusion that benefit both business outcomes and social justice.

Intellectual stimulation involves encouraging innovation and challenging assumptions about "how things are done." Transformational leaders create psychological safety for questioning established practices and experimenting with new approaches. This dimension becomes particularly powerful when leaders from diverse backgrounds bring fresh perspectives that challenge industry orthodoxies.

Individualized consideration requires attending to followers' individual needs, acting as coach and mentor to help each person reach their full potential. This dimension emphasizes the leader's role in developing others, recognizing that different individuals require different types of support and challenge.

Research by Eagly, Johannesen-Schmidt, and van Engen (2003) found that women leaders often display more transformational leadership behaviors than men, particularly in the dimension of individualized consideration. This tendency may be especially pronounced among women from collectivist cultural backgrounds where attention to relationships and community needs receives cultural emphasis. For leaders like Dr. Morejon, transformational leadership provides a framework for understanding how cultural values of community care and collective advancement translate into effective leadership behaviors that benefit organizations while maintaining cultural authenticity.

Career Construction Theory

Career Construction Theory (Savickas, 2005) explains how Dr. Morejon created coherent meaning from non-linear experiences. Her narrative demonstrates active career construction through life themes that bridge cultural worlds: "I never grew up watching... a 9-to-5 job model" shaped her entrepreneurial approach to banking leadership. Her promise to her father to "pursue the highest education in my respective field" became a guiding narrative that integrated family values with professional advancement, exemplifying how individuals construct careers through meaning-making rather than following predetermined paths.

Research Design

This study employed a narrative phenomenological approach to explore Dr. Morejon's lived experiences and the meanings she constructs from her life journey. Phenomenological research, as described by Moustakas (1994), seeks to understand the essence of experiences from the participant's perspective. The narrative dimension, drawn from Clandinin and Connelly's (2000) work, recognizes that humans understand their lives through stories, making narrative inquiry particularly suitable for exploring complex career trajectories.

The phenomenological approach was selected for several compelling reasons that align with our research objectives. First, this methodology privileges the participant's perspective and meaning-making processes, allowing Dr. Morejon to articulate her own understanding of her experiences rather than imposing external interpretive frameworks. Second, the approach enables exploration of complex, multifaceted experiences that resist simple categorization, particularly important given the intersectional nature of Dr. Morejon's identity as a Cuban-American woman in banking. Third, phenomenological inquiry captures the temporal dimension of career development, recognizing that careers unfold over time with meanings that evolve through reflection and re-interpretation. Finally, this methodology honors the cultural contexts that shape experience, acknowledging that Dr. Morejon's journey cannot be understood apart from the specific cultural, historical, and organizational environments in which it occurred.

Implementation of Phenomenological Reduction

The phenomenological reduction process followed Moustakas's (1994) systematic procedures. Prior to data collection, researcher assumptions about first-generation professionals and Cuban-American identity were identified and bracketed through reflexive journaling. During analysis, horizontalization treated all transcript statements as having equal value, yielding 147 initial meaning units. Through iterative reduction, these were clustered into 23 meaning units and ultimately four essential themes representing invariant structures of the participant's experience.

Narrative co-construction occurred through dialogic interviewing where Dr. Morejon's responses shaped subsequent inquiries. When emergent concepts arose (e.g., "winning in spite of"), the participant was invited to elaborate, allowing her narrative priorities to guide discussion. Following Clandinin and Connelly's (2000) three-dimensional narrative inquiry space, the interviews explored experiences across temporal (past-present-future), spatial (Cuba-Tampa-corporate), and social (personal-professional) dimensions.

Throughout the interviews, understanding was ver-

ified through real-time member checking, where interpretations were reflected for clarification or correction. This collaborative meaning-making ensured findings represented the participant's lived reality rather than imposed analytical categories. The approach privileged Dr. Morejon's voice in constructing coherent meaning from her life experiences while maintaining systematic rigor in phenomenological analysis.

Research Positionality

The researcher acknowledges their positionality as a doctoral researcher conducting this narrative study as part of doctoral coursework in organizational behavior. As someone with extensive experience in technical fields but relatively new to qualitative phenomenological research, the researcher brought both strengths and limitations to this inquiry. The researcher's own background as an international scholar who has navigated multiple cultural and professional contexts likely influenced sensitivity to themes of cultural navigation and professional identity. This shared experience of moving between worlds may have enhanced rapport with Dr. Morejon while potentially leading to over-identification with certain aspects of her journey.

