The diffuse light of sunset colors the sky and a flock of geese flies overhead in V formation. The leader pierces the air, breaking an invisible path for its fellow travellers. As the leader tires, another bird succeeds it; all will take a turn. Pull back to watch them disappear as one over the horizon.

Fade in on a pack of cyclists navigating a mountain road’s sharp turns. Their formation mimics that of the geese as one cyclist glides ahead and the rest slipstream in a tight group, all in the service of bringing the team leader to victory. Zoom in on a single cyclist, then cut to a tight shot of the mechanics of the cycle itself. Cogs, chains and gears mesh, working together to propel the athlete forward.

The closing credits roll. The names of all the actors, the director and producers crawl up the screen—but the credits are far from over. Hundreds of other names follow: from the cinematographer and composer, the costume designers and creators of visual effects, right down to the caterers and production assistants (those ubiquitous and indispensable gofers on set). A small army, yet the fruit of their labor is a seamless whole.

The orchestral score swells as the credits close. The conductor elicits a last, passionate outpouring from musicians who weave their instruments’ voices into a single sound. Imagine the violinists’ bows moving together, stirring the air like the wingbeats of a flock of birds bound for the south.
The Grass Goes Greener: How the Dairy Industry Reimagined Its Future with Appreciative Inquiry

Give Us Big Data: Students Thrive in Jagdip Singh’s New Analytics Class

Donor Profile: Diane McDaniel

Weatherhead in the News

Over the Counter, Under the Radar

Shale Gas: At the Intersection of Economics and Engineering

Exploring Hispanic-American Market Segments

Just How Much Is Word of Mouth Worth?

The Best of Both Worlds: JeShaune Jackson Merges Science and Business

Leadership Deep Dive Expands to Three Continents

Weatherhead by Department

Alumni Notes
One of the 10 most innovative business school courses
MBA among the 30 best design programs in the world
#13 undergraduate business program among private universities

weatherhead by the numbers

68 full-time faculty
1211 students
83 full-time staff
21 endowed professorships
06 academic departments

01 unique Department of Design and Innovation
Full-Time MBA among the 30 Best Design Programs in the World (Businessweek, 2009)

MBA Institute in Sustainable Value and Social Entrepreneurship among the 10 Most Innovative Business School Courses (Forbes, 2010 – U.S.)

#8 undergraduate entrepreneurship program
#14 international business
#18 macroeconomics
#18 microeconomics (Businessweek, 2013 – U.S.)
#22 undergraduate accountancy program (Public Accounting Report, 2010 – U.S.)
#28 undergraduate business program (U.S. News & World Report, 2012 – U.S.)
#31 full-time MBA in the U.S.
#55 in the world (CNN Expansión, 2012 – Global)
#34 EMBA in the world (The Economist, 2013 – Global)
#36 undergraduate business program (Businessweek, 2012 – U.S.)
#37 undergraduate business program
#13 among private universities
#2 in Ohio (U.S. News & World Report, 2013)
#45 full-time MBA in the U.S.
#94 in the world (Financial Times, 2013 – Global)
#48 full-time MBA in the U.S.
#100 in the world (The Economist, 2012 – Global)
#49 full-time MBA (Forbes, 2011 – U.S.)
#51 full-time MBA (Businessweek, 2011 – U.S.)
#52 full-time MBA (U.S. News & World Report, 2013 – U.S.)
#57 full-time MBA (Poets and Quants, 2012 – U.S.)
#69 undergraduate business program (Businessweek, 2013 – U.S.)
#72 part-time MBA (Businessweek, 2011 – U.S.)
#80 full-time MBA (U.S. News & World Report, 2012 – U.S.)
A message from Dean Robert Widing

At the Weatherhead School of Management, we develop leaders who innovate to create sustainable value and who are good global citizens. Of course, in order to be a good leader, it helps to be a great collaborator—and the people you'll meet in this issue of the Weatherhead Collection are excellent examples of that principle.

In the pages that follow, we highlight some of the collaborations that members of our community have engaged in over the past year. You'll read about JeShaune Jackson, an MBA candidate whose vision for a biotech accelerator drew students from all disciplines to pool their knowledge. You'll learn how David Cooperrider's work inspired the U.S. dairy industry to shrink milk's ecological footprint all the way "from grass to glass." These stories, and many more, show how leaders in the Weatherhead community are helping to change business and society for the better. Download our new Collection app to view even more content, and let us know what you think at collection@case.edu.

Whether you are an alumnus or alumna of Weatherhead, a donor to our school, or a supporter of our approach to business education, I hope that you'll share my pride in these student and faculty stories. As a member of our community, you are an important part of our success.

Sincerely,

Robert E. Widing II, PhD
Dean
Albert J. Weatherhead III Professor of Management
Abraham Lincoln’s quote, “Give me six hours to chop down a tree and I will spend the first four sharpening the axe,” best captures my experience at Weatherhead. While problem solving is a prized skill that managers and organizations often highlight, problem finding is not. Weatherhead is an environment where I am able to cultivate the art of problem defining, a practice overshadowed by problem solving. Members of the faculty genuinely support the issues that interest me, provide the foundation for my work through their accomplished scholarship, and push me to linger just a bit longer in ambiguity if it means discovering a topic and trajectory worthy of pursuit and inquiry.

If you want to become a practicing scholar or scholarly practitioner, this is the place to be. If you want to become a thought leader who will shape the destiny of a discipline, this is the place to be. If you want to sharpen and refine yourself, this is the place to be.

Kip Lee, PhD Candidate, Department of Design and Innovation

One of the many great things about Weatherhead is that it is located in Cleveland. Aside from Cleveland being a great place to live (great restaurants, theater, symphony, park system and museums), Cleveland has a very diverse business community. There are Fortune 500 companies that have headquarters here, as well as many medium and small businesses. This gives our students many different opportunities for internships, projects and employment.

Cleveland also provides many research opportunities for me, personally. I am an urban economist, with a focus on housing and neighborhood. My current research projects have to do with understanding the foreclosure crisis and dealing with its aftermath. Although the crisis hit our city hard, I’m encouraged by the growth of community engagement around creating vibrant neighborhoods. There’s a great energy here—maybe that’s why they call Cleveland the Comeback City.

Robin Dubin, PhD, Chair and Professor, Economics

I have had the unique opportunity to experience the Weatherhead difference as a student and a staff member. I became director of admission for the executive and part-time MBA programs while I was finishing the part-time MBA. I can personally attest to the value and the quality of the education our students receive and the strength of the leadership development here. I enjoyed tremendously sharing with prospective students what I found so special about the Weatherhead classroom and community. As I moved into my current position at Swagelok, the road before me had been paved by a strong relationship between the two organizations—a relationship established on quality and collaborations. Weatherhead didn’t invent management. Our faculty didn’t invent the MBA. We just put all the pieces together in a way that makes this degree more than the sum of its parts.

Lisa Dunnigan, MBA ’13, Talent Acquisitions Manager, Swagelok
This year, the Weatherhead School of Management launched the first-ever Department of Design and Innovation. The new department brings together the faculty of the former Marketing and Policy Studies Department and Information Systems Department. The merger strengthens Weatherhead’s reputation for scholarship that anticipates burgeoning business practice.

Our design and innovation faculty are committed to training dynamic business leaders for innovation-driven careers. Students will use design practices to shape business strategy, developing their capacity to imagine new alternatives, game-changing ideas and fresh perspectives on emerging problems.

The new department, chaired by Richard Buchanan, PhD, