**David Souder**

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Storrs, CT 06269-1041

**Academic Positions**

**University of Connecticut, School of Business,** Storrs, CT

*Professor, Boucher Management & Entrepreneurship Department* 2021 - present

*Associate Professor, Management Department* 2014-21

*Assistant Professor, Management Department* 2007-14

*Senior Associate Dean for Faculty and Research* 2022 - present

*Interim Campus Dean & Chief Administrative Officer, UConn Stamford* 2021-22

*Interim Dean* 2019-20

*Associate Dean for Graduate Programs* 2017-19

*Interim Academic Director, Connecticut Center for Entrepreneurship and Innovation* 2019-20

*Strategic Advisor to the Dean* 2020-22

*Academic Director, Executive MBA Program* 2014-22

*PhD Coordinator, Management Department* 2013-17, 2020-22

**Education**

**University of Minnesota**, **Carlson School of Management**, Minneapolis, MN 2002-07

*PhD in Business Administration, concentration in Strategic Management and Organization*

Dissertation: Choice of payoff horizon and firm performance: Strategic investments by cable TV operators 1972-1996

**University of Pennsylvania, The Wharton School,** Philadelphia, PA 1989-93

*BS in Economics, concentrations in Strategic Management and Finance, cum laude*

Study Abroad: Institute for European Studies, Vienna, Austria Fall 1991

**Publications**

1. David Souder, Myles Shaver, Jared Harris, and Abdullatif Alrashdan. 2024. ‘Performance metrics in strategy research: A new metric and method for assessing dynamic value,’ *Strategic Management Journal,* 45(1): 144-167.
2. David Souder and Dhvani Badwaik. 2022. ‘Designing long term incentives that promote innovation instead of value capture,’ *Oxford Review of Economic Policy* 38(2): 322-337. Edited by Atif Ansar.
3. Brian Fox, Sergio Grove, and David Souder. 2021. ‘When good deals need help getting done: Articulating side payment strategies,’ *Long Range Planning* 54(6).
4. David Souder. 2019. ‘Coordinating infrastructure changes to meet retiring baby boomers’ needs,’ forthcoming in the *Handbook of Inclusive Innovation: The Role of Organizations, Markets and Communities in Social Innovation*. Published by Edward Elgar, edited by Gerard George, Ted Baker, Paul Tracey, and Havovi Joshi.
5. David Souder and Philip Bromiley. 2017. ‘Timing for dollars: How option exercisability influences resource allocation,’ *Journal of Management*, 43(8): 2555-2579.
6. David Souder, Akbar Zaheer, Harry Sapienza, and Rebecca Ranucci. 2017. ‘How family influence, socioemotional wealth, and competitive conditions shape new technology adoption,’ *Strategic Management Journal*, 38(9): 1774-1790.
7. David Souder, Phil Bromiley, Scott Mitchell, and Greg Reilly. 2017. ‘Does investing for the long term pay off for firms?’ From Research to Practice section of *Rutgers Business Review*, 2(2): 191-198.
8. David Souder, Greg Reilly, Philip Bromiley, and Scott Mitchell. 2016. ‘A behavioral understanding of investment horizon and firm performance,’ *Organization Science*, 27(5): 1202-1218.
9. Greg Reilly, David Souder, and Rebecca Ranucci. 2016. “Investment horizon in the resource allocation process: A review and framework for next steps,” *Journal of Management*, 42(5): 1169-1194.
10. David Souder, Greg Reilly, and Rebecca Ranucci. 2015. ‘Bringing long-term thinking into business,’ a systematic review sponsored by the *Network for Business Sustainability*.
11. Rebecca Ranucci and David Souder. 2015. ‘Facilitating tacit knowledge transfer: Routine compatibility, trustworthiness, and integration in M&As,’ *Journal of Knowledge Management*, 19(2): 257-276.
12. Jared Harris, Scott G. Johnson, and David Souder. 2013. ‘Model-theoretic knowledge accumulation: The case of agency theory and incentive alignment,’ *Academy of Management Review,* 38(3): 442-454.
13. Aks Zaheer, Xavier Castaner, and David Souder. 2013. ‘Synergy sources, target autonomy, and acquisition performance,’ *Journal of Management,* 39(3): 604-632.
14. David Souder and Philip Bromiley. 2012. ‘Explaining temporal orientation: Evidence from the durability of firms’ capital investments,’ *Strategic Management Journal,* 33(5): 550-569.
15. David Souder, Zeki Simsek and Scott G. Johnson. 2012. ‘The differing effects of agent and founder CEOs on the firm’s market expansion,’ *Strategic Management Journal,* 33(1): 23-41.
16. David Souder and J. Myles Shaver. 2010. ‘Constraints and incentives for making long horizon corporate investments,’ *Strategic Management Journal,* 31(12): 1316-1335.
17. Zeki Simsek, Ciaran Heavey, John F. Veiga, and David Souder. 2009. ‘A typology for aligning organizational ambidexterity’s conceptualizations, antecedents, and outcomes,’ *Journal of Management Studies*, 46(5): 864-894.
18. David Souder. 2008. ‘Which firms invest for the long term? Longitudinal evidence from cable TV operators,’ *Academy of Management Proceedings*.
19. Jared Harris and David Souder. 2004. ‘Bad apples or bad bushel? Ethics, efficiency and capital market integrity,’ *Business and Professional Ethics Journal*, 23(1&2): 201-222.

**Working Papers**

1. Sergio Grove, Rebecca Ranucci, Brian Fox, and David Souder. ‘Structural safeguards at alliance formation: Accounting for partner asymmetry in industry distance,’ under second review.
2. David Souder, Scott G. Johnson, and Dhvani Badwaik. ‘Analyzing the purpose of the corporation in market-based systems.’
3. David Souder, Dhvani Badwaik, and Philip Bromiley. ‘International variation in investment horizons.’
4. David Souder, Scott G. Johnson, and Brian Fox. ‘Managing in a bubble: Unanticipated consequences of exploiting temporary advantages.’
5. Brian Fox, Zeki Simsek, and David Souder. ‘Firm repertoires and performance: Direct and competitive effects.’

**Grants and Awards**

Outstanding Reviewer award, *Academy of Management Journal*, 2019, 2023

Outstanding Reviewer award, *Organization Science*, 2019

Ackerman Scholar, University of Connecticut School of Business, 2016-18

Best Paper Honorable Mention, University of Connecticut School of Business, 2010, 2017

CIBER faculty grant award, University of Connecticut School of Business, 2017-18

Research Support, University of Connecticut School of Business Dean’s Fund, 2012-17

5-year Research Excellence Award, University of Connecticut School of Business, 2014

Systematic Review on Long-Term Thinking, Network for Business Sustainability, 2014

Finalist, SMS Conference Best Paper for Practical Implications prize, 2011

Research Support, Connecticut Center for Entrepreneurship and Innovation, 2008-11

Best Paper Co-winner, University of Connecticut School of Business, 2011

Honorable Mention, Best Paper Award, University of Connecticut School of Business, 2010

The State Farm Companies Foundation Dissertation Award, 2006

Austin W. Shanfelter Dissertation Grant Award (from The Cable Center), 2006

Finalist, Booz Allen Hamilton/SMS PhD Fellowship, 2006

University of Minnesota Graduate School Dissertation Fellowship, 2006-2007

Finalist, Joseph M. Juran Center Doctoral Fellowship competition, 2006-2007

**Invited Research Presentations**

Syracuse University, 2018

Copenhagen Business School, 2018

Waseda University, 2016

University of California, Irvine, 2014

University of Western Ontario, 2014

Theories of Family Enterprise Conference, Edmonton, 2012

Oklahoma State University (PhD seminar), 2011

Management Development Institute, Gurgaon, 2011

Indian School of Business, 2011

University of Virginia, 2009

University of Pennsylvania, 2007

University of Maryland, 2006

Joint Statistical Meetings, Minneapolis, 2005

**Refereed Conference Presentations – Strategic Management Society**

1. ‘Completing dissertations with process designs: Perspectives from recent grads and their advisors,’ (session organizer and panelist with Dhvani Badwaik, Fleur Deken, and Kathrin Borner), 2022 in London.
2. ‘Minding the time gap: Organizational processes to reduce forecast errors in long horizon investments,’ (with Dhvani Badwaik, Rebecca Ranucci, and Atif Ansar), 2020 in London (virtual).
3. ‘The effect of CEO career horizon on the choice of alliance governance mode’ (with Abdullatif Alrashdan and Sergio Grove), 2019 in Minneapolis.
4. ‘Coordination equilibria: Facilitating value-creating deals’ (with Sergio Grove and Brian Fox), 2019 special conference in Frankfurt.
5. ‘The market value partitioning method for interpreting intertemporal tradeoffs’ (with Myles Shaver and Abdullatif Alrashdan), 2017 special conference in San Jose, Costa Rica.
6. Invited panelist for ‘Organizations and the long-term’, 2017 in Houston.
7. ‘Assurances between managers and securities analysts’ (with Rebecca Ranucci), 2015 in Denver.
8. ‘Recovering after the bubble: Understanding restart strategies as a problem in coordinating aspirations’ (with Scott Johnson), 2014 special conference in Tel Aviv.
9. ‘Shared stakeholder interest, leading performance indicators, and value creation’ (with Jared Harris), 2012 in Prague.
10. ‘The interactive human capital resource: Performance gains from the configuration and bundling of human capital’ (with Mark Maltriarch and Greg Reilly), 2012 in Prague.
11. ‘Does temporal myopia hurt firm performance?’ (with Phil Bromiley), 2011 in Miami. Selected as a finalist for the SMS Best Conference Paper for Practical Implications prize.
12. ‘Corporate governance and boundary testing: Advancing the usefulness of models by engaging in non-paradigmatic empirical research’ (with Jared Harris and Scott Johnson), 2011 special conference in memory of C.K. Prahalad in San Diego.
13. ‘Short-termism, stock options, and visibility in firm investment behavior’ (with Phil Bromiley), 2010 in Rome.
14. ‘Unpacking uncertainty: Differences between investment horizon and production function uncertainty’ (with Greg Reilly), 2009 in Washington.
15. ‘The impact of CEO tenure on exploration and exploitation: A longitudinal modeling’ (with Zeki Simsek), 2008 in Cologne. Selected as runner-up for SMS Best Conference Paper Prize.
16. ‘Routine compatibility, tacit knowledge, and M&A implementation success’ (with Aks Zaheer), 2006 in Vienna. Selected as a finalist for the Booz Allen Hamilton/SMS PhD Fellowship.
17. ‘When does complementarity add value in mergers and acquisitions?’ (with Aks Zaheer and Xavier Castaner), 2004 in San Juan.

**Refereed Conference Presentations – Academy of Management**

1. ‘Short-termism and equity pressure’ (symposium presentation), 2023 in Boston.
2. ‘Measurement of long-term orientation: Distinguishing between firm and country levels of analysis’ (with Dhvani Badwaik, Phil Bromiley, and Scott Mitchell), 2021 (virtual).
3. ‘A bilateral perspective on asymmetric distance and alliance governance mode’ (with Sergio Grove, Rebecca Ranucci, and Brian Fox), 2021 (virtual).
4. ‘Short-term vs. long-term investments of public corporations: past and frontiers for the future’ (Session chair and moderator), 2019 in Boston.
5. ‘A behavioral perspective on the choice of alliance governance mode’ (with Abdullatif Alrashdan), 2018 in Chicago.
6. ‘Firm repertoires and performance’ (with Brian Fox and Zeki Simsek), 2018 in Chicago.
7. ‘Managing to impress: A model of information sharing with analysts about long-term growth forecasts’ (with Rebecca Ranucci), 2018 in Chicago.
8. ‘Coordination equilibria: Formalizing a path forward for value creation’ (with Sergio Grove and Brian Fox), 2017 in Atlanta.
9. ‘The pay-performance link: Using text data in proxy statements’ (symposium presentation with Rebecca Ranucci), 2014 in Philadelphia.
10. ‘Boundaries of long term orientation in family firms’ (with Aks Zaheer, Harry Sapienza, and Rebecca Ranucci), 2014 in Philadelphia.
11. ‘Riding the wave without support: Predictable failure from inverted aspiration discrepancies’ (with Scott Johnson and Michael Willenborg), 2012 in Boston.
12. ‘Option exercisability, investment visibility, and firm investment behavior’ (with Phil Bromiley), 2011 in San Antonio.
13. ‘Interpreting long term performance’ (symposium presentation), 2010 in Montreal.
14. ‘Firm growth by replication over agents and founders’ time in office’ (with Scott Johnson), 2010 in Montreal.
15. ‘Synergy sources, target autonomy, and integration in acquisitions’ (with Xavier Castaner), 2010 in Montreal.
16. ‘Which firms invest for the long term? Longitudinal evidence from cable TV operators,’ 2008 in Anaheim. Selected for AOM Best Paper Proceedings.
17. ‘Good theories gone bad: What happens when theory holds, even if the assumptions don’t’ (with Jared Harris), 2008 in Anaheim.
18. ‘Challenges of temporal discounting and the firm-level horizon problem,’ 2006 in Atlanta.
19. ‘A proposed structure for comparing definitions of long run performance across research studies,’ 2006 in Atlanta.
20. ‘The moderating effect of integration on dimensions of M&A relatedness’ (with Aks Zaheer and Xavier Castaner), 2005 in Honolulu.
21. ‘Knowledge transfer in mergers and acquisitions: An empirical test,’ 2004 in New Orleans.

**Refereed Conference Presentations – Others**

1. ‘Are alliances just another day at the beach? A bilateral perspective of alliance governance mode,’ 2020 Southern Management Association Conference planned for St. Petersburg (with Sergio Grove and Rebecca Ranucci).
2. ‘Future of MBA education in the Northeast,’ 2019 Northeast Regional Executive MBA Conference in Hartford (one of two panelists).
3. ‘Firm repertoires and performance,’ 2019 Industry Studies Association Conference in Nashville (with Brian Fox and Zeki Simsek).
4. ‘Building a long-term culture in university settings,’ 2019 GMAC Leadership Conference in Fort Lauderdale.
5. ‘Frontiers of strategy research on time horizon’ (with Greg Reilly and Rebecca Ranucci), 2014 INFORMS meeting in San Francisco.
6. ‘An empirical examination of temporal orientation as reflected in capital expenditures and working capital’ (with Pedro Sottile and Phil Bromiley), 2014 meeting of the Financial Management Association International in Nashville.
7. ‘Riding the wave without support: Predictable failure from inverted aspiration discrepancies’ (with Scott Johnson), 2013 INFORMS meeting in Minneapolis.
8. ‘Phased market entry: Avoiding multipoint competition by gaining footholds,’ (with Junichi Yamanoi), 2012 Special conference on Entry Timing Strategies in Madrid.
9. ‘Shared stakeholder interest, leading indicators, and firm value creation’ (with Jared Harris), 2011 Interdisciplinary Conference on Stakeholders, Resources, and Value Creation in Barcelona.
10. ‘Bad apples or bad bushel? Ethics, efficiency and capital market integrity’ (with Jared Harris), 2004 Conference on Ethics in the Financial Services after Sarbanes-Oxley in Minneapolis.

