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University of Virginia  
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EDUCATION:

1964-67 Tulane University B.S. Physiological Psychology (now called Neuroscience)  
1968-69 Tulane University M.B.A. Marketing  
1974-77 University of Washington Ph.D. Strategy and Organization

Dissertation: "Strategy Making, Environment, and Economic Performance: A Conceptual and Empirical Exploration" (Recipient of the international 1978 A.T. Kearny Prize for best strategy dissertation written in 1977)

ACADEMIC EXPERIENCE:

2008- **Professor and Senior Fellow, Darden Center for International Affairs**, University of Virginia (Darden School)

2005-2008 – **Associate Dean for International Affairs**, Darden School: served as school's ambassador and Dean's "secretary of state" to corporations, business schools, alumni and prospective students around the world, traveling to 20+ nations annually.

2004-2008 - **Paul M. Hammaker Research Professor, and Director, Tayloe Murphy International Center**, Darden School.

1990-2004 **Professor**, Darden School

**Chair:** First Year Program (2001-04).

**Area Head** for Strategy, Management and Organization (1991-94); and Strategy, Entrepreneurship and Ethics (SEE) areas (1999-03).

**Coursehead:** Strategy, Leadership & Change (1991-94); First Year Strategy (1995-99: turned course around to where it was number-one-ranked course in first year program).

1986-90 **Associate Professor**, Darden School. **Coursehead:** Business Policy (1987-90: turned course around to where it was number-one-ranked course in (mostly electives) second-year program).

1980-86 **Assistant Professor**, Stanford Business School (MBA and Sloan programs).

1979-80 **Adjunct Professor**, McGill University.

1978-80 **Assistant Professor**, University of Pittsburgh.

## BUSINESS EXPERIENCE:

1970-74 – Dole Foods. Started in home office as Financial Analyst in Standard Fruit Company. Promoted to Assistant to V. P. Production, traveling through Honduras, Costa Rica, and Ecuador as new product project manager. Transferred to Honduras Division following merger with Dole Company, where initiated and managed development and construction of new residential subdivision in La Ceiba. Promoted to Manager of Industrial Engineering, where supervised modeling of production cycle, from plastics extrusion, box manufacture, fruit harvesting and packaging, to railroad operation and ocean shipping. Represented management during nine-month labor negotiations. Assisted in successful discussions with Honduras Labor Minister during politically sensitive arbitration deadlock. Prior to leaving firm, was acting General Manager of the Sula Valley division in Honduras.

1980 to Present - Consultant to more than 100 corporations, governments, and non-profits in six continents on strategic planning, competitive war games, and post-merger integration. Also served as coach to various CEOs. Clients in various industries, including airlines, banking, beverages, chemicals, electronics, energy, foods, insurance, jet engines, law, mining, nuclear energy, oil exploration, paper, pharmaceuticals, public accounting, publishing, shipping, and telecommunications. (See end of document for representative list of clients and countries.)

## EXECUTIVE DEVELOPMENT:

Extensive experience teaching executives in both corporate and university sponsored programs.

Corporate programs include seminars in strategic management for NASA, Bell Labs, IBM, Peat Marwick, Alcan Indonesia, Siam Cement, China Steel, Singapore Times, Hong Kong Management Association, QANTAS Airlines, Malaysian Institute of Management, Security Pacific National Bank, Hewlett-Packard, Wells Fargo, Fletcher Challenge (New Zealand), TRW, BHP (Australia) and Pratt & Whitney.

University programs include participation in various Darden programs, including TEP (consistently highest-rated professor), the Australia Program (highest rated), Mergers and Acquisitions (second-highest out of seven), Bacardi (highest rated), Degussa (highest), Pacific Basin Manager's Program, Global Manufacturing Competition, and others; the Stanford Sloan Program; the Stanford Executive Program in Organizational Management; and programs for University of California (Berkeley), Claremont Graduate School, and Kellogg (Northwestern).

## PROFESSIONAL SERVICE ACTIVITIES:

1. Board memberships: University Business Innovation Center (a high tech business incubator), 1988-92; PRA, Inc. (pharmaceutical research firm), 1990-92; Music Resource Center (volunteer organization), 1999-2003; Global Business School Network, 2004-2010; UVA Center for Telemedicine (2011-present).
2. Vestry member, St. Paul's Memorial Episcopal Church (2011-2014). Strategic Planning Committee (lead); Executive and Finance Committee; Grants Committee; Diocesan Representative.

3. Co-chairman, Academy of Management Junior Faculty Consortium, 1986; and faculty, Academy of Management Doctoral Consortia, 1980 and 1984.
4. Executive Committee member, Business Policy and Planning Division, Academy of Management, 1981-1983, and 1986-1991.
5. Chairman, Academy of Management (BPP Division), 1989-1990 and Program Chairman, Academy of Management (BPP Division), 1988.
6. N.S.F. reviewer, Policy Research and Analysis Division, 1979; and Decision, Risk & Management Sciences Division, 1988.

### HONORS AND AWARDS:

Recipient of the international 1978 A.T. Kearny Company Prize for Best Dissertation in Business Strategy.

Recognized in the *Journal of Management* as among the top 150 out of 25,000 management scholars globally over the past quarter century (top ½ of 1 percent). (“Management,” as defined by the authors of the study, includes strategy, OB, HR, leadership, management science, entrepreneurship, decision sciences, operations management, international management, technology and innovation, and others). The article appeared as: “Scholarly influence in the field of Management: A bibliometric analysis of the determinants of university and author impact on the management literature in the past quarter century.” *Journal of Management*, August 2008, page 641-720.

Nominated for outstanding faculty award at both Stanford Graduate School of Business and Darden Graduate Business School.

Recipient of 2009 Theo Herbert International Award for “exceptional contributions to the promotion of Darden” around the world.

*HBR* article, "Managing Conflict: How Top Management Teams Can Have a Good Fight," (see “refereed publications,” below) was designated in 2009 as a “*Harvard Business Review* Classic,” “... a seminal piece containing ... a groundbreaking idea that has shaped best practices and inspired countless managers around the world...”

Three articles were ranked among “The 50 most-noted strategy works of 1980-85” (Hambrick, *Academy of Management Proceedings*, 1988). These articles ranked #8, 20, and 34. All three were sole-authored. (As a point of interest, Porter’s *Competitive Strategy* book was #1, and Peters and Waterman’s *In Search of Excellence* was #7.)

Three articles have been translated into German, Finnish and Italian and reprinted in Swiss, Finnish and Italian books or management journals.

Several pieces of research listed below are required reading in Ph.D. programs at most schools granting doctorates in Strategy and/or Management, and have been the basis for a number of dissertations. The following (selected) list of schools is representative of where this research is part of the PhD curriculum:

Harvard      LBS   INSEAD      Michigan      Columbia      Wharton      UNC  
Duke          NYU   Sloan          UCLA          Boston U      Texas          Kellogg

FOREIGN LANGUAGE:

Fluent Spanish (brought up in Venezuela); passable French.

JOURNAL AFFILIATIONS:

Associate Editor, *Management Science*, 1985-1991.

Editorial Review Board, *Strategic Management Journal*, 1982-1987.

Editorial Review Board, *Academy of Management Journal*, 1981-1982

Ad Hoc reviewer, *California Management Review*, *Administrative Science Quarterly*, *Journal of Management Studies*, *Strategic Management Journal*, *Academy of Management Review*.

MEMBERSHIPS:

Strategic Management Society; Academy of Management.

PUBLICATIONS - BOOKS:

*Strategic Management: From Concept to Implementation* (Fort Worth: Dryden Press, 1996).

*Strategic Management: A Managerial Perspective*, 2<sup>nd</sup> edition, by L. J. Bourgeois, I. Duhaime, and L. Stimpert (Fort Worth: Dryden Press, 1999).

*Strategic Management: Concepts for Managers*, 2<sup>nd</sup> edition, with Irene Duhaime, and Larry Stimpert (Fort Worth: Dryden Press, 1999).

*Corporate Marriage Counseling: Strategies for Integrating Acquisitions* (Darden Business Publishing, 2018). (Original title was, *Post-Merger Integration Toolkit: 20 Questions for Every M&A.*)

BOOKS UNDER CONTRACT:

*Strategic Intuition and Eastern Philosophy*, with Serge Eygenson and Mint Namasondi.

PUBLICATIONS – REFEREED ARTICLES:

"Economic Performance and Dominant Coalition Agreement on Means vs. Ends in Second Order Strategy Making," *Academy of Management Proceedings*, (August 1978): 101-105.

"The Effects of Different Organizational Environments Upon Organization Design Decisions," by L. J. Bourgeois, Dan McAllister, and T. R. Mitchell, *Academy of Management Journal*, 21, 3 (September 1978): 508-514.

"Toward a Method of Middle Range Theorizing," *Academy of Management Review*, 4, 3 (July 1979): 433-447.

"A Strategic Model of Organizational Conduct and Performance," by L.J. Bourgeois and W. G. Astley, *International Studies of Management and Organization*, 9, 3 (Fall 1979): 40-66.

"Strategy and Environment: A Conceptual Integration," *Academy of Management Review*, 5, 1 (January 1980): 24-39.

"Performance and Consensus," *Strategic Management Journal*, 1, 3 (July-September 1980): 227-248.

"On the Measurement of Organizational Slack," *Academy of Management Review*, 6, 1 (January 1981): 29-39.

"Organization Development in Cross-Cultural Settings: The Case of Latin America," by L. J. Bourgeois and Manuel Boltvinik, *California Management Review*, 23, 3 (Spring 1981): 75-81.

"Analyzing Corporate Culture in Its Strategic Context," by L. J. Bourgeois and D. B. Jemison, *Exchange: The Organization Behavior Teaching Journal*, 7, 3 (1982): 34-41. (**Reprinted in:** *GDI-Impuls* (a Swiss journal), No. 1, 1984.)

"Organizational Slack and Political Behavior within Top Management Teams," by L. J. Bourgeois and Jitendra V. Singh, *Academy of Management Proceedings* (August 1983): 43-47.

"Strategy Implementation: Five Approaches to an Elusive Phenomenon," by L. J. Bourgeois and D. R. Brodwin, *Strategic Management Journal*, 5, 3 (July-September 1984): 241-264.

"Five Steps to Strategic Action," by D. R. Brodwin and L. J. Bourgeois, *California Management Review*, 26, 3 (Spring 1984): 176-190. (This is an adaptation of the preceding article for managerial audiences.) **Reprinted in:** (1) Carroll and Vogel (eds.), *Strategy and Organization*, Pitman, 1984; (2) McCarthy, Minichiello, and Curran (eds.), *Business Policy and Strategy*, Irwin, 4th ed., 1987; (3) Pearce and Robinson (eds.), *Strategic Management Practice*, Irwin, 1991; and (4) **Finnish translation reprinted in** J. Laine (ed.), *Principles of Strategy* (Helsinki: Weilin & Goos, 1989). A shorter version appeared as "Putting Your Strategy into Action" (Parts I, II, and III), *Strategic Planning Management* (March, April, and May 1983). It was **reprinted in:** (1) Paine, Taylor, and Tate (eds.), *Contemporary Readings in Strategic Management*, Business Publications, Inc., 1984; (2) Millman, DeWitt, Bergh and Thomas. (eds.), *Perspectives in Strategic Management*, McGraw-Hill, 1991; and (3) translated into German for: GDI-impuls (Swiss Management Journal), No. 4, 1983: 180-26.

"Strategic Management and Determinism," *Academy of Management Review*, 9, 4 (October 1984): 1-11. **Italian translation reprinted in:** Luca Zan (ed.), *Strategic Management: Materiali Critici* (Torino, Italy: Utet Libreria, 1992).

"Strategic Goals, Environmental Uncertainty, and Economic Performance in Volatile Environments," *Academy of Management Journal*, 28, 3 (September 1985): 548-573.

"Strategic Decision Processes in Silicon Valley: The Anatomy of a 'Living Dead'," by L. J. Bourgeois and K. M. Eisenhardt, *California Management Review*, 30, 1 (Fall 1987): 143-159.

"Strategic Decision Processes in High Velocity Environments: Four Cases in the Microcomputer Industry," by L. J. Bourgeois and K. M. Eisenhardt, *Management Science*, 34, 7 (July 1988): 816-835.

"The Politics of Strategic Decision Making in High Velocity Environments: Towards a Mid-Range Theory," by K. M. Eisenhardt and L. J. Bourgeois, *Academy of Management Journal*, 31, 4 (December, 1988): 737-770.

