

## YORAM (JERRY) WIND

**Academic Positions:** Jerry Wind is The Lauder Professor and Emeritus Professor of Marketing at The Wharton School of the University of Pennsylvania. Dr. Wind joined the Wharton faculty in January 1967, upon receipt of his doctorate from Stanford University, and was granted Emeritus status in July 2017.

**Program Development:** Dr. Wind was the founder and academic director of *The Wharton Fellows* program from 2000 to 2018. From 1983 to 1988, he was the founding director of *The Joseph H. Lauder Institute of Management and International Studies*, and from 1980 to 1983 the founding director of *The Wharton Center for International Management Studies*. Dr. Wind chaired the Wharton committees that designed *The Wharton Executive MBA Program* (1974), *the new MBA curriculum* (1991), the School's *globalization strategy* (1995-1997), and the MBA's cross-functional integration efforts (2002-04). He also started *The Wharton International Forum* (1987) and served as the chairman of its faculty council until 1998. He was instrumental in establishing the Alfred West, Jr. Learning Lab and served as a member of its first advisory board (2001-05). Dr. Wind was also the founding director of the Wharton "think tank," *The SEI Center for Advanced Studies in Management*. The Center's mission was to assure, through research and development, the quality, relevance, and impact of management research, education, and practice (1988-2018).

**Publications:** Dr. Wind is one of the most cited authors in marketing. His regular contributions to professional marketing literature include over 25 books and over 300 papers, articles, and monographs encompassing the areas of marketing strategy, marketing research, new product and market development, consumer and industrial buying behavior, and global marketing. Dr. Wind's books have received wide acclaim and many have been translated into a number of languages. His most recent books are *Beyond Advertising* (2016) and *The Network Imperative* (2016). Dr. Wind's other publications include: *Competing in a Flat World*, with Victor and William Fung (Wharton School Publishing 2007), *The Power of Impossible Thinking: How Changing Your Mental Models Will Transform the Business of Your Life and the Life of Your Business*, with Colin Crook (Wharton School Publishing 2004), *Convergence Marketing: Strategies for Reaching the New Hybrid Consumer* with Vijay Mahajan (Financial Times/Prentice Hall 2002), and *Driving Change* with Jeremy Main (Free Press 1998). Both *The Power of Impossible Thinking* and *Convergence Marketing* were selected by Executive Book Summaries as one of the thirty best business books of 2002 and 2004. His edited books— *The Network Challenge: Strategy, Profit and Risk in an Interlinked World* (Wharton School Publishing, June 2009), *New Product Diffusion Models* (Kluwer 2000), *Digital Marketing* (Wiley 2001), and *Marketing Research and Modeling: Progress and Prospects* (Kluwer 2004)—include the works of the leading experts on these topics.

**Editorship:** Dr. Wind founded *Wharton School Publishing* (Wharton's J.V. with Pearson) (2003), served as the first Wharton editor (2003-2008), and published over 60 books. He has served as editor-in-chief of the *Journal of Marketing*, on the policy boards of the *Journal of Consumer Research* and *Marketing Science*, and has been on the editorial boards of the major marketing journals. He has been a guest editor of special issues of the major marketing journals including *Marketing Science* (1996) on Empirical Generalization in Marketing (with Frank Bass), *JMR* (1978) on market segmentation and (1997) on Innovation in New Product Development and *Marketing Research* (1998) on The State of the Art in Quantitative Research.

**Business Experience:** Dr. Wind has served as an advisor to many Fortune 500 firms and a number of non-U.S. multinationals in the financial services, pharmaceuticals, information, and consumer packaged goods industries. His consulting focuses on both overall global corporate and business strategy and transformation as well as marketing strategy and especially the development of new businesses. He is a regular advisor to SEI and a member of their executive committee. In addition, he has served as an expert witness in various legal cases. Dr. Wind is a member of the advisory board of a number of start-ups including Decision Lens, LiquidHub, DreamTime Vision, Beyond Verbal, and others. He is a former director of IDT (HK), Enhance Financial Services Corporation, Contel Corporation, CASA and a number of entrepreneurial ventures.

**Professional Activities:** Dr. Wind is an active member of the major marketing and management science professional associations. He is the former Chancellor of the International Academy of Management (IAM). A former academic trustee of the Marketing Science Institute and former chairman of the College of Marketing of the Institute of Management Science. He is a member of the Board of Directors of the Marketing Accountability Standards Board. He is one of the founders of the Israeli university—*The Interdisciplinary Center Herzliya* (IDC) (1994), chairman of its academic council, and member of its academic appointment and promotion committee. He is also a member of the board of the American Friends of IDC. He is a member of the boards of a number of Wharton's centers, including the Lauder Institute and Knowledge@Wharton; a trustee of *The Philadelphia Museum of Art*, and chairman of marketing committee. He is a frequent lecturer in faculty seminars and executive programs in over 50 universities worldwide and the founder of *Reimagine*

*Education: Innovative Pedagogical Approaches for Higher Education ([www.reimagine-education.com](http://www.reimagine-education.com)).*

**Awards:** Dr. Wind is the recipient of various awards, including the four major marketing awards—The Charles Coolidge Parlin Award (1985), the AMA/Irwin Distinguished Educator Award (1993), the Paul D. Converse Award (1996) and the Buck Weaver Award (2007). He is the recipient of the first Faculty Impact Award given by Wharton Alumni (1993). In 1984, he was elected as member of the Attitude Research Hall of Fame and has won a number of research awards, including two Alpha Kappa Psi Foundation awards and a recent inclusion in JAR *Classics* issue of 18 articles that have withstood the test of time. In 2001 he was selected as one of the 10 *Grand Auteurs in Marketing* and later named as the 2003 recipient of the Elsevier Science Distinguished Scholar award of the Society for Marketing Advances. In May 2004 he was awarded as Honorary Fellow of the Decade by the Interdisciplinary Center Herzliya (Israel). In 2009, Dr. Wind was selected as one of the 10 *Legends of Marketing* and in 2014 Sage published 8 edited volumes anthologizing his various publications. In 2017, Dr. Wind was inducted into the Marketing Hall of Fame.

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# 1. ACADEMIC EXPERIENCE

## EDUCATION

Stanford University, Graduate School of Business. Ph.D. (Marketing), September 1964-December 1966.

Stanford University, International Center for Advancement of Management Education, Certificate in Marketing Management. September 1963-June 1964.

The Hebrew University, Jerusalem, School of Economics and Social Sciences, M.A. (Business Administration and Political Science), September 1961-June 1963; B. Soc. Sci. (Economics and Political Science), September 1958-June 1961.

## UNIVERSITY POSITIONS

### A. University of Pennsylvania, The Wharton School

#### Faculty Positions:

The Lauder Professor Emeritus, 2017-present

The Lauder Professor, 1983-2017

Professor of Marketing, 1973-present

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Associate Professor of Marketing, 1970-1973

Assistant Professor of Marketing and International Business, 1967-1970

#### Selected Administrative Positions:

Founding Academic Director, The Wharton Fellows program and network , 2000-2018

Founding Director, The SEI Center for Advanced Studies in Management, 1988-2018

Founding Academic Director, The Future of Advertising Program, 2008-2018

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Founding Editor, Wharton School Publishing (WSP), 2003-2008

Founding Director, The Joseph H. Lauder Institute of Management and International Studies, 1983-1988

Founding Director, the 1st Title VI National Resource Center in International Management Studies, 1985-1988

Founding Director, The Wharton Center for International Management Studies, 1980-1983

#### Secondary Faculty Appointments:

Member of the Graduate Group in International Studies (School of Arts & Sciences), 1984-1998

Member of the OR Group, 1979-1984 and the OR affiliated faculty, 1984-1989

Senior Fellow of the Leonard Davis Institute, 1977-1980

Secondary Appointment as Professor of Management, 1981-1984

Member of the Extended Faculty of the Social Systems Sciences Dept. 1981-1986

### B. Other Universities

The Interdisciplinary Center (IDC) Herzliya Israel, Co-Founder (for specific activities since 1994, see p. 75).

University of Tokyo (Japan) Co-Director of the Marunouchi Global Center (MCG) program, 2002; The First Hakuhodo Visiting Professorship, Spring 1992 and 1993.

Erasmus University (The Netherlands) The First Visiting Unilever-Erasmus Professorship, Spring 1993.

University of New South Wales (Australia) The First Visiting Hoover Foundation Professor, 1977.

University of California at Berkeley, School of Business Administration Visiting Professor, Fall 1975.

University of Tel Aviv, The Leon Recanati Graduate School of Business Administration, Visiting Senior Lecturer, September 1968-August 1969.

Stanford University, Graduate School of Business, Research Assistant, June 1965-October 1966.

The Hebrew University Jerusalem, Teaching Assistant in the Departments of Political Science and Business Administration, September 1961-June 1963.



## 2. PUBLICATIONS

### I. BOOKS

1. Libert, Barry, Jerry Wind, & Megan Beck Fenley. The Network Imperative: A Playbook for Creating Unprecedented Value in the Digital Age. Harvard Business Review Press, June 2016.
2. Wind, Yoram (Jerry) and Catharine Findiesen Hays. Beyond Advertising: Creating Value Through All Customer Touchpoints. Hoboken: Wiley, February 2016.
3. Yoram Wind Legends in Marketing: Sage Publications India, 2014 – 8 volumes:  
*Organizational Buying Behavior*, (ed) Robert Thomas  
*Consumer Behavior*, (eds) Barbara Kahn and Robert Meyer  
*Product and New Product Management*, (ed) Vijay Mahajan,  
*Marketing Strategy*, (ed) David Reibstein  
*Market Segmentation*, (ed) David Bell  
*Global Marketing*, (ed) Arun Jain  
*Marketing Research and Modeling*, (ed) Vithala Rao  
*The Future of Marketing*, (ed) George Day
4. Fung, Victor K., William K. Fung and Yoram (Jerry) Wind. \*Competing in a Flat World: Building Enterprises for a Borderless World. Upper Saddle River: Wharton School Publishing, 2007. [Translated editions: Bahasa Indonesia; Chinese Simplified; Chinese Traditional; English (India); Italian; Korean; Polish; Portuguese; Spanish; Italian; Bahasa Indonesian; Turkish.]
5. Wind, Jerry, Colin Crook and Robert E. Gunther. \*The Power of Impossible Thinking: Transform the Business of Your Life and the Life of Your Business. Upper Saddle River: Wharton School Publishing, 2004. Selected by Executive Book Summaries as one of the thirty best business books of 2004. [Translated editions: Arabic; Bahasa Indonesia; Bulgarian; Chinese (simplified and traditional); English (Singapore); Italian; Japanese; Korean; Polish; Portuguese; Russian; Serbian; Spanish; Thai; and Turkish.] Selected by Executive Book Summaries as one of the thirty best business books of 2004; finalist in *Fast Company* Reader's Choice Award for the October book of the month; among CEO READ top 25 books of August 2004. A paperback edition was published in 2006.
6. Krieger, Abba, Paul E. Green and Jerry Wind. Adventures in Conjoint Analysis: A Practitioner's Guide to Trade-Off Modeling and Applications. Philadelphia: The Wharton School, 2004  
<<https://marketing.wharton.upenn.edu/faculty/green/monograph/>>.
7. Wind, Yoram (Jerry), Vijay Mahajan and Robert Gunther. \*Convergence Marketing: Strategies for Reaching the New Hybrid Consumer. Upper Saddle River: Prentice Hall, 2002. Selected by Executive Book Summaries as one of the thirty best business books of 2002. Translated editions: Chinese (simplified), Tsingua University Press; Chinese (traditional), Prentice Hall Taiwan; Bahasa (Indonesia); Spanish; Portuguese; Italian [*Consumatore Centauro: Orvaro il Marketing Della Converganza*, ETAS LAB. IT. 2002]; Korean; and Japanese.
8. Fields, George, Hotaka Katahira, Jerry Wind and Robert E. Gunther. Leveraging Japan: Marketing to the New Asia. San Francisco: Jossey-Bass, 1999.
9. Wind, Yoram and Jeremy Main. \*Driving Change: How the Best Companies are Preparing for the 21<sup>st</sup> Century. New York: The Free Press, 1997. Translated editions in U.K. by Kogan (Page Ltd.), 1998; China by Shanghai Jiao (Tong University Press), 1999; Hungary by Veres István (Geomeédia Szakkönyvek), 2000. Adaptation to local condition: Brazil by Luiz Felipe Monteiro Jr. (IBMEC Qualitymark Editoria), 2002.

10. Bauer, Roy A., Emilio Collar, Victor Tang, Jerry Wind and Patrick R. Houston. The Silverlake Project: Transformation at IBM. New York: Oxford University Press, 1992.  
Translated to Chinese, Huaxia Publishing, 2000.
11. Wind, Yoram. \*Product Policy: Concepts, Methods and Strategies (Addison-Wesley Marketing Series). Reading: Addison-Wesley, 1982. Reviewed in the *Journal of Marketing*, Summer 1981.
12. Wind, Yoram. \*Marketing and Product Planning (in Spanish). Mexico: Expansion, 1979.  
This book is based in part on sections from *Product Policy* which was selected by the editors of Expansion as the "Book of the Year" 1979.
13. Wind, Yoram, Paul E. Green and Douglas Carroll. Multi-Attribute Decisions in Marketing: A Measurement Approach. Hinsdale: The Dryden Press, 1973.
14. Webster, Frederick E. and Yoram Wind. Organizational Buying Behavior (Foundations of Marketing). Englewood Cliffs: Prentice Hall, 1972.  
Translated to Portuguese (Editor, Atlas, Sao Paulo, Brazil, 1975). Reviewed JMR, August 1974.
15. Wind, Yoram, Ronald E. Frank and William F. Massy. Market Segmentation (International Series in Management). Englewood Cliffs: Prentice Hall, 1972. Reviewed JMR, November 1972; August 1974.
16. Wind, Yoram, Homer Dalby and Irwin Gross. Advertising Measurement and Decision Making. Boston: Allyn & Bacon, 1968.
17. Robinson, Patrick J. and Yoram Wind. Industrial Buying and Creative Marketing. Boston: Allyn & Bacon, 1967.  
Contributed two chapters; co-authored with Patrick J. Robinson three chapters; and participated in the overall organization and preparation of the book.
18. Yoram Wind. Industrial Buying Behavior: Source Loyalty in the Purchase of Industrial Components. Unpublished Ph.D. dissertation, Stanford University, 1966.

## II. EDITED BOOKS

1. Wind, Yoram and Arun Jain, eds., "Paul Green Contributions to Clustering and Segmentation." Paul Green Sage Series on Legends of Marketing, 2017.
2. Wind, Yoram and Paul Kleindorfer, eds., The Network Challenge: Strategy, Profit and Risk in an Interlinked World. Wharton School Publishing, 2009.
3. Wind, Yoram (Jerry) and Paul E. Green, ed., \*Marketing Research and Modeling: Progress and Prospects. Norwell: Kluwer Academic Publishers, 2004.
4. Wind, Jerry and Vijay Mahajan, ed. Digital Marketing: Global Strategies from the World's Leading Experts. New York: John Wiley & Sons, 2001.
5. Mahajan, Vijay, Eitan Muller and Yoram Wind, ed. New-Product Diffusion Models. Boston: Kluwer 2000.
6. Mahajan, Vijay and Yoram Wind, ed. Innovation Diffusion Models of New Product Acceptance. Cambridge: Ballinger Publishing Co., 1986.
7. Wind, Yoram, Vijay Mahajan and Richard N. Cardozo, ed. New-Product Forecasting: Models and Applications. Lexington: Lexington Books, 1981.

8. Wind, Yoram and Robert J. Thomas, ed. Advances in Organizational Buying Research: The Case of Acquisition of Scientific and Technical Information. Washington, D.C: National Science Foundation, 1979.
9. Wind, Yoram and Marshall Greenberg, ed. Moving Ahead with Attitude Research: Proceedings of the Seventh Attitude Research Conference. Chicago: American Marketing Association, 1977.
10. Nicosia, Francesco M. and Yoram Wind, ed. Behavioral Models for Market Analysis: Foundations for Marketing Action. Hinsdale, IL: The Dryden Press, 1977.

### III. BOOKS UNDER DEVELOPMENT

1. Latar, Noam, Ornat lev-Er and Yoram Wind. "Art and Conflict Resolution"
2. Eberlein, Barbara, Derek Gilman and Yoram Wind. "Being Creative: Lessons from Architecture and Design"
3. Crook, Colin and Yoram Wind. "Challenging Our Mental Models."
4. Bell, David and Yoram Wind. "Market Segmentation Uncut: A Practitioner's Guide to Understanding and Implementing The Most Powerful Concept in Marketing." NOW The Essence of Knowledge: Foundations and Trends in Marketing, Forthcoming.

### IV. ARTICLES, CONTRIBUTED CHAPTERS, PAPERS IN PROCEEDINGS, AND WORKING PAPERS

The papers are grouped by the following topics:

1. Portfolio analysis and strategy
2. Marketing and business strategy
3. Marketing and product strategy
4. Research on industrial buying behavior
5. Research on consumer behavior
6. Marketing research and modeling
7. International marketing
8. International management education and the Lauder Institute
9. Management practice and education in the 21st Century
10. Convergence Marketing
11. Mental Models – Power of Impossible Thinking
12. Network-Based Strategies
13. Advertising
14. Entries in Dictionaries, Encyclopedias, and Handbooks

#### A. Portfolio Analysis and Strategy

1. Wind, Yoram. "Product Portfolio Analysis: A New Approach to the Product Mix Decision." Combined Proceedings. Ed. Ronald C. Curhan. Chicago: American Marketing Association, Aug. 1974. 460-464.  
<[https://www.dropbox.com/s/udii2qxrrakcofc/7401\\_Product\\_Portfolio\\_A\\_New\\_Approach.pdf?dl=0](https://www.dropbox.com/s/udii2qxrrakcofc/7401_Product_Portfolio_A_New_Approach.pdf?dl=0)>.

- 2\*. Wind, Yoram, and Henry J. Claycamp. "Planning Product Line Strategy: A Matrix Approach." Journal of Marketing 40 (Jan. 1976): 2-9. <  
[https://www.dropbox.com/s/0ijqcty8mop47bc/7601\\_Planning\\_Product\\_Line\\_Strategy\\_A.pdf?dl=0](https://www.dropbox.com/s/0ijqcty8mop47bc/7601_Planning_Product_Line_Strategy_A.pdf?dl=0)>.
3. Wind, Yoram and Daniel Gross. "An Analytic Hierarchy Process for the Allocation of Resources Within a Target Product/Market/Distribution Portfolio." Proceedings of the First ORSA/TIMS Special Interest Conference on Market Measurement and Analysis. Eds. David B. Montgomery and Dick R. Wittink. Cambridge, MA: Marketing Science Institute, 1980. 278-297. <  
[https://www.dropbox.com/s/ovx80z9am9dbxkn/8001\\_An\\_Analytic\\_Hierarchy\\_Process\\_For.pdf?dl=0](https://www.dropbox.com/s/ovx80z9am9dbxkn/8001_An_Analytic_Hierarchy_Process_For.pdf?dl=0)>.
- 4\*. Wind, Yoram, and Thomas L. Saaty. "Marketing Applications of the Analytic Hierarchy Process." Management Science 26.7 (July 1980): 641-658. <  
[https://www.dropbox.com/s/n6swrkxv2oyxdek/8002\\_Marketing\\_Applications\\_of\\_the\\_Analytic.pdf?dl=0](https://www.dropbox.com/s/n6swrkxv2oyxdek/8002_Marketing_Applications_of_the_Analytic.pdf?dl=0)>.
- 5\*. Wind, Yoram, and Vijay Mahajan. "Designing Product and Business Portfolios." Harvard Business Review 59.1 (Jan. - Feb. 1981): 155-165. [B] Based on "Measurement Issues in Portfolio Analysis." Paper presented at the Second Market Measurement and Analysis Conference, Austin, TX, Mar. 1980. [C] Translated and reprinted in French as "Un portefeuille d'activités en sept étapes." Harvard La Revue des Responsables L'Expansion. 1981: 37-49. <  
[https://www.dropbox.com/s/qnuz393qyomme1f/8110\\_Designing\\_Product\\_and\\_Business\\_Portfolios.pdf?dl=0](https://www.dropbox.com/s/qnuz393qyomme1f/8110_Designing_Product_and_Business_Portfolios.pdf?dl=0)>. <  
[https://www.dropbox.com/s/2uotwyro5xgxn3w/8114\\_Un\\_portefeuille\\_d%27activites\\_en\\_sept.pdf?dl=0](https://www.dropbox.com/s/2uotwyro5xgxn3w/8114_Un_portefeuille_d%27activites_en_sept.pdf?dl=0)>.
- 6\*. Wind, Yoram, and Susan Douglas. "International Portfolio Analysis and Strategy: The Challenge of the 80s." Journal of International Business Studies (Fall 1981): 69-82. <  
[https://www.dropbox.com/s/e87s4de1qwbh7o6/8101\\_International\\_Portfolio\\_Analysis\\_and\\_Strategy.pdf?dl=0](https://www.dropbox.com/s/e87s4de1qwbh7o6/8101_International_Portfolio_Analysis_and_Strategy.pdf?dl=0)>.
7. Mahajan, Vijay, Yoram Wind, and John W. Bradford. "Stochastic Dominance Rules for Product Portfolio Analysis." TIMS Studies in the Management Sciences 18 (1982): 161-183. <  
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- 8\*. Harshman, Richard A., Paul E. Green, Yoram Wind, and Margaret E. Lundy. "A Model for the Analysis of Asymmetric Data in Marketing Research." Marketing Science 1.2 (Spring 1982): 205-242. <  
[https://www.dropbox.com/s/lr9q8wtg84h2lsc/8202\\_A\\_Model\\_for\\_the\\_Analysis.pdf?dl=0](https://www.dropbox.com/s/lr9q8wtg84h2lsc/8202_A_Model_for_the_Analysis.pdf?dl=0)>.
- 9\*. Wind, Yoram, Vijay Mahajan, and Donald J. Swire. "An Empirical Comparison of Standardized Portfolio Models." Journal of Marketing 47 (Spring 1983): 89-99. [B] Based on paper presented at the Conference on Analytical Approaches to Product and Marketing Planning, 1981 <  
[https://www.dropbox.com/s/cg7x59475cki2e6/8308\\_An\\_Empirical\\_Comparison\\_of\\_Standardized.pdf?dl=0](https://www.dropbox.com/s/cg7x59475cki2e6/8308_An_Empirical_Comparison_of_Standardized.pdf?dl=0)>
- 10\*. Cardozo, Richard N., and Jerry Wind. "Risk Return Approach to Product Portfolio Strategy." Long Range Planning 18.2 (1985): 77-85. <  
[https://www.dropbox.com/s/98pi0jrm8bdng4y/8501\\_Risk\\_Return\\_Approach\\_to\\_Product.pdf?dl=0](https://www.dropbox.com/s/98pi0jrm8bdng4y/8501_Risk_Return_Approach_to_Product.pdf?dl=0)>.
11. Mahajan, Vijay, and Jerry Wind. "Integrating Financial Portfolio Analysis with Product Portfolio Models." Strategic Marketing and Management. Eds. H. Thomas and D. Gardner. New York: John Wiley & Sons Ltd., 1985: 193-212. <  
[https://www.dropbox.com/s/bb3bx99pzwpdfxi/8502\\_Integrating\\_Financial\\_Portfolio\\_Analysis\\_with.pdf?dl=0](https://www.dropbox.com/s/bb3bx99pzwpdfxi/8502_Integrating_Financial_Portfolio_Analysis_with.pdf?dl=0)>

12. Wind, Yoram, and Vijay Mahajan. "Corporate Growth Through Synergy: Concept, Measurement & Applications." Wharton School Working Paper, Aug. 1985.  
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- Creating and Implementing Quality in Organizations, March 1990.
- Creating and Implementing a Corporate Vision, January 1990.
- Human Resources: Management for the 21<sup>st</sup> Century, January 1990.
- The Impact of Artificial Intelligence on Management Decision Making and Organizational Design, February 1990.

## IX. Edited Publications of the Wharton Future of Advertising Program

Wharton Knowledge in Action Column on Think with Google Forum, 2012.  
<http://www.thinkwithgoogle.com/insights/forum/> :

1. Jerry Wind, Orchestration as the New Managerial Model in the Digital Age
2. David Bell, Thin-Slicing and Retailing on the Internet
3. Robert Malcolm & Peter Sieyes, From Bowling to Pinball – how successful marketing organizations are adapting to digital
4. Kartik Hosanagar, Attribution: Who gets the Credit for a New Customer?
5. Dave Reibstein, The Many Flavors of ROI
6. Eric Bradlow, The Golden Age of Marketing Research
7. Shawndra Hill, Social TV: Linking Content, Buzz and Sales
8. Kevin Werbach, Turn Your Customers into Players: Lessons from Gaming
9. Leonard Lodish, When the Parts are more Powerful than the Sum

## X. EDITOR: WHARTON SCHOOL PUBLISHING BOOKS

### 2008

1. V. Kumar, Managing Customers for Profit: Strategies to Increase Profits and Build Loyalty
2. Stewart Black, Hal Gregersen, It Starts with One: Changing Individuals Changes Organizations
3. Russell E. Palmer, Ultimate Leadership: Winning Execution Strategies for Your Situation
4. J.C. Larreche, The Momentum Effect: How to Ignite Exceptional Growth
5. Yves Doz, Mikko Kosonen, Fast Strategy: How strategic agility will help you stay ahead of the game
6. Russell L. Ackoff, Daniel Greenberg, Turning Learning Right Side Up: Putting Education Back on Track
7. Bernard Lewis, Buntzie Ellis Churchill, Islam: The Religion and the People
8. Alexander B. van Putten, Ian C. MacMillan, Unlocking Opportunities for Growth: How to Profit from Uncertainty While Limiting Your Risk
9. Vijay Mahajan, Africa Rising: How 900 Million African Consumers Offer More Than You Think
10. Michael A. Roberto, Know What You Don't Know: How Great Leaders Prevent Problems Before They Happen (Rough Cuts)
11. Jon M. Huntsman, Winners Never Cheat: Even in Difficult Times, New and Expanded Edition

### 2007

1. Aswath Damodaran, Strategic Risk Taking: A Framework for Risk Management
2. Rajendra S. Sisodia, David B. Wolfe, Jagdish N. Sheth, Firms of Endearment: How World-Class Companies Profit from Passion and Purpose
3. Leonard M. Lodish, Howard L. Morgan, Shellya Archambeau, Marketing That Works
4. Howard Moskowitz, Alex Gofman, Selling Blue Elephants: How to Make Great Products That People Want BEFORE The Even Know They Want Them
5. Daniel M. Cable, Change to Strange: Create a Great Organization by Building a Strange Workforce
6. Jagdish N. Sheth, The Self-Destructive Habits of Good Companies...And How to Break Them
7. Bala Chakravarthy and Peter Lorange, Profit or Growth, September.
8. Victor K. Fung, William K. Fung, Jerry (Yoram) Wind, Competing in a Flat World: Building Enterprises for a Borderless World, September.