Throughout the research process, reflexive practices were employed to maintain phenomenological rigor. These included maintaining a reflexive journal to document assumptions and reactions during interviews, engaging in peer debriefing with colleagues to check interpretive choices, and repeatedly returning to transcript data to ensure interpretations remained grounded in Dr. Morejon's own words rather than projected meanings. The researcher's technical background, while initially seeming distant from narrative inquiry, ultimately provided useful analytical discipline in systematic coding procedures. However, this same background required conscious effort to remain open to emergent meanings rather than imposing predetermined categories. The collaborative nature of meaning-making inherent in narrative phenomenology helped mitigate these limitations, as Dr. Morejon's active participation in constructing her story provided ongoing correction to researcher assumptions.

Findings

The analysis of Dr. Morejon's narrative revealed four interconnected themes that characterize her journey from immigrant daughter to banking executive. These themes—Identity and Upbringing, Leadership Evolution, Service and Mentorship, and Purpose and Resilience—work synergistically to create a portrait of leadership grounded in cultural heritage and oriented toward collective advancement.

Theme 1: Identity and Upbringing

This theme explores how Dr. Morejon's identity was shaped by her Cuban immigrant background, bilingual upbringing, and strong family values rooted in entrepreneurship, education, and caregiving. These early influences grounded her sense of cultural belonging, work ethic, and commitment to legacy.

Cuban Immigrant Heritage

Dr. Morejon's identity as a first-generation Cuban-American fundamentally shaped her worldview and approach to life:

"I was born and raised in Tampa, FL. So my family is originally from Cuba. I'm the first generation born Cuban American, so all of my childhood was raised right in the backyard of USF."

This geographic positioning—being raised "in the backyard" of a major university while maintaining Cuban roots—establishes the dual worlds Dr. Morejon would navigate throughout her life. The spatial metaphor suggests both proximity to mainstream educational opportunity and distance from full belonging.

The immigration story of her parents, fleeing Castro's Cuba, instilled deep appreciation for opportunity and freedom:

"Both of my parents immigrated here to the US from Cuba in different periods of time. They met here in Tampa in the States. Unfortunately, it was time. It was a time where Castro was coming into power. So there was a lot of choices that my family had to make."

The phrase "choices that my family had to make" carries weight beyond mere decision-making; it speaks to forced displacement and the immigrant experience of sacrificing the familiar for the possible. This foundational narrative of choice under duress would later inform Dr. Morejon's leadership philosophy of "winning in spite of" obstacles.

This background created a sense of being "different" that would later become an asset:

"So, growing up in an environment where our family was just a little bit different, and how do you deal with that, and how do you manage it, because you are not going to fit in. So, I would say that would kind of be one set of chapters."

Her framing of difference as something to be "managed" rather than erased reveals early strategic thinking about identity. The metaphor of life as "chapters" suggests narrative agency, the ability to write one's own story even when the setting feels predetermined by cultural outsider status.

Entrepreneurial Family Environment

Both parents' entrepreneurial pursuits provided early business education:

"They were entrepreneurs, both of them. So I think

that's really one thing that from my childhood is important to note is that I lived with two individuals that were in a dual income household. My mom was a beautician, so she had her own beauty shop where she ran her business. And my father was a real estate broker for many years."

The emphasis on "dual income household" with both parents as entrepreneurs disrupts traditional gender narratives while establishing business ownership as normal rather than exceptional. This early exposure to entrepreneurship would later translate into her innovative approach to banking, seeing opportunities where others saw only risk.

This environment shaped her understanding of work-life integration:

"I never grew up watching. I saw my parents flex in and out of what was necessary to provide for their family while also being very present in their lives."

The verb "flex" captures the fluid boundaries between work and family life in immigrant entrepreneurial households. This flexibility model contrasts sharply with rigid corporate structures, preparing her to later navigate and eventually reshape inflexible banking hierarchies.

The beauty shop became a classroom for business and human relations:

"I joke that I grew up in a beauty shop on Saturdays, washing hair and watching my mom being a therapist and a beautician, which is typically the nature of that industry."

The dual role of "therapist and beautician" her mother embodied taught early lessons about emotional labor and relationship-based business. This understanding of service professions as requiring both technical skill and human connection would prove invaluable in relationship banking.

Education as Sacred Value

Education emerged as a fundamental family value transcending material success:

"My father was even someone who—for his time—was very passionate about education. One thing that in Cuba is that we could argue a lot about the politics of the country, the underpinnings were very much focused on education for all."