"Conflict and Strategic Choice: How Top Management Teams Disagree," by K.E. Eisenhardt, J. L. Kahwajy, and L. J. Bourgeois, III, *California Management Review*, 39, 2, (Winter 1997): 42-62. **Reprinted in:** Hambrick, Nadler and Tushman (eds.), *Navigating Change: How CEOs, Top Teams, and Boards Steer Transformation*, Harvard Business School Press, 1997.

"Managing Conflict: How Top Management Teams Can Have a Good Fight," by K.M. Eisenhardt, J. L. Kahwajy, and L. J. Bourgeois, III, *Harvard Business Review*, 75, 4 (July-August, 1997): 77-85. **Reprinted in:** (1) J. R. Katzenbach (ed.), *The Work of Teams* (HBS Press, 1998) and (2) *Harvard Business Review on Effective Communication* (HBS Press, 1999). **Designated a "Harvard Business Review Classic"** in 2009.

"Doing Strategy," with Jonathan Pugh. *Journal of Strategy and Management*, Vol. 4, No. 2 (2011).

"Profitability: the Impacts of Industry and Firm over Time," with Adam Ganz, Andrew Gonce and Keith Nedell. *Journal of Strategy and Management*, Vol. 7, No. 3 (August 2014).

#### PUBLICATIONS - CHAPTERS:

"Environmental Volatility and Perceived Environmental Uncertainty," in W. E. Souder, *Managing New Product Development Innovations*, N.S.F. Research Report, Technology Management Studies Group, University of Pittsburgh, 1981.

"Organization Climate and New Product Innovation," by Paul Shrivastava and L. J. Bourgeois, in W. E. Souder, *Managing New Product Innovations*, Vol. 2, 1982.

"Knowledge Technology and New Product Innovation," by L. J. Bourgeois and W. E. Souder, in W. E. Souder, *Managing New Product Innovations*, Vol. 2, 1982.

"Strategic Management: From Concept to Implementation," in G. E. Germane (ed.) *The Executive Course* (New York, New York: Addison-Wesley, 1986): 347-391. This book was

**published in Japanese** in 1988. My chapter was also **translated into Finnish** for publication in J. Laine (ed.), *Principles of Strategy* (Helsinki: Weilin & Goos, 1989).

"Charting Strategic Decisions in the Microcomputer Industry: Profile of an Industry Star," by K. M. Eisenhardt and L. J. Bourgeois, III, in M.A. Von Glinow and S. Morhman (eds.), *Managing Complexity in High Technology Organizations, Systems, and People* (New York: Oxford University Press, 1990).

"Commentary on Competitive Agility," in Srivastava and Huff (eds), *Advances in Strategic Management*, Vol. 10 (San Francisco: Josey-Bass, 1994).

"Taming Interpersonal Conflict in Strategic Choice: How Top Management Teams Argue, But Still Get Along," by K. M. Eisenhardt, J. L. Kahwajy, and L. J. Bourgeois, in Papadakis and Barwise (eds.) *Strategic Decisions: Context, Process and Outcomes* (Kluwer Academic Publishers, 1998).

"Integration Due Diligence: Setting the Stage for Value Creation," by L. Jay Bourgeois and Henning Hoerber, in Ronald Gleich, Gordana Kierans and Thomas Hasselback (eds.), *Value in Due Diligence: New Risks, New Mitigation* (Hants, UK: Gower Publishing, 2010, p. 155-169).

#### BOOKS UNDER PREPARATION

*Doing Strategy: A Manager's Guide*. Cengage Learning.

#### DISSERTATIONS SUPERVISED

Nir N. Brueller, Tel Aviv University, "Post-Merger Value Capture in Technology-Grafting Acquisitions" (2006)

Margaret Cording, Darden, "Organizational Integrity & Acquisition Performance: The Role of Values in Value Creation" (2004)

Marsha Wadkins, UVA Anthropology, "The Mortgage You Buy May Be Your Own" (1989)

David L. Hingtgen, Naval Postgraduate School, "An Empirical Analysis of the Influence of Corporate Mergers on Organizational Slack" (1987)

Theresa Lant, Stanford Graduate School of Business, "Goals, Search, and Risk Taking in Strategic Decision Making" (1987)

Jitendra Singh, Stanford Graduate School of Business, "Performance, Slack, and Risk Taking in Strategic Decisions: Test of a Structural Equation Model" (1983)

#### CASES AND TEACHING NOTES:

Note on Environmental Analysis for Strategy Making, S-BP-212N (1983)

Note on Interactive Computer Graphics and CAD/CAM (with Christine Blouke),S-BP-220N (1984)

Calma Company (A) through (E), S-BP-214 (1984)

**Reprinted in:** Boulton, W. R., *Business Policy: The Art of Strategic Management*(New York: Macmillan, 1984).

Calma Company (A) (condensed) and the CAD/CAM Industry, UVA-BP-0269 (1995)

Calma Company (B) through (E), UVA-BP-0270, UVA-BP-0358 to 0360 (1988)

Calma Company Teaching Note, UVA-BP-0269TN.

OSIM Corporation (A) through (G), UVA-BP-0306 to 0312 (co-copyrighted with Stanford) (1990)

**Reprinted in:** Thompson and Strickland III, *Strategic Management: Concepts and Cases*, 3rd Ed. (Plano, TX: Business Publications Inc., 1984).  
The Stanford issue is a **Best Seller**.

OSIM Corporation Teaching Note, UVA-BP-0306TN

Home Computers (A) through (E), UVA-BP-0279 to 0283 (1987)

Home Computers Teaching Note, UVA-BP-0279TN

Darden, Inc., UVA-BP-0286 (1987)

(Revision of UVA-OM-0596 for use in Business Policy course.)

Note on Strategy Implementation through Organization Design, UVA-BP-0287 (1988)

The Microcomputer Industry in 1987, UVA-BP-0288 (1989)

Apple, Compaq, IBM and Tandy in 1988, UVA-BP-0289 (1987)

Microcomputer Industry: 1989 Addendum, UVA-BP-0304 (1989)

Microcomputers in 1991: The Notebook Wars, UVA-BP-0317 (1991)

Microcomputer Case Series Teaching Note, UVA-BP-0288TN

Note on Portfolio Techniques for Corporate Strategic Planning, UVA-BP-0292 (1988, Rev. 2/97)

Amer Group, Ltd. (A), UVA-BP-0290 (1988, Rev. 2/93)

Amer Group, Ltd. Teaching Note and Intro to MacGregor Golf, UVA-BP-0290TN

MacGregor Golf Company (A,B-1 & B2) , UVA-BP-0291, 0293, 0294 (1988, Rev. 1/97)

MacGregor Golf Company Teaching Note, UVA-BP-0291TN

*Video:* Amer/MacGregor Golf Company (8 minutes) Tape #8086

Dollar General Corporation (A) Abridged, UVA-BP-0388 (1998, Rev. 4/01)

Dollar General (B), UVA-BP-0296 (1989)

Dollar General (B) Teaching Note, UVA-BP-0296TN

*Video:* Cal Turner, Jr. - Dollar General Corporation (20 minutes) Tape #8219

Arvin Industries, Inc., (A, B, C), UVA-BP-0297, 0298, 0299 (1989, Rev. 4/98)

Arvin Industries Teaching Note, UVA-BP-0297TN

*Video:* Arvin Industries (8 minutes) Tape #8086

Georgia Digital Reproduction, Inc., UVA-BP-0300 (with A. Larson) (1989)

Georgia Digital Reproduction, Inc., Teaching Note, UVA-BP-0300TN

Jiffy Lube International, Inc., UVA-BP-0303 (with J. Colley) (1989)

Jiffy Lube International, Inc., Teaching Note, UVA-BP-0303TN

Jiffy Lube International, Inc. (Abridged), UVA-BP-0417 (2000)

Jiffy Lube International, Inc. (Abridged) TN, UVA-BP-0417TN

Hewlett-Packard (Condensed) UVA-BP-0305 (1989, Rev. 9/95)

Hewlett-Packard (Condensed) Teaching Note, UVA-BP-0305TN

Peninsular Insurance (A,B,C,) UVA-OB-0416, 0417, 0418 (1992, Rev. 2/98)

Peninsular Insurance Teaching Note, UVA-BP-0416TN

Falls River Learning Center UVA-BP-0341 (1994)

Falls River Learning Center Teaching Note, UVA-BP-0341TN

*Video:* Falls River (6 minutes) #4129

Yamaha Corporation and Electronic Musical Instruments Industry, UVA-BP-0348 (1994, Rev. 3/98)

Yamaha Corporation Teaching Note, UVA-BP-0348TN

International Colour Envelope Advisors S/A, UVA-BP-0350 (1994)