9. Barry Libert, Jon Spector, Don Tapscott, *We Are Smarter Than Me: How to Unleash the Power of Crowds in Your Business*, September.
10. Hamid Bouchikhi, John R. Kimberly, *Soul of the Corporation, The: How to Manage the Identity of Your Company*, September.
11. Hunter Hastings, Jeff Saperstein, *Improve Your Marketing to Grow Your Business: Insights and Innovation That Drive Business and Brand Growth*, October.
12. Satish Nambisan and Mohanbir Sawhney, *The Global Brain: Your Roadmap for Innovating Faster and Smarter in a Networked World*, October.
13. James F. Parker, *Do The Right Thing: How Dedicated Employees Create Loyal Customers and Large Profits*, November.
14. Ellen Ernst Kossek and Brenda A. Lautsch, *CEO of Me: Creating a Life that Works in the Flexible Job Age*, December

## 2006

1. Peter Navarro, *The Well Timed Strategy: Executing Strategy Through the Business Cycle for Competitive Advantage*
2. Stuart Lucas, *Wealth: Grow It, Protect It, Spend It and Share It* (Paperback, 2007)
3. Peter Killing, Thomas Malnight, and Tracey Keys, *Must-Win Battles: How to Win Them, Again and Again*
4. Neil Bender, Paul Farris, Philip Pfeifer, and Dave Reibstein, *50+ Marketing Metrics Every Business Executive Should Know*
5. Russell Ackoff, Herbert Addison, and Jason Magidson, *Idealized Design: How to Dissolve Tomorrow's Crisis... Today*
6. Lars Kolind, *The Second Cycle: 7 Proven Tools for Revitalizing Your Business... Before It's Too Late*
7. George Chacko, Anders Sjoman, Hideto Motohashi, and Vincent Dessain, *Credit Derivatives: Introduction to Credit Risk and Credit Instruments*
8. Jerry Porras, Stewart Emery, and Mark Thompson, *Success Built to Last: Creating a Life that Matters*
9. Philip Kotler and Nancy Lee, *Marketing in the Public Sector: A Roadmap for Improved Performance*

## 2005

1. Randall Billingsley, *Understanding Arbitrage: An Intuitive Approach to Financial Analysis*
2. Tony Davila, Marc Epstein, and Robert Shelton, *Making Innovation Work: How to Manage It, Measure It, and Profit from It*
3. Sunil Gupta and Donald Lehmann, *Managing Customers as Investments: The Strategic Value of Customers in the Long Run*
4. Stuart Hart, *Capitalism at the Crossroads: The Unlimited Business Opportunities in Solving the World's Most Difficult Problems* (2<sup>nd</sup> Edition, 2007)
5. Lawrence Hrebiniak, *Making Strategy Work: Leading Effective Execution and Change*
6. Jon Huntsman, *Winners Never Cheat: Everyday Values We Learned as Children (But May Have Forgotten)*
7. Eamonn Kelly, *Powerful Times: Rising to the Challenge of Our Uncertain World*
8. Doug Lennick and Fred Kiel, *Moral Intelligence: Enhancing Business Performance and Leadership Success* (Paperback, 2007)
9. V. J. Mahajan and Kamini Banga, *The 86 Percent Solution: How to Succeed in the Biggest Market Opportunity for the Next 50 Years*
10. Alfred Marcus, *Big Winners and Big Losers: The 4 Secrets of Long-Term Business Success and Failure*
11. Kenichi Ohmae, *The Next Global Stage: Challenges and Opportunities in Our Borderless World*
12. Michael Roberto, *Why Great Leaders Don't Take Yes for an Answer: Managing for Conflict and Consensus*
13. Arthur Rubinfeld and Collins Heminway, *Built for Growth: Expanding Your Business Around the Corner or Across the Globe*
14. David Sirota, Louis Mischkind, Michael Meltzer, *The Enthusiastic Employee: How Companies Profit by Giving Workers What They Want.*
15. Thomas Stallkamp, *SCORE!: A Better Way to Do Business: Moving from Conflict to Collaboration*

16. Glen Urban, *Don't Just Relate – Advocate!: A Blueprint for Profit in the Era of Customer Power*.
17. Craig Vogel, Jonathan Cagan, and Peter Boatwright, *The Design of Things to Come: How Ordinary People Create Extraordinary Products*.

## 2004

1. Bernard Baumohl, *The Secrets of Economic Indicators: Hidden Clues to Future Economic Trends and Investment Opportunities* (2<sup>nd</sup> Edition, 2007)
2. Sayan Chatterjee, *Failsafe Strategies: Profit and Grow from Risks that Others Avoid*
3. Robert Mittelstaedt, *Will your Next Mistake Be Fatal? Avoiding the Chain of Mistakes that Can Destroy your Organization*
4. Mukul Pandya, Robbie Shell, Susan Warner, Sandeep Junnarkar, Jeffrey Brown (2004), *Nightly Business Report Presents Lasting Leadership: What You can Learn from the Top 25 Business People of our Time* (Paperback, 2006)
5. C.K. Prahalad, *The Fortune at the Bottom of the Pyramid* (Paperback, 2006)
6. Scott Shane, *Finding Fertile Ground*
7. Oded Shenkar, *The Chinese Century: The Rising Chinese Economy and Its Impact on the Global Economy, the Balance of Power, and your Job* (Paperback, 2006)
8. Jerry Wind and Colin Crook, *The Power of Impossible Thinking* (Paperback, 2006)

## XI. ILLUSTRATIVE PUBLISHED ABSTRACTS OF PAPERS DELIVERED IN PROFESSIONAL MEETINGS

- “Enduring Vs. Situation Dependent Customer Characteristics as Bases for Market Segmentation: An Evaluation,” in David L. Sparks, (ed.), *Broadening the Concepts of Marketing*. Proceedings of the American Marketing Association, August 1970 Conference.
- “Preference of Relevant Others and Individual Choice Models,” in W.L. Nichols, ed., *Proceedings of the 1974 AAPOR Conference and in Public Opinion Quarterly*, 38. Fall 1974, pp. 447.
- “Multivariate Decision-Making in the Setting of Pulmonary Outpatient Clinic,” with Lawrence Spitz and Ronald Daniele. Paper presented at American College of Physicians, San Francisco, April 1975.
- “Diagnosis Consumer Behavior: A Quantitative Approach,” in D. Rothwell, (ed.), *Proceedings of the 30<sup>th</sup> Annual AAPOR Conference* May 1975 and in *Public Opinion Quarterly*, 39. Fall 1975, pp. 415.
- “Segmentation and Positioning of Health Insurance Services Under Conditions of Heterogeneous Health Insurance Portfolios,” in TIMS/ORSA Bulletin for the S.F. Joint Meeting, May 1977, pp. 244.
- “Alternative Approaches to Industrial Market Segmentation,” with Paul E. Green, in TIMS/ORSA Bulletin for the S.F. Joint Meeting, May 1977, pp. 234.
- “Innovation and the R&D-Marketing Interface,” with Joel Goldhar, in TIMS/ORSA Bulletin for the Atlanta Meeting, November 1977.
- “Measurement Issues in Portfolio Analysis,” with Vijay Mahajan, in R.P. Leone, (ed.), *Proceedings of Market Measurement and Analysis*, TIMS, 1980, pp. 50-53.
- “Imagery Products: A Measurement Challenge,” with Lew Pringle, in J. Keon, (ed.), *Market Measurement and Analysis*, TIMS/ORSA, 1981.
- “Standardized Portfolio Models: An Empirical Comparison of Business Classification,” with Vijay Mahajan and Donald J. Swire in Allan D. Shocker and R. Srivastava, (eds.), *Proceedings of the 1981 Analytical Approaches to Product and Marketing Planning Conference*.

## XII. CASE STUDIES

- During the academic year 1962-1963, I wrote a number of marketing cases at the Hebrew University, Jerusalem (Israel). One of these cases, The Ozi Ballpoint Pen III, was published in Harper W. Boyd, Jr. et al., (eds.), *Marketing Management: Cases from the Emerging Countries* (Reading, MA: Addison-Wesley Publishing Company), 1966.



- During the academic year 1968-1969, several marketing cases were written under my supervision at the Leon Recanati Graduate School of Business Administration, Tel Aviv University.

### 3. CONSULTING EXPERIENCE

#### I. Marketing, Business Strategy, and Marketing Research Consulting

##### 1. Information and Telecommunication Industry

- Telenet, Strategies for “Getting More with Less” (2006)
- Samsung, Management of Technological Innovation (2006)
- Next Level Communication: Business strategy consulting (2000)
- Motorola Broadband Sector: 1998-2004. Business Strategy consulting
- Northern Telecom: Value Pricing and Business Strategy Consulting (1993-1995)
- IBM:
  - ABS Division: Developing procedure for Integrating Marketing and R&D (1988-1989)
  - ES Division, Marketing Strategy and Segmentation (1991-1993)
- AT&T & the Bell companies: Occasional consultant to various units, including:
  - AT&T Technologies Inc. – Design a market segmentation program (1986)
  - AT&T – Review and Design of Portfolio System (1981-1982)
  - Bell Atlantic – Marketing & pricing strategy (1983)
  - Bell Canada – Design of a segmentation study and product portfolio (1979-1980)
- Xerox: Marketing consulting to a design integration program (coordinated by Jay Doblin Associates) and design of a market segmentation project (1982-1983)
- Geometric Data: Segmentation/positioning studies (1981-1982)
- Newsweek, Inc.: Marketing consulting (1979-1980)
- RCA, Government Communications Systems: Design of a research program to assess the market response to new Electronic Mail System (1978-1979)

##### 2. Financial Services

- SEI: Marketing, Business and Corporate Strategy consulting (1986 to present)
- 
- Edward Jones & Co.: Marketing and Business Strategy consulting (1984-2004)
- CitiBank: Statistical consulting (1980); marketing strategy consulting (1996-1997)
- E. F. Hutton: Design and implementation of a marketing planning system and various marketing research projects (1979-1984)
- Reliance Insurance Companies: Marketing research consulting (1980-1981)
- Colonial Penn Group: Design and evaluation of most of the firm’s research activities and general consulting to marketing and top management (1973-1980)
- Chase Manhattan Bank: Process for evaluation of mergers and acquisitions and design of segmentation studies (1978-1979)

##### 3. Health Care

- ConvaTec: Marketing Driven Business Strategy (2008)
- Bristol-Myers Squibb (BMS): Marketing strategy consulting (1997-2002)
- Sterling Drug, Inc.: Development of marketing driven portfolio of R&D projects (1986-1991); Pricing study for innovative new product (1991-1992)
- 
- Merck, Sharp, and Dome: General marketing research consulting (1981)
- Merck & Co.: Marketing Strategy and Marketing Research and Modeling (1991-1996)
- Pfizer, Inc.: 1975-1990. Design and analysis of most of the marketing research projects of Pfizer Laboratories and Roerig. Occasional marketing strategy consultant to the Hospital Products Group (1984-1986) and Pfizer Pharmaceuticals (1987-1990).
- SmithKline Beckman: Marketing strategy development for TAGAMET (1987-1988); evaluation of strategy implementation (1989)
- SmithKline Clinical Laboratories: Marketing planning (1984)

- Upjohn: Strategic planning consulting (1981)
- West Jersey Health System: Marketing and Business Strategy (1985)

#### 4. Transportation

- Air Canada: Market segmentation, positioning and new product development (1973)
- Chrysler: Modeling the advertising budget (1978), advising regarding the analysis of customer satisfaction process (1995-1997)
- Conrail: Design of a positioning/segmentation study (1978-1979)

#### 5. Consumer Goods

- Mars, Advisor to the Catalyst Group (2010 – present)
- 
- DAYMON: Marketing Strategy (2003-05)
- American Dairy Brands and Schreiber Foods, Inc.: Arbitration (2004)
- Campbell Soup: Advertising Strategy, 91-96, 2005-07; Taste Tests (2001-2003)
- Coors Brewing Company, Pricing and positioning (2001)
- Eastman Kodak: New product research approaches (1978)
- R.J. Reynolds Tobacco Co.: Evaluation and design of a new product development system (1979-1980)
- S.B. Thomas: Marketing and research consultant (1979-1980)
- Simplicity Patterns, Inc.: Develop a business plan (1982)
- Pepsi: Research support for the Pepsi Challenge and related campaigns (1978, 1981, 1990, 1995, 1999)

#### 6. Industrial Products and Services

- ITT Water Technology Group (2004-2005)
- John Fluke Manufacturing Co., Inc.): Marketing and corporate strategy (1985-1988)
- Exxon Chemicals: Marketing and Business Strategy (1985-1986)
- International Harvester: Designing a market segmentation process (1980)
- Stauffer Chemicals: General marketing consulting (1980)
- Exxon Chemicals: Marketing and Business Strategy (1985-1986)

#### 7. Retailing

- Wickes, plc: U.K. Marketing and Business Strategy Consulting (1988-1996)
- Sears Roebuck & Company: Advertising and marketing strategy (1972-1973)

#### 8. Professional Service Firms

- Liquid Hub (2016-present)
- MS&L: Marketing consulting (1995-1997; 2001-2002)
- Price-Waterhouse Coopers LLP (marketing and corporate strategy consulting, 1996-2001).
- Standard & Poors (1997-2000)
- IMS America (1997)
- Medicus (1989-1997)
- Hakuhodo. Marketing Strategy for the 21<sup>st</sup> Century (1992-1995)
- Morgan, Lewis & Bockius: Development of Business Strategy (1992-1994)
- DMB&B (1993)
- Y & R (1989)
- Market Research Corporation of America (MRCA) (1975-1987)
- BBD&O (on an occasional basis, 1974-1985)
- Doyle Dane Bernbach: Evaluation of a campaign claim (1980)

- Cunningham and Walsh, Inc. (1978)
- Oxtoby-Smith (selected projects, 1972-1978)
- Gahagan Research Associates, Inc. (selected projects, 1972-1978)
- Professional Marketing Research, Inc. (1977-1978)
- Oxtoby-Smith (selected projects, 1972-1978)
- Applied Communication Research (1974-1976)
- National Analysts (1975-1976)
- Robinson Associates (1969-1975)
- Robinson Associates (1969-1975)
- McConnel Advertising (Montreal), (1974)
- Whittlesey and Partners (1972-1973)

9.Trading Companies, Real Estate Development

- Li & Fung: Business Strategy consulting (1998 to present)  
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- Dewey Companies: Marketing and Business Strategy consulting (2003)

**II. Directorship**

- IDT (2005-2008)
- Ecquaria (2001-04)
- Enhance Financial Services (1997 until acquisition by Radian Group, Inc. in 2001)
- Credit 2B (2001)
- CASA – Center for Adaptive Systems Applications Inc. (1999 Until acquisition by HNC in 2000)
- Access Technologies Group, co-founder and chairman (1992-1996)
- Contel Corporation, member of the Board of Directors (1988 Until acquisition by GTE in 1991)
- Reality Technologies, Inc. (1988-until acquisition by SEI Investments in 1990)
- Dover Regional Bank Shares, member of Board of Trustees (1986-1990)
- Shooting Stars, Inc., member of the Board of Directors (1986-1990)
- The Cortlandt Group, Inc., Co-founder and Chairman of the Board of Directors, (1979-1986)

**III. Illustrative Advisory Boards**

- ANA Talent (2016-present)
  - Decision Lens (2005-present)
  - DreamtimeVision.com (2016-present)
  - QS World University Rankings (2009-present)
  - Fung Retailing Group (2013-present)
  - Journal of Advertising Research, Editorial Review Board and Senior Advisory Board (2015-present)
  - Turner Ad Lab (2016-present)
  - Liquid hub (2016-present)
  - Visual Domains (2016-present)
- 
- Insights 2020 (2015-2016)
  - Arshiya (India) (2007-2013)
  - Cisco Collaboration Consortium (2009-2011)
  - NetXentry (WebForPhone) (2000-2011)
  - Mutual Art (2003-2011)
  - Ad4ever (2000-2003)

**IV. Expert Witness: Marketing and Marketing Research Consulting in Legal Cases**

- Alschuler, Grossman and Pines: Packard Bell vs. Compaq, 1995-1996
- Arent, Fox, Kitner, Plotkin & Kahn: Marketing research consulting re: Estee Lauder, 1987
- Arnold, White and Dunkee: The Clorox Co. vs. Dow Brands Inc. re: Smart Scrub v. Soft Scrub,

- 1995
- Arnold & Porter:
    - a) Schering v. Pfizer, Perceived sedation of Zyrtec, 2000
    - b) Pfizer: Physicians' beliefs concerning prescription antihistamine products in terms of their sedating/non-sedating characteristics 2002
  - Baker & McKenzie:
    - a) G.D. Searle & Co. and subsidiaries litigation in the U.S. Tax Court, 1982
    - b) American Republic Insurance Co. vs. Americare Inc. and American Dental Centers P.C., 1988
  - Berle, Kass and Case: Evaluation of public attitude re: Burlington County Bridge Commission, 1992
  - Bilzin Sumberg Attorneys at Law, Lennar Corporation vs. Michael C. Morgan, 2007
  - Bingham McCutchen LLP: Sharp Computer v. Dell Inc., 2010
  - Maurice Blackburn Cashman Commercial (Australia), Biota Holdings Limited vs. GlaxoSmithKline re. Relenza, 2007-2008.
  - Blanchard, Krasner & French, Consulting Re. Aerus, 2006-2007
  - The Calorie Control Council vs. FTC re: the Saccharin case, 1979
  - Covington and Burling:
    - a) The Proprietary Association vs. FTC re: over-the-counter (antacids) drugs, 1979
    - b) FTC Staff Report on cigarette advertising investigation 1981-1983 including appearance before congressional committee in hearing on H. R. 1824: "The Comprehensive Smoking Prevention Education Act"
    - c) International Telecharge Inc. vs. AT&T, 1992-1994
    - d) Dream Team Collectibles vs. NBA Properties (re: Dream Team), 1996
    - e) G. A. Modefine S.A. v. Armani.com, 2003-2004
    - f) Defence in Class Action Re: IBM REAP Educational Benefit, 2006-
    - g) Spirits Int Nv vs. S.S. Taris Zeytin Vezeyinyagi Birliei, Re: Moskovskaya, 2006-2008
    - h) Cunningham v. International Business Machines Corp., 2007
    - i) QS Wholesale, Inc., v. World Marketing, Inc., 2013
    - j) American Petroleum Institute, et al., vs. Roy A. Cooper, III, 2014
    - k) Sequoia Pacific Solar I, LLC, and Eiger Lease Co., LLC v. The United States of America, 2015
  - Cravath Swain and Moore:
    - a) Amertech Corporation, et. Al. v. Lucent Technologies Corporation [Arbitration], 1997
    - b) Louis Vuitton v. Dooney & Bourke, Inc., 2004
  - Crude Oil Resellers vs. U.S. Department of Energy Economic Regulatory Administration re: the proposed crude oil reseller price regulations, 1979, including presentation at public hearing
  - Darby and Darby. Procter & Gamble vs. Colgate, Palmolive, and Y&R re: China advertising, 1997
  - Davis Polk & Wardwell LLP
    - a) P&G and Sanofi-Aventis US vs. Hoffman-La Roche Inc and GlaxoSmithKline, Inc. Re.Boniva, 2007
    - b) Procter & Gamble Pharmaceuticals, Inc., and Sanofi-Aventis US LLC, v. Hoffman-La Roche Inc. and Glaxosmithkline, Inc., 2006
  - Dechert Price & Rhoads:
    - a) The Mutual Assurance Co. vs. American Council of Life Insurance and Health Insurance Association of America (re: The Green Tree), 1983-1984
    - b) INC vs. Manhattan, Inc., 1985
    - c) Tunis Brothers Co. vs. Ford Motor Credit Co., 1988
    - d) Allerest vs. Alleraact, 1988-1990
    - e) Campbell Soup Co. vs. Conagra, Inc. (Various deceptive advertising cases) 1991-1996
  - Department of Justice, Antitrust Division: Consulting in a number of cases since 1996, including Microsoft Network, ski resorts, Echostar's proposed acquisition of DirecTV, and dental supplies
  - Dilworth, Paxson, Kalish, Levy and Kauffman: Prince Castle vs. Le-Jo Enterprises, 1977-1978
  - Fish & Richardson: Rembrandt Social Media vs. Facebook, Inc., et al, 2014
  - Fitzpatrick, Cella, Harper & Scinto:
    - a) The Gap, Inc. and Gap (Apparel) LLC v. G.A.P. Adventures, Inc., 2010
    - b) American Beverage Corporation and Pouch Pac Innovations, LLC v. DiAgeo North America,

- Inc., and DiAgeo Americas Supply, Inc. t/d/b/a Captain Morgan Co., 2012
- Forrest, Hainline III, American Pasta Co. vs. New World Pasta Co. (re: “America’s favorite pasta”), 2002
- Fulbright & Jahorski: Deere and Co. vs. MTD Holdings, 2003
- Gibson, Dunn, & Crutcher:
  - a) Pfizer, Inc. vs. International Rectifier Corp., 1982-1983
  - b) Thompson vs. General Nutrition Corp., 1985
  - c) New Vector vs. Metro Mobile, 1986;1992
  - d) Air Passenger CRS Antitrust Litigation vs. American Airlines, 1987-1990
  - e) Quintons/Mahurkar vs. Shiley
  - f) McCaffrey vs. Pfizer re: Plax, 1990
  - g) The Travel Difference vs. The Time Mirror Co. (LA Times), 1992
  - h) Toyota re: class action defense vs. Staples Stillwell on the “destination charge” on Monronery Stickers,1995-1996; 1999-
  - i) Hewlett-Packard vs. Nu-Kote Int. Inc., Anti-trust, 1998-1999
  - j) LA Cellular AT&T Wireless class action defense, 2002, 2004-
  - k) Hewlett Packard defense vs. Staple Stilwell in class action suit re economy cartridge, 2003
- Global Business Experts Group
  - a) Yeti Coolers, LLC v. RTIC Coolers, LLC; John Jacobsen; and James Jacobsen, 2016
- Gold, Farrel & Marks: Miramax Film Corp. vs. Columbia Pictures Entertainment, re: *I Know What You Did Last Summer* (1997)
- Goodell, DeVries:
  - a) Roth Licensing, LLC v. GAC International, LLC, ADR Services, 2017.
- Goodwin Procter LLP:
  - a) FTC vs. New Balance re: “made in USA”, 1995-1996 [FTC Hearing] and consulting, 1998
  - b) Public Media Center and People of the State of California vs. Tri-Union Seafoods, Delmonte Corp & Bumble Bee Seafoods. Re: Proposition 65 Mercury In Tuna, 2006
  - c) Environmental World Watch, Inc. v. The Procter & Gamble Distributing Co., Los Angeles Superior Court No. BC 338895; Council for Education & Research on Toxics v. McDonald’s Corp., et al., Los Angeles Superior Court No. BC 280980; and People of the State of California v. Frito-Lay, et al., Los Angeles Superior Court No. BC 337618, 2007.
  - d) Legalzoom.com vs. Rocket Lawyer., 2014
- Greenberg Traurig LLP
  - a) Chatham et al v. Sears Roebuck & Co. Re: Craftsman Made in USA, 2007-
  - b) Whirlpool Corp. vs. Sensata Technologies and Texas Instrument, Inc., 2011
  - c) Curt Schlesinger v. Ticketmaster, 2011
  - d) Santamarina , et. al. v. Sears Roebuck & Company, 2012
- Hapgood, Calimafole, Kalil, Blaustein & Judlowe: Merrill Lynch vs. Paine Webber (re. RMA), 1985
- Heller, Ehrman, White, and McAuliffe: Apple Computer Securities Litigation, 1985-1986.
- Herling, Lindeman, Goldstein and Siegal: Roli Boli vs. Pizza Hut, 1997
- Hill, Betts, and Nash: Fender Musical Instruments Inc. vs. E.S.P. Co., 1985
- Howrey, Simon, Arnold & White:
  - a) Sands, Taylor and Wood vs. The Quaker Oats Co. re: Thirst-Aid, 1987
  - b) Syntex, Inc. vs. Schering-Plough Healthcare Products, Inc. re: Femcare, 1992
  - c) Anheuser Busch (re Bud Dry commercials), 1993
  - d) Anheuser Busch vs. Labbatt (re: Ice Beer), 1994-1995
  - e) Anheuser Busch vs. Samuel Adams, 1995
  - f) Anheuser Busch vs. United Guinness Distillers (re: Red Label from Budweiser), 2002
  - g) Nissan North America vs. BMW (re: “Z”), 2002
  - h) Consulting Re: Schering Plough, 2007
- IT&T Continental Baking vs. FTC re. Fresh Horizons advertising, 1977-1978
- Jenner & Block:
  - a) General Dynamics vs. AT&T. re: Antitrust litigation, 1987-1990
  - b) AT&T vs. MCI re: Telemarketing Practices 1990
  - c) Recording Industry Association of America, Re: Adjustment of Rates & Terms for Satellite Digital Radio Services (Copyright Royalty Board), 2006-2008
  - d) In Re: Adjustment of Rates and Terms for Preexisting Subscription Services and Satellite



- d) Shelby Motor vs. Ford, 1988.
- e) GFA Brands Inc. and Fitness Foods Inc. vs. Canbra Foods Ltd. and Campbell Mithun/Esty, Inc. re Heartlight, 1990-1991.
- f) AT&T vs. MCI (various deceptive advertising cases) 1991-
- g) Walt. Disney vs. Good Times, 1993
- h) Car Freshener Corp. vs. S.C. Johnson and Son, Inc. (re:Glade Plug Ins Air Freshener Design), 1994
- i) International Telecharge, Inc. vs. AT&T, 1992-1994
- j) S.C. Johnson and Son, Inc. vs. Avon (re: Skin So Soft) 1996
- k) GTE Card Services Inc. vs. AT&T, 1996
- l) SunAmerica Corp. vs. Sun Life Assurance Co. of Canada 1993-1995, 1997-1998 [W.H. Covington and Burling]
- m) Blue Cross Blue Shield vs. American Medical Association, re: CPT, 1998
- n) Encyclopedia Britannica, Inc. vs. Britannica Home Fashions, Inc., 1999
- o) Simon Property Group, L.P. v. mySimon Inc., 2001-
- p) Montblanc – Simplo GmbH v. Savonnerie et Parfumerie Bernard, 2001
- q) Old World Industries, Inc. vs. AutoMeter Products, 2002
- r) JLJ Inc. v. Santa's Best Craft (Christmas tree lights), 2004
- s) Energy Brands Inc. (Glaceau) vs. Pespico Inc. + South Beach Beverage Co., Inc Re: Sobe Life Water, 2006
- t) Auto Meter Products Inc. v. Maxima Technologies & Systems LLC, 2007
- u) Dyson, Inc. v. BISSELL Homecare, Inc., 2012
- v) Select Comfort Corp. vs. The Sleep Better Store, 2013
- w) Sweet Street Desserts, Inc. vs. Chudleigh's LTD., 2014
- Paul, Weiss, Rifkin, Wheaton and Grasser:
  - a) Revlon vs. L'OREAL re: Colour Endure Commercials 1995
  - b) Revlon vs. Cover Girl self-renewing lipstick advertising, 1996 [NAD]
  - c) Castrol vs. Penzoil (re comparative advantage) 2008.
- Pepper, Hamilton and Scheetz:
  - a) Del Monte Corp. vs. Sunkist Growers, Inc. Arbitration, 1990-1991
  - b) Sun Oil Company defense against class action certification, 1996-1997
- Pennie & Edmonds IT&T Continental Baking (C&C Cola): defense against Coca Cola re: C&C Cola, 1978
- Perkins Coie:
  - a) Patrick Garrett, Jeff Mains and Linda Eustice, individually and on behalf of all other similarly situated v. Bumble Bee Foods, LLC, Superior Court of the State of California, County of Santa Clara, 2017.
- Pillsbury, Madison & Sutro: Consulting re:
  - a) Thrifty Rent-A-Car vs. Elder, 1991-1992
  - b) Green Giant American Mixtures, 1994
  - c) Chrysler Corp. vs. Replacement Sheet Metalparts Distributors, 1992-1993
- Pillsbury Winthrop LLP
  - a) Mulligan v. Pacific Bell Telephone Co. (inside wiring), 2004
  - b) State of California vs. Tri-Union Seafoods, et al. (Canned Tuna, Proposition 65)
- Quinn Emanuel:
  - a) Louis Vuitton Malletier, S.A. v. Hyundai Motor American, 2011
  - b) Moldex-Metric, Inc. v. McKeon Products, Inc., 2012
  - c) Apple, Inc. vs. Samsung Electronics Co. Ltd., 2012
- Rogers and Wells [and the Italian Trade Commission], re: Italian pasta dumping case, 1996
- Roll Law Group
  - a) POM Wonderful LLC, a Delaware limited liability company, v. The Coca-Cola Company, 2015
- Sidley and Austin:
  - a) Industrial Gas litigation, 1986
  - b) Land O'Lakes, Inc. vs. Bakers Franchise Ltd., 1987
  - c) Ultramar, Inc. vs. CITGO Petroleum Corporation, 1997
  - d) AT&T vs. US West Communications, re: US West advertising, 1998
  - e) DIRECTV, 2017