**Teaching**

*Award recognition*

Executive MBA Faculty Award Winner, University of Connecticut, 2023

MBA Teacher of the Year, Management Department, University of Connecticut, 2014

Recipient of Provost’s Faculty Development Abroad Grant, University of Connecticut, 2011

Nominated for Educator of the Year, University of Connecticut, 2007-08

Outstanding PhD Student Teaching Award, University of Minnesota, 2004-05, 2005-06

*Doctoral education – University of Connecticut*

BADM 6201 **Introduction to Research and Teaching** Fall 2022-23

MGMT 6204 **Seminar in Strategic Management** Fall 2023

MGMT 6405 **Research Design** Spring 2021

MGMT 6202 **Research Methods in Strategic Management** Fall 2011,13,15,17

Dissertation Committees:

Dhvani Badwaik (Chair), 2023

Abdullatif Alrashdan (Chair), 2020

Sergio Grove (Chair), 2020

Xian Cao, 2018

Brian Fox (co-Chair), 2017

Rebecca Ranucci (Chair), 2015

Nesij Huvaj, 2012

Junichi Yamanoi, 2011

Elizabeth Lim, 2009

Pre-Dissertation Supervision:

Walker Dornisch, 2020-21

Dhvani Badwaik, 2018-19

Abdullatif Alrashdan, 2016-17

Sergio Grove, 2015-16

Rebecca Ranucci, 2011-12

Jennifer Ma, 2008-10

Qualifying Paper Reviews:

Esam Boraey (Committee), 2022

Walker Dornisch (Committee), 2021

Nathaniel Easton (Editor), 2020

Rohit Piplani (Editor), 2020

Dhvani Badwaik (Committee), 2018

Abdullatif Alrashdan (Committee), 2017

Jenna Rodrigues (Reader), 2017

Sergio Grove (Committee), 2016

Howard Jean-Denis (Committee), 2016

Redona Methasani (Editor), 2015

Semin Park (Editor), 2015

Xian Cao (Editor), 2014

Mikhail Wolfson (Editor), 2014

Dale Watson (Reader), 2013

Nicole Jones (Committee), 2012

Rebecca Ranucci (Committee), 2011

Lauren D’Innocenzo (Reader), 2010

Jennifer Ma (Committee), 2009

Nesij Huvaj (Committee), 2008

Michael Kukenberger (Reader), 2007

*Executive education – University of Connecticut*

EMBA 5301 **Using Statistics for Business** Spring 2014-18, Fall 2018, 2020-21, 23

EMBA 5001 **Current Business Topics** Spring 2019, 2021-23

EMBA 5602 **Modeling Quantitative and Qualitative Uncertainty**  Summer 2014-16, 2020

EMBA 5901 **Executive Project**  Fall 2016 – Spring 2018

Northeast Utilities Finance Academy, **Case Studies** Spring 2009-12, Fall 2013 MGMT 5894 **Graduate Business Studies in Strategic Management** Summer 2009

*Masters’ education – University of Connecticut*

BADM 5183(B) **Communicating for Impact** Spring 2019

MGMT 5805 **Human Resources Capstone Project** Summer 2016

MGMT 5184 **Strategic Fit and Coordination** Spring 2016

MGMT 5800 **Strategy, Policy, and Planning**

* Full time MBAs Spring 2008-15
* Part time MBAs Summer 2012

*Undergraduate education – University of Connecticut*

MGMT 4900 **Strategy, Policy, and Planning** Fall 2007-11, 2014; Spring 2023

UNIV 3088 **Exploring the Entrepreneurial Perspective** (co-taught) Fall 2022

UNIV 1985 **The Covid-19 Pandemic** (co-taught with many instructors) Spring 2020

MGMT 3234 **Opportunity Generation, Assessment, and Planning** Fall 2012

BADM 3741 **Risks and Rewards of Entrepreneurship** Fall 2012

Independent study supervision 2008-19

*Undergraduate education – University of Minnesota*

MGMT 4004 **Strategy Formulation and Implementation** Summer 2003 – Fall 2005

**Service to Students**

Faculty judge, preliminary round, Innovation Quest competition, U. of Connecticut, 2013-18, 21-23

Strategy Case Competition Advisor, MBA competition held at the University of Illinois, 2011-17 (Winning team in 2013; 2nd place in 2017)

Faculty Advisor, Graduate Consulting Club, 2015-17

Faculty Advisor, Undergraduate Consulting Club, 2012-17

Faculty judge, MBA case competition, University of Connecticut, 2010-16

Faculty judge, Hack UConn: Smart Cities competition, University of Connecticut, 2016