International Colour Envelope Teaching Note, UVA-BP-0350TN

New Zealand Dairy Board, UVA-BP-0356 (1995)

New Zealand Dairy Board Teaching Note, UVA-BP-0356TN

The Louisiana-Pacific Board, UVA-BP-0375 (1996)

The Louisiana-Pacific Board Teaching Note, UVA-BP-0375TN

*Video:* Bonnie Guiton Hill (14 minutes) #4508

National Guitar Summer Workshop, UVA-BP-0378 (1998)

National Guitar Summer Workshop Teaching Note, UVA-BP-0378TN

Standard & Poors Financial Information Services (A), UVA-BP-0389 (1998)

Standard & Poors Financial Information Services (B), UVA-BP-0390 (1998)

Rodale Press (A), UVA-BP-0393 (1998)  
Rodale Press (B), UVA-BP-0394 (1998)  
Rodale Press Teaching Note, UVA-BP-0393  
Video: Maria Rodale (15 minutes) #4509

OSIM Group (A) through (G), UVA-BP-0399 to 0405 (1999, Rev. 5/02)  
OSIM Group (A) through (G) Teaching Note, UVA-BP-0399TN

Southeast Paper Manufacturing Company, UVA-BP-0407 (2000)

Launch of Lucent Technologies (A) UVA-BP-0409 (2000)  
Lucent Technologies (B) UVA-BP-0421 (2000)  
Lucent Technologies (C) UVA-BP-0422 (2000)

Artic Cat (A) UVA-BP-0413 (2000)  
Artic Cat (B) UVA-BP-0413 (2000)  
Artic Cat Teaching Note, UVA-BP-0413TN

Kellogg-Worthington Merger, UVA-BP-0426 (2001, Rev. 5/02)  
Kellogg-Worthington Integration Exercise, UVA-BP-0468 (2002)  
Kellogg-Worthington Merger Teaching Note, UVA-BP-0426TN

Note on the Accelerated Transition, UVA-BP-0427 (2001)

Albany International/Geshmay Group Merger, UVA-BP-0428 (2001)  
Albany International/Geshman Group Merger Teaching Note, UVA-BP-0428TN

Two Big Banks' Broken Back Office, UVA-BP-0432 (2001)  
Two Big Banks' Broken Back Office Teaching Note, UVA-BP-0432TN

PSINet: Building an Internet Supercarrier (A), UVA-BP-0433 (2001, Rev. 9/02)  
PSINet: Building an Internet Supercarrier (B), UVA-BP-0434 (2001)  
PSINet Building an Internet Supercarrier Teaching Note, UVA-BP-0433TN

The Hamilton-Sundstrand Merger (A), UVA-BP-0435 (2001, Rev. 5/02)  
The Hamilton-Sundstrand Merger (B), UVA-BP-0436 (2001)  
The Hamilton-Sundstrand Merger Teaching Note, UVA-BP-0435TN

Hibernia National Bank and the Texarkana Acquisition, UVA-BP-0437 (2001)

Trader Publishing and the UAP Acquisition, UVA-BP-0438 (2001, Rev. 4/03)  
Trader Publishing and the UAP Acquisition Teaching Note, UVA-BP-0438TN

Breaking the News: How to Communicate a Merger to Employees, UVA-BC-0180 (2001)

Plow & Hearth: Double Acquisition, UVA-BP-0463 (2002, Rev. 4/03)  
Plow & Hearth: Double Acquisition Teaching Note, UVA-BP-0463TN

Cisco: Early if Not Elegant (A), UVA-BP-0446 (2003, Rev. 2013)  
Cisco: Early if Not Elegant (B): Epilogue, UVA-BP-0467 (2003)

Creating Options on the Future: New Product Development at Bacardi Limited, UVA-BP-0469 (2003)

Bacardi Limited: Integrating Tequila Cazadores Acquisition, UVA-BP-0470 (2003)

Post Merger Integration at Northrop Grumman Information Technology, UVA-BP-0472 (2003)  
*Video: Fighting the Fog of War: Post-Merger Integration of Northrop Grumman Information Technology CD-ROM* (2004)  
Post Merger Integration at Northrop Grumman IT Teaching Note, UVA-BP-0472TN

Ben & Jerry's and Unilever: The Bohemian and the Behemoth, UVA-BP-0471 (2003)  
Ben & Jerry's and Unilever: The Bohemian and the Behemoth Teaching Note, UVA-BP-0471TN