- f) Federal Trade Commission v. DIRECTV, United States District Court, Northern District of California, 2017
- Sills, Cummins, Zuckerman, Radin, Tischman, Epstein and Gross: E.R. Squibb and Sons, Inc. vs. Stuart Pharmaceuticals, 1991.
- Skadden, Arps, Meagher, & Flom:
  - a) American Home Products vs. Beecham re: Delicare commercials, 1986
  - b) Tambrands, Inc. vs. Warner-Lambert Co. re: EPT commercials, 1986-1987
  - c) Beecham Inc. vs. Yankelovich, Clancy, Shulman and Saatchi & Saatchi Holdings, Inc., re: projections for Delicare, 1986-1988
  - d) American Express vs. MasterCard re: Goldcard, 1988
  - e) Challenge to the networks by Sterling Drug re: Bristol Myers Tribuffered Bufferin commercials, 1988
  - f) Challenge by Dow Brands, Inc. of the TV advertisement for Reynolds Metals Company's "SURE-SEAL" food storage bags, 1989
  - g) Anheuser-Busch Company vs. Coors Brewing Company (various deceptive advertising cases) 1991-1993
  - h) R.H. Donnelley vs. Sprint Publishing and Adv. Inc., re: Sprint Yellow Pages, 1996
  - i) Anheuser Busch vs. Boston Beer re: A-B advertising [NAD], 1997
- Spirits International BV: N.V. vs. S.S. Taris Zeytin, Opposition No. 91163779 before the Trademark Trial and Appeal Board, 2006
- Steptoe & Johnson LLP: DirectTV Inc. and EchoStar Satellite LLC v. William W. Wilkins, Tax Commissioner of Ohio 2006-2007
- Sullivan & Cromwell: Remington Rand Corp. vs. Amsterdam-Rotterdam Bank N.V., 1991
- Van Hagey & Bogan, Ltd.: Consulting re: The Quaker Oats Co, 1991
- Vinson & Elkins LLP: Wal-Mart Stores, Inc. v. GFA Brands, Inc., 2009.
- Weil, Gotshal and Manges:
  - a) Johnson & Johnson vs. SmithKline Beecham, Re: Tums Advertising, 1991
  - b) Schering-Plough Healthcare Products vs. Johnson and Johnson, Inc. re: Neutrogena Chemical-Free Sun Block, 1996
  - c) Pharmacia Corp. vs. Glaxosmith Kline Consumer Healthcare (re: NicoDerm advertising), 2002-2003
  - d) Priceline.com re: NAD, 2003
- White & Case:
  - a) Trovan Ltd. and Electronic Identification Devices vs. Pfizer Inc. re: Trovan's trademark, 1999
  - b) Frederick E. Bouchat vs. Baltimore Ravens, Inc. and NFL Properties Inc., (re: the Ravens Logo), 2001-2002
  - c) Oakland Raiders vs. TBB and NFL, 2003 [with Bingham McCutchen]
- Whiteman, Breed, Abbott & Morgan:
  - a) Pepsi Cola Company: Defense against Coca Cola Co. re: The Pepsi Challenge, 1978; 1981; 1995 [Mostly with the NAD]
  - b) Burger King Comparative Advertising Campaigns vs. McDonald's and Wendy's, 1982-1990
- Winston & Strawn, LLP
  - a) Verizon Directories Corp. vs. Yellow Book USA, Inc., 2004
  - b) Merix Pharmaceuticals vs. GlaxoSmithKline, Re: Releev, 2006
  - c) Dyson Technology Ltd. vs. Maytag Corp., 2006-2007
  - d) Procter & Gamble Co. vs. Ultero Inc. 2007
  - e) Dyson Technology Limited v. Hoover, Inc. and Maytag Corp., 2007
  - f) GlaxoSmithKline Consumer Healthcare LP v. Merix Pharmaceutical Corp, 2007
  - g) Doctor's Associates Inc. vs. QIP Holders LLC & iFilm Corp.: Subway vs. Quiznos, 2008
  - h) LG Electronics USA, Inc. v. Whirlpool Corp., 2009.
  - i) The Scotts Company LLC v. Central Garden & Pet Company and Gulfstream Home & Garden, Inc., 2009.
  - j) Dyson, Inc., v. Oreck Corporation, Oreck Holdings, LLC, Oreck Direct, LLC, Oreck Merchandising, LLC, Oreck Sales, LLC, Oreck Homecare, LLC, and Oreck@Home, LLC 2009.
  - k) LG Electronics USA Inc. v. Whirlpool Corporation, 2010.
  - l) Western Sugar Cooperative, et al. vs. Archer Daniels-Midland Co., et al., 2014
  - m) Fieldturf USA, Inc. and Fieldturf Tarkett, Inc. v. AstroTurf, LLC, 2015

- n) David Davies d/b/a Davies Home Services, individually and as the representative of a class of similarly-situated persons v. W.W. Grainer, INC., 2015

#### **V. Illustrative Marketing Research Clients:**

1. Air Canada (1973\*)
2. American Cyanamid (1972-1973)\*
3. Atlantic Richfield Company (1971-1972)\*
4. Bankers Trust Company (1973-1974)\*
5. BBD&O (1974-1982)
6. Bell Telephone Company of Pennsylvania (1974;1977)
7. Bissell, Inc. (1969-1971)\*
8. Bristol Myers Squibb (1998-2005)
9. Brown & Williamson Tobacco Corp. (1978-1979)
10. Bureau of Newspaper Advertising (1974)\*
11. Campbell Soup Company (1972-1973)\*
12. CBS (1972)
13. Chrysler (via BBD&O) (1975-1978)
14. Clorox Company (1975-1976)
15. Colonial Penn Group, Inc. (1973-1979)
16. Commercial Union Assurance Companies (1974-1975)
17. Connecticut Bank and Trust Company (1972)\*
18. Downe Publishing, Inc. (1972-1973)
19. Eastman Kodak Company (1973)\*
20. Edward D. Jones (1985-1987)
21. E.F. Hutton (1981-1984)
22. First Pennsylvania Banking and Trust Company (1971-1972; 1974-1975)\*
23. General Electric (via BBD&O 1977) (1982)
24. General Foods Corporation: the Jell-O and Kool-Aid divisions and various departments of the corporate product development division (1969-1972)\*
25. Geometric Data (1981)
26. International Air Transport Association (1973-1975)\*
27. International Harvester Company (1975)
28. International Harvester Credit Corporation (1973-1974)\*
29. IT&T Continental Baking Company (1972-1978;1982)
30. Lever Brothers Company (1971-1973)\*
31. Marriott Corp. (1982)
32. Modern Medicine (1970)\*
33. MRCA (1975-1987)
34. Pacific Bell (1981-1982)
35. Pepsi Cola (1981)
36. Pfizer Pharmaceuticals, Inc. (1975-1990)
37. Pillsbury (1975)
38. Pioneer Electronics of America (1978)
39. RCA Computer Division (1972)\*
40. Sears Roebuck & Company (1972-1973)\*
41. SEI Investments (1988-present )
42. Singer (1973)
43. SmithKline and French (1971)\*
44. Snelling and Snelling, Inc. (1973-1974)
45. Sterling Drugs (1985-1986; 1990-1992)
46. Stroh Brewery Company (1970)\*
47. Sun Oil Company (1972)\*
48. Syntex Laboratories, Inc., (1976-1977)
49. The Wool Bureau, Inc. (1975)
50. Twentieth Century Fox (via the Data Group, Inc.) (1972)
51. UNICOM (1973)
52. U.S. Dept. of Commerce, Office of Telecommunications (1972)

53. Western Airlines (via BBD&O) (1979)

The research projects designed and conducted for these firms covered variety of consumer and industrial marketing problems including product positioning and market segmentation, new product development, generation and evaluation of new products, and promotional concepts. Projects with \* were conducted via Robinson Associates.

**VI. Illustrative Marketing Research Program Evaluation and Redesign:**

1. Bristol Meyer Squibb: Redesign of the Marketing Research function and various research and modeling procedures (1999-2002)
2. Brown and Williamson: copy and concept testing (1978-1979)
3. Colonial Penn: all aspects of research (1973-1980)
4. IT&T Continental Baking: copy and concept testing, segmentation studies (1972-1978)
5. Pfizer Pharmaceuticals: image studies, new product selection models, etc. (1975-1990)
6. R.J. Reynolds Tobacco: new product development system (1979-1980)

**VII. Illustrative Intra-Company Marketing Strategy (and Marketing Research) Workshops:**

Estee Lauder (2012 to present)  
SEI Corporation (1990 to present)

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1. American Medical International (1978)
  2. Amoco Fabrics Co. (1984; 1988)
  3. ARA (1983)
  4. Asociacion Mexicana de Ejecutivos en Planeacion (1979)
  5. AT&T (1972-1978)
  6. Atlantic Richfield Company (1971)
  7. Bank of East Asia (2005)
  8. BBD&O (1974-1983)
  9. Bell Atlantic (1983)
  10. Bell Canada (1980)
  11. Black and Decker (1981)
  12. Bristol Myers Squibb (1998)
  13. Campbell Soup (1972)
  14. Career Futures, Inc. (1975)
  15. Certain-Teed Corporation (1983)
  16. Colonial Penn Group (1975-1980)
  17. Computer Science Corporation (1975)
  18. Contel (1989)
  19. Daymon (2004)
  20. Deutsche Bank (2004)
  21. Di Giorgio Corp (1980-1981)
  22. Edward D. Jones & Co. (1983)
  23. E.F. Hutton (1979-82)
  24. Ethicon, Inc. (1979)
  25. General Foods (1970)
  26. Gray Advertising, Inc. (1977)
  27. IBM – Applied Business Systems (1988)
  28. Intermountain Health Care, Inc. (1978)
  29. International Harvester (1974-1975)
  30. ITT Water Technology Group (2004)
  31. Li & Fung (2005)
  32. Los Angeles Times (1993)
  33. 3M's Marketing Council (1986)
  34. Machinist Publishing Co., Ltd., Japan (1977)

35. Miles Laboratories Ltd., Canada (1973)
36. MRCA (1978)
37. New York Telephone Company (1976)
38. Pfizer Pharmaceutical, Inc. (1975-1987)
39. Phillips Petroleum Company (1992-1993)
40. The Pillsbury Company (1976)
41. Rhodia, Brazil (1979)
42. Schlachman Research, U.K. (1975)
43. SmithKline & French (1970)
44. Spectra-Physics (1983)
45. Standard & Poors (1998)
46. Syntex Laboratories, Inc. (1976)
47. Tektronix, Inc. (1978)
48. The Bunge Group (1982) Spectra-Physics (1983)
49. The Clorox Company (1975)
50. The Executive Forum (1979)
51. Unilever, U.K. (1975)
52. Union Mutual (1981)
53. Wyeth International Ltd. (1980)
54. Xerox (1981)

#### **VIII. Selected International Consulting**

Li & Fung, Hong Kong: Business Strategy (1998 to present)

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1. UNIG, Singapore, Business Strategy (2000)
2. Hakuodo, Japan: Design of a 21<sup>st</sup> Century Advertising Agency (1993-1997)
3. Wickes, plc., UK: Marketing and business consulting (1988-1996)
4. McKinsey, Milan: New Developments in Marketing Strategy, Research, and Modeling (1988)
5. Bunge Group, Brazil: Marketing planning (1982-1986)
6. Meridian Group U.K.: Marketing and Business Strategy (1985-1986)
7. Sunstar, Japan: Marketing and Business Strategy (1985)
8. P.E. Consulting Group, South Africa: Strategic planning & Marketing Consulting and Conducting Executive Seminars (1982)
9. Bell Canada, Canada: Market Segmentation Study (1979-1981)
10. Cooperative de Seguros de Vida, Puerto Rico: Design of a marketing planning system (1980)
11. Discount Bank, Israel: Marketing planning (1980)
12. Bank Leumi Ltd., Israel: Marketing planning (1978)
13. Fuji electric, Japan: Design of a management planning process (1977)
14. Koor Industries, Israel: Designing and organizing the marketing function for the corporation's 34 companies (1968-1969)

#### **IX. Consulting to Government Agencies**

1. FinCen/BENS project on Terrorist Financing, 2003-2004
2. U.S. AIR FORCE: Evaluation of the Air Force resource allocation procedure (1980-1981)
3. CANADIAN GOVERNMENT: Industry, Trade & Commerce Design and execution of a study for evaluation of the U.S. market potential for selected Canadian medical diagnostic and therapeutic products (1980-1981)
4. U.S. PATENT AND TRADEMARK OFFICE: Designing a strategic planning system (1981)
5. NASA: Evaluation of NASA's IAC's 1976 advertising campaign and recommendations for its future advertising and marketing strategy (1977)
6. ISRAEL DEFENSE MINISTRY: Analyze and evaluate the marketing system of the Administered Areas (Arab territory prior to the 6-Day War). The findings and recommendations of this study were submitted in classified report to the Israeli Defense Ministry (1968-1969)

#### **X. Consulting/Advising to Research Organizations**

1. Member of the advisory committee of the Diebold Institute study of the impact of public policy on entrepreneurial startup companies: the U.K. and U.S. in biotech and IT, (1998 -2000)
2. Institute of Business and Economic Research, University of California, Berkeley. Consultant on the Coping Behavior (an empirical study of the consumer-technology interface) project, sponsored by the National R&D Assessment Program, NSF. (1976-1981)
3. Pennsylvania Science and Engineering Foundation, Temple University/Applied Communication Research, Inc. Research consultant for design, analysis, and evaluation of an NSF (Office of Science Information Services) sponsored project concerning the design and evaluation of experiments for the marketing of scientific and technical information services. (1974-1977)
4. EDUCOM: Inter-university Communications Council, Inc. Participant in an interdisciplinary seminar to identify and measure special interest audiences for public television. (1974)
5. The John and Mary R. Markle Foundation.
6. Participated in a workshop for design of "Quality Ratings of TV Programs." (1979)
7. Participated in the design of a study on special interest audiences. (1975)
8. Marketing Science Institute Consultant from February 1967 to December 1968. Conduct and plan research projects primarily in the areas of industrial buying behavior, advertising, and international marketing.
9. Marketing Science Institute U.S. Department of Agriculture Study Group on Marketing Performance Principle investigator, March-December 1968. Developed a model for the evaluation of the performance of the U.S. marketing system.
10. Management Science Center University of Pennsylvania Senior staff member September 1967 to July 1968. Engaged in the development of a marketing model for Anheuser-Busch.

## 4. UNIVERSITY ACTIVITIES

### I.University of Pennsylvania, The Wharton School

#### A. Program Development

##### 1. The Wharton Fellows

Master classes designed and directed included:

- November 27-December 2, 2000: Philadelphia: Transformation Leadership
- January 7-January 12, 2001: Silicon Valley: Transformation Leadership
- February 18-February 24, 2001: Barcelona: Transformation Leadership
- March 15-March 17, 2001: Philadelphia: Transformation Leadership
- May 6-May 12, 2001: Philadelphia, Wharton: Transformation Leadership
- June 3-June 9, 2001: Barcelona/Helsinki: Transformation Leadership
- July 8-July 14, 2001: Silicon Valley: Transformation Leadership
- March 17-March 22, 2002: CEO Forum: Transformation Leadership
- April 21-April 25, 2002: Silicon Valley/San Francisco: Transformation Leadership
- June 9-June 11, 2002; Munich
- November 3-November 8, 2002: Foundations I: Philadelphia
- January 5-January 9, 2003: Foundations II: San Francisco: Transformation Leadership
- September 7-September 9, 2003: Top Line Growth in Turbulent Times: Philadelphia
- January 7-January 9, 2004: Success: What's Next?: Seattle
- April 25-April 28, 2004: Milken & the Media: Los Angeles
- June 1-June 8, 2004: Leveraging Japan: Tokyo; China: Transformation from the Inside: Shanghai
- November 12-November 14, 2004: Toward a New Europe: Prague, Czech Republic
- December 12-December 14, 2004: Merger, Acquisition and Renewal: New York
- March 6-March 9, 2005: Market & Sourcing Opportunities in India: Mumbai & Bangalore, India
- June 26-June 28, 2005: Working with Government, Washington D.C.
- November 22-November 27, 2005: Design, Innovation and Strategy: Copenhagen, Denmark/Milan, Italy
- December 4-December 6, 2005: Opportunities in Latin America and the US Hispanic Markets: Miami
- April 5-April 7, 2006: What's Next? Silicon Valley
- June 4-June 6, 2006: Islam and the West: Istanbul
- February 25-February 27, 2007: Managing in an Evolving World, Philadelphia
- May 21-May 23, 2007: Globalization Revisited, Shanghai
- October 14-October 16, 2007: The Next Big Thing, Silicon Valley
- January 9-11, 2008: Innovation, Customer Insights and Creative Growth Strategies, with David Reibstein, Las Vegas.
- April 6-8, 2008: Creativity and Innovation, with Karl Ulrich, Philadelphia.
- October 11-15, 2008: Islam and the West: Insights and Opportunities, with Bulent Gultekin, Dubai.
- May 17-19, 2009: Philadelphia: Finding Opportunity in Times of Economic Crisis
- October 25-27, 2009 Washington DC: Opportunities in Times of Crisis: The Changing Relationship between Business and Government
- June 6-10, 2010: China: Insights and Opportunities, Shanghai, China.
- October 8-12, 2010 Israel: The Holy Land of Innovation and Entrepreneurship
- May 2-4, 2010: Lessons for profitable growth: New York
- February 20-22, 2011 Philadelphia: What's Next in Management Disciplines and Business Transformation?
- October 9-11, 2011 Buenos Aires: Argentina: Insights and Opportunities
- October 13-15, 2011 São Paulo: Brazil: Insights and Opportunities
- June 27 – 29, 2011 Russia: Opportunities and Insights
- October 14-17, 2012 Philadelphia, PA: Innovation and Growth

- March 3 – 6, 2012 India: Insights and Opportunities
  - July 14-17, 2013 Silicon Valley, CA: The Next Big Thing
  - October 13 – 15, 2013 Discovering Africa
  - August 17 – 21, 2014 Israel: The Next Big Thing
  - February 9-13, 2014 New York, NY: The Next Big Thing
  - May 18-21, 2014 Seattle, WA: The Next Big Thing
  - October 29-31, 2014 Boston, MA: The Next Big Thing
  - February 15-18, 2015 Austin, TX: The Next Big Thing
  - May 17 - 20, 2015 Israel: The Next Big Thing
  - September 29 – October 2, 2015 Philadelphia, PA: The Next Big Thing
  - May 1 – 4, 2016 San Francisco, California: The Next Big Thing
  - October 2 – 5, 2016 Singapore: The Next Big Thing
  - May 7 – 10, 2017 Los Angeles: The Next Big Thing
2. The MBA X-Functional Integration Initiative (2003-2005)
  3. A number of Executive Development Programs including :
    - Winning in the Next Millennium: Strategies for Driving Change: Initiator and Director, December 1998.
    - Wharton on the New Reality of Business: Co-Academic Director with Bob Mittlestaedt, December 2001.
    - IDC's MBA @ Wharton Program, 2003-2004; October 2007, 2008, 2009, 2010 (co-director with Ziv Katalan); 2011-2012 (co-director Jehoshua Eliashberg)
    - IESE / CEIBS Global CEO Program: A Transformational Journey (co-director David Heckman), 2012 and 2013
    - LinKS @Wharton, 2007, 2008, 2009, 2010, 2011, 2012 and 2013
  4. The e-Curriculum R&D Initiatives. Initiator/Chair of the Committee that designed the new program platform and the e-Curriculum R&D Initiatives (1999-2000) and continued direction and reinvention of the program.
  5. The Advanced Management Program (AMP) Design Team (1998).
  6. Wharton's Information Management Initiatives (1998-1999). Founder and co-chair (with Paul Kleindorfer) of its faculty council.
  7. The Revised MBA Curriculum (1990-1991). Chaired the committee that developed the new curriculum.
  8. The SEI Center for Advanced Studies in Management, founding Director. Develop and direct all Center activities and chair its faculty council, 1988-2018.
  9. The Joseph H. Lauder Institute of Management and International Studies, founding Director and chairman of its faculty council. Designed and directed all the Institute's programs, including the establishment of the Institute MBA/MA program which admitted its first class of 50 students in May 1984, February 1983-July 1988.
  10. Wharton International Forum. Initiated and designed the original program and chairman of its faculty council, 1987-1998.
  11. Wharton Ph.D. with M.A. in International Studies. Initiated the joint program, 1988.
  12. Wharton Center for International Management Studies (renamed as the Wurster Center, 1988) founding director. Designed/directed all the Center's activities aimed at the stimulation of international research at Wharton and the internationalization of the faculty and programs, 1980-1983.
  13. The Wharton/SIA (Security Industry Association) Marketing Program. Initiated and designed the program which held sessions on April 1982 and November 1982.
  14. The Wharton Recanati Multinational Marketing and Management Program, Co-founder, 1978.
  15. The Wharton Executive MBA (WEMBA) program, chaired the committee that developed the program, 1974.
  16. Marketing Programs, participated in the redesign of the marketing MBA programs, 1970; Ph.D. 1971; and Undergraduate, 1973 and 1981; including the initiation of The Wharton Dual MBA Major in Marketing/Multinational Enterprise.

## B. Courses Developed and Taught

- a. Developed (courses developed by me are indicated by an \*), modified and taught courses and seminars in:
- Advertising Management (MBA)
  - Channel Management (MBA)
  - Communication Processes in Marketing\* (MBA)
  - Consumer Behavior\* (MBA and Ph.D.)
  - Creating an e-Business (MBA)\*[A binational e-course to Wharton and IDC students]
  - Creativity\* (MBA)
  - Health Care Marketing\* (MBA)
  - Industrial Marketing\* (MBA)
  - Integrating Marketing and Operations\* (MBA) [developed jointly with P. Kleindorfer]
  - Interactive Marketing in the Age of the Empowered Consumer (MBA)\*
  - International Marketing\* (MBA)
  - Marketing Management (MBA)
  - Marketing Methods and Applications for Business Consulting\* (MBA) [with P. Green]
  - Marketing Research (MBA and Evening School)
  - Marketing Strategy (WEMBA\*, MBA)
  - Multinational Management
  - Necessity and Experimentation: Lessons from Israeli Innovation: Global Modular Courses
  - Planning Marketing Strategy Projects (MBA)
  - Product Policy\* (MBA)
  - Promotion Policy (MBA)
  - Research Seminar (MBA and Undergraduate)
- b. Course head: MBA advanced study project (1967-1968, 1974-1979), Marketing Management for non-majors (1967-1968, 1970-1971), the MBA Core Marketing Management Course (1970-1971, 1971-1972), Marketing Strategy Seminar (1974-1975)
- c. Guest lecturer in various departments of the Wharton School including the Multinational Enterprise Unit, the Leonard Davis Institute of Health Economics, the Management Department, Management of the Arts Program, Decision Science, Public Policy and Management.

## C. Executive Education Programs at the University of Pennsylvania – Illustrative Sessions

### 1) Creativity and Innovation

- “Innovation by Legacy Firms Does Not Have to Be an Oxymoron\*,” Accessories Council, October 21, 2016.
- “Innovation by Legacy Firms Does Not Have to Be an Oxymoron\*,” Wharton Club of Washington, April 26, 2016.
- 
- “Creativity,” Advanced Management Program, June 26, October 21, 2014
- “Creating a Creative Organization,” Global CEO Program, March 4, 2014.
- “What Business Can Learn from Art,” GCEO Program, March 4, 2014.
- 
- “Creativity,” Advanced Management Program, July 26, October 28, 2013
- “Creating a Creative Organization,” Master Class Wharton Alumni Forum, Tokyo, May 25, 2013
- “Lessons from Art and the Secrets of Creativity,” Global CEO Program: A Transformational Journey, March 14, 2013
- “Enhancing Your Personal Creativity and Challenging your Mental Models,” Comcast Women in Leadership, February 21, 2013
- 
- “Creativity,” Advanced Management Program, June 27, October 29, 2012
- “Lessons from Art and Guidelines for Creating a Creative Organization,” Aresty IESE/CEIBS Global CEO Program, March 23, 2012.



- “Israel Innovation for Global Social Impact: Accomplishments and Opportunities,” Wharton Global Webinar, February 3, 2012.
- “The Challenge of Creativity,” AMP, June 20, 2011.
- “Creative Thinking and Action,” and “Competing in a Flat World in a Time of Crisis,” FirstCaribbean Leadership Programme, December 8, 2008.
- “Creative Thinking and Action,” Toyota Executive Development Program, July 21, 2008
- “Creative Thinking and Action,” (3 Sessions) Toyota Executive Development Program, July 21, 2008.
- “The Innovation Challenge,” (2 Sessions) Raytheon Executive Leadership Development Program, June 9, 2008..
- “Wharton Fellows Philadelphia Master Class: Innovation and Creativity,” Wharton Fellows, April 6, 2008.
- “Creative Thinking and Action,” FirstCaribbean Leadership Programme, November 19, 2007.
- “Innovative Approaches to the Design of Strategy,” LinKS @ Wharton, November 11, 2007.
- “Creative Thinking and Action,” Toyota Executive Development Program, September 17, 2007.
- “Innovation Strategies for Profitable Growth,” Wharton Fellows Philadelphia Master Class *Managing in an Evolving World*, February 27, 2007.
- “Advances in Innovation Management and New Product Innovation,” LINKS @ Wharton, August 26, 2006.
- “Advances in Innovation Management and New Product Innovation,” Quad-C Executive Session, July 10, 2006.
- “Creativity – A Must for Marketing Success,” back-to-class session at the 2005 Wharton Marketing Conference, October 28, 2005.
- “Enhancing Creativity and Innovation,” The Wharton e-Fellows I Program, March 2001.
- “Creativity and Innovation,” in Wharton Workshop on Creativity and Knowledge Creation, April 1999.
- “Innovation and New Product and Business Development,” CEO Circle, May 10, 1996.

## 2) Challenging your Mental Models

- “Challenging Your Mental Models,” Comcast Women in Leadership Program, June 21, 2017
- “The Power of Impossible Thinking: Challenge Your Mental and Business Models,” Global CEO Program, March 13, 2017
- “Challenging Your Mental Models,” McKesson Health Solutions Product Management Program, March 7, 2017
- “Challenging Your Mental Models and Toward New Marketing and Paradigm: Implications and Actions,” Vertex Portfolio Leadership Program, November 30, 2016.
- “Challenging and Changing Your Mental Models,” Hero Motor Corp: The iLead Senior Leadership Development Program, November 29, 2016.
- “The Power of Impossible Thinking: Challenge Your Business and Mental Models,” LinKS @ Wharton, November 1, 2016.
- “Challenging and Changing Your Mental Models,” IDC @ Wharton, October 31, 2016.
- “Challenging Your Mental Models,” PVH Global Leadership Program, September 29-October 1, 2015.
- “The Power of Impossible Thinking,” PVH Global Leadership Program, January 28, 2015
- “Challenging Your Mental Models,” Global CEO Program, March 3, 2014
- “Challenging Your Mental Models,” Comcast Women in Leadership Program, May 14, November 12,

2014

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- “Mental Models: Power of Impossible Thinking,” Global Leadership Fellows Program, July 8, 2013.
  - “Challenging the Mental Models of Advertising and Marketing,” Google Marketing Academy Module 2, June 6, 2013.
  - “Challenging Your Mental Models,” Global CEO Program, March 11, 2013
  - “Challenging Your Mental Models,” ,” LinKS NEXT in Line Module 2: Achieving Global Lead & Global Projects- Listen Louder, January 31, 2013
- 
- “Challenging and Changing your Mental Models,” IDC@Wharton W12, October 19, 2012
  - “Challenging Your Mental Models of Innovation and Growth,” Wharton Fellows Philadelphia Master Class, October 15, 2012
  - “Challenging your Mental Models,” Links: Winning the Right to Serve, September 20, 2012
  - “Challenging Your Mental Models,” Cheil Worldwide Global Marketing Program, August 20, 2012
  - “Mental Models: The Power of Impossible Thinking,” Global Leadership Fellows Program World Economic Forum, July, 11, 2012
  - “Challenging Your Mental Models,” LinKS Next in Line Program, June 22, 2012.
  - “Challenging Your Mental Models,” Estee Lauder Companies, William P. Lauder Brand Equity & Business Symposium, May 1, 2012.
  - “Challenging Your Mental Models,” IESE/CEIBS Global CEO Program, March 19, 2012.
  - “Challenging Your Mental Models,” Estee Lauder Companies Finance Forum, March, 5, 2012.
  - -----
  - “Lesson From Art & Challenging Your Mental Models,” Daimler Advanced Executive Program For Vice Presidents, December 6, 2011.
  - “Challenging Your Mental Models,” LinKS Next in Line @ Wharton, November 10, 2011.
  - “Challenging your Mental Models,” IDC @ Wharton, September 19, 2011.
  - “Challenging Your Mental Models,” LinKS@Wharton WWI, September 15, 2011.
  - “Challenging your Mental Models,” WEF Wharton Global Leadership Fellows Program: Personal Power and Influence, July 13, 2011.
  - “Challenging Your Mental Models: The What, Why, How and Beyond,” IBM Wharton Executive Forum, July 11, 2011.
  - “Challenging your Mental Models,” Wharton & Citi Asia: Leadership Program, June 21, 2011.
  - “Challenging Your Mental Models,” PMA BP CFO Executive Module 3, May 9, 2011.
  - “Challenging Your Mental Models, Tyco Electronics Leadership Development Program, February 28, 2011.
- 
- “Challenging Your Mental Models”, Tyco Electronics Leadership at Wharton, November 16, 2010.
  - “Challenging Your Mental Models”, IDC at Wharton, October 18, 2010
  - “Challenging your Mental Models,” 10th LinKS Wharton Program, June 9, 2010.
  - “Challenging your Mental Models,” LA CEO Global Program, May 6, 2010.
  - “Challenging your Mental Models,” Tyco, February 4, 2010.
- 
- “Challenging your Mental Models,” IDC/CEIBS@Wharton, October 15, 2009.
  - “Challenging Your Mental Models,” LinKS@Wharton, June 10, 2009.
  - “New Mental Models for Capitalizing on Opportunities in Times of Crisis,” LinKS@Wharton, June 10, 2009.
  - “Challenging Your Mental Models,” Latin America CEO Program, April 27, 2009.
- 
- “Challenging Your Mental Models,” ConvaTec, December 16, 2008.
  - “Challenging Your Mental Models,” ConvaTec, November 12, 2008.
  - “Challenging Your Mental Models,” linKS @ Wharton, October 27, 2008.
  - “Islam and the West: Challenging Your Mental Models,” Wharton Fellows Dubai Master Class, October 12, 2008.
  - “Challenging Your Mental Models,” Wharton Fellows, April 6, 2008.
  - “Philadelphia Master Class: The Power of Impossible Thinking,” Wharton Connect, April 3, 2008.
- 
- “Challenging Your Strategic Thinking,” Animas/Lifescan Senior Leadership Strategy Program,

- December 3, 2007.
  - “The Power of Impossible Thinking,” Animas/Lifescan Senior Leadership Strategy Program, December 3, 2007.
  - “Challenging Your Mental Models,” Animas/Lifescan Senior Leadership Strategy Program, December 3, 2007.
  - “Challenging Your Mental Models,” LinKS @ Wharton, November 12, 2007.
  - “The Power of Impossible Thinking,” Wharton Connect, November 1, 2007.
  - “The Power of Impossible Thinking and Global Strategic Management,” CEIBS @ Wharton, June 18, 2007.
  - “Challenging Your Mental Models,” Estée Lauder Companies General Management Program, January 28, 2007
- 
- “Challenging Your Mental Models,” Wharton’s Business Initiative re: Building Winning Profitable Organization in Professional Team Sports, March 19, 2006.
  - “The Power of Impossible Thinking,” Wharton Staff Workshop, September 12, 2006
  - “Creative Thinking and Action,” Toyota Executive Development program, September 26, 2006.
- 
- “The Power of Impossible Thinking,” A Wharton Fellows Dinner Event, Kuala Lumpur, March 2005.
- 
- “Growth Strategies and New Mental Models,” Wharton Fellows, August 2003.
- 
- “Capturing Opportunities and Developing New Mental Models,” Wharton on the New Business Reality, December 2001.

### 3) Transformation and Growth

- “Profitable Growth Strategies,” Links: Winning the Right to Serve, September 20, 2012
- 
- “Business Models of the Future,” 10th LinkS Wharton Program, June 9, 2010.
  - “Creating a New Business Paradigm,” LA CEO Global Program, May 10, 2010.
- 
- “Opportunities In Times of Crisis,” Wharton Fellows, May 17, 2009.
  - “Opportunities In Times of Crisis and Recession,” Knowledge@Wharton Advisory Board, May 14, 2009.
  - “Opportunities In Times of Crisis and Recession,” Knowledge@Wharton Advisory Board, May 14, 2009.
  - “Progress, Problems, and Prospects,” Wharton Fellows, May 12, 2009.
  - “Creating a New Business Paradigm,” Latin America CEO Program, April 27, 2009.
- 
- “Stretch Objectives, Synthesis and Strategy,” Animas/Lifescan Senior Leadership Strategy Program, December 3, 2007.
  - “Expand Customers, Value Creation and Diabetic Pathways,” Animas/Lifescan Senior Leadership Strategy Program, December 3, 2007.
  - “Integrating Strategies and Leveraging Synergies,” Animas/Lifescan Senior Leadership Strategy Program, December 3, 2007.
  - “The Evolving World,” LinKS @ Wharton, November 12, 2007.
  - “The Evolving World,” Wharton Fellows Philadelphia Master Class, February 27, 2007.
  - “Leadership Challenges in the Pharmaceutical Industry,” TEVA Israel *Leading Your Business*, June 28, 2007.
- 
- “A View from the Top: The Perspective of the Enlightened CEO,” Wharton Executive Leadership Program for AICPCU, April 2005.
- 
- Strategy Discussion with Telenet’s Top Management, March 11, 2003.
- 
- “Organizational Change: Problems, Progress, and Prospect,” Price-Waterhouse-Coopers Strategy Master Class, July 26, 2002.

- “Capturing Business Opportunities in a Changing World,” SIA Institute, 50<sup>th</sup> Anniversary Program, March 2002.
- Winning in the Next Millennium, “Driving Change,” 1998.
- Stennis Congressional Fellows Program at Wharton, “Driving Change: Creating Winning 21<sup>st</sup> Century Organizations,” 1997.
- “Management in the 21st Century,” Wharton AMP, September 1989, Philadelphia, PA.

#### 4) Marketing and Branding

- “Global Branding Strategy,” Brand Leadership: Strategies for Driving Growth in a Global Marketplace, June 5, 2013. Philadelphia, Pennsylvania.
- “Towards a New Marketing Paradigm,” IDC@Wharton November 25, 2012
- “Rethinking Your Marketing Strategy,” Aresty IESE/CEIBS Global CEO Program, March 19, 2012.
- “Marketing and Business Strategies in the Age of the Empowered Consumer,” IDC @ Wharton, September 19, 2011.
- “Rethinking Marketing Strategy,” LA CEO Global Program, May 14, 2010.
- “Reinventing Marketing,” IDC/CEIBS@Wharton, October 21, 2009.
- “Opportunities in Reinventing Marketing,” Wharton Fellows, May 18, 2009.
- “Is Marketing Driving Your Business Strategy?,” The Conference Board 2008 Marketing Excellence Conference, November 13, 2008.
- “Destroy Your Brand,” Animas/Lifescan Senior Leadership Strategy Program, December 3, 2007.
- “Market-Driven Organization,” AICPCU and IIA Advanced Executive Education, Wharton, September 10, 2003.
- “Marketing Driven Strategies in a Global Economy,” IBM’s Managing Director’s Executive Development Program, February 13, 2002.
- “The Impact of the e-Bus Revolution on the Marketing Discipline,” Wharton Fellows in e-Business, The Impact on the Discipline, December 2000.
- “World Class Marketing: Implications for Spencer Stuart,” The Wharton/Spencer Stuart Leadership Assessment Program, June 2000.
- “Marketing Strategy in the Global Information Age,” AMP Program, October 1997.
- “Segmentation and Positioning for Sales Force Effectiveness,” Sales Force Management, Wharton Executive Education, March 1997.
- Sales Force Management Program, “Segmentation and Positioning for Sales Force Effectiveness,” 1987, 1990, 1997.
- “Marketing in the Pharmaceutical Industry: Emerging Challenges and Opportunities,” Keynote Address, Healthcare Marketing and Communications Council and Wharton Executive Education, Wharton School, April 8, 1996.
- “Marketing 2000,” AIMSE/Wharton Investment Institute, January 13, 1995.
- “Pharmaceutical Marketing: Emerging Challenges and Opportunities,” Pharmaceutical Advertising Council and Wharton Executive Education Conference on Reengineering Pharmaceutical Marketing, February 25, 1994

- "Marketing Strategy" in the J&J-Wharton Fellows Program in Management for Nurses, 1983, 1984, 1985, 1986.
- AMA International Conference Workshop, Philadelphia, June 1978.
- Marketing Strategy, AMP – Advanced Management Program, 1988-91; 1997-1998.

## 5) The Network Challenge

- "Leveraging the Network Multiplier," LinKS@Wharton, September 15, 2014
  - "Creating Network Organizations," LinKS@Wharton, September 14, 2014
  - "Network Orchestration," Global CEO Program, March 3, 2014.
- 
- "Network Orchestration," Global CEO Program, March 13, 2013
  - "Network Orchestration in a Flat World," , " LinKS NEXT in Line Module 2: Achieving Global Lead & Global Projects- Listen Louder, January 31, 2013
- 
- Governance and Orchestration in a Flat World," Links: Winning the Right to Serve, September 20, 2012
- 
- "Orchestration in a Flat World," LinkS Next in Line @ Wharton, November 10, 2011.
  - "Organizational Networks for Effective Competition in the Flat World, Leadership Development Program at Wharton, February 28, 2011.
- 
- "Organizational Networks for Effective Competition in the Flat World", Tyco Electronics Leadership at Wharton, November 16, 2010.
  - "The Network Challenge," SEI Executive Network, June 28, 2010.
- 
- "Business Models of the Future: Orchestrating Alliances," LinKS@Wharton, June 10, 2009.
  - "Global Economic Crisis," Latin America CEO Program, April 26, 2009.
- 
- "Competing in a Flat World," Wharton Fellows, February 26, 2008.
- 
- "Network Orchestration," Network-Based Strategies & Competencies Workshop, May 3, 2007.

## 6) Future of Advertising

- "The Future of Media in the Context of the Future of Advertising, " The Media Future Summit, October 27, 2016.
- 
- "Creating an Agile and Innovative Organization: Lessons from the FoA Program," Strategic Agility & Innovation Workshop, June 17, 2013
  - "Facebook Roundtable," Wharton Future of Advertising, January 18, 2013
- 
- "Challenging your Mental Models of Advertising," Havas University Leadership Excellence Program, September 20, 2012
  - "The Future of Advertising," Cheil Worldwide Global Marketing Program, August 30, 2012
- 
- "The Future of Advertising," Havas/Euro University Leadership Excellence Program, October 4, 2011.
  - "The Future of Advertising," Cheil Worldwide, Global Marketing Program, September 6, 2011.
  - "Challenging Your Mental Models of Advertising," Austrian Executive "Future of Advertising" Program, March 7, 2011.
  - "Insights from The Wharton Future of Advertising Project" Wharton Fellows at the Conference Board: Philadelphia Master Class, January 20, 2011.
- 
- "The Future of Advertising", Havas/Euro University Leadership Excellence Program, October 26, 2010.

- "The Future of Advertising is NOW," Cheil Communications Project Based Learning in Marketing, August 19, 2008.

#### D. Committee Responsibility:

##### 1. Marketing Department Committees:

- Curriculum Committee 2008-2013; 2015-2017
- Computer Committee 2009-2012
- 5 Year Plan Committee (chair), 2004-2005.
- Initiator and Chair of a Committee to develop a marketing certification program, 2004-2005
- Recruiting/Personnel Committee, since 1971. Chairman Recruiting Committee, 1978-1979; 1981-1983; 1987-1988; Co-chair of the subcommittee for recruiting of STARS 2007- .
- Curriculum Committee, Member of Committee and Chairman of a number of its subcommittees 1967-1978, and 1996-1998. Chairman of the committee 1970-1971, 1973-1975, 1976-1978, and 1980.
- Ph.D. Program Coordinator, 1972-75. Doctoral Committee, 1988-1989.
- External Boards/Affairs Committee, 1987/88; Chair 1988-1989.
- Member and Chairman of various departmental Committees, including all the department's advisory committees since 1971, Marketing Fund Committee since 1983, and its Long Range Planning Committee, 1970-1971.
- Senior Faculty Recruiting, Chairman 1995-1997

##### 2. Wharton School Committees:

- Initiator and developer of *Wharton School Publishing* in conjunction with Pearson/FT, Founding Editor and member of the Faculty Editorial Board (2003-2008)
- Initiator of a faculty group to generate creative curriculum options as input to the MBA Review Committee 2010.
- Dean Advisory Council (since its inception in 1983 to 2000) and 2007/2008; 2008/2009.
- Initiator of a faculty group to generate creative curriculum options as input to the MBA Review Committee 2010.
- Co-Chair, Search Committee for the new Director of the Lauder Institute (2006)
- Member of the Alfred West, Jr. Learning Lab Faculty Committee (2001-2005)
- Chairman, Dean's Committee on Cross-Functional Integration (2002-2004)
- Member of the Executive Development Faculty Advisory Board (2002-2004)
- Chairman of a Faculty Committee to assure cross program dissemination of e-Curriculum Developments (2000)
- Member of the Strategic Planning Steering Committee, 1999-2000
- Member of the Committee to prepare the strategy for "Management, Leadership, and Organizational Priority" area of the University's Agenda for Excellence, 1998
- Senior Faculty Committee to Review the Global Presence strategy (Summer 1997)
- Member of the Advisory Committee on Faculty Personnel, 1976-1978; 1984-1985; 1987-1989; 1994-1995.
- Chairman of the Graduate Curriculum Committee focusing on a critical examination of the MBA program and its appropriateness for preparing the leaders of the 21<sup>st</sup> century enterprises. The Committee developed the new MBA curriculum which was tested in 1991/1992 and 1992/1993 and which was fully implemented starting in 1993/1994.
- Initiated and organized the Management Education Council – the vehicle for corporate support and funding of the new MBA curriculum, 1992-1993
- The Wharton International Committee: Chairman, 1978-1981, 1982/1983, 1995-1997. [The 1995-1997 committee developed the Wharton globalization strategy.] Member: 1967-1968, 1983-1987, 1989-1991.
- Member of Boards of the following Wharton Centers:
  - The SEI Center for Advanced Studies in Management (Founder), 1988 to 2018
  - The Lauder Institute (Founder) (1983 to present)

Knowledge@Wharton (2011 to present)

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The Alfred West, Jr. Learning Lab (Initiator of the Lab and Founder of the External Advisory Committee), 2001-2005

Risk and Decision Process Center, 1984-1986

The Manufacturing and Logistics Forum, 1992-2000

The Wharton/PIMS Research Center (Co Founder), 1985-1998

U.S. Japan Management Studies Center, 1989-1992

Wharton Emerging Economics Program, 1992-1995

The Wharton Center of International Management Studies (Founder), 1981-1983

Wharton Public Policy Initiative, 2013-present

- Dean's Planning Task Force (1986).
- Member of the School's Executive Education Policy Committee, 1987-1989.
- Member or chairman of a number of Chair Search Committees, including seven chairs in Marketing (1985, 1987, 1988-1990, 1992, and 1997), Entrepreneurship (1984-1985, 1997-1998), International Management (1984-1985), Operations Management (1986), the chair and director of the US-Japan Center (1988-1991), the chair in Managerial Economics (1989), the chair in Information Technology (1996-1997), and the chair in Electronic Commerce (1999).
- Member of the (ad hoc) Committees to Review Various Units and Departments:
  - The Snider Entrepreneurial Research Center, 2004-2005
  - Finance Department, 2001-2002
  - The Real Estate Center, 1988
  - Social Systems Science, 1985-1987
  - U.S. Japan Center, 1985-1986
  - Multinational Enterprise Unit, 1977-1978
- Member of the School's Faculty Personnel Committees of:
  - The Health Care Systems Unit, 1974-1975.
  - The Multinational Enterprise Unit, 1978-1979.
- Member of the Committee on Academic Freedom, 1977-1978.
- Chairman of the Advisory Committee for the Wharton Executive MBA Program, 1974-1975.
- Chairman of the Wharton School Doctoral Admissions Committee, 1974-1975.
- Graduate Academic Standards Committee, 1969/1970 – 1971-1972. Chairman of its subcommittee for the evaluation and redesign of the school's grading system.
- A number of Ad Hoc Committees and task forces for the:
  - development of a core Ph.D. Behavioral Science Course, 1972-1973,
  - redesign of the International Business program, 1971,
  - review of the Economic Offerings for Business and Applied Economic doctoral students, 1970-1971,
  - development of a Continuing Education Program in Health Care Administration, November 1971-October 1973.
- Evening School Committee, 1972-1973.
- Behavioral Lab Planning and Implementation Committee, 1989-1990.

#### **E. Doctoral Dissertations Supervised**

Bent Stidsen (1972); Yehoshua Buch (1972); Kathy Villani (1973); Rene Y. Darmon (1973); Arun K. Maheshwari (1973); Chris Hetzel (1973) winner of the AMA Doctoral Dissertation Competition; Arun K. Jain Honorable mention at the AMA Doctoral Dissertation Competition; Joel Huber (1974); Irwin D. Reid (1975); Chris Buss (1979) winner of the AMA Doctoral Dissertation Competition; Robert J. Thomas (1980) Winner of the Academy of Marketing Doctoral Dissertation Competition; Cynthia Fraser (1980); Joel Steckel (1981) Honorable Mention AMA Doctoral Dissertation Competition; John Deighton (1983); Rajeev Kohli (1984); Oliver Heil (1988); Kamel Jedidi (1988); Bari Harlam (1989); Kris Helsen (1990); Nino Buran (1991); Hoon Young Lee (1992); Rajeev K. Tyagi (1994); Amy Kallianpar (1998).

#### **F. Addresses to Alumni Club and Other Groups Regarding:**

## 1) The Joseph H. Lauder Institute

Illustrative addresses to alumni clubs and other groups on the changing needs for management education and the University's response -- The Joseph H. Lauder Institute.

1. Alumni Clubs addressed include:
  - Toronto (August 1987)
  - Milan (October 1987)
  - Philadelphia (January 1984, January 1986)
  - Long Island (January 1984, March 1986)
  - Cleveland (April 1986)
  - Taipei (July 1985)
  - Tokyo (June 1985)
  - Hong Kong (July 1985)
  - Dallas (December 1984)
  - London (May 1984)
  - Paris (December 1983)
  - San Francisco (November 1983)
2. University Groups:
  - Board of Directors of the Association of Alumnae, (March 1984)
  - The Vice Provost Advisory Board, (February 1984)
  - Wharton Board of Overseers, (January 1984, 1997)
  - Trustees (October 1983, January 1984)
3. Other Groups (partial list):
  - University of Pennsylvania Trustee Committee on Academic Policy (January 1988).
  - 40<sup>th</sup> National Conference of the Council on International Education Exchange, San Francisco (November 1987)
  - Title VI Center Lauder conference on International Studies and Foreign Language for Management. Philadelphia (May 1986)
  - University of Pennsylvania Alumni (Alumni day, Philadelphia, May 1985)
  - Delaware Valley Faculty Exchange Program on International Business and Language Studies (December 1984)
  - AIESEC-Northeast regional conference (October 1984)
  - Deans of 50 schools in an AACSB seminar on Internationalizing the Business Curriculum (March 1984)

## 2) Management 2000 project, the SEI Center for Advanced Studies in Management, and the revised MBA curriculum

- Wharton External Affairs, May 2009
- Wharton-Recanati Program, 1993
- International Forum, 1993
- Erasmus University – Faculty and Administration, 1993
- Marketing Advisory Board Meeting, 1993
- Board of Directors of the Wharton Alumni Association, September 1988; May, 1993
- College of Business Administration, University of Texas at Austin C Advisory Board and Faculty, February 1992
- INSEAD Faculty and Administration, February 1992
- Security Industry Institute, 40<sup>th</sup> Anniversary Program, Wharton, March 1992\
- Wharton Advanced Management Program Participants, 1990, 1991
- The Wharton Graduate Advisory Board 1990
- Wharton's European Advisory Board 1991
- Alumni attending the May 1991 Alumni Reunions
- The SEI Center Board of Directors 1990-1991
- The Joseph H. Lauder Institute Board of Governors 1991
- The Wharton Board of Overseers, April 1988



### **3) Globalization Strategy**

- Dean's Advisory Board, February 1997
- Wharton Board of Overseers, March 1997
- Wharton Graduate Executive Board, March 1997
- Wharton Executive Education Advisory Board, May 1997
- European Advisory Board 1997
- Wharton Faculty 1997

### **4) Wharton's Information Management Initiatives (WIMI)**

- All Wharton Departments 1998 – 2001
- The 1<sup>st</sup> Conference of the Wharton Alumni Club of Israel March 2001
- Dean's Faculty Lunch, April 1998

### **5) Cross-Functional Integration of the MBA Curriculum**

- Ph.D. Proseminar (Fall 2003)
- CEO Panel for the entering 2004 class (August 2003)
- Graduate Executive Board (March 2003)
- Wharton Faculty (Feb 2003)

### **6) Wharton Fellows Program**

- Wharton Executive Education Advisory Board (April 2004)
- Wharton Alumni Club of Atlanta (November 2001) and Israel (December 2001)

### **7) Wharton School Publishing**

- Wharton Executive Education Group (January 2005; May 2006)
- Jay H. Baker Retailing Initiative Board (October 2005)
- Wharton School External Affairs group (February 2004)

### **8) Illustrative presentations regarding The Power of Impossible Thinking**

- Alumni Leadership Conference, Hong Kong (May 2007)
- Wharton Connect: On Campus (March 2007)
- Wharton Connect (October 2006)
- Organizational Development Network of Greater NYC (October 2006)
- Wharton Staff Workshop (September 2006)
- The Wharton Club of New Jersey (July 2006)
- CEIBS @ Wharton (July 2006)
- Wharton Sports Business Initiative (May 2006)
- Microsoft's Latin America Financial Services CEO Roundtable (March 2006)
- LinkS@Wharton (November 2005; August 2006)
- Merrill Lynch, Investment Banking Institute at Wharton (August 2005)
- The Greater Glenside Chamber of Commerce Meeting (June 2005)
- Wharton Fellows Event, Singapore (March 2005)
- EMTM Alumni Council (February 2005)
- Miami Wharton Club (December 2004)
- Advertising Research Foundation Breakthrough Conference (November 2004)
- Washington, D.C. Clubs of Wharton and AFLSE (September 2004)
- Deutsch Bank External Insights, New York (September 2004)
- Executive Briefing to Federal Express (September 2004)

## 9) Competing in a Flat World

- Links @ Wharton, Philadelphia (October 2008)
- University of Monterrey, Monterrey, Mexico (October 2008)
- American Chamber of Commerce in Hong Kong, Hong Kong (July 2008)
- The Wharton Club of Spain, Madrid, Spain (June 2008)
- CASRO International Research Conference, New York (May 2008)
- Wharton Club of Southern California, Santa Monica, California (April 2008)
- Wharton Club of New York, New York, New York (February 2008)
- Wharton Fellows, New York, New York (February 2008)
- FirstCaribbean Leadership Programme, Philadelphia, Pennsylvania (November 2007)
- Wharton Marketing Conference: Back to Class Session (October 2007)
- Milken Institute Global Conference, (April 2006)

## II. University of Pennsylvania – University Committees:

- Faculty Affiliate to the Wharton Public Policy Initiative, 2013
- Member, Faculty Advisory Board, Positive Psychology Center, 2011
- Member of the Institute for Strategic Threat Analysis & Response @ Penn (ISTAR) Advisory Board, 2007
- Integrated Product Design – Overseer, 2008-2012
- Chair, Penn Social Responsibility Advisory Committee, 2008-2009 and 2009-2010
- Committee for generating new revenues by medical education initiatives, University of Pennsylvania Health System, 2007-2008
- Research Foundation Committee, Social Science and Management Review Panel, 1999-2006
- Member of the Faculty Advisory Group to Campus Development Planning Committee, 2005-2006.
- Member of the Committee on International Programs, 2002-2006
- Member of The Ackoff Center Advisory Board, 2001-2006
- Member of the Provost Art and Culture Committee, 2002-2004
- Faculty Senate Committee on Administration, 1995-1998
- Chair, Subcommittee of the Faculty Senate Committee on Faculty Teaching Evaluations, 1997-1998
- Chairman of Special Presidential Committee on Borderless Education, 1997-1998
- Provost's Task Force on the University of the Global Information Age, 1996-1997
- Faculty Editorial Board, University of Pennsylvania Press, 1996-1997
- Member of the Provost's Committee on Information Science and Technology, 1996-1997.
- Member of the Provost's Committee on Distance Learning, 1996-1997
- Chairman of a new university committee focusing on innovative revenue generation, 1992/1993 and 1993/1994. Members include the President, Provost, Chairman of the Board of Trustees, 3 deans, 3 trustees, and 3 faculty members.
- Chairman of a Subcommittee for the Evaluation of the University Office of International Programs, 1990-1991 and of a Subcommittee to Evaluate the University's Off-Campus Programs, 1991-1992.
- Member of the Provost Task Force on International Programs (1992/1993; 1993/1994).
- Member of the Provost International Council, 1990-1992.
- Member of the Commission for the 250<sup>th</sup> Anniversary Celebration of University of Pennsylvania, 1987-1990
- Advisory Board of the PBS series on The Global Economy, 1990.
- University of Pennsylvania correspondent for PBS program on Geo-economy, moderated by Ted Koppel, May 1990.
- Chairman of the Faculty Council of the Joseph H. Lauder Institute, 1983-1988.
- Member of the Board of Directors of the Joseph H. Lauder Institute, 1983 to present.
- Member of the Advisory Board of the office of International Programs, 1980 to present.
- Chairman, the Wharton Dean Search Committee, (selected Russ Palmer)1982/1983.
- The Senate Committee on the Economic Status of the Faculty, 1978/1979 (member); 1979/1980 (chairman).

- Member of the University's Committee on Research, 1977/1978. Chairman of its subcommittee for evaluation of the University's Policy and Conduct of Research Programs.
- Member of the FAS – Wharton Committee, 1975-1977.
- Member of the subcommittee of the University's Academic Planning Committee for the Measurement of Academic Performance, 1972/1973.

### **III. The Interdisciplinary Center (IDC), Herzliya, Israel**

- Chairman, Higher Academic Council 1999-present
  - Founder of the American Friends of IDC 1998 and a Member of the Board, 2003-present
  - Faculty Promotion and Appointment Committee: Chairman 1999-2005; Member 2005-present
- 
- Founder of the American Friends of IDC 1998 and a Member of the Board, 2003
  - Designed the week-long programs at Wharton for its visiting MBA class since 2002
  - Chairman, International Academic Advisory Board, 1994-2000
  - Delivered the first graduation address of the Wharton IDC Marketing Communication Program, March 1999
  - Delivered the first Graduation Address, October, 1998
  - Co-founder (1994)
  - Delivered the first Zoltan Wind lecture, 1996
  - Occasional lectures in various courses, faculty seminars, and public addresses since 1995

### **IV. Other Universities**

#### **A. Courses Taught**

- Erasmus University (The Netherlands) – A variety of courses on marketing strategy and marketing science (1993).
- University of Tokyo (Japan) – Marketing Science (1992).
- University of New South Wales (Australia) – Doctoral Seminar in Marketing (1977).
- University of California at Berkeley – Product Policy, Doctoral Seminar (1975).
- University of Tel Aviv (Israel) – Consumer Behavior, Marketing Seminar (1968).

#### **B. Faculty Promotion Review – Illustrative Universities**

Columbia University, Harvard University, Massachusetts Institute of Technology, New York University, Pennsylvania State University, Stanford University, Tel Aviv University, University of California at Los Angeles and at Berkeley, University of Chicago, University of Georgia, University of Illinois, University of Pittsburgh, University of Rochester, University of Southern California, University of Texas, Yale, and others.

#### **C. Program/School Review**

- Indian School of Business – Organization of the Wharton Planning Meeting, April 2002.
- Rice University – member of the external review committee, 1996.
- University of Santa Clara – member of a Site Review Team for the evaluation of the school's marketing department, 1981.
- University of Tel Aviv – Initiator and organizer of the school's faculty colloquium, working paper series, planned and organized a number of the school's executive development programs and various other activities, 1968/1969.
- The Technion, Israel Institute of Technology – Outside examiner at the Graduate Division of the Technion – The Israel Institute of Technology, Haifa, 1969.

## 5. OTHER PROFESSIONAL ACTIVITIES

### I. Development of Research Programs [Illustrative List]

1. The Future of Advertising (2007 to 2018)\*
2. Network-Based Strategies and Competencies (2007-present)
3. Creativity and Innovation (2006-present)
- 
4. SEI Center project Toward a New Theory of the Firm (2004-2008)
5. SEI Center project with Business Executives for National Security and FINCEN using the Suspicious Activity Reporting System (SARS) for identifying terrorist financing (2003-2004)
6. SEI Center project, Assessing the True Value of the Firm, Co-Directed with David Larcker (2002-2003)
7. The Wharton Office of Homeland Security (OHS) Project, Economic Vulnerability to Terrorism: Assessment, Prioritization and Action Implications, Co-Directed with Paul Kleindorfer (2001-2002)
8. Digital Transformation Project in Collaboration with McKinsey, WeBI and the Fishman-Davidson Center for Service and Operations Management (2001-)
9. e-Curriculum R&D Initiatives (2000-2002) and Curriculum R&D for the Wharton Fellows Decision Support Network (2001-2004)
10. The SEI Center's research program on Creating a 21<sup>st</sup> Century Enterprise. (1990 to 2018)
11. Established the Value of Marketing program. (1993-1997)
12. Initiated (with Frank Bass) the Empirical Generalizations in Marketing program. (1993-1995)
13. Co-founded (with Greg Farrington) the Virtual University Lab program (1995-1997)
14. Initiated the Computers and Art program for the ENIAC at 50 celebration (1998-1999)
15. Co-developed (with Bob Holland) the SEI Center's George Harvey Program on Value Creation Through Diversity (1996-2000)
16. Co-founded (with Paul Kleindorfer) the Information Management Initiatives Research Program (1998-1999)

### II. Editorial Activities

1. Founding editor, Wharton School Publishing, 2003-2008 [see p. 46-48 for list of edited publications]
2. Initiator and editor of *Advances in Marketing Research and Modeling: Progress and Prospects – A Tribute to Paul E. Green*, Kluwer Academic Publishers, 2002.
3. Initiator and editor of *The Wharton School Publishing Newsletter* (monthly July 2005-July 2008)
4. Initiator and Co-Editor of the *Wharton Fellows Newsletter* (quarterly 2003-4; monthly January-December 2005).
5. Initiator and editor of *Wharton Executive Library* (published by Oxford University Press), 1984-1987. The series was aimed at familiarizing top management with recent developments in the various management disciplines. Books published include:
  - Gerard Adams, *The Business Forecasting Revolution, Nation-Industry-Firm*, 1986.
  - Leonard M. Lodish, *The Advertising and Promotion Challenge, Vaguely Right or Precisely Wrong?*, 1986.
  - David Solomons, *Making Accounting Policy: The Quest for Credibility in Financial Reporting*, 1986
  - James C. Emery, *Management Information Systems: The Critical Strategic Resource*, 1987.
6. Initiator and editor of the Scientific Press *Computer Based Marketing Series*. 1984-90. The series offers short books on specialized marketing topics with accompanying PC software. Books published include:
  - Paul E. Green, *CAPPA Electronic Questionnaire Display and Analysis*, 1986
  - Gary Lilien, *Marketing Mix Analysis with Lotus 1-2-3*, 1987
  - John Hauser, *Applying Marketing Management: Four PC Simulations*, 1987
  - Darral G. Clarke, *Marketing Analysis and Decision Making: Text and Cases with Lotus 1-2-3*,

- 1987.
  - Gary Lilien, *Marketing Management: Analytical Exercise with Lotus 1-2-3*, 1988.
7. Editor-in-Chief, *The Journal of Marketing* 1978-1981 (Vol. 43-45)
  8. Area Editor, *Marketing Science*, 1981-83 (Vol. 1-2); occasional Area Editor (2002-)
  9. Advisory Editor of the Addison-Wesley Marketing Series, 1974-1981. Books published under my editorship include:
    - David Hughes, *Marketing Management*, 1978.
    - James Bettman, *An Information Processing Theory of Consumer Choice*, 1979.
    - Richard N. Cardozo, *Product Policy: Cases & Concepts*, 1979.
    - F.E. Brown, *Marketing Research: A Structure for Decision Making*, 1980.
  10. Member of the Editorial Boards of:
    - Journal of Interactive Marketing, 1998-present
    - Journal of Business to Business Marketing, 2004
    - Journal of Global Marketing, 1986-1990
    - Journal of Product Innovation Management, 1982-1990
    - Annual Review of Marketing, 1980-1982
    - Computer Operations, 1968-1970
    - Journal of Business Research, 1974-1977
    - Journal of Consumer Research, 1973-1984
    - Journal of High Technology Management and Market Research, 1988
    - Journal of Marketing Research, 1978-1981
    - Journal of Marketing, 1971-1978
    - Journal of Organizational Behavior and Statistics, 1983
    - Journal of Pricing Management, 1989
    - Journal of Segmentation in Marketing, 1997
  11. Occasional reviewer for:
    - Decision Sciences
    - IEEE Transactions on Engineering Management
    - Journal of Management Studies
    - Journal of Marketing
    - Management Science
    - Marketing Science
    - Operations Research
    - Public Opinion Quarterly
    - R&D Management
    - The Journal of Economics and Business
    - The Wharton Quarterly
  12. Screening editor, *Journal of Consumer Research*, 1973-1974.
  13. A judge of competitive research papers submitted to the National Conference of The AMA Academic (August) Conference in - Minnesota (1971), Houston (1972), Washington (1973), Portland (1974), Rochester (1975), Memphis (1976), Chicago (1980), Chicago (1984).
  14. A judge of Ph.D. dissertations submitted to the AMA Doctoral Dissertation Competition, 1974, 1976, 1977, 1981, 1982, 1983. And the MSI Dissertation, and other award competitions 1984, 1985, 1990
  15. Reviewer of papers submitted to the Market Measurement and Analysis Conference (renamed Marketing Science Conference) since 1981.
  16. Occasional reviewer of applications for research grants for the Social Science Research Council

(London, England) since 1972; and the National Science Foundation, Division of Science Information and Advanced Productivity Research and Technology, since 1977.

17. Reviewer of manuscripts for a number of publishers and universities, including the MacMillan Company, the Center for Research of the College of Business Administration of Pennsylvania State University, the Graduate School of Business, Columbia University, Prentice Hall, Jose Bass and others.

### **III. Offices Held in Professional Associations**

#### **AMA**

1. Member of the Board of Directors, The Philadelphia Chapter of the AMA, 1979-1983.
2. Program Chairman of:
  - a) The 1977 AMA Doctoral Consortium Philadelphia, August 1977.
  - b) The 1975/1976 AMA Attitude Research Conference, Hilton Head, SC, February 1976.
  - c) The National Educators AMA Conference, Washington, D.C., August 1973.
3. Member of a number of AMA councils including the Advisory Council of the National Marketing Honorary Society of the AMA - Alpha Mu Alpha, 1980/1981 and the Educational Policy Council, 1977/1978.

#### **TIMS**

1. Chairman, 1974/1975; Chairman Elect, 1973/1974; and Vice Chairman, 1971/1972 of the Institute of Management Science College of Marketing.
2. Program Chairman of:
  - a) Marketing track on "Marketing Science for Increased Competitiveness of Firms and Countries," 1988 Washington, D.C., TIMS/ORSA Conference.
  - b) The 1981 Market Measurement and Analysis Conference (with Vijay Mahajan).
  - c) The Delaware Valley Chapter, 1967/1968.
3. Member of the Program Committees of the Market Measurement and Analysis Conference: University of Texas, 1980; New York University, 1981; and the Marketing Science Conference: University of Chicago, 1983; Vanderbilt University, 1985; University of Texas at Dallas, 1986; Centre HEC-ISA, Jouy-en-Josas, France, 1987; Washington University, 1988.
4. Member of the Advisory Board of Marketing Science, 1983-present.

#### **IAM – The International Academy of Management**

1. Chancellor, 2000-2006.
2. Vice Chancellor for the Americas, 1995-2000.
3. Program chairman, the Americas Conference, 1994, 1998.

#### **MASB – Marketing Accountability Standards Board**

1. Member of the Board of Directors since 2010.

#### **MSI – Marketing Science Institute**

1. Chair of a task force on e-business evaluation (part of the Metrics program), 1999.
2. Academic Trustee (1989-1995).
3. Member of the Academic Advisory Council (1983-1987).
4. Member of a number of steering groups, including
  - Marketing Strategies Steering Group, 1983-1987.
  - The International Advisory Steering Committee (1985-1987).
  - Information Technology Steering Committee (1990-1992).

## Other

1. The Diebold Institute Entrepreneurship and Public Policy Project, Committee of Advisors (1999-\_\_ ).
2. World Management Council. Member of the Academic Advisory Board (1988–1989).
3. Member of the interdisciplinary task force (organized by AMA) for the design of the *Journal of Consumer Research*, (October 1971–July 1972). Founding member of the Policy Board of the *Journal of Consumer Research* (1972–1983); Chairman of the Board (1977–1978); Chairman of the 1976 and 1981 Editor Search Committees.
4. Member of the Philadelphia's International City Steering Committee (1983–1985, 1987–1988).
5. Member of the Publication Committee of AAPOR (1973-1974).
6. Member of Program Committee of 1979 ACR Conference.
7. Member of the Advertising Research Foundation 75<sup>th</sup> Anniversary Convention Program Committee (2010)
8. ANA Talent (2016-present)
9. QS World University Rankings (2009-present)
10. Insights 2020 (2015-present)
11. Journal of Advertising Research, Editorial Review Board and Senior Advisory Board (2015-present)
12. Turner Ad Lab (2016-present)
13. Visual Domains (2016-present)

### D. Planning and Organizing Professional Programs at the University

1. Empirical Generalizations in Advertising, December 2008; and Empirical Generalizations in Advertising II, "What works in the New Age of Advertising and Marketing," May 2012, with the Ehrenberg-Bass Institute for Marketing Science, University of South Australia
2. Advertising Effectiveness, with the Wharton Customer Analytics Initiative, May 2013.
3. Gaps in Measuring Advertising Effectiveness, with the Advertising Research Foundation, 2012-2013.
4. Chair, "Network-Based Strategies and Competencies," a joint project with INSEAD co-directed with Paul Kleindorfer, Initial Workshop, May 3, 2007. Conference, November 2007.
5. Chair, "The Future of Advertising," a joint project with the ARF, Workshop, March 30, 2007. Conference, December 2008.
6. Initiated and chaired a task force to develop a Marketing Certification Program (2003-2004)
7. Co-Designed with Bob Mittelstaedt an executive education program on "Wharton on the New Reality of Business," December 2001 [including the design of the "Wharton Post 9/11 Business Scenario" (October 2001-)] and May 2002.
8. Designed and directed the executive programs, "Winning in the Next Millenium," December 1998.
9. Initiated "The Impact of Computers and Information Technology on Management: 1946, 1996, 2001," May 13-14, 1996 program for the ENIAC at 50 celebration (1994-1995).
10. Initiated the "Computers and Art" program for the ENIAC at 50 celebration (1994-1995).
11. Participated in the original design of the Wharton – AT&T Marketing Management Program. Taught in the 1973, 1975 -1980 programs.
12. Developed, organized and taught a Marketing Research Seminar for U.P. Clinical Scholars Group (February–May 1975 and February–April 1976).
13. Planned and taught the marketing management section of a number of advanced management programs of the University of Pennsylvania:
  - Dean Witter - Wharton Account Executive Program, 1986.
  - Securities Industry Association Program, annually since 1982.
  - Advanced Management Program for Overseas Bankers, 1975, 1976.
  - Program for Health Care Executives, 1973, 1975, 1982.
14. Participated in various executive development programs of the Marketing Department of the University of Pennsylvania:
  - Marketing for the Postal Service, 1983.
  - Marketing Strategy Seminar, since 1981 (January & May).
  - Pharmaceutical Advertising Council, 1980/1981.
  - Wharton Salesforce Management Seminar, since 1980 (January & May).
  - Dixie/Marathon (American Can Company), May 1977.
  - Marketing Research Seminar 1977-1983.
  - General Building Contracting Association, Inc., January 1977.

- Center de Promotion du Commerce International, Chambre de Commerce et d'Industrie de Nantes, 1976, 1978-1980.
15. Planned and taught (with Thomas Robertson) a number of seminars on Health Care Marketing for:
    - The Virginia Hospital Association, February 1978.
    - The New York Management Center, September and November 1977.
    - The Wharton School's Lifelong Education Program, October 1976.
  16. Co-founder, organizer of the Wharton teaching component, and frequent lecturer in the Wharton/Israel Binational Marketing Management Program [The Consulting Practicum] 1979-1995.

#### **E. Award Committees**

1. Member of the Sheth Award Committee to select the winning *Journal of Marketing* article that had the greatest long-term impact on the marketing discipline, 2009-2010
2. Member of the Parlin Board of Governors, 1978-1983, 1995-2008 ; Chairman of the Board, 1980/1981.
3. Member of the selection committee for MIT's Sloan Management Review/Price-Waterhouse Company, 2003 – Best Article Award.
4. Member of the "Global Marketing Scholar's Prize" Selection Committee, 2011, hosted by Korean Academy of Marketing Science
5. Nominator for the Marketing Communications Award of the World Technology Network, 2002-present
6. Initiator of the Lauder Institute Award for the Research Paper that Best Advances the Theory & Practice of International Management Science. Administered by TIMS and Chairman of the first award, 1989.
7. Member of the W. Arthur Cullman Executive Award Selection Committee (Ohio State University), 1985-1986
8. Member of a panel of judges for the evaluation of nominees for the Paul D. Converse Awards for Outstanding Contributions to the Development of Theory and Science in Marketing, 1974, 1977, 1981, and 1986.

#### **F. Planning and Organizing Professional Programs Outside the University**

1. KMDC Program, Kuala Lumpur, The Power of Impossible Thinking and Its Implications for Marketing Innovations, March 15-16, 2005.
2. Co-director (with Hotaka Katahira) of the Marunouchi Global Center Management Program, 2002.
3. Planned and taught a number of two-day seminars on "Recent Developments in Marketing Research Methodology" for:
  - The Management Center, University of Bradford, February 1975 and May 1976.
  - The University of Laval, Canada, November 1973.
  - The University of Social Sciences at Grenoble, France with (Paul E. Green), May 1973.
4. Planned and taught various AT&T Executive Development Seminars on:
  - "Multivariate Analysis in Marketing," March and August 1975.
  - "Market Analysis," December 1974, and June 1975.
  - "Market Segmentation," September 1974, November 1975 and March 1976.
  - "How to get the Most Out of Your Marketing Research," Spring 1974.
  - "Consumer Behavior," October 1972, January 1978.



5. Planned and taught two one-day executive seminars on Conjoint Analysis and New Product Policy at the University of New South Wales (Australia), June 1977.
6. Planned and taught a number of executive seminars at the University of Tel Aviv: Marketing Strategy (1969); Product Policy (1977); Marketing and Corporate Strategy (1978, 1980); New Development in Product and Marketing Research (1980).
7. Planned and taught the marketing research section of the Bank Marketing Program of the Graduate School of Bank Marketing, April 1977.
8. Planned and taught a series of two-day seminars on Marketing Strategy for the New York Telephone Company, February and April 1976.
9. Initiated, planned and organized a number of two day workshops on:
  - Concept Testing, University of Pennsylvania, March 1972.
  - Industrial Buying Behavior (with Frederick E. Webster and Richard N. Cardozo), sponsored by the AMA & the University of California at Berkeley, April 1971.
  - Research Utilization, (with Steve Greyser and Randy Batsell), sponsored by the AMA and MSI, April 1979.
  - Advances and Applications in New Product Forecasting: Innovation Diffusion Models (with Vijay Mahajan) sponsored by MSI, October 1983.
10. Organizer and chairman of various sessions at annual conferences of various professional associations (illustrative list):
  - "Design Meets Marketing: Service Innovation by Design," Marketing Science Institute and Corporate Design Foundation Conference, Stanford University, October 17, 2007.
  - "Marketing science: Accomplishments and challenges in the global information age," plenary session at Informs, Philadelphia, November 1999.
  - "Consumer Labs," Marketing Science Conference, March 1997.
  - "Global Marketing Strategy," 1991 ORSA/TIMS Meeting
  - "Creation of Innovative Marketing Knowledge: An Interdisciplinary Perspective," 1989 AMA Marketing Educators Conference, August 1989.
  - Strategic Alliances," TIMS Osaka, Japan, July 1989.
  - "Industrial and New Technologies Marketing: Lessons from Industry," International Research Seminar in Marketing, La Londe les Maures, France, May 1989.
  - "New Product Development Models," ORSA/TIMS, San Diego, October 1982.
  - "Product/Market Portfolio Models," ORSA/TIMS, Colorado Springs, November 1980.
  - "The Role of Multivariate Analysis in Consumer Research," APA, Toronto, 1978.
  - "Applications of Management Science to Market Segmentation," TIMS, Miami, 1976.
  - "Recent Developments in Management Science Application in Marketing," TIMS, Las Vegas, 1975.
  - "Multidimensional Scaling and Conjoint Measurement in the Study of Multidimensional Psychophysics," ACR, Boston 1973.
  - "Implementation of Management Science in Marketing," TIMS, Houston 1972.
  - "On the Teaching of Consumer Behavior," AMA, Houston, 1972.
  - "Family and Industrial Buying Behavior," AMA, Minneapolis, 1971.
  - "Multidimensional Scaling in the Study of Consumer Behavior," ACR, 1970.
11. Planned, organized and taught a Marketing Management Program for the top executives of the Union of Cooperative Societies (Israel), April to July 1969.
12. Planned and taught marketing courses at a Graduate Program for Marketing Consultants at the Israel Institute of Productivity, September 1968 to January 1969.
13. Academic advisor to a number of organizations engaged in Management Training in Israel. Primarily the Israel Institute of Productivity, and the Technion Research and Development Foundation Ltds., January to August 1969.

## **G. Presentations\*1**

### **A. Presented papers at various national conferences of the American Marketing Association**

December 1967; June and August 1968; August 1969; August 1970; June and August 1974; April and August 1975; August 1976; August 1977; June and August 1978; June and August 1979; June and August 1980; August 1981-1990, March 1990, August 1991; August 1991, April 1993; February & August 1994, August 1995, August 1996, August 1997, February 1998, August 1999.

### **B. Speaker in various conferences and workshops**

- Association for Consumer Research (ACR), 1968, 1970/1973, 1975, 1977, 1984.
- The Institute of Management Science (TIMS), 1969, 1972, 1974-1978, 1980- .
- American Institute of Decision Sciences (AIDS), 1974, 1976.
- American Association of Public Opinion Research (AAPOR), 1974/1975.
- American Psychological Association (APA) DIV 23, 1978.
- American Statistical Association (ASA), 1978.
- AMA Philadelphia Chapter, 1980/1981.
- Annual Conference of the Strategic Management Society, 1984.
- Annual Conference of the Pharmaceutical Marketing Research Group (PMRG), 1986, 1987.
- Annual Conference of the World Future Society Assembly, Washington, D.C., 1993.

### **C. Speaker in a number of the AMA Attitude Research Conferences:**

1967, 1971, 1973, 1976, 1987.

### **D. Member of the Faculty of the AMA Doctoral Consortiums**

- University of Colorado, 1996
- University of Santa Clara, 1994
- University of Southern California, 1991
- New York University, 1987
- University of Notre Dame, 1986
- University of Michigan, 1983
- University of Minnesota, 1982
- Pennsylvania State University, 1980
- University of Maryland, 1981
- University of Wisconsin, 1979
- University of Chicago, 1978
- University of Pennsylvania, August 1977
- University of Texas, August 1976
- University of Illinois, September 1971

### **E. Member of the Faculty of the First Indian Doctoral Consortium, 2012**

### **F. Member of the AMA Faculty Consortium, Chicago 1997**

### **G. Illustrative papers delivered in various professional workshops**

- Applications of Multidimensional Scaling to Marketing and Business, sponsored by the University of Pennsylvania and Bell Laboratories, June 1972.
- Planning Data for STI Managers, Sponsored by NSF office of Science and Information, December 1976.
- Synthesis of Knowledge of Consumer Behavior, sponsored by the RANN Program National Science Foundation, April 1975.
- Multinational Product Management, sponsored by the Marketing Science Institute and the AMA International Marketing Division, January 1976.
- Consumer and Industrial Buying Behavior, sponsored by the University of South Carolina, March

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\*Illustrative recent presentations are listed by topic starting on page 81

- 1976.
- Organizational Buying Behavior, sponsored by the University of Pittsburgh, April 1976.
- Consumer Research for Consumer Policy, sponsored by the MIT Center for Policy Alternatives, July 1977.
- Analytical Approach to Product-Marketing Planning, sponsored by the AMA and MSI, University of Pittsburgh, November 1977, October 1981.
- Interfaces Between Marketing and Economics, sponsored by the University of Rochester, 1978, 1983.
- Industrial Marketing, Penn State University, May 1982.
- Market Measurement and Analysis, renamed Marketing Science Conference sponsored by ORSA/TIMS:
  - Centre HEC-ISA, Jouy-en-Josas, France, 1987.
  - University of Texas at Dallas, 1986
  - Vanderbilt University, 1985
  - University of Chicago, 1984
  - University of Southern California, 1983
  - Wharton, March 1982
  - New York University, March 1981
  - University of Texas, Austin, March 1980
  - Stanford University, March 1979

#### **H. Illustrative addresses at various top management conferences and meetings**

- Moderator of Key Issue Forum on Social Media and Brand Opportunities, ARF Re:think Conference, New York, NY, March 23, 2010
- “Moving From Me to We: The New Competitive Edge,” Milken Global Conference, Los Angeles, April 28, 2008.
- “The Wisdom of Crowds in Today’s Digital World: We vs. Me,” Milken Global Conference, Los Angeles, April 23, 2007.
- “Innovation,” Telenet Top Executive Strategic Workshop, June 19, 2006.
- “The 1st Mover Advantage Challenge,” Telenet Top Executive Strategic Workshop, June 19, 2006.
- “Getting More with Less,” Telenet CEO Strategy Review, June 19-20, 2006.
- “Advances in the Management of Technological Innovation,” Executive Briefing at Samsung Electronics, June 2, 2006.
- “Brand Names and Logos,” Penn Humanities Forum on Word and Image, February 2006.
- “New Frontiers in the Practice of Management” with Paul Kleindorfer, CEO Workshops at IDC Israel, January 2006.
- “Strategic Trends on the Global Marketplace,” The Sixth Herzliya Conference on The Balance of Israel’s National Security, January 2006.
- “Recent Developments in Marketing and Branding Strategies,” presented to the Board and top management of IDT HK, August 2005.
- “Tapping Opportunity in the Developing World: Innovative Solutions for Companies and Communities,” Milken Institute Global Conference, April 2005.
- “Return on Marketing Investment: Progress, Problem, and Prospects,” Council of Marketing Executives, The Conference Board, October 6, 2004.
- “The Power of Impossible Thinking: A Prerequisite for Profitable Growth,” Milken Institute Global Conference, April 27, 2004.
- “The Transformation Challenge,” YPO at SEI, March 2004.
- “Technology for Profitable Growth: Progress, Problems, and Prosperity, eBRC Board of Directors meeting, Philadelphia, May 2003.
- “Business and the Pending Wars,” a global senior executive Web conference, February 2003.
- “e-Business Revolution: R2R (Return to Reality),” World Leadership Forum of the Foreign Policy Association, New York, September 2000.
- “UNIG Top Executive Forum,” Singapore, August 2000.
- “The Future of the Marketing Organization,” MSI Board of Trustees Meeting, April 2000.
- “Preparing for 2002: Creating a Leading Global Medical Communication Company for the 21<sup>st</sup> Century,” Top Management of Medius Group Int. Paris, May 1997.

- "The Next Enterprise: Creating a Successful 21<sup>st</sup> Century Enterprise," The Hong Kong Management Association, January 1996.
- "Building the 21st Century Corporation Today: A Marketing Perspective," A one day session for CEOs who participate in the MASTERSHIP program (LA) January 1990.
- "Growth Outlook for Consumer Products and Services" to the policy committee of Anheuser-Busch Company, 1986.
- "Marketing Management in Securities Firms" SIA Regional conference, 1986.
- "Recent Developments in Marketing Strategy," to Dutch top executives by Horryng & DeKoning, October 1986.
- A number of 1-day Top Management Seminars organized by Studio Ambrosetti (Italy)
  - Developing and Launching New Products (1986)
  - Marketing and Corporate Strategy (1987)
  - Marketing for Financial Institutions (1987)
  - Domestic and International New Business Entry Strategies 1988)
  - Strategic Marketing and New Product Development (1989)
  - How to Develop Products More Often and Get Them to Market Faster (1991)
  - The Consumer Goods Scenario: The Challenge (1992)
  - Marketing Driven Bus Strategy in the Global Information Age (2000)
- "The Challenge of Marketing" Board of directors and top management of Grand Metropolitan, 1985.
- "Advances in marketing and Business Strategies" Top management group of the John Fluke Manufacture Co., 1985.
- "Global Marketing Strategies" YPO Chapter of Hong Kong, 1985.
- "Marketing for Hospitals" Hospital presidents program of the J&J Leonard Davis Institute program, 1985.
- "Global Marketing Strategies" Top executive group of MARS pet food business, 1984.
- "Marketing for the Evolving Company" Conference on "Financing & Managing the Evolving Company" sponsored by Arthur Andersen & Co. and the GSB University of Texas at Austin, April 1984.

#### **I. Illustrative Other Top Management groups addressed**

- MSI Trustees, Cambridge, Massachusetts, October 1983.
- Securities Industry Association Fall Meeting, N.Y., October 1982, Spring Meeting, April 2000, Homestead, Virginia, May 1982: keynote speaker.
- Three sessions at the 1979 YPO Central Area Conference, Williamsburg, October 1979.
- Two sessions at the YPO International University, Rio de Janeiro, May 1979.
- Two sessions at the 1978 YPO, Eastern/Northeastern Area Conference, Sea Island, Georgia, November 1978.
- Eastern Pennsylvania Chapter of YPO, October 1978.
- Two-day seminars for top executives of Latin American countries sponsored by Expansion Publishing Group, Mexico City, June 1978, (Marketing Strategy); June 1979 (the Marketing Audit); and December 1980 (Marketing for Top Executives).
- Bell Laboratories (Applied Statistics Area), 1978

#### **J. Guest lecturer at faculty research seminars and executive development programs of various universities and research institutes including:**

- Columbia University, 1974, 1976-1978
- Drexel University, 1977, 1984
- Erasmus University, The Netherlands, 1993
- Escola de Administrao de Empresas de Sao Paulo, Brazil, 1979
- European Institute for Advanced Studies in Management, Brussels 1981
- Florida Atlantic University, 1972
- Harvard University, 1981
- IESE Universidad de Navarra, 1999
- Indian Institute of Technology (IIT) Bombay, 1989
- INSEAD, France, 1992, 2000

- Institut Supérieur des Sciences Économiques et Commerciales, Paris, 1981
- Interdisciplinary Center Herzliya, 1996, 1997, 1998, 1999, 2000
- Kōc University, Turkey, 2000
- Laval University, Canada, 1973
- Katholieke Universiteit, Leuven, 2001
- Monash University, Australia, 1977
- Nanzan University, Nagoya, Japan, 1977
- New York University, 1979, 1984
- Northwestern University, 1980
- Norwegian School of Management, Norway, 1993
- Pennsylvania State University, 1978
- Southern Methodist University, Texas, 1982, 1984, 1986
- Stanford University, 1976, 1982
- State University of New York at Buffalo, 1975
- University of Bradford, 1975-1976
- University of California at Berkeley, 1975
- University of California at Los Angeles, 1976, 1980, 1990
- University of Capetown, S.A., 1982
- University of Chicago, 1981
- University of Groningen, 1986
- University of Houston, 1977
- University of Illinois, 1985
- University of Iowa, 1971
- University of Minnesota, 1973
- University of New South Wales, Australia, 1977
- University of Ottawa, 1974
- University of Pittsburgh, 1988
- University of Social Sciences, Grenoble, France, 1973
- University of Southern California, 1979
- University of Tel Aviv, 1977-1980, 1982
- University of Texas at Austin, 1984, 1997
- University of Tokyo, Japan, 1992, 1993, 1995, 1997
- University of Washington, 1979
- Yale University, 1982

**K. Speaker at various local and regional meetings**

of the American Marketing Association, 1967 to present, and national meetings of other marketing associations such as the National Account Marketing Association, 1973; the International Pharmaceutical Marketing Research Group, 1973; The National Association of Children's Hospitals and Related Institutions, 1976; American Management Association's advanced Marketing Research Seminars, 1967/1968; and the Marketing Science Institute conferences and management seminars, 1968-1994.

**L. Guest speaker at special seminars**

- The Australia and New Zealand Marketing Societies in Sydney and Melbourne, June 1977.
- "New Developments in Social Research," in the Symposium on Corporate Awareness, February 1977.
- The 11th Annual "New Horizons in Science," Conference of the Council for the Advancement of Science Writing, New York, November 1973.
- Various conferences of the Israel Advertisers' Association, The Technion Research and Development Foundation, Ltd., The Ministry of commerce and Industry, 1968/1969.
- Foreign market entry and import protection strategies, The Israel Institute of Management, October 1984.

**M. Monthly Co-Host of *Marketing Matters*, weekly radio show airing on Sirius XM Channel 111, Business Radio Powered by the Wharton School**

- “A Commercial Show with Football Breaks: Super Bowl Advertising,” February 5, 2014
- “You May Also Like This Radio Show: Native Advertising, Sponsored Content, and Transparency,” March 5, 2014
- “The Billboard Looks Also Into You: The Future of Out-Of-Home Advertising,” April 2, 2014
- “Overcoming Audience Indifference, with the Most Interesting Man in the World,” April 30, 2014
- “Storytelling in the Digital Age: How to Make it Work,” May 14, 2014
- “Live from France with Awards Jurors from the Cannes Lions Festival,” June 18, 2014
- “World Cup Soccer and Playing Well With Fans,” July 16, 2014
- “Ads in Pockets: The Future of Mobile,” September 3, 2014
- “Ad Week, and the 64 Weeks After: Looking to 2015,” October 1, 2014
- “Xmas & AmEx & Small Business Saturday,” November 19, 2014
- “Marketing Management Matters with the Forbes CMO Network,” January 21, 2015

**H. Presentations: Illustrative Topics**

**A. Creativity and Innovation**

- “Reimagine B2B Marketing: Building Your Own Action Agenda,” Penn State ISBM Big Talk, September 20, 2017
- “Innovation by Legacy Firms Does Not Have to Be an Oxymoron\*,” PCI IT Conference, April 4, 2017
- “Creativity & Lessons from Art,” Global CEO Program: A Transformational Journey, March 12, 2017
- 
- “Innovation by Legacy Firms Does Not Have to Be an Oxymoron\*,” Accessories Council, October 21, 2016.
- “Innovation by Legacy Firms Does Not Have to Be an Oxymoron\*,” Global Executive MBA, June 24, 2016.
- “The Power of Art: A New Dimension of National Strength,” The 16<sup>th</sup> Annual Herzliya Conference, June 15, 2016.
- “Innovation By Legacy Firms,” SEI Senior Leadership Strategy Program, May 23, 2016.
- “Reimagine the MBA,” AACSB 2016 Redesigning the MBA: A Curriculum Conference, May 10, 2016.
- “Innovation By Legacy Firms Does Not Have To Be An Oxymoron,” The Wharton Club of Washington, April 26, 2016.
- “Creativity & Lessons from Art,” Global CEO Program, March 13, 2016.
- 
- “New Business Models: Challenges & Opportunities,” Mack Institute Program, November 20, 2015.
- “Capturing Your Imagination: Building a Creative Organization,” Arts + Business Council, Creative Xchange, October 28, 2015
- “Creativity & Lessons from Art,” Global CEO Program, March 10, 2015
- 
- “Tools for Bringing Creativity and Innovation to Your Client Interactions,” KPMG Global Insurance Academy & KPMG Global Banking Academy, December 1, 2014.
- “Creativity & Innovation: The Power of Impossible Thinking,” Lubrizol, October 16, 2014.
- “Should You and Can You Inspire Curiosity,” TEDx, Free Library of Philadelphia, September 17, 2014.
- “Creating a Creative Organization,” Cannes CEO Academy, June 18-19, 2014.
- “Ten Guidelines for Successful Innovation,” IDC’s CEO Forum, June 10, 2014.
- “How to Ignite Creativity in Your Entire Organization,” Cannes Lions Workshop, June 17, 2014.
- “Building and Leading a Creative Organization,” Washington DC Innovation Summit, April 29, 2014.
- “Improv and Other Creativity Enhancing Approaches for Survival and Growth,” University of the Arts, March 27, 2014.
- “New Audience Initiative,” America’s Orchestral Academy, New World Symphony, DATE, 2014.
- 
- “Creativity & Innovation Problem, Prospects,” SEI Growth Forum, May 25, 2013.
- “Enhancing Your Personal Creativity,” The Academy of University of Pennsylvania, February 9, 2013

- "The ROI of Creatives," Cannes Lions International Festival of Creativity, June 19, 2012.
- "Rethinking Your Innovation and NPD Strategies," IDC's CEO Forum, May 24, 2011.
- Personal Power and Influence, July 14, 2010.
- "Innovation in Retailing: Progress, Problems and Prospects", Discussion at the Jay H. Baker Retailing Center, October 28, 2010.
- "Marketing Innovation: Reinventing your Marketing and New Product Launch," Marketing Management Program, MA Industries, IDC, November 23, 2009.
- "Selling Scents: Innovative Approaches to the Age Old Selling Challenge in a Flat World of Empowered Consumers," The Fragrance Foundation Conference, March 12, 2008.
- "Advances in New Product Development and Innovation," Mutual Art Lecture Series, November 2, 2007.
- "The Creative Economy: Art and Culture at Penn and in Philadelphia," Penn Arts Leadership Conference, May 9, 2007.
- "Advances in the Management of Technological Innovation," Executive Briefing at Samsung Electronics, June 2, 2006.
- "Innovation and Change in the Turbo—Global Environment: Lessons from the Transformation of 'Old Economy' Firms [and Universities] and The Challenges to Congress," Stennis Congressional Staff Fellows Program on Leadership in e-Business Environments: What Congress Might Learn, Washington D.C., May 2000.
- "Innovation and Change in the Turbo-Global Environment: Lessons from the Transformation of 'Old Economy' Firms [and Universities] and the Challenges to Congress," Stennis Congressional Staff Fellows Program on Leadership in e-Business Environments: What Congress Might Learn, May 2000.
- "Customerization: The New Management Challenge," The President's Forum of the Interdisciplinary Center in Herzliya, Israel, September 2000.
- "Innovation Strategy," New Product Development and Launch, April 1999.
- "Innovation and New Product Development," Tutorial at the 2nd International Workshop, Santiago, Chile, October 1996.
- "Innovative New Product and Service Development: Best Practice and Opportunities for Experimentation," The Israel-North America Business Conference, New York, October 1996.
- "Innovation in New Product Development: Best Practice in Research, Modeling and Applications," Presentation to the JMR Editorial Board on the Special issue, August 1996.
- "Creativity and Innovation: The Management Edge in the Technological Age," the First Wind Lecture at the Interdisciplinary University of Law, Management and Technology (ISRAEL), May 1996.
- "Product Launch," Software Development and Marketing for Competitive Advantage, IC<sup>2</sup>, The University of Texas Conference, March 20, 1996.
- "JMR Special Issue on Innovation in New Product Development: Best Practice in Research, Modeling and Applications," JMR Editorial Board Meeting, San Francisco, August 7, 1994.
- "A New Approach for Estimating the Demand for Interactive TV Products and Services, Interactive Industry 2000: Market Research for the Interactive Television Business," July 28-29, 1994.
- "Determinants of New Product Success: Lessons from the U.S. and Japan," Faculty and Ph.D. students seminar at Erasmus University, June 10, 1993.
- "Issues and Advances in New Product Development and Management: A U.S. Perspective," Advanced Industrial Marketing Strategy Seminar, September 18, 1992.

- "New Product Development: Problems, Advances and Prospects," Wharton's Advanced Industrial Marketing Strategy, March 19, 1992.
- "How to Develop Products More Often and Get Them to Market Faster: Guidelines for Functional Management," Ambrosetti Group, Milan, Italy, May 9-10, 1991.
- "Inducing Creativity and Innovation in Large Bureaucracies: Lessons from Marketing," RGK 4th International Conference on Creativity and Innovative Management, August 8-10, 1991, Los Angeles, CA.
- "Globalization: Opportunities for Innovative Research and Modeling," UCLA, January 9, 1990, Los Angeles, CA.
- "Increasing the Effectiveness of Your New Product Development," Indian Institute of Technology, November 1989, Bombay, India.
- "Improving the Effectiveness of the Industrial New Product Development Process: Lessons from Industry – The AS 400 Case," 16th International Research Seminar in Marketing, La Londe les Maures, France, May 19, 1989.
- "Developing and Launching New Products: Costs, Risks, and Conditions for Success," Studio Ambrosetti, AF Marketing Group, May 16, 1989.
- "What a Difference a Difference Can Make," Amoco Fabrics and Fibers Co-Leadership Council, May 1988.
- "A Innovation Diffusion and New Product Forecasting," TIMS Conference, November 1984.
- "The contribution of Research to Product Management and New Product Development." The 1983 ESOMAR congress August 1983 at Barcelona.
- The First Delaware Valley Meeting of the Product Development and Management Association (PDMA), December 1980.

## **B. Challenging your Mental Models**

- "Fung Retailing Group: Conversations with Professor Jerry Wind," Li & Fung Top Management Meeting, February 26-27, 2017.
- "Challenging our Mental and Business Models and their Implications," Idealized Design Workshop, January 13-14, 2017.
- "IDC: Visions and Actions for the Next Decade," Idealized Design Workshop, December 17-18, 2017.
- "PAFA 2022: Visions and Actions," PAFA Board Meeting, December 14, 2017.
- "Challenging Your Mental Models," Hero Motor Corp – The iLead Senior Leadership Development Program, November 29, 2017.
- "Challenging Your Mental Models and Toward a New Marketing Paradigm: Implications and Actions," Takeda Pharmaceuticals: Marketing Program, November 27, 2017.
- "Architecture of Disruption: The Changing Role of the CXO," Knowledge@Wharton Board Meeting: The Architecture of Disruption, November 16-18, 2017.
- "Challenging Your Mental Models," Merck Marketing Program, November 25, 2017.
- "Challenging Your Mental Models," Comcast Women in Leadership Program, October 25, 2017.
- "Challenging Your Mental Models," Merck Marketing Program, October 23, 2017.
- "Reimagine Knowledge@Wharton: Idealized Design Workshop (2)," Knowledge@Wharton, October 22, 2017.
- "Challenging Your Mental Models and Toward (a) New Marketing and (b) Insight Paradigms: Implications and Actions," Vertex Portfolio Leadership Program, October 18, 2017.
- "Challenging Your Mental Models," Merck: Marketing Program, October 10, 2017.
- "Challenging Your Mental Models," Merck: Marketing Program, September 28, 2017.
- "Challenging Your Mental Models," Bureau Veritas, July 18, 2017.
- "Challenging Your Mental Models," Merck: Marketing Program, July 17, 2017.
- "Challenging Your Mental Models," Nanjing Sample Tech Strategic Leadership Program, July 12,



2017.

- “Challenging Your Mental Models,” Comcast Women in Leadership Program, June 21, 2017.
  - “The Power of Impossible Thinking,” Global CEO Program, March 13, 2017.
  - “Challenging Your Mental Models.” McKesson Health Solutions Product Management Program, March 7, 2017.
- 
- “Challenging Your Mental Models and Toward New Marketing and Paradigm: Implications & Actions,” Vertex Portfolio Leadership Program, November 30, 2016.
  - “Challenging and Changing Your Mental Models,” Hero Motor Corp: The iLead Senior Leadership Development Program, November 29, 2016.
  - “The Power of Impossible Thinking: Challenge Your Business and Mental Models,” LinKS at Wharton, November 1, 2016.
  - “Challenging and Changing Mental Models,” IDC at Wharton, October 31, 2016.
  - “The Power of Impossible Thinking: Challenge Your Business and Mental Models,” PVH Global Leadership Program, September 27, 2016.
  - “The Power of Impossible Thinking,” Lubrizol Executive Development Leadership Program, May 25, 2016.
  - “Challenge your Mental Models,” SEI Senior Strategy Program, May 9, 2016.
  - “Challenge Your Mental Models Implications & Actions,” MedStar Leader of the Future: Accelerated Leadership Program, April 27, 2016.
  - “Challenge Your Mental Models Implications & Actions,” Estee Lauder Brand Leadership Program, March 14, 2016.
  - “Challenge Your Mental Models Implications & Actions,” Global CEO Program, March 14, 2016.
  - “Mental Models Towards a New Marketing Paradigm: Implications & Actions,” Vertex Portfolio Leadership Program, February 3, 2016.
- 
- “Challenging Your Mental Models,” Comcast Women in Leadership Program, November 11, 2015
  - “Challenging Your Mental Models,” US Trust - Executive Performance Leadership Program, November 3, 2015
  - “Challenging Your Mental Models,” Sumitomo Mitsui Banking Corporation, Global Leadership Program, October 26, 2015
  - “Challenging Your Mental Models,” Estee Lauder HR Program, October 20, 2015
  - “Challenging Your Mental Models,” IDC, Philadelphia, October 12, 2015
  - “The Power of Impossible Thinking,” PVH Global Leadership Program, September 29, 2015.
  - “Challenging the Mental Models of an Industry: The Case of the Future of Advertising,” Education Entrepreneurship, Penn GSE, July 23, 2015
  - “Challenge Your Mental Models,” Education Entrepreneurship, Penn GSE, July 23, 2015
  - “Challenging Your Mental Models: A Necessary Condition for Creativity and for Staying Ahead of the Curve” Accessory Council, April 25, 2015
  - “Challenging Your Mental Models,” Estee Lauder, April 14, 2015
- 
- “Challenging and Changing Your Mental Models,” IDC Herzliya Arison School of Business, October 20, 2014.
  - “Challenging Your Mental Models,” Estee Lauder, April 2, 2014
- 
- “Challenging Your Mental Models,” Estee Lauder, February 28, 2013
- 
- “Challenges and guidelines for building learning effectiveness,” 2012 Inaugural AIM-AMA Sheth Foundation Doctoral Consortium, July 29, 2012
  - “Challenging your mental, business and revenue models,” Wharton Alumni club – Beijing, July 25, 2012
  - “Challenging your mental, business and revenue models,” Wharton Alumni Club – HK, July 20, 2012
  - “Challenging your Mental Models,” SEI Trust Company Operations, July 16, 2012
  - “Challenging Your Mental Models,” Israel Police Senior Management Program, June 11, 2012.
- 
- “Challenging Your Mental Models in the Age of Empowered Consumers and Networks,” SEI Executive Network, November 2, 2011.

- “Challenging Your Mental Models,” Estee Lauder Companies Global Marketing Symposium, November 1, 2011.
  - “Challenging Your B2B Mental Models,” Google’s Think B2B: Deconstructing Today’s B2B Customers, October 6, 2011.
  - “The Power of Impossible Thinking,” Austria Connect, September 9, 2011.
  - “Challenging Your Mental Models,” NESS Executive Session and IDC, May 23, 2011.
  - “Challenging Your Mental Models,” Perry Ellis Session, May 17, 2011.
  - “Should We Challenge our Mental Models of Creative,” FoA Future of Creatives and Creative Ideas in a Digital World, March 18, 2011.
- 
- “Challenging your Mental Models,” Discount Bank, Israel, May 25, 2010.
  - “Challenging your Mental Models,” Mellanox Technologies, Israel, May 25, 2010.
- 
- “Challenging Our Mental Models,” Jay H Baker Advisory Board Meeting, November 30, 2009.
  - “Challenging the Mental Models of Top Management,” IDC’s CEO Forum, November 19, 2009.
  - “Challenging your Mental Models,” Wharton Combined Boards Meetings, October 23, 2009.
  - “Challenging Your Mental Models,” Partner, June 2, 2009.
- 
- “The Power of Impossible Thinking,” Alumni Leadership Conference, May 24, 2007
- 
- “The Power of Impossible Thinking: Implications for OD,” Organizational Development Network of Greater NYC, October 17, 2006.
  - “Should the Alumni Leadership Challenge their Mental Models?” Alumni Leadership Conference, October 14, 2006.
  - “The Power of Impossible Thinking,” Wharton Staff Workshop, September 12, 2006.
- 
- “Wharton School Publishing and the Power of Impossible Thinking,” Presentation to the Board of the Jay H. Baker Retailing Initiative, October 6, 2005.
  - “The Power of Impossible Thinking,” Opening Session: Transform Your Business with New Thinking and New Models, The 51<sup>st</sup> Annual ARF Convention, Research Powered Marketing: New Models for Growth, April 2005.
- 
- “The Power of Impossible Thinking in Meeting the Jim Stargel Challenge,” ARF Breakthrough Conference, November 4, 2004.
  - “Challenging Your Industry’s Mental Models,” KPMG Global Insurance Institute, December 2003 and November 2004.
- 
- “Disruptive Technology—Rethinking Your Mental Models,” Forbes Global CEO Conference, Singapore, September 2001.

**C. Growth**

- “7 Guidelines for Profitable Growth Strategies in Turbulent Times,” NY Accessory Council Meeting, April 9, 2015
  - “Meeting the Challenges and Opportunities of the New Economy: And 8 Guidelines of the New Economy,” The Li & Fung & Fung Group President’s Forum, January 24, 2015.
- 
- “Growth Rules: Getting to \$2.50,” SEI Growth Forum, May 21, 2013.
- 
- “The Changing Business Environment: Key Trends & Growth Opportunities & Their Growth Implications for SEI,” SEI Management Meeting, May 3, 2012.
- 
- “Growth, Interactive Marketing and Business Strategies in the Age of the Empowered Consumer,” Wharton Global Alumni Forum, June 24, 2011.
  - “The Challenge of Ethical Leadership Lessons from ‘Inside Job’,” The Leadership in Film Series, April 20, 2011.

- "Perspectives on the Changing Economy," AMA Session, February 20, 2010.
- "Profitable Growth Opportunities in times of Crisis and Rebirth," Jay H Baker Advisory Board Meeting, November 30, 2009.
- "Opportunities in Times of Crisis," SEI Center Annual Board Meeting, October 9, 2009.
- "Opportunities in Times of Crisis," Baker Retailing Initiative, June 23, 2009.
- "Member Managed Relationship: Opportunities for Growth," AAA Management Meeting, June 11, 2009.
- "Innovation and Creativity in Time of Crisis," The Israeli Innovation Forum at IDC, May 31, 2009.
- "The Future of the Corporation Survey Results," SEI Center Board Meeting, November 16, 2006.
- "How Should Directors Think About Directing?" The Governance Summit, October 27, 2005.
- "Barcelona 2020: Strategic Options and Action Plans," The Barcelona Group Philadelphia Meeting, July 18, 2005.
- "Decision Aiding Technologies and the New Theory of the Firm," with Paul Kleindorfer, Mack Center for Technological Innovation Conference on Using Technology to Improve Decision Making, May 27, 2005.
- "The Silver Lining: Seeing Opportunities in Risk," Recent Advances in Operations and Risk Management Conference in Honor of Paul Kleindorfer, May 2005.
- "The Challenge of Corporate Governance," IAM Conference, Barcelona, Fall 2003.
- "Corporate Transformation: Lessons for Japan," Marunouchi Global Center First Executive Program, November 2002.
- "Leading Transformation Lessons for Mexico," TeleTech's Top Executive Program, October 2002.
- "Wharton on the New Reality of Business: Insights from Our Experience," presentation with Robert Mittelstaedt to the Wharton Combined Boards, March 8, 2002.
- "Capturing Opportunities in the Post 9/11 Reality," The Wharton Club of Israel, December 2001.
- "What Keeps Us Up At Night?: Post 9/11 Survey of US CEOs – Top Line Results," SEI Center Board, October 2001.
- "Capturing Internet Opportunities Above the Low-Hanging Fruit," Business Week "Rethinking the Internet," Conference, Chicago, October 2001.
- "Making Strategy Happen: Problems, Progress and Proposed Actions for Winning in the Changing Global Information Age," Li & Fung Distribution Annual Conference, Hong Kong, July 2001.
- "Globalization of Technology Startups," Wharton-Israel Global Alumni Conference on the Globalization of Technology Intensive Business, March 2001.
- "The e-Bus Challenge," the Top Executives of the Bank of East Asia, March 2001.
- "Developing a Strategy," ICA Board, March 2001.
- "e-Business: The Lessons to Date and Implication to Management Practice, Research and Education," opening lecture of the PriceWaterhouseCoopers Management Consultants e-Bus Chair at the Graduate School of Business Studies at Katholieke Universiteit Leuven, Belgium, February 2001.
- "Driving Change: New Business Models for the Global Digital Age," Opening Lecture of the PriceWaterhouse Coopers Management Consultants, e-Business Chair, Graduate School of Business Chair, Graduate School of Business Studies, Katholieke Universiteit Leuven, Belgium, February 2001.
- "e-Transforming an 'Old Economy' Business," Wharton-Singapore Management University Conference: e-Business in the New Millennium, July 2000.
- "Creating an e-Business," Wharton-Singapore Management University Conference: e-Business in the New Millennium, July 2000.
- "Preparing for Leadership in the Changing e-Business Environment," CEO Circle, May 2000.
- "Preparing for Leadership in the Changing e-Business Environment," CEO Circle, May 2000.
- "Building Communities," Virtual Communities and the Internet, April 2000.