Lecture on ‘The nuts and bolts of consulting,’ sponsored by the Graduate Consulting Club, 2015

Faculty Advisor, INTD 3999 Student Strategic Advisory Program, 2012

Faculty Advisor, SCOPE Project on University of Connecticut Summer Session, 2010-11

CIBER Case Competition Advisor, MBA competition held at the University of Wisconsin, 2008-10

**Service to the Profession**

Inclusion and Diversity Committee, EMBA Council, 2021-22

Elected as Representative-at-Large for the Strategy Process division of the Strategic Management Society, 2021-22

Editorial Review Board, *Journal of Management*, 2018-present

Editorial Review Board, *Academy of Management Journal*, 2017-present

Editorial Review Board, *Strategic Management Journal*, 2014-present

Editorial Review Board, *Organization Science*, 2013-2019

Faculty panelist, Business Policy and Strategy Doctoral Consortium, Academy of Management, Anaheim, CA, 2016

External tenure reviewer, Oklahoma State University, 2016

Faculty judge, INFORMS Dissertation Proposal competition, 2013

Faculty panelist, New Doctoral Student Consortium, Academy of Management, Orlando, FL, 2013

Discussant, U21 Research Conference, 2012

Discussant, ‘Getting your first job,’ Eastern Academy of Management, Hartford, CT, 2009

Ad hoc reviewer, *Academy of Management Review*, 2017-18

Ad hoc reviewer, *Israeli Science Foundation*, 2018

Ad hoc reviewer, *Journal of Management Studies*, 2013-14, 2018

Ad hoc reviewer, *Academy of Management Journal*, 2009-17

Ad hoc reviewer, *Journal of Management*, 2016-17

Ad hoc reviewer, *Netherlands Organization for Scientific Research*, 2017

Ad hoc reviewer, *Journal of Strategy and Management*, 2017

Ad hoc reviewer, *Journal of Knowledge Management*, 2017

Ad hoc reviewer, *Journal of Business Research*, 2011-12, 2017

Ad hoc reviewer, *Administrative Science Quarterly*, 2010, 2012-14, 2016

Ad hoc reviewer, *Journal of Institutional Economics*, 2016

Ad hoc reviewer, *Swiss National Science Foundation*, 2015

Ad hoc reviewer, *Strategic Management Journal*, 2013-14

Ad hoc reviewer, *Organization Science*, 2011-13

Ad hoc reviewer, *Management Science*, 2010-13

Ad hoc reviewer, *Strategic Entrepreneurship Journal*, 2008-09, 2013

Ad hoc reviewer, *Time & Society*, 2012

Ad hoc reviewer, *Managerial and Decision Economics*, 2008

Ad hoc reviewer, *Organization Studies* 2008

Outstanding Reviewer Award, Academy of Management (BPS), 2005-10, 2012

Ad hoc reviewer, Academy of Management conference (BPS), 2003-2013, 2015-17

Ad hoc reviewer, INFORMS Dissertation Proposal competition, 2010, 2012, 2014-15, 2018

Ad hoc reviewer, SMS Best Conference PhD Paper Prize, 2013-18

Ad hoc reviewer, Strategic Management Society conference, 2010-2018

Ad hoc reviewer, EURAM conference, 2013

**Service to the University of Connecticut**

Search committee, Vice Provost and Dean of the Graduate School, 2023-24

Strategic Planning Steering Committee, 2023-24

Research Dean’s Council, 2022-24

Deans and Department Heads Council, School of Business, 2017-24

PhD Coordinators Committee, School of Business, 2014-17, 2020-24 (Chair 2022-24)

EMBA Academic Committee, School of Business, 2013-24 (Chair, 2014-22)

Werth Institute for Entrepreneurship and Innovation director review committee, 2022

Academic Planning Committee, University of Connecticut, 2020-22

Business and Society Committee, School of Business, 2020-22

Search committee, Sustainable Global Cities Initiative director, 2021

Search committee, Business and Human Rights faculty, School of Business, 2020-21

Post-Covid Fiscal Working Group, University of Connecticut, 2020

Council of Deans, University of Connecticut, 2019-20

Council of Deans, University of Connecticut, 2019-20

Entrepreneurship Advisory Group, University of Connecticut, 2019-20

Centers and Institutes Working Group, University of Connecticut, 2019-20

Presented a faculty perspective, Admitted Student Reception, New York, NY, April 3, 2019.

Promotion and Tenure Review Committee (elected), School of Business, 2016-17

Session Facilitator on Research Ethics for first-year Doctoral students, School of Business, 2016-17

Member, Transportation Summit Planning Committee, 2015-16

Chair, Faculty Review Grade Change Panel, School of Business, 2015

CIBER Grant Review Committee, School of Business, 2012-14

Session Facilitator on Using Cases in Teaching, Conference on Internationalizing Doctoral Education in Business, University of Connecticut, 2013

EMBA Review Committee, School of Business, 2012-13

MBA Program Director Search Committee, School of Business, 2012-13

Masters Program Committee, School of Business, 2009-13

MBA Redesign Committee, School of Business, 2008-09

**Departmental Service**

PhD Committee, Management Department, U. of Connecticut, 2007-17, 2020-22 (Chair 2013-17, 20-22)

Chair, Search Committee, Management Department, University of Connecticut 2016-17

Department Strategy Committee, Management Department, University of Connecticut, 2013-14

Undergraduate Curriculum Committee, Management Department, University of Connecticut, 2013-14

Undergraduate Honors Advisor, Management Department, University of Connecticut, 2012-14

Chair, Assistant Professor Search Committee, Management Dept., University of Connecticut 2012-13

Faculty Search Committees, Management Department, University of Connecticut, 2010-13, 15

Department Head Search Committee, Management Department, University of Connecticut, 2010

Doctoral student liaison to SMO Department faculty, University of Minnesota, 2004-06

Teaching Assistant Liaison Committee, University of Minnesota, 2003-04

Strategic Management Research Council Student Representative, University of Minnesota, 2002-04

**Professional Memberships**

Academy of Management (STR, SIM, ENT)

Strategic Management Society

INFORMS (College on Organization Science)

Society for Business Ethics (2011-2016)

Phi Kappa Phi Honor Society

International Honor Society of Phi Beta Delta

American Economics Association (2006-2010)

**Industry Positions**

**Luminant Worldwide,** New York, NY

*Manager, Enterprise Strategy Group* 2000-2002

Managed six-person teams of pre- and post-MBA consultants on projects to define and implement e-Business strategies for *Fortune* 500 clients. Served as an advisor to client senior management in formal and informal settings. Project highlights include the creation of a full marketing plan for the e-Business venture of an energy company, design of a multi-year customer loyalty strategy for a freight logistics firm, and recommendation of digital distribution and customer relationship management strategies for a major airline to launch a low-cost carrier.

**The Learning Project,** New York, NY

*Finance Director* 1998-1999

Served as the primary financial officer for a non-profit start-up that managed one of the first charter schools in New York. Directed the accounting, purchasing, payroll, budgeting, human resources, and strategic planning for the growing organization. Negotiated with individual school directors and the city’s Board of Education on resource allocation and prioritization. Wrote fundraising proposals for support from private donors and government agencies.

**SCA Consulting,** New York, NY and London, England

*Associate and Senior Associate* 1995-1998

Managed over a dozen major and many smaller client projects to identify key performance metrics and align incentive programs. Wrote and presented findings and recommendations to senior executives and Boards of Directors. Recruited and trained new employees in principles of accounting, finance, strategic management, regression analysis, communications skills, and compensation plan design. Served clients across a wide range of industries, including multiple projects in media and entertainment, financial services, and specialty chemicals.

*Business Analyst* 1993-1995

Performed major financial analyses, including growth and return measures, economic profit, and discounted cash flows. Created spreadsheet models projecting the equity values of private companies, joint ventures, and subsidiaries. Analyzed and redesigned the entire performance management system for a large UK retailer facing a rapid turnaround.

**Philadelphia Festival Theater for New Plays,** Philadelphia, PA

*Subscriptions Manager* 1992-1993

Work-study student promoted mid-year to process subscriber orders and exchanges.

**WPEL Radio,** Montrose, PA

*On-air Announcer and Newscaster* 1986-1991

Edited, produced, and delivered over 1000 15-minute newscasts.

**Advisory Boards**

Silver Fern Healthcare, Hartford, CT 2018-present

Aravah, LLC, Viera, FL 2016-2019

**Public Engagement**

*Articles*

Authored ‘We need a pay everything policy to combat coronavirus recession,’ for *The Hill*, March 30, 2020.

Authored ‘UTC move shows where prospects will grow,’ for *Hartford Courant*, June 30, 2019.

Authored ‘A quake in the healthcare industry,’ for *UConn Today*, February 2, 2018.

Authored ‘How to thrive and gain respect in your first job,’ for *University of* *Connecticut School of Business Perspectives*, August 4, 2016.

Featured in ‘Study: Short-sighted planning costs companies money,’ by Claire Hall, *UConn Today*, November 3, 2016.

Co-authored ‘The Baby Boomer effect: A look into the Connecticut business landscape and the effects of an aging generation on the state,’ with Thomas DeVitto of *Blum Shapiro*, released October 2015.

Authored participant report on M&A integration survey for the *Strategic Management Research Center*, Minneapolis, MN, 2003.

*Presentations on short-termism and long-term thinking*

Lectured on ‘Tacit knowledge and long term organizational value: Measurement challenges and research opportunities,’ for the European Mentoring & Coaching Council 30th anniversary series on organizational tacit knowledge retaining (live translated into Chinese), September 1, 2022.

Panelist on ‘Long-term thinking’ at the WD Unleashed Conference, Chicago, IL, October 4, 2018.

Lectured on ‘Long-term thinking in a short-term world,’ University of Connecticut Health Center, Farmington, CT, February 16, 2017.