Tata Tea Ltd. and Tetley, Plc (A), UVA-BP-0478 (2004)  
Tata Tea Ltd. and Tetley, Plc (B), UVA-BP-0479 (2004)  
Tata Tea Ltd. and Tetley, Plc Teaching Note, UVA-BP-0478TN

Comcast Corporation's Merger with AT&T Broadband, UVA-BP-0480 (2004)  
Comcast Corporation's Merger with AT&T Broadband Teaching Note, UVA-BP-0480TN

CS Robinson/Ford Merger, UVA-BP-0481 (2006) (Rev. 2008)  
CS Robinson/Ford Merger Teaching Note, UVA-BP-0481TN

Building the New Bosco-Zeta Pharma (A), UVA-BP-0525 (2008)  
Building the New Bosco-Zeta Pharma (B), UVA-BP-0536 (2008)  
Building the New Bosco-Zeta Pharma Teaching Note, UVA-BP-0525TN (draft)

Yamaha's Corporate Strategy, UVA-S-0139 (2008)

Embraer in China, UVA-S-0151 (2008)  
Embraer in China Teaching Note, UVA-S-0151TN

PMI Consultant Evaluation Questions for Assessing Beauty Contestants, UVA-BP-0527 (2008)

Integration of Wachovia and Golden West (A), UVA-BP-0532 (2008)  
Integration of Wachovia and Golden West (B), UVA-BP-0535 (2008)  
Integration of Wachovia and Golden West (A) and (B) Teaching Note, UVA-BP-0532TN

Whole Foods and Wild Oats Merger, UVA-BP-0533 (2008)  
Whole Foods and Wild Oats Merger Teaching Note, UVA-BP-0533TN

The News Corp and Dow Jones Merger, UVA-BP-0534 (2008)

Note on the Impact of Industry and Firm Factors on Firm Profitability: An Empirical Analysis of the *Fortune* 1000, UVA-S-0152 (2008)

Acquisition of Axia by Healthways, Inc., UVA-BP-0537 (2009)

Note on Post-Merger Integration, UVA-BP-0539 (2009)

Titan Products, Inc.: Acquisition of Franz Schuler GMBH (A), UVA-BP-0546 (2010, Rev. 2013)  
Titan Products, Inc.: Acquisition of Franz Schuler GMBH (B1), UVA-BP-0547 (Rev. 2013)  
Titan Products, Inc.: Acquisition of Franz Schuler GMBH (B2), UVA-BP-0548 (Rev. 2013)  
Titan Products, Inc.: Acquisition of Franz Schuler GMBH (C), UVA-BP-0560 (2013)  
Titan Products, Inc.: Acquisition of Franz Schuler GMBH Teaching Note, UVA-BP-draftTN

Danaher – the Making of a Conglomerate, UVA-BP-0549 (2010, Rev. 2013)  
Danaher – the Making of a Conglomerate Teaching Note, UVA-BP-0549TN

American Airlines Acquisition of TWA, UVA-BP-Draft

Roma Victor: Europe's First Serial Acquirer, UVA-BP-0551 (2010)  
Roma Victor Teaching Note, UVA-BP-0551TN

Note on Strategic M&A Analysis, UVA-S-0224 (2012)

Twenty Questions for Every M&A: Improving Post-Merger Integration Performance, UVA-S-0226 (2013)

Strategic Planning: Questions Necessary for Preparing Business Strategy, UVA-S-0231R (2013)

Strategic Planning Sequence, UVA-S-0232 (2013)

Cisco Systems in 2005: From B2B to B2C, UVA-S-0233 (2013)

Orascom Telecom Holding (A) through (C), UVA-S-234 to 236 (2014)  
Orascom (C): Condensed UVA-S 2xxx (2015)  
Orascom Telecom Holding (A) and (B) Teaching Note: UVA-S-234TN  
Orascom Telecom Holding (C) Teaching Note: UVA-S-236TN

Value Creation in Vertical Acquisitions: UVA-S-0245 (2014)  
Practical Mind in a Universal World: UVA-S-0286 (2016)

Note on Not-for-Profit Board Performance: UVA-S-0294 (2017)

Aston Martin – The Crossover Conundrum: UVA-S-0298 (2017)  
Aston Martin – The Crossover Conundrum Teaching Note: UVA-S-0298TN (2018)  
Aston Martin – Video Interview with CEO Ulrich Bez (2018)

## PERSONAL INTERESTS:

Distance bicycling, classical and jazz guitar.