- "Valuation: Valuable or Value Less," Entering the Virtual Millennium, Wharton North American Regional Forum, April 2000.
  - "Customization Strategies for Financial Services in the Global Information Age," the Citigroup and Simon Graduate School conference on Electronic Banking Commerce, New York. February 17-18, 2000.
  - "Emerging Trends in the Pharmaceutical Industry and the Expected Scenarios," Innovative Managed Care Contracting, January 2000.
- 
- "Winning the high Tech Wars: Strategies for Driving Change," NEC Management Team, Tokyo, April 1998.
  - "The Challenge of Market Leadership," Bristol-Myers Squibb Medical Devices Group, January 1998
- 
- "Driving Change: Preparing for the 21<sup>st</sup> Century," Business Writers=Seminar, December 1997.
  - "Preemptive Strategies," Wharton Executive Education Competitive Marketing Strategies, June 1997.
  - "Toward a New Corporate Governance Model: Lessons from the Japanese and U.S. Experience," With Masaru Yoshitomi, the Corporate Governance Workshop, March 1997.
  - "Creating a Leading Global Medical Communication Company for the 21st Century," Medicus Group International, Inc., March 1997.
- 
- "The Challenge of Competitive Strategies in the Global Information Age," The Interdisciplinary Center, Herzliya, Israel, December 1996.
  - "The Technology Challenges for Family Business," Technology Day: The Web, The Future and You, the 1996 Family Firm Institute Conference, October 1996.
- 
- "Business in the Global Information Age," The Interdisciplinary Center of Business, Law and Technology, December 3, 1995.
- 
- "AHP in Top Management Decisions," The Keynote address of The International Conference on AHP Washington, DC, July 11, 1994.
  - "Creating a 21st Century Enterprise," Poon Kam Kai Institute of Management, The University of Hong Kong, June 16, 1994.
  - "Market Driven Quality," at the Beyond Quality: Organizational Transformation to the 21st Century Enterprise, March 17-18, 1994.
- 
- "Getting the Most out of Benchmarking," Board of Directors of Wharton's Alumni Association, May 14, 1993.
- 
- Executive Development 1992, 1993.
  - "The Market Driven 21st Century Enterprise: Implications for Law Departments," Presentation at the SmithKline Beecham U.S. Law Department Conference on Customer Focus Continuous Improvement, April 28, 1992.
  - "Preparing for the 21st Century Today," Securities Industry Institute, 40th Anniversary Program, March 1992.
  - "The Successful 21st Century Enterprise as Customer Driven: Implications for Marketing and Management Science," University of Texas at Austin, Faculty Colloquium, February 1992.
- 
- "Management in the 21st Century: Implications to the Fragrance Industry," Summit 2000 Conference of the Fragrance Association, April 8, 1991.
- 
- "Research Priorities in the Information Technology Area," MSI, Information Technology Steering Group, January 18, 1990.
  - "Building the 21st Century Corporation Today: A Marketing Perspective," MASTERSHIP, January 9, 1990, Los Angeles, CA.
- 
- "Management in the 21st Century: Implications for Management Research and Education," University of California, Irvine, April 27, 1989.

- "Foreign Market Entry and Import Protection Strategies," Israel Institute of Management, October 1984.
- "The CEO and the Board," Strategic Management Conference, October 1984.

#### **D. Marketing and Branding**

- "First 100 Days of Digital Marketing," Aresty Institute – Digital Marketing Strategies for the Digital Economy, November 28, 2017.
  - "Reimagine Knowledge@Wharton: The Reason for Winning the New Nobel Prize for Most Useful Business Resource (Parts 1&2)," Idealized Design Workshop, September 22, 2017.
  - "Reimagine B2B Marketing: Building Your Own Action Agenda," Penn State Institute for the Study of Business Markets, September 20, 2017.
  - "Digital Storytelling," Future of Advertising Program, September 13, 2017.
  - "Reimagine B2B Marketing: Building Your Own Action Agenda," FOA Program, September 2, 2017.
  - "First 100 Days of Digital Marketing," Digital Marketing Strategies for the Digital Economy, June 5, 2017.
  - "Reimage Marketing: Implications for Knowledge@Wharton," Knowledge@Wharton Board Meeting, May 24, 2017.
  - "Reimagine Marketing," Marketing Hall of Fame Induction Ceremony, May 11, 2017.
  - "Reimagine Marketing," The Wroe Alderson Lecture, April 13, 2017.
  - "The Challenge of Personalization," Lessons from the Future of Advertising Program, Amazon Outbound Marketing Summit, March 21, 2017.
- 
- "The Evolutionary (Disruptive?) Practice of Marketing," J&J Global Marketing Summit, August 2, 2016.
  - "The Five Forces of Change and their Implications to Marketing Capabilities," Global Marketing Excellence Summit, May 5, 2016.
  - "The New Age of Marketing," Fung Retail Group Board Meeting Shanghai, March 30-31, 2016.
  - "Designing an Idealized Marketing Function," SEI Corporate Marketing Retreat, January 1, 2016.
- 
- "Toward a New Marketing Paradigm: Implications for Action," Vertex Portfolio Leadership Program, February 10, 2015.
  - "The CMO Advantage: Evolving Beyond the Digital Revolution," CMO Advantage, Penn Club of New York, February 6, 2015
- 
- "Towards a New Marketing Paradigm: Implications for Action," Vertex/Wharton Program, November 19, 2014
  - "From Big Data to Smart Data," Forbes CMO Next, November 5-7, 2014.
  - "Coping With and Leveraging Disruptive Technologies," Rocket Fuel Management Conference, May 13, 2014.
  - "Samsung," April 7, 2014.
  - "Marketing in the Age of the Omnichannel Consumer," The Estee Lauder Companies Global Marketing Symposium at Wharton, April 7, 2014.
  - "Marketing and Business Models 2.0 for the UOB and the National Gallery," Singapore, March 18, 2014.
  - "The Omnichannel Challenge: Progress, Drivers, Problems, and Prospects," Fung Retailing Group, February 18, 2014.
- 
- "Strategic Review," Estee Lauder North America Leadership Meeting, November 15, 2012
  - "Perspectives on Marketing Strategy and Financial Performance," 2012 Inaugural AIM-AMA Sheth Foundation Doctoral Consortium, July 28, 2012
  - "Assessing the ROI of Marketing Strategy," 2012 Inaugural AIM-AMA Doctoral Consortium, July 28, 2012
  - "The Future of Retailing is Now," Li & Fung Retailing Holding Co., July 23, 2012
  - "Client Experience and Engagement," SEI Global Wealth Services Executive Network, May 15, 2012.

- “The Future of Branding and Intellectual Property in Marketing: The Challenge” Brands and Branding in Law, Accounting and Marketing Conference at UNC, April 13, 2012.
  - “Rethinking Marketing in the Age of the Empowered Consumer,” Temple Fox School of Business, March 16, 2012.
- 
- “Conversations with MARS Catalyst & Marketing Lab, MARS, November 8, 2011.
  - “Designing TV Commercials That Maximize Social Diffusion,” MARS, November 8, 2011.
  - “The Myth of the Four-Minute Mile and its Implication to B2B Marketing,” Google’s Think B2B: Deconstructing Today’s B2B Customers, October 6, 2011.
  - “Marketing and Business Strategy in the Age of the Empowered Consumer,” SEI Private Banking Executive Network, June 16, 2011.
  - “Marketing and Business Strategy in the Age of the Empowered Consumer,” Wharton Fellows @ The Conference Board: Fellows Breakfast & Program, June 3, 2011.
  - “MSI- The Philadelphia Story,” MSI 50<sup>th</sup> Anniversary, April 26, 2011.
  - “Marketing Communication in the Digital Era,” MSI 50<sup>th</sup> Anniversary, April 26, 2011.
  - “Marketing: What’s Next,” Wharton Fellows at the Conference Board: Philadelphia Master Class, January 22, 2011.
  - “Accelerating & Improving GTM Strategies Via Effective Experimentation,” SEI Marketing Group Meeting, January 2011.
  - “Marketing and Business Strategies in the Age of the Empowered Consumer,” The Wharton Club of London, February 15, 2011.
- 
- “Getting the Most Out of Your Interactive Marketing Dollars,” Wharton Club of Southern California, November 18, 2010.
  - “7 Advertising Myths,” Wharton Alumni Webinar, April 22, 2010.
  - “Revitalizing Brands and Reinventing Marketing,” SEI, December 14, 2010.
  - “Go To Market Strategies 10 Interrelated Questions” SEI Marketing Leaders Workshop, November 9, 2010.
  - “The Challenge of Customer Centricity”, GSK Executive Leadership, November 9, 2010.
  - “Marketing Careers,” Wharton Marketing Conference, November 12, 2010.
  - “Marketing of Israel,” Gratz College, May 6, 2010
  - “7 Advertising Myths,” M Factor, May 5, 2010.
  - “Global Business Branding,” America-Israel Chamber of Commerce, April 14, 2010.
  - “Marketing Implications of the Changing Economy,” AMA Winter Marketing Conference, February 20, 2010.
- 
- “Leveraging Social Media,” The Fox Chase Cancer Center Leadership, December 15, 2009.
  - “Leveraging the PMA’s Marketing and Pricing Strategies,” A Discussion on Reverse Marketing for the PMA, July 20, 2009.
  - “The Challenge of Marketing Israel,” Wharton Alumni Club of Pacific Palisades, July 8, 2009.
  - “Marketing Strategy Discussion Guideline,” PhD Seminar, March 27, 2009.
  - “Some Observations on the Changing Retail Scene,” The Wharton Retail Club Seminar on Industry Trends, March 18, 2009.
  - “Can We Brand Our Customers and Not Our Products?” MPlanet, January 27, 2009.
- 
- “Market Driven Strategy,” and “Integrated Global Marketing Strategy,” Newell Rubbermaid Marketing Excellence Program, September 17 and 19, and December 10 and 11, 2008.
- 
- “Rigor & Relevance: A Key Marketing Challenge,” The Buck Weaver Award Presentation, September 7, 2007.
  - “Global Branding & Marketing,” TEVA Israel Leading Your Business, June 28, 2007.
  - “The Wisdom of Crowds in Today’s Digital World We vs. Me,” Milken Global Conference, April 23, 2007.
  - “Brand Names and Logos: Implications to Language Instruction,” Penn’s Language Faculty, March 22, 2007.
- 
- “Customer Value: Strategies for the Long Term,” Marketing Precision Conference: The Value of

Marketing, September 27, 2006.

- “Does Korean Marketing Need Reform?” Korean Marketing Club, Seoul, June 5, 2006.
- “Redefining Marketing for the 21<sup>st</sup> Century,” Wharton Club of Korea, Seoul, June 3, 2006.
- “Brand Names and Logos,” Penn Humanities Forum on Word and Image, February 2006.
- 
- “Recent Developments in Marketing and Branding Strategies,” IDC Board of Directors Meeting, August 25, 2005.
- “Effective Marketing Planning: What It Is and How to Produce It,” JCCA Conference, April 2005.
- 
- “Strategic Shifts and the Balance of National Security: Summation,” J. K. Herzliya Conference, Israel, December 2004.
- “Return on Marketing Investment: Progress, Problems and Prospects,” Address to the CMO Group of the conference board, October 6, 2004.
- “Challenges of Identifying, Developing, and Capturing Opportunities: A Fresh Look at Marketing,” SEI Center Board Meeting, October 1, 2004.
- “Challenging the Mental Models of Marketing,” A State of Marketing Symposium, Does Marketing Need Reform? Boston, August 9, 2004.
- “Should We Challenge Our Mental Models for Building Better Brands?” Med Ad News Conference on Building Better Brands, Philadelphia, July 28, 2004.
- 
- “The Changing Nature of Marketing: Implications for Research, Teaching, and Practice,” The Elsevier Science Distinguished Scholar Award Lecture at the Society for Marketing Advances, November 6, 2003, New Orleans.
- “The Interdisciplinary Challenge of Marketing,” Ph.D. Proseminar, February 2003.
- “Convergence Marketing: Strategies for Reaching the New Hybrid Consumers,” a Webcast of the University of Wisconsin Consortium for Global e-commerce, January 2003 and a Soundview Teleconference, May 2003.
- 
- “Managing the Complexities of the Convergent and Multi-Channel Marketing,” CMO Summit, October 30, 2002.
- “Marketing Driven Strategies for Today’s Economy,” presentation at Alumni Weekend, May 2002.
- “Pioneer and Late Entrants: Winning Strategies,” Viagra, Cardura, Darifenacin WWT Meeting, April 9, 2002.
- “The Interdisciplinary Challenge of Convergence Marketing,” Wharton Ph.D. Proseminar, March 8, 2002.
- “Marketing Driven Strategies in a Global Economy,” IBM’s Managing Director’s Executive Development Program, February 13, 2002.
- “Should You Have a Chief Marketing Officer?” January 2002.
- “Convergence Marketing: The Challenge for the On-Demand Era,” IBM’s 2002 WW Summit for the On-Demand Era, 2002.
- 
- “Target Audience, Public Opinion and Foreign Policy – A Marketing Perspective,” Balance of National Strength and Security – The Herzliya Conference, December 2001.
- “The 5 Cs of Marketing: Capitalizing on the New Opportunities of Convergence Marketing,” The Wharton Club-Atlanta, GA, November 2001.
- “Advances in Customer Focused Marketing and Business Strategy: The 5 Cs of Convergence Marketing,” The International Academy of Management, Claremont Graduate University, November 2001.
- “Convergence Marketing: A New Marketing Strategy for the Global e-Business Environment,” The Wharton European Forum, May 2001.
- 
- “Whither System Thinking: Will Taking a Marketing Perspective be an Oxymoron?,” Inaugural Conference of the Achoff Center for Advanced Systems Appraisal, September 2000.
- “New Marketing Rules for e-Business Success,” UNIG, Singapore, August 2000.
- “New Marketing Rules for the Global Information Age,” IBM Global Services Academic Conference, August 2000.
- “Marketing Driven Business Strategy in the Global Information Age,” Managing Change in the New

- Millennium, Wharton-Singapore Management University Conference, July 2000.
- “A New Marketing Paradigm for the Global e-Business Environment: A Catalyst for Bridging the Gaps,” Building Bridges & Broadening Perspectives: A Paradigm for the Next Millennium, 29<sup>th</sup> EMAC Conference, Rotterdam, May 2000.
  - “Research Priorities in e-Commerce and Internet Marketing,” Web Consortium, Pennsylvania State University’s ISBM, March 2000.
  - “Implications of the New e-Business Environment and Models for Management Research and Education,” International Academy of Management, Barcelona Meeting, March 2000.
  - “Marketing Driven Business Strategy in the Global Information Age,” Studio Ambrosetti’s top executive seminar in Padova and Milan, March 2000.
  - “New Trends in Marketing Research,” IDC, Herzliya, March 2000.
  - “Digital Marketing: Towards a New Paradigm for the Global Information Age,” Faculty Session-INSEAD, France, June 2000.
  - “The Future of the Marketing Organization,” The Future of the Marketing Organization, MSI Board of Trustees Meeting, Cambridge, Massachusetts, April 2000.
- 
- “Towards a Research Agenda in E-Commerce and Internet Marketing,” AMA Educators’ Conference, San Francisco, August 1999.
  - “Digital Marketing: Implication for the Future of Marketing Management Research and Research in Marketing,” plenary session presentation AMA Marketing in the 21<sup>st</sup> Century, San Francisco, August 1999.
  - “Marketing Strategy in the Global Information Age: Implications for Research and Modeling,” PhD. And Faculty Seminar IESE Universidad de Navarra, Barcelona, March 8, 1999.
  - “Implementation and Feasibility Issues of New Forms of Organizations: A Marketing Perspective,” Wharton Impact Conference, March 1999.
  - “A Marketing Perspective on Communitarian Policies,” The Communitarian Summit, Washington, D.C., February 28, 1999.
- 
- “An Extended Marketing Perspective on Corporate Architecture for the 21<sup>st</sup> Century,” Japan Marketing Association, World Marketing Conference, Tokyo, April 1998.
  - “The Challenge of Customer-Driven Product and Service Customization,” Senior management of Convatec, March 1998.
  - “Towards a New Marketing Paradigm,” AMA Winter Marketing Educators’ Conference, February 1998.
  - “Positioning and Segmentation in the Global Information Age,” IMS Marketing Management Meeting, January 1998.
- 
- Competitive Marketing Strategies, “Preemptive Strategies,” 1997, 1998.
  - “Positioning and Segmentation Opportunities for Synergy and Growth,” Cognizant Group’s Marketing Council, July 1997.
  - “Integration of Marketing and other Business Functions: The Wharton Experience,” AMA: 1997 Faculty Consortium B Chicago, August 1997.
  - “Communicating and Marketing Your Excellence,” Volunteer Committees of Art Museums - VCAM Conference, Philadelphia, April 1997.
  - “The Challenge of Information Technology to Marketing and Retailing in the 21<sup>st</sup> Century,” University of Tokyo, April 1997.
  - “Marketing Strategy in the Global Information Age: Implications for Modeling and Research,” Ph.D. Proseminar, March 1997.
- 
- “Marketing: The State of the Art,” Conference of the 2<sup>nd</sup> International Workshop on Economics and Management, Santiago, Chile, October 1996.
  - “Creating a 21<sup>st</sup> Century Enterprise: Implications for Marketing Practice, Research and Education,” Keynote Address, 2<sup>nd</sup> International Workshop on Economics and Management, Santiago, Chile, October 1996.
  - “Marketing Strategy in the Global Information Age: Implications for Research and Modeling,” AMA 1996 Doctoral Consortium, July 1996.
  - Segmentation in the Global Information Age: Accomplishments, Problems and Challenges,” The



- 1996 Converse Award Presentation, May 7, 1996.
  - "Advances in Marketing," Janssen Pharmaceutica, April 18, 1996.
- 
- "Marketing Issue in the Global Economy," Wharton Doctoral Consortium, August 11, 1995.
  - "A View of Marketing Through the Prism of the 1977 and 1995 Doctoral Consortia," Wharton School, Doctoral Consortium, August 8, 1995.
  - "Toward a New Marketing Paradigm," Ambrosetti Group's A.F. Meeting (Rome, Italy), March 8, 1995.
  - "Toward a New Marketing Paradigm: Lessons From and Implications to the Marketing of Services," Ambrosetti Group's Chief Executive Seminar (Milan, Italy), March 7, 1995.
  - "Marketing in the Pharmaceutical Industry: Emerging Challenges and Opportunities," P.A.C. Pharmaceutical Meeting: New Thinking, New Customers. February 28, 1995.
  - "Beyond Brand Management," Wharton MBA Marketing Club, January 23, 1995.
  - "The Value of Marketing Program," Janssen Pharmaceutica, January 9, 1995.
- 
- "Research Priorities in Marketing as Derived From the SEI Center for Advanced Studies in Management Work on Creating Successful 21st Century Enterprises," Doctoral Proseminar, November 16, 1994.
  - "Entering the U.S. Consumer Durable Markets," Nijenrode Executive MBA Program, August 4, 1994.
  - "The Challenge of a New Marketing Paradigm," University of Texas at Austin, March 23, 1994.
  - "Creating a Successful 21st Century Enterprise: Implications for Business and Marketing Theory, Practice, Research and Education," The University of Tokyo, November 4, 1994
  - "The Marketing Challenges for the Philadelphia Orchestra," Presentation to the Board of Trustees of the Philadelphia Orchestra, March 1, 1994.
  - Re Engineering Pharmaceutical Marketing, 1994.
  - Is Your Marketing Obsolete? Implications of the New Marketing Paradigm for Business and Non-profit Organizations," YPO Philadelphia Chapter University, The Cloister, September 1994.
  - "The Value of Marketing: A Research Agenda," Value of Marketing Conference, Stanford University, August 9, 1994.
  - Determining the Value of Marketing: A New Challenge to the Discipline," San Francisco AMA Conference, August 8, 1994.
  - "Electronic Commerce: Progress and Prospects," AMA Conference, San Francisco, August 8, 1994.
  - "Advances in U.S. Marketing and Their Implications to China," Joint faculty seminar of the School of Economics and Management, Tsinghua University and the School of Management, Peking University, June 15, 1994.
  - "Toward a New Marketing Paradigm," a faculty seminar at the Hong Kong University of Science and Technology, School of Business and Management, June 14, 1994.
  - "Empirical Generalizations in Marketing: Opportunities for MSI Research Program," MSI Board of Trustees Meeting, April 29, 1994.
  - "Empirical Generalizations in Marketing: Some Observations," Wharton Conference on Empirical Generalizations in Marketing, February 16-18, 1994.
  - "Increasing Marketing Effectiveness," Executive Conference of Schering-Plough Int., January 18, 1994.
- 
- "The Value of Pharmaceutical Advertising and Promotion," Coalition of Healthcare Communication Conference, Marketing Conference in an Era of Change, New York October 27, 1993.
  - "Advances in Marketing Strategies," Nijenrode University Executive Program, August 6, 1993.
  - "Global Consumer Brand Strategies: Problems and Prospects," Seminar for the Business Partners of the Norwegian School of Management, June 11, 1993.
  - "Marketing Opportunities in Japan and East Asia," with Hotaka Katahira and the International Forum Participants, April 18, 1993.
  - "Toward a New Marketing Paradigm: Implications for Marketing Departments," Advisory Board Meeting of the Wharton's Marketing Department, April 8, 1993.
- 
- Third Workshop on Marketing and Competitive Advantages with Ambrosetti Group, Milan on "The Customer Driven Company: From Concept to Reality," November 27-28, 1992.
  - "The Strategic Impact of Market Driven Quality," with Paul R. Kleindorfer. ORSA/TIMS, San

Francisco, Session on Customer Satisfaction and its Role in Global Competition. November 1992

- "Marketing Skills and Strategies for the 1990's," Pfizer International Marketing Managers, December 1989, Lambertville, NJ.
  - "Competitive Advantage Through Strategic Marketing," Contel Corporation, October 1989, Lake of the Ozarks, MO.
  - "The Contributions of Strategy and Other Business Functions to the Creation of Innovative Marketing Knowledge," AMA Marketing Educators Conference, Chicago, August 1989.
  - "Strategic Marketing," Studio Ambrosetti AP Milan Group, May 17, 1989.
  - "The Marketing Challenge for Top Management: Promises and Pitfalls of Expert Systems," University of California, Irvine, April 27, 1989.
  - "A Contrarian Approach to Effective Pricing," The Pricing Institute, March 7, 1989, New York.
  - "Achieving Competitive Advantage in Marketing," Securities Industry Association, March 6, 1989, Philadelphia, PA.
- 
- "Courtyard by Marriott: Designing a Hotel Facility with Consumer Based Marketing Models," presented to the TIMS/AMA seminar Marketing Science: A Developmental Tool for Management Scientists, New York, November 16, 1988.
  - "Technology and Marketing-Driven Global Portfolio of R&D Projects," with Robert DeLuccia presented at the ORSA/TIMS Joint National Meeting in Denver, Co, October 26, 1988.
  - "Pitfalls and Challenges of Global Marketing," Second International Conference on Marketing and Development, Karl Marx University, Budapest, Hungary, July 12, 1988.
  - "Information Technology and Marketing Strategy," with Eric Clemons, presented at IS, TC and Strategy Plenary Meeting, January 1988.
- 
- "A New Challenge for Human Resource Management: Incorporating a Marketing Perspective," The Lauder Institute: International Human Resource Conference, December 1987.
  - "Advances in Marketing Strategy and Research," Wharton Alumni Club, Milan, October 1987.
  - "Marketing and Corporate Strategy," Studio Ambrosetti, Milan, October 1987.
  - "Marketing for Financial Institutions," Studio Ambrosetti, Milan, October 1987.
  - "Proactive Marketing Research and Modeling: Pitfalls and Prospects," PMRG Fall 1987 meeting, Captiva Island, Florida, October 1987.
  - "Turning Salespeople and Non-Marketing Executives into Marketing Strategists," AMA Marketing Educators' Conference, Toronto, August 1987.
  - "International Marketing," Wharton Alumni Club, Toronto, August 1987.
  - "Marketing and Technology: Progress, Problems, and Prospects," European-American Symposium, Enschede, The Netherlands, June 29-July 1, 1987.
  - "Market Segmentation: Shortcomings and Opportunities," 1987 Attitude Research Conference, West Palm Beach, Florida, May 1987.
- 
- "Advances in Management Strategy: A Marketing Perspective," The Institute of Management Consultants, March 1986.
  - "Advances in Global Marketing Strategy: Concepts, Methods, and Applications," International Symposium on Recent Developments in Management Research, Helsinki, Finland, 1986.
  - "The Marketplace of the Future: Global Consumers," Advertising Research Foundation 50th Anniversary Conference, March 1986.
  - "A Marketing Perspective for Public Management: Research Implications," Wharton Department of Public Policy and Management Brown Bag Seminar, January 1986.
- 
- "Marketing to the U.S." A special meeting of the Chinese Management Association and the Taiwan Ministry of Trade, (Taipei), July 1985.
  - "Advances in Portfolio Analysis and Strategy," Chinese Management Association, Taipei, July 1985.
  - "New Development in Marketing and Planning," WEFA/Lauder Seminar, June 1985, Tokyo, Japan. Sessions on Advances in Market Segmentation, Product Positioning and Portfolio Analysis and Strategy.
  - "Advances in Portfolio Analysis and Strategy," University of Illinois, Theories of Marketing Practice Conference, May 1985

- "Micro Computers in Marketing," Marketing Science Conference, March 1985.
- "Global Marketing Strategies," New York University, 1985.
- 
- "Diffusion Models: The State of the Art," ASA conference, 1984.
- "Generating and Evaluating Industrial Marketing Strategies Using the AHP," TIMS Conference, November 1984;
- MRCA Conference on "The Affluent Market: New Data and Methodologies in Financial Services Planning," November 1984.
- 
- "Increasing Marketing Productivity," S.F. Chapter of the AMA, March 1982.
- 
- "Advances in Segmentation," Philadelphia Chapter of the AMA, Conference on Market Segmentation, January 1981.
- 
- "Marketing Strategy," Delaware Valley Hospital Strategic Planning Program, May 1980.
- National Agricultural Marketing Association, Philadelphia, March 1977 and February 1978.
- Marketing Planning Conference, The AMA Western Michigan Chapter, Grand Rapids, March 1976

## **E. The Network Challenge**

- "New Business Models: Challenges and Opportunities," Mack Institute, November 20, 2015
- "Exploring the Customer as the Core Axis for Transformation," Fast Forward: Executive Strategies for Digital Personnel & Organized Transformation, Penn Club of New York, November 2, 2015
- "Business Model Multipliers and Innovative Business Models," LinkS @ Wharton G3, September 17, 2015
- "The Digital Imperative," Global CEO Program, March 9, 2015
- 
- "Surviving & Thriving in a Hyper-Connected World: An Ideal Design," WEF Risk in a Hyper-connected World Project, November 13, 2011.
- "From Firm Centric to Network Orchestration," MARS, November 8, 2011.
- 
- "The Network Challenge," SEI Connections Conference, June 8, 2010.
- "Organizational Networks for Effective Competition," Tyco, February 4, 2010.
- 
- "The Network Challenge," SEI PB&T Management Team, November 9, 2009.
- "The Network Challenge," SEI Center Annual Board Meeting, October 9, 2009.
- "Wharton Combined Boards Meeting Spring 2009 Opening Plenary Session," Wharton Combined Boards Meeting, April 2, 2009.
- "Competing in a World of Network Orchestration: Implications For Marketing," MPlanet, January 27, 2009.
- 
- "Network Orchestration and Open Innovation Models," SEI Center Board Meeting, November 7, 2008.
- "Making Your Way in the New Flat World Economy," CASRO International Research Conference, May 6, 2008.
- "Competing in a Flat World," Wharton Club of NY, February 5, 2008.
- 
- "Network-Based Strategies and Competencies," SEI Center Board Meeting, November 16, 2007.
- "Network Orchestration: Core Competencies for a Borderless World," Wharton-INSEAD Impact Conference: Network-Based Strategies and Competencies, November 9, 2007
- "Network Orchestration," Network-Based Strategies & Competencies Workshop, May 3, 2007.
- "Succeeding in a Flat World," The Wharton Economic Summit, Philadelphia, April 12, 2007.
- "Web 2.0 & Social Networking: Implications for Management," The Worldwide J&J Diabetes Franchise Leadership Team, January 3, 2007.
- 
- "The Changing Nature of Corporations: Competing in a Flat World," organizer and chair of a panel at

the Milken Institute Global Conference, April 2006.