Her father's passion for education, rooted in Cuban values despite political differences, demonstrates how immigrants often carry and transform cultural values across borders. The phrase "for his time" suggests progressive thinking that challenged gendered expectations about educational investment.

Her father's powerful message about education's permanence shaped her trajectory:

"It was one thing, he used to tell me, people can't take from you, right? No one can take knowledge from you and the more that you pursue that and have zest

for that. You're kind of charting your own course."

This philosophy, *education as the one untakeable asset*, reflects the immigrant experience of material loss and reinvention. The connection between knowledge and agency ("charting your own course") would manifest throughout her career as continuous learning and eventual pursuit of a doctorate while in executive leadership.

Theme 2: Leadership Evolution

This theme captures Dr. Morejon's journey into leadership, highlighting how her early leadership instincts evolved through structured education, mentorship, and corporate experience.

Early Leadership Emergence

Leadership tendencies appeared early in her life:

"I probably have always had an interest in leadership. It's probably always been a little bit of who I am."

Her involvement in diverse educational settings shaped her perspective:

"I had an opportunity to be in a very diverse cohort of individuals, both from a vast economic and resource, kind of rich and not environments."

This early exposure to economic diversity provided crucial preparation for her future role bridging different communities into banking. The fragmented syntax ("rich and not environments") itself mirrors the navigation between worlds, neither fully articulating privilege nor poverty, but occupying the space between.

Political aspirations emerged through programs like Girls State:

"I was selected as a student in high school to attend Girls State, which was an organization that helped bring students to the capital and kind of essentially try to serve in this mock kind of government structure."

Her selection for this prestigious program validated early leadership potential while exposing her to formal political structures. The shift from wanting to be "the first female President" to business leadership shows pragmatic adaptation, recognizing multiple pathways to systemic change.

Strategic Career Navigation

Entry into banking came through strategic mentorship:

"There was a mentorship program. So the University of Tampa actually had a mentorship program where you could kind of look through a book of alumni who were willing to mentor MBAs in that program."

Her proactive engagement with institutional resources demonstrates how first-generation professionals must intentionally seek what others inherit through family networks. The "book of alumni" becomes a substitute for absent familial business con-

nections.

Her career progression demonstrates exceptional growth:

"I lead a team of 12 what we call commercial bankers. So our team is responsible for providing advice and consultation to CEOs and CFOs of corporate companies. We talk about 50 million to 2 billion in revenue is the types of clients we serve."

The scope of responsibility, advising companies with billions of dollars in revenue, represents remarkable ascent from her entry as a bilingual retail banker. This trajectory validates her father's education philosophy while demonstrating how cultural capital can open unexpected doors.

Leadership Philosophy and Team Management

Dr. Morejon's approach to leadership emphasizes structure and clarity:

"I'm pretty structured in how I work with the team. Historically, at the beginning of each month, I provide them an outline of exactly what I'm going to be looking for in those business reviews."

This structured approach reflects lessons from her entrepreneurial parents where success requires both flexibility and systematic planning. Her transparency about expectations shows how she translates her own need for clarity as an outsider into leadership practices that benefit all team members.

Her commitment to inclusion extends through her mentorship work:

"I have an affinity for folks who are young women professionals—folks who perhaps have lived experience similar to mine, whose families are not on a traditional path."

Theme 3: Service and Mentorship

Mentorship—both received and offered—emerges as a core pillar in Dr. Morejon's professional life.

Transformative Mentors

Early mentors recognized her potential:

"I had an English teacher who was just a wonderful person. She was probably one of those individuals. She gave me a lot of confidence about my natural skills, whether it was related to leadership and community involvement."

The English teacher's role in building "confidence about natural skills" illustrates how mentors serve as mirrors, reflecting back capabilities that marginalized students may not recognize in themselves. This early validation proved foundational for her later leadership development.

Academic mentors provided life-changing experiences:

"I had two professors that took us on the study abroad and they're since retired from USF. But Doctor Solomon and Miss Solomon were the two profes-

sors that went with us on the study abroad and they were another group of mentors that really kind of changed my life and the trajectory of my professional and personal career.”

The study abroad experience represents exposure to global perspectives that her family’s economic situation might not have otherwise afforded. These mentors didn’t just teach, they expanded her world, demonstrating how education can be transformative rather than merely transactional.