## SELECTED LIST OF CONSULTING CLIENTS – INTERNATIONAL

### Australia

KPMG  
CSR (sugar and building products)  
ICI (Imperial Chemicals)  
BHP (steel, mining, oil)  
QANTAS Airlines  
Coca-Cola Amatil

### Belgium

Imperial Chemicals

### Canada

CAE Electronics (flight simulators)  
Royal Bank of Canada

### England

Houlder Offshore (mobile oil rigs)  
Cobham Surveillance (defense)  
Wolseley (building and plumbing supplies)  
Shire Pharmaceuticals

### Finland

EKA Corp. (conglomerate)  
Amer Group (conglomerate, including  
McGregor Golf)

### France

Suez Energy (oil & gas)  
Standard & Poors Ratings

### Germany

Stinnes (logistics & transportation)

### Hong Kong

Overseas Container Corp.  
CY Tung Group (shipbuilding)

### Indonesia

Alcan Indonesia  
Jankar Jati Group (conglomerate)

### Colombia

BanColombia

### Japan

Kosa Tirecord  
Mitsubishi Chemical  
Takata (automotive supplier, airbags)

### Mexico

Cemex

### Netherlands

Bacardi

### New Zealand

Ernst & Young  
Fletcher Challenge (conglomerate)

### Nigeria

Zenith Bank

### Russia

Unilever RUB (Russia-Ukraine-Belarus)

### Singapore

Straits Times News Corp.

### South Africa

EdCon (diversified retailer)

### Spain

Bacardi

### Switzerland

ABB

### Taiwan

China Steel

### Thailand

Siam Cement

### Venezuela

Nabisco Venezuela

### China

Tsinghua University (Beijing)

## CONSULTING CLIENTS – USA

Ashland Chemical  
Bell Labs  
Carrier  
Caterpillar  
Chesapeake Corp.  
Clarke American (bank checks)  
Cone Mills (fabrics & denim)  
Connecticut Mutual Life  
Disney Development Corp.  
Hewlett-Packard  
Hibernia Bank Corp  
Hoechst Celanese  
IBM  
John Deere  
Key Pharmaceuticals  
Metairie Bank & Trust  
Northrop Grumman  
Paine Weber  
Peat Marwick  
Pratt & Whitney  
S&P Ratings  
S&P Financial Information Services  
Schering Plough  
Signet Bank  
Sperry Marine  
TRW  
Virginia Power  
Wells Fargo  
Westinghouse  
York

### Privately Owned

Alex Lee (grocery conglomerate)  
Bacardi Corporation  
Blueprint Automation  
California Homes  
Charlotte Pipe & Foundry  
Hooker Furniture  
Landmark Communications (newspapers, TV stations)  
McGuire Woods (law firm)  
Pharmaceutical Research Associates (PRA)  
Rodale Press (*Men's Health, Runners World, Prevention*)  
Rowe Furniture  
SNL Financial

Southeast Paper (newsprint)  
Trader Publications (Auto Trader, Yacht Trader, AutoTrader.com)  
The Weather Channel

Government Agencies (in USA)

Army Corps of Engineers (Research Labs)  
LSU Health Sciences Center  
NASA  
Oak Ridge National Labs  
Sallie Mae  
Virginia Dept. of Transportation  
Virginia Secretary of Commerce

Other Governments

Australian Post  
Australia Dept. of Agriculture  
Shiga Prefecture (Japan)  
Victoria Public Services Board (Australia)

Pro Bono

Core Knowledge Foundation  
Corporation for Public Broadcasting (NPR)  
Culpepper Regional Hospital/UVA Health Sciences System  
Curry School of Education (UVA)  
UVA School of Nursing  
UVA College of Arts and Sciences  
UVA Real Estate Foundation  
UVIMCO (UVA endowment investment company)  
Sunrise Senior Living Center  
Telemedicine Institute (UVA)  
Music Resource Center (Charlottesville)  
Dogwood Institute (complementary health care)  
Red Cross of Virginia  
NOMA (New Orleans Museum of Art)  
Le Petit Theatre (New Orleans)