- “An Extended Example of New Risks and their Management in Supply Chains,” SEI Meeting, September 26, 2005.
- “Assessing Vulnerabilities,” System Approaches to Terrorism Conference at George Washington University, July 15, 2002.
- “State of the World: Trades, Problems and Prospects,” YPO Philadelphia Chapter University, The Cloister, September 1994.
- “Selecting and Negotiating International Strategic Alliances: Applications of the AHP,” TIMS Osaka, July 1989.

## F. Future of Advertising

- “Marketing 2020, Towards Idealized Design,” US Market Senior Leader Meeting, November 30, 2017.
- “The Future of Advertising,” Aresty Institute – Digital Marketing Strategies for the Digital Economy, November 28, 2017.
- “The Road Ahead: Lessons from the Wharton Future of Advertising Program,” CIAM Insights and Analytics Council, November 14, 2017.
- “Advertising 2020: Insights from the Wharton Future of Advertising Program,” The Council for Research Excellence Future Webinar, October 26, 2017.
- “The Future of Advertising: Lessons for City Magazine Publishers,” City Magazine Publisher Conference, October 13, 2017.
- “The Future of Advertising,” Merck Marketing Program, September 28, 2017.
- “The Future of Advertising: Digital Marketing Strategies for the Digital Economy,” Digital Marketing Academy Merck, July 17, 2017
- “The Future of Advertising: Digital Marketing Strategies for the Digital Economy,” Wharton Future of Advertising Program, December 8, 2016.
- “The Future of Media in the Context of the Future of Advertising,” The Media Future Summit, October 27, 2016.
- “The Role of the CMO in All-Touchpoint Value Creation,” 2016 ANA Masters of Marketing Conference, October 19, 2016.
- “Don’t Call it a Phone: Marketers’ New Mobile Perspectives “Beyond Advertising,” Advertising Week NYC 2016, September 28, 2016.
- “Reimagine Market Research: Insights from the Wharton Future of Advertising Program,” ESOMAR Congress 2016, September 19, 2016.
- “Beyond Advertising: Creating Value Through All Customer Touchpoints,” Pfizer, September 13, 2016.
- “Beyond Advertising: Creating Value Through All Customer Touchpoints,” Integrated Marketing Virtual (IMV), June 23, 2016. <<http://imv.targetmarketingmag.com/register/?source=Wharton>>
- “New Creativity Standards for the Future,” Cannes Lions, June 18, 2016.
- “Beyond Advertising: Creating Value Through All Customer Touchpoints,” Marketing Science Institute, May 18, 2016.
- “Beyond Advertising: Creating Value Through All Customer Touchpoints,” Turner Ad Lab, April 28, 2016.
- “Beyond Advertising: Creating Value Through All Customer Touchpoints,” Edelman Lunch and Learn, April 26, 2016.
- “Network Orchestration Leadership for CMOs,” ANA, NYC, December 11, 2015
- “Beyond Advertising: Creating Value Through All Customer Touchpoints,” Nationwide Meeting at SEI, November 10, 2015
- “Beyond Advertising: Creating Value Through All Customer Touchpoints,” WFOA Future Vision

Series, November 9, 2015

- “The Role of the CMO As a Network Orchestrator,” ANA Master Circle Roundtable, Orlando, October 14, 2015
  - “Advertising in the Age of Watson,” Cannes Lions, June 25, 2015
  - “Designing the Future of Advertising Now,” Italia Innovation Program - Venice Innovation Cluster, June 30, 2015
  - “Beyond Advertising: Creating Value Through All Touchpoints” 2014 WFoA Future Vision Series (CAA), Los Angeles, June 5, 2015
  - “Addressing the Capabilities and Talent Challenges,” ANA Workshop - Capability & Talent Leadership Program, Philadelphia, May 12, 2015
  - “Digital Opportunities in Luxury Retail,” Online Luxury Retailing Conference, New York, April 30, 2015
  - “Beyond Advertising: Creating Value Through All Touchpoints,” 2015 WFoA Future Vision Series, MDC Innovation Centre, NYC, April 10, 2015
- 
- “Text Mining vs. Surveys,” The Advertising Research Foundation, March 26, 2014.
  - “Saving the Golden Goose: A Framework for Maximizing Effectiveness and Transparency in Native Advertising,” Festival of Media – Asia Pacific, Singapore, March 17, 2014.
  - “Get Ready for Advertising 2020...Now: Lessons from the Wharton Future of Advertising Program’s Advertising 2020 Project,” AMA Philadelphia, Chapter Meeting, March 7, 2014
  - “The Future of Advertising – Now!” CMO Workshop at Wharton, March 6, 2014.
  - “Get Ready for Advertising 2020...Now: Lessons from the Wharton Future of Advertising Program’s Advertising 2020 Project,” FFWD Advertising & Marketing Week, Toronto, January 29, 2014.
- 
- “Advertising and Media 2020: Implications for Action,” Cannes Lions Young Media Academy, June 19, 2013
  - “The New Frontiers of Retailing,” Fung Group Idealized Workshop, May 29, 2013.
  - “Creating an Agile and Innovative Organization: Lessons from the FoA Program,” Strategic Agility & Innovation Workshop, IDC Herzliya, June 17, 2013.
  - “Innovative Approaches to Measuring Advertising Effectiveness,” Wharton Future of Advertising Program and Wharton Customer Analytics Initiative, May 16, 2013.
  - “Insights from Advertising 2020,” ARF Webinar, May 9, 2013.
  - “Insights from Advertising 2020,” ARF Re:think: Unparalleled Knowledge, Unparalleled Networking, March 17, 2013.
  - “Facebook Roundtable,” Wharton Future of Advertising Program, January 18, 2013.
  - “The Implications of Advertising 2020,” ARF Rethink 2013. March 19 2013,” Wharton Future of Advertising, January 18, 2013.
- 
- “The Future of Advertising Program; Global Insight Roundtables: China,” Beijing, July 25, 2012
  - “What’s Next for Empirical Generalizations in Advertising,” Emirical Generalizations in Advertising II: Whar works in the New Age of Advertising and Marketing, June 1, 2012.
  - “The Secrets of Viral Ads” Post-Advertising Summit Story Worldwide, March 29, 2012.
- 
- “Rethinking Marketing and Advertising Research,” Future of Advertising Global Advisory Board Meeting, December 9, 2011.
  - “Toward a New Mental Model of Advertising: Implications to Orchestration, Business & Revenue Models,” FoA Orchestration Session, October 27, 2011.
  - The Future of Brand Building and Brand Experience: Blurring Boundaries Between Advertising and Retailing,” Workshop Session with the Jay H. Baker Retailing Initiative, April 21, 2011.
  - “The Future of Sports Advertising,” WSBI Alumni Advisory Committee Mtg, April 7, 2011.
  - “The Future of Marketing & Advertising: An opportunity for Preeminence,” Wharton External Affairs Director’s Meeting, March 21, 2011.
  - The Future of Sports Advertising, Innovations and Experiments with Multi Touch Point Portfolios,” Leverage Sports Agency, March 16, 2011.
  - “The Future of Advertising, The Wharton Club of London, February 18, 2011.
- 
- “The Future of Advertising is Now,” IESE, May 17, 2010.

- “Future of Advertising,” Future of Advertising Project Global Advisory Board Working Session, March 10, 2010.
- “Future of Advertising: Progress and Prospects,” Board Meeting of Ehrenberg-Bass Institute, November 10, 2009.
- “The Future of Advertising Project and The New Marketing Challenges,” SEI Center Annual Board Meeting, October 9, 2009.
- “The Future of Advertising Project (Project Update),” Future of Advertising Project Global Advisory Board Meeting, October 8, 2009.
- “What We Know about Advertising: Implications for Management and Measurement,” Audience Measurement 4.0, June 24, 2009.
- “Empirical Generalizations in Advertising: What We Know, Don’t Know, Can’t Know, and Should Know,” Rethink The ARF Annual Convention, March 31, 2009.
- “Taking Stock of Existing Advertising Empirical Generalizations,” Wharton Impact Empirical Generalizations in Advertising Conference, December 4, 2008.
- “The Future of Advertising if NOW: Project Overview and Update,” SEI Center Board Meeting, November 6, 2008.
- “The Future of Advertising,” SEI Center Board Meeting, November 16, 2007.

#### **G. Future of Management & Management Education**

- “Lessons from the Reimagine Education Global Competition 2014-2017,” IDC Strategic Planning Meeting, December 17-18, 2017.
- “MBA for Executive at 40: Reflections and Musings about the Future,” Executive MBA Program, November 11, 2017.
- “Wharton Fellows’ Singapore Master Class: The Next Big Thing,” Wharton Fellows, October 2-5, 2016.
- “Israel Knowledge@Wharton: Implications,” Israel Knowledge@Wharton Launch Event and Working Forum, October 12, 2012
- “Managing Change in Higher Education: Challenges, Approaches & Action Plans,” NACUBO Conference on Managing Change, September 30, 2011.
- “Management Education 2020”, Wharton Combined Boards Meeting, October 15, 2010.
- “Reinventing Management Education,” SEI Center Annual Board Meeting, October 9, 2009.
- “Socially Responsible Capitalism Approaches to Improving Business and Government Relations,” SEI Center Annual Board Meeting, October 9, 2009.
- “Future of Management and Management Education,” SEI Center Annual Board Meeting, October 8, 2009.
- “The Financial Crisis and the Changing Relationship between Business and Government,” Chiefs of Staff Meeting, September 15, 2009.
- “Approaches for Redesigning the Total Wharton Experience,” The Wharton School, May 15, 2009.
- “Challenging the Current MBA,” January 1, 2008.
- “Thought Leadership,” The Wharton Economic Summit, April 12, 2007.
- “The Future of Management Education,” International Academy of Management @ IMD, March 22, 2007.
- “The Future of Management Education,” International Academy of Management @ IMD, March 16, 2007.

- “Perspectives on Research: Innovation, Impact, and Fun,” The Joseph Wharton Scholars Senior Research Seminar, October 11, 2006.
  - “Reinventing the MBA,” Panelist at the MBA Roundtable Session on MBA 2020: Curricular Innovation for Tomorrow’s Business School,” October 6, 2006.
  - “New Frontiers in the Practice of Management” with Paul Kleindorfer, CEO Workshops at IDC Israel, February 2006.
- 
- “Toward a New Theory of the Firm,” SEI Center Board Meeting, October 7, 2005.
  - “The Lauder Institute: 1984-2005: A Reexamination,” The Lauder Institute, July 12, 2005.
- 
- “e-Bus: The Curriculum and Research Challenge: A Discussion with Jerry Wind,” Faculty Seminar, Graduate School of Business Studies, Katholieke Universiteit Leuven, Belgium, February 2001.
  - “Reinventing Training for the Global Information Age,” Delphi e-Learning Conference, January 2001.
- 
- “Creating a University for the Global Information Age,” The Inaugural Lecture of the Wharton-Singapore Management University, July 2000.
  - “Reinventing the Business School for the Global Information Age,” plenary session, The EFMD Deans and Directors Meeting 2000, Helsinki, Finland, January 2000.
- 
- “The Information Revolution and the Emerging Management Education Paradigm,” On Line Educa, Berlin, December 1998.
  - “Towards a New Management Education Paradigm,” IDC Faculty Workshop, June 1998.
- 
- “Choices and Strategies for Universities in the Global Information Age,” Provosts Seminar on Information, February 1997.
- 
- “Creating a 21st Century Enterprise,” Universidad Adolfo Ibanez, Vina del Mar, Chile, October 1996.
  - “Creating a 21st Century Enterprise: Implications for Boards of Directors,” Enhance Board of Directors, September 1996.
  - “The Stakeholder Challenge for Increased European Competitiveness,” Wharton European Forum, (London, England), March 29, 1996.
  - “The Next Enterprise: Creating a Successful 21st Century Enterprise Today,” The Hong Kong Management Association, January 12, 1996.
- 
- “Toward Virtual Management Education,” International Academy of Management (Boston, MA), December 8, 1995.
  - “The Virtual University: Research and Action Agenda,” The Virtual University Conference, SEI Center, January 12, 1995.
- 
- “A New Management Paradigm for the 21st Century Enterprise,” Conference of the International Academy of Management, December 9, 1994.
  - “Textbook of the Future: A Perspective From the Virtual University Lab,” April 8, 1994.
  - Neuhauf Lecture, “The Impact of Marketing Science on Industry and Academia: Applications, Results and Lessons,” at Rice University, March 23, 1994.
  - “Role of Marketing in the New MBA Curriculum: Lessons from the Wharton Experience,” AMA Winter Conference, February 21, 1994.
- 
- “The New Wharton MBA Curriculum,” Faculty seminar at Erasmus University, March 10 and June 10, 1993.
- 
- “Designing & Implementing an Innovative MBA Program: Lessons from the Wharton Experience,” Conference on the Future of Management Education in Israel, Jerusalem, Israel, October 16, 1991.
- 
- “The Globalization of Management Education: Options, Trade-Offs, and an Agenda for Implementation,” AACSB Annual Meeting, April 18, 1989, Montreal.
- 
- “Management Education in a Global Context,” University of Pennsylvania Conference on

## H. Marketing Research & Modeling

- "Marketing Research in the Age of Watson," ESOMAR Congress 2016, September 19, 2016.  
-----
- "The Changing Role of Marketing Research," 2012 Inaugural AIM-AMA Sheth Foundation Doctoral Consortium, July 29, 2012  
-----
- "Marketing Research in Times of Crisis," Navigating a New World Conference hosted by Greater NY and Phila Marketing Research Association, April 16, 2009.  
-----
- "Online Panels: Where We Are Today and in the Future," CASRO, June 22, 2007.  
-----
- "Adaptive Experimentation" The Sammy Ofer School of Communications and Information," IDC Herzliya, September 9, 2005.  
-----
- "Research Challenges in the Management of Extreme Events: The Case of the Office Homeland Security," with Paul Kleindorfer, Advisory Board Meeting of the Wharton Managing and Financing Extreme Event Project, December 2001.  
-----
- "Marketing Science: Accomplishments and Challenges in the Global Information Age," Informs, November 1999.
- "Marketing Research in the Global Information Age: Practice, Problems, and Prospects," Wharton-IDC Marketing Communications Program, March 1999.  
-----
- "Creative Joint Ventures and the Potential Role of the University," Philadelphia-Israeli Chamber of Commerce, June 1997.
- "The Use of Conjoint Analysis-Based Survey to Determine Consumer Price Elasticities," Debriefing Session for the Anti-Trust Division, Washington, D.C., February 1997.  
-----
- Address on Issues in Marketing Research for Legal Cases: Necessity of Using controls and the Propriety and Risk of Repetitive Probes," Marketing and Public Policy Conference, Washington, D.C., May 1996.  
-----
- "Marketing Science at a Crossroad," Inaugural Presentation as the first holder of the Unilever-Erasmus Marketing Professorship, Erasmus University, February 18, 1993.  
-----
- "Time Based Competition: Implications for Marketing Science," INSEAD Faculty Presentation, January 1992.  
-----
- "Marketing Research and Modeling for the 21st Century Enterprise: The Emerging Crisis and its Challenges," Management Science Roundtable, February 17, 1991, Redington Beach, FL.  
-----
- "Concept Testing for Generating and Evaluating Positioning Strategies," PDMA Positioning Conference, March 6, 1990, New York, NY.  
-----
- "Second Generation Expert Systems: Incorporating Enhanced Explanation and Learning," Marketing Science Conference, Jouy-en-Josas, France, June 24-26, 1987.  
-----
- "Advances in Marketing Research and Modeling," Studio Ambrosetti, Milan, December 1986.
- "Expert Systems in Marketing," TIMS October 1986 Conference, Miami.  
-----
- "The Contribution of Consulting to the Consumer Research Discipline," ACR conference, October 1984.



## **I. Israel**

- “Innovative Pedagogical Approaches in Higher Education” IDC, March 25, 2015
- “Getting the Most from your Israel Visit,” 2012 Faculty International Seminar to Israel/Turkey, April 25, 2012.
- “Israel: Insights and Opportunities: Background Discussion for GIP Israel Program,” GIP Israel Program, November 16, 2010.
- “Making the Case for Israel,” IDC Panel Discussion, Israel, May 26, 2010.
- “The Challenge of Marketing Israel,” Israeli MBA Conference, April 19, 2009.
- “A New Management Paradigm for Israel's Schools of Management: Lessons from the New Wharton MBA Curriculum,” Conference on the Future of Management Education in Israel, Jerusalem, Israel, October 16, 1991.

## **J. Video Presentations: Illustrative Topics**

- “The Future of Marketing: M.A.D.E.S. and R.A.V.E.S.” Target Marketing, 2016
- “Transforming Corporate Cultures by Celebrating Failures,” Knowledge@Wharton in collaboration with Mphasis, Oct 13, 2015
- “The CMO Advantage: Evolving beyond the Digital Revolution,” Wharton Executive Education, April 14, 2015. <<https://www.youtube.com/watch?v=a1-gxoMCXIs>>.
- “Should You & Can You Inspire Curiosity?” TEDxFreeLibraryofPhiladelphia, January 25, 2015
- “Wharton Future of Advertising Research,” Tsou, Rose & Wind, Jerry, The Festival of Media Asia 2014, March 16, 2014. <<https://www.youtube.com/watch?v=79hlMyUB5fg>>.
- “Should You & Can You Inspire Curiosity?” TED x Free Library of Philadelphia. September 17, 2014. <<https://www.youtube.com/watch?v=Kx2ZF3-10B8>>.
- “Can Technology Help Enhance Student Engagement?” Engaging Students Through Technology Symposium, November 1, 2013. <<https://www.youtube.com/watch?v=FDRVrXUCeds>>.
- “The Fourt Minute Mile & Its Implications for B2B Marketers,” Google Small Business, October 18, 2011. <<https://www.youtube.com/watch?v=fXjnXz9-qPs>>.

## 6. PROFESSIONAL AFFILIATIONS AND AWARDS

### I. Professional Affiliations

1. Fellow of the International Academy of Management (since 1989), Chancellor 2000-2006, Vice Chancellor for the Americas, 1996-2000
2. Academy of International Business
3. American Marketing Associations
4. American Association for Public Opinion Research
5. American Psychological Association, Division of Consumer Psychology (Div. 23)
6. Association for Consumer Research
7. International Communication Association
8. Product Development and Management Association
9. Psychometric Society
10. Strategic Management Society
11. INFORMS – The Institute of Management Sciences
12. The Market Research Society (London)

### II. Professional Awards

#### 1. Honorary Degrees

M.A. Honors, University of Pennsylvania, 1971

#### 2. Awards

- Inducted into the Marketing Hall of Fame, 2017
- Member of the Inaugural Cohort of the **AMA Fellows**, 2015.
- One of the original 10 **Legends of Marketing, 2009**. An 8-volume set of anthologized work published by Sage, 2013.
- **Buck Weaver Award**, Massachusetts Institute of Technology, 2007.
- **Honorary Fellow of the Decade**, Interdisciplinary Center, Herzliya (Israel), May 2004.
- The **2003 Elsevier Science Distinguished Scholar Award** of the Society for Marketing Advances
- One of the **10 Grand Auteurs** in Marketing. [Alain Jolbert, EMS Management and Societe, 2000]
- One of 18 *JAR* articles in the Special Classics Issue **of articles that have withstood the test of time**. Nov./Dec. 2000.
- **The Paul D. Converse Award**, 1996.
- **American Marketing Association/Irwin Distinguished Educator Award**, 1993.
- **First Faculty Impact Award**, Wharton Alumni Association, 1993.
- First Runner-Up in the **1988 Franz Edelman Award for Management Science/Achievement**.
- **The 1985 Charles Coolidge Parlin Award**.
- Elected as the 1984 member of the **Attitude Research Hall of Fame**.
- Delivered the 13th (1981) **Albert Wesley Frey Lecture**, University of Pittsburgh.
- My *Product Policy* book won the **1979 Book of the Year Award** given by the editors of *Expansion* (Mexico).
- Winner of two **Alpha Kappa Psi Foundation Awards** for the best article published in the *Journal of Marketing* in 1973 and 1976.
- Runner up of the 1983 **William O'Dell Award** for "the article published 5 years earlier in *JMR* which stood the test of time and made the most significant long run contribution to Marketing Theory, methodology and practice".
- **Winning paper** (with Paul E. Green) of American Psychological Association Division of Consumer Psychology, 1972 Research Design Competition.
- A finalist (top 5) for the 1980 Wharton Award for teaching excellence.

#### 3. Illustrative Citations

- Third highest ranked Marketing Scholar in the University of Maryland's Kirkpatrick and Locke Faculty

Scholarship Study, 1985 (based on number of publications, citations, and peer ratings).

- 10th highest ranked marketing Scholar in the Cote, Leong and Cote "Assessing the Dissemination and Utilization of Marketing Research in the Social Sciences: A Citation Analysis Approach," 1990.

#### **4. Illustrative Research Grants**

- National Science Foundation: U.P. Research Grant (Summer 1970);
- General Foods, the Jell-O Division (1971);
- N.W. Ayer (1972) - (with Paul E. Green);
- Downe Communication, Inc. (1972);
- Lever Brothers (1972) - (with Paul E. Green);
- Thomas Jefferson University Hospital (1973);
- AT&T (1973);
- The Robert Wood Johnson Foundation Clinical Scholar Fund (1974);
- The John and Mary R. Markle Foundation with R.E. Frank (1975-1976);
- National Science Foundation (Grant No. 51575-12928) (1975);
- The National Health Care Management Center of the Leonard Davis Institute with Thomas Robertson (1977).
- Wharton Global Initiatives Research Program (2010)
- Wharton Sports Business Initiative Program (2010)
- Global Initiatives Research Program (2014)

#### **5. Fellowships**

- Hebrew University Awards 1959/1960; 1964/1965; 1965/1966;
- Ford Foundation Fellowship 1963/1964;
- Owen D. Young: General Electric Fellowship in Marketing 1964/1965; 1965/1966;
- Bankendorf Fellowship 1964/1965;
- Stanford University Fellowship 1964/1965; 1965/1966.

#### **6. Illustrative Recent Media Coverage**

- Knowledge@Wharton:
  - Amazon vs. Walmart: Which One Will Prevail? [June 27, 2017]  
<http://knowledge.wharton.upenn.edu/article/amazon-vs-walmart-one-will-prevail/>
  - How Insurers Can Protect Against Digital Disruption [March 03, 2017]  
<http://knowledge.wharton.upenn.edu/article/insurers-can-protect-digital-disruption-2/>
  - How Platforms Will Disrupt the Future of Media and Entertainment [November 18, 2016]  
<http://knowledge.wharton.upenn.edu/article/platforms-will-disrupt-future-media-entertainment/>
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Wharton Alumni Newsletter	August	2007	Featured book
Wharton Alumni Newsletter	December	2007	Featured book
Wharton Executive Education - - featured on home page	September	2007	Featured book
Wharton Faculty / Staff newsletter	September	2007	Featured book
Wharton Faculty / Staff newsletter	December	2007	Competing in a Flat World Competition Announcement
Knowledge at Wharton	October	2007	Interview with audio download
Competing in a Flat World	October	2007	Website went live in

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  - WABJ Radio, John Sabastian Morning Show, Detroit, MI, August 18, 2004.
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## 7. PERSONAL DATA

**Office:** The Wharton School  
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Philadelphia, PA 19104  
Tel: (215) 898-8267  
E-mail: windj@wharton.upenn.edu

**Marital Status:** Widowed; Two children.

### Illustrative Pro Bono Activities

The Interdisciplinary Center, Herzliya (Israel), all planning activities and other involvement (as outlined on p. 75), since 1994.

American Friends of IDC – Founding President (1998-2002); Member (2003-present).

Government of Catalonia, International Advisory Board (2007-present)

The Philadelphia Museum of Art, Trustee (1992-present); Founding chair of the Marketing Committee (2013-present); Member of PMA Brand Steering Group (2013-present); Member of the Digital Age Committee (2009-2013); Member of the Corporate Executive board of the Museum (1996-present); Led a committee of trustees, management, and curatorial staff in the development of a market driven strategy, (1990); Member of the Nominating Committee (1999-2002); Member of Trustee Committees for Development (1993-1997); Special Exhibitions (1993-1995); and Strategy (1997-1998); Chairman, Audience Building Committee (2004-2006)

The Curtis Institute, Communication Committee (2016-present)

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Business for Diplomatic Actions, Member, Advisory Board and Coordinator of the Wharton research efforts in this area (2005-2010)

The Fox Chase Cancer Center, Member, Advisory Board (2009-2012)

Institute of Contemporary Art (ICA). Help guide a strategic planning process (2001).

The Jewish Federation of Greater Philadelphia: Member of the Financial Resource Development Committee, 1990-1992.

National Constitution Center, Member, Strategic Planning Steering Committee (2005)

Operation Independence, Israeli Management School Oversight Committee, 1991-1992.

The Philadelphia Orchestra: Advisor regarding the development of Marketing Strategy (1994-1997).

University of Pennsylvania Museum of Archeology and Anthropology. Help establish a vision and revenue generation strategies (1999).

### Affiliations:

The Philadelphia Museum of Art – Trustee (Philadelphia)  
The Barnes Foundation (Philadelphia)  
The Institute of Contemporary Art of the University of Pennsylvania (Philadelphia)  
Pennsylvania Academy of the Fine Arts (Philadelphia)  
The Museum of Modern Art (New York)  
Museum of Art and Design (New York)  
The New Museum (New York)  
Whitney Museum of American Art (New York)  
The Jewish Museum (New York)  
Guggenheim Museum (New York)  
U.S. Holocaust Memorial Museum (Washington D.C.)