Seminar leader on ‘Long-term thinking in a short-term world,’ University of Connecticut Executive Education Thought Leadership Breakfast series, Stamford, CT, March 10, 2016.

Facilitated 4-hour discussion on ‘Anticipating the future’ for a private consulting client, Alexandria, VA, October 26, 2015.

Delivered lecture on ‘Bringing long-term thinking into business,’ Hebrew University Executive MBA foreign study, New York, NY, March 27, 2015.

Seminar leader on ‘Long-term thinking in a short-term world,’ University of Connecticut Executive Education Thought Leadership Breakfast series, Hartford, CT, February 24, 2015.

Seminar leader on ‘Long-term thinking in a short-term world’ for the Leadership Council, *Network for Business Sustainability*, King City, Ontario, September 29-30, 2014.

Delivered lecture on ‘Long-term strategy,’ Hebrew University Executive MBA foreign study, New York, NY, March 25, 2014.

*Presentations on entrepreneurship and family business*

Lectured on ‘Entrepreneurial strategy,’ Entrepreneurial Boot Camp for Veterans, Hartford, CT, August 11, 2022.

Lectured on ‘Entrepreneurial strategy,’ Entrepreneurial Boot Camp for Veterans, Hartford, CT, December 8, 2021.

Lectured on ‘Entrepreneurial strategy,’ Entrepreneurial Boot Camp for Veterans, Hartford, CT, August 14, 2019.

Moderated discussion on “Difficult conversations” with Blair Trippe for the UConn Family Business Program sponsored by Simsbury Bank, West Hartford, CT, June 11, 2019.

Lectured on ‘Anticipating how the retirement of Baby Boomers will affect family businesses,’ for Rotary International, Glastonbury, CT, February 11, 2019.

Lectured on ‘Entrepreneurial strategy,’ Entrepreneurial Boot Camp for Veterans, Hartford, CT, August 15, 2018.

Lectured on ‘Are family businesses really more long-term oriented than non-family firms? It depends on who provides capital,’ sponsored by Simsbury Bank, Hartford, CT, November 7, 2017.

Lectured on ‘Entrepreneurial strategy,’ Entrepreneurial Boot Camp for Veterans, Hartford, CT, August 16, 2017.

Panelist for ‘Women in family businesses,’ sponsored by Hinckley Allen, Hartford, CT, May 9, 2017.

Lectured on ‘Anticipating how the retirement of Baby Boomers will affect family businesses,’ sponsored by Simsbury Bank, Avon, CT, May 2, 2017.

Lectured on ‘Entrepreneurial strategy,’ Entrepreneurial Boot Camp for Veterans, Hartford, CT, October 10, 2016.

Lectured on ‘Entrepreneurial strategy,’ Entrepreneurial Boot Camp for Veterans, Storrs, CT, October 6, 2015.

Seminar leader on ‘Entrepreneurial strategy,’ *Entrepreneurial Boot Camp for Veterans*, Storrs, CT, October 7, 2014.

Lectured on ‘Entrepreneurial strategy,’ *Entrepreneurial Boot Camp for Veterans*, Storrs, CT, October 8, 2013.

Lectured on ‘Entrepreneurial strategy,’ *Entrepreneurial Boot Camp for Veterans*, Storrs, CT, September 24, 2012.

*Other public appearances*

Panelist for ‘Risk management in higher education’ sponsored by *Deloitte*, New York, NY, November 21, 2019.

Panelist for ‘Five steps to accelerate economic growth in Connecticut’ sponsored by the *UConn Department of Public Policy, CT Chapter of American Society of Public Administration, Capital Region Council of Governments, Connecticut Town & City Management Association, and UConn Sustainable Global Cities Initiative*, Hartford, CT, October 31, 2019.

Session facilitator on ‘Listen to the finance experts: Innovation is an unmistakable financial strategy’ *Geno Auriemma Leadership Conference*, Stamford, CT, October 2-3, 2019.

Session facilitator on ‘People and capital: What else do you need?’ *Geno Auriemma Leadership Conference*, Uncasville, CT, April 17-18, 2018.

Session facilitator on ‘The muscle that goes with the title: What can leaders really accomplish?’ *Geno Auriemma Leadership Conference*, Uncasville, CT, October 26-27, 2016.

Delivered lecture on ‘Strategic planning,’ Connecticut Department of Labor, Wethersfield, CT, September 1, 2015.

Session facilitator on ‘Leadership in a financial crisis,’ *Geno Auriemma Leadership Conference*, Uncasville, CT, October 22-23, 2014.

Session facilitator on ‘Leadership in a financial crisis,’ *Geno Auriemma Leadership Conference*, Uncasville, CT, April 2013.

Featured speaker on ‘Charter school financing,’ Buffalo, NY, August 1999.

*Media appearances*

Interviewed about ‘Subway, which started in Connecticut in 1965, will be sold to private equity firm,’ *Vermont National Public Radio*, August 24, 2023.

Interviewed about ‘What makes a lasting company?,’ *Connecticut Public Television*, Hartford, CT, first aired April 23 & 25, 2020.