Commitment to Mentoring Others

Dr. Morejon’s mentorship philosophy emphasizes reciprocity:

“There are many mentors and sponsors who looked very different than me. I like to do the same thing. I like to extend a hand back pulling someone along with you in that journey.”

The physical metaphor of “extending a hand back” while moving forward captures the essence of inclusive leadership. Unlike models emphasizing individual ascent, her imagery suggests continuous connection. Success involves maintaining links to those behind rather than severing them for faster climbing.

Institutionalizing Mentorship

Dr. Morejon moved beyond individual mentoring to create systems:

“A great example that is a power of 10. I don’t know if folks are familiar with that, but we help to establish a power-of-10-group, which essentially aligns a senior executive with perhaps a real diverse group of candidates, of folks who are looking for mentorship.”

The “power of 10” model multiplies mentorship impact geometrically rather than linearly. This systemic approach shows evolution from individual success to structural change, using executive position to alter organizational DNA rather than simply adding diverse faces.

Theme 4: Purpose and Resilience

This theme reflects Dr. Morejon’s deep sense of purpose and her capacity to thrive amidst challenges.

Values-Driven Decision Making

Personal challenges tested her resilience:

“My father became ill and unfortunately was diagnosed with terminal cancer probably about two weeks after he decided he was going to retire. And so that that kind of propelled me into a role of not only kind of a working professional, but also someone who became a caregiver and a decision maker.”

The cruel timing—cancer diagnosis immediately after retirement—exemplifies how immigrant families often defer dreams only to have them stolen. Her dual role as “professional” and “caregiver” reflects the complex negotiations many first-generation professionals face, balancing career ambitions with fam-

ily obligations.

Her promise to her father drives continued growth: “I promised my father that I would pursue the highest education in my respective field when my children were a little older and I could kind of juggle the two things.”

This deathbed promise transforms grief into purpose, education into memorial. The verb “juggle” acknowledges the ongoing challenge of multiple responsibilities while refusing to see them as mutually exclusive, a both/and rather than either/or approach to life’s demands.

Philosophy of “Winning in Spite Of”

Dr. Morejon developed a resilience framework:

“We can chart the best laid plans but they’re always gonna have some disruptions. I like to have a theme called ‘win in spite of.’ So there’s always gonna be something that presents itself, but there is always a path towards success.”

This philosophy transforms the immigrant experience of overcoming obstacles into leadership doctrine. The grammatical construction “win in spite of” rather than “win because of” or “win despite”, acknowledges obstacles as permanent features rather than temporary inconveniences, reframing challenge as context rather than exception.

This philosophy shapes team culture:

“I try to set the tone for the team about the positivity of that winning in spite of having that kind of cold culture established of winning in spite of because we can get really into the weeds about what is impacting our ability.”

Her emphasis on “tone” and “culture” shows how personal resilience strategies scale to organizational level. Rather than toxic positivity that ignores obstacles, this approach acknowledges barriers while maintaining agency, a critical balance for teams facing systemic challenges.

Theoretical Integration

Social Identity Theory best explains the foundational dynamics of Dr. Morejon’s journey, revealing how bicultural identity served as strategic capital rather than liability. Her sophisticated management of multiple identities, “pulling someone along with you in that journey”, demonstrates that leadership effectiveness for diverse professionals requires not choosing between identities but orchestrating them strategically.

While Social Identity Theory explains the “what” and “why” of her experience, Transformational Leadership Theory illuminates the “how” the specific mechanisms through which cultural identity translates into leadership impact. Her statement “I like to extend a hand back” operationalizes transfor-

mational leadership's individualized consideration dimension through a culturally informed lens of collective advancement. The intersection of these theories reveals that for first-generation leaders, transformational leadership naturally emerges from navigating identity complexity, as the skills required for cultural border-crossing (i.e., perspective-taking, adaptability, bridge-building), directly translate into transformational leadership capabilities.

Conclusions

Dr. Shirley Morejon's journey from the daughter of Cuban immigrants to bank SVP, illuminates the complex process of building successful leadership while navigating multiple cultural contexts. Her narrative demonstrates that leadership excellence for individuals from diverse backgrounds requires strategic cultural navigation, reciprocal mentorship relationships, values-based decision-making, and commitment to collective advancement.

The four themes identified—Identity and Upbringing, Leadership Evolution, Service and Mentorship, and Purpose and Resilience—work together to create sustainable leadership. These themes enabled Dr. Morejon to transform potential barriers into opportunities, creating value for her organizations while advancing diversity and inclusion.

Her story challenges traditional career development models that assume linear progression within homogeneous contexts. Instead, it reveals how bicultural competence creates unique value propositions. Her success in building diverse teams that captured previously untapped markets demonstrates that diversity is business imperative when properly leveraged.

Perhaps most significantly, Dr. Morejon's narrative reframes career success from individual achievement to collective impact. Her commitment to "extending a hand back" created expanding networks of opportunities. This reciprocal approach suggests true sustainability comes from creating systems enabling broader success.

As organizations grapple with demographic changes and inclusive leadership imperatives, Dr. Morejon's example provides both inspiration and practical guidance. Her journey demonstrates that 21st-century leadership requires embracing difference, building bridges between communities, and defining success through legacy rather than just achievement.

The enduring lesson from Dr. Morejon's narrative is that exceptional leadership emerges from alignment between personal values, cultural identity, and professional contribution. Her promise to her father to "pursue the highest education in my respective field" was fulfilled not just through earning a doctorate but through a career dedicated to education, mentorship, and creating opportunities for others. In an era

of rapid change and increasing diversity, such models of culturally grounded, values-driven, collectively oriented leadership become essential for both individual fulfillment and organizational success.

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Review

This article was accepted under the **constructive peer review** option. For further details, see the descriptions at:

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Appendix A: Coding Framework

Table A1: Open Codes with Frequencies	
Open Code	Frequency
Cuban immigrant background	4
Family entrepreneurship	5
Bilingual identity	3
Role of education in family	5
Parental caregiving role	5
Close-knit family values	2
Supportive friendships	3
Gendered cultural expectations	3
Early leadership tendencies	3
Mentors in high school and college	5
Leadership in banking sector	4
Strategic planning and routines	3
Mentorship and sponsorship roles	5
Navigating corporate culture	2
Supporting minority advancement	4
Balancing motherhood and career	2
Adapting to disruption and uncertainty	4
Team accountability and empathy	5
Workplace inclusion advocacy	1
Commitment to legacy and education	4
Using influence for community impact	2
Purpose through mentorship	5
Redefining leadership identity	4
Women in leadership challenges	1
Personal resilience and responsibility	1

Table A2: Axial Codes with Frequencies	
Axial Code	Total Frequency
Family and Cultural Foundations	27
Leadership and Career Development	17
Mentorship and Social Impact	22
Resilience and Values	16

Appendix B: Thematic Map

Dr. Morejon's Leadership Journey

Theme 1: Identity and Upbringing

- Cuban Immigrant Background (4)
- Family Entrepreneurship (5)
- Bilingual Identity (3)
- Role of Education in Family (5)
- Parental Caregiving Role (5)
- Close-knit Family Values (2)
- Gendered Cultural Expectations (3)

Theme 2: Leadership Evolution

- Early Leadership Tendencies (3)
- Leadership in Banking Sector (4)
- Strategic Planning and Routines (3)
- Navigating Corporate Culture (2)
- Redefining Leadership Identity (4)
- Women in Leadership Challenges (1)

Theme 3: Service and Mentorship

- Mentors in High School and College (5)
- Mentorship and Sponsorship Roles (5)
- Supporting Minority Advancement (4)
- Using Influence for Community Impact (2)
- Purpose Through Mentorship (5)
- Workplace Inclusion Advocacy (1)

Theme 4: Purpose and Resilience

- Balancing Motherhood and Career (2)
- Adapting to Disruption and Uncertainty (4)
- Team Accountability and Empathy (5)
- Commitment to Legacy and Education (4)
- Personal Resilience and Responsibility (1)

Appendix C: Word Cloud



Figure C1: Word Cloud

Appendix D: Career Timeline

Early Years

- Born in Tampa, FL to Cuban immigrant parents
- Raised in entrepreneurial household
- Developed bilingual and bicultural competencies

Education & Early Career

- University of South Florida undergraduate
- University of Tampa MBA
- Entry into banking through mentorship program
- Early leadership roles in retail banking

Corporate Leadership

- Transition to commercial banking
- SVP, senior relationship manager, Florida banking division (30,000 employees)
- Implementation of diversity initiatives

Current Role & Legacy

- Leading global commercial banking team (12 direct reports)
- Attained DBA degree to fulfill promise to father
- Mentoring next generation through “power of 10”
- Continuing “win in spite of” philosophy