Interviewed about ‘The Baby Boomer effect,’ on The Full Story Radio with Ronald Ropiak, *WSHU-TV*, Fairfield, CT, January 3, 2019.

Interviewed about ‘The Baby Boomer effect,’ on The Real Story with Al Terzi and Jenn Bernstein, *WTIC-TV*, Hartford, CT, March 13, 2016.

Interviewed about ‘The Baby Boomer effect,’ Ray Dunaway morning show, *WTIC-AM*, Hartford, CT, November 5, 2015.

Interviewed about the opening of the John A. Reisenbach Charter School, *WABC-TV*, New York, NY, July 1999.

*Expert quotes*

‘How a CT firm became the state’s fastest-growing startup,’ by Paul Schott, *Stamford Advocate*, October 18, 2023.

‘CT-based Subway sold to Roark Capital in $10B deal, staff layoffs could come,’ by Luther Turmelle, *Stamford Advocate*, August 24, 2023.

‘Experts: Subway’s Connecticut headquarters would likely see job cuts from sale to Roark Capital,’ by Luther Turmelle, *New Haven Register*, August 23, 2023.

‘Report: CEO of CT-based Cigna awarded nearly $21 million in 2022 compensation,’ *The Wilton Bulletin*, June 1, 2023.

‘Omicron clouding return to the office,’ by Kenneth R. Gosselin, *Hartford Courant*, December 27, 2021.

‘As Fintech firms rise in Connecticut, UConn to launch master’s program to meet demand,’ by Paul Schott, *Stamford Advocate*, November 3, 2021.

‘State is hub for Amazon,’ by Austin Mirmina, *Journal Inquirer*, September 13, 2021.

‘A takeover of insurer The Hartford would ripple throughout the city of Hartford,’ by Kenneth R. Gosselin and Stephen Singer, *Hartford Courant*, March 21, 2021.

‘Charter Communications to expand broadband to more than 1 million new customers across country’ by Paul Schott, *Stamford Advocate*, February 2, 2021.

‘Pitney Bowes, turning 100, shifts focus to e-commerce,’ by Stephen Singer, *Hartford Courant*, October 12, 2020.

‘COVID-19 and business: UConn experts offer perspective,’ *UConn Today*, March 11, 2020.

‘Stamford-based Charter Communications to stay, expand in NY’ by Paul Schott, *Stamford Advocate*, April 19, 2019.

‘Tech hopes rising: Infosys, Seven Stars latest to offer new vision, new jobs,’ by Kenneth R. Gosselin, Rebecca Lurye, and Stephen Singer, *Hartford Courant*, July 8, 2018.

‘How to take your small business to the next level’ by T.M. Brown, *Thrilllist*, June 14, 2018.

‘Charter Communications eyes entry into mobile market’ by Paul Schott, *Stamford Advocate*, May 17, 2018.

‘CVS not wasting time getting to know Hartford,’ by Kenneth R. Gosselin, *Hartford Courant*, February 26, 2018.

‘CVS plans to keep Aetna in city: ‘Center of excellence’ planned for Hartford,’ by Stephen Singer and Kenneth R. Gosselin, *Hartford Courant*, January 13, 2018.

‘Connecticut internet firms face post-net neutrality era’ by Paul Schott, *Stamford Advocate*, December 10, 2017.

‘CVS-Aetna: What about Hartford?’ by Kenneth R. Gosselin, *Hartford Courant*, December 5, 2017.

‘CVS-Aetna deal seen as defensive move,’ by Kenneth R. Gosselin, *Hartford Courant*, December 3, 2017.

‘In days, Aetna pivots from insurer to a health care business,’ by Kenneth R. Gosselin and Stephen Singer, *Hartford Courant*, October 29, 2017.

‘State unveils Stamford, Hartford details for Amazon bid,’ by Paul Schott, *Stamford Advocate*, October 19, 2017.

‘Charter rumors persist year after merger,’ by Paul Schott, *Stamford Advocate*, August 11, 2017.

‘Eyeing wireless expansion, Charter and Comcast forge closer ties,’ by Paul Schott, *Stamford Advocate*, July 11, 2017.

‘Charter sees big growth and major challenges in year since mega-deals,’ by Paul Schott, *Stamford Advocate*, May 14, 2017.

‘Experts: Differences between Verizon and Charter could protect Stamford employees,’ by Paul Schott, *Stamford Advocate*, January 31, 2017.

‘Serendipity Labs offers latest shared work space in Connecticut,’ by Paul Schott, *Stamford Advocate*, September 2, 2016.

‘Taking the guesswork out of yardwork,’ by Hugh Bailey, *Connecticut Post*, April 4, 2016.

‘CT Telecom ruling opens US market to phone carriers,’ by Brad Kane, *Hartford Business Journal*, Hartford, CT, May 7, 2013.

‘Xerox sees business services growth,’ by Patrick Gallagher, *Fairfield County Business Journal*, Stamford, CT, November 30, 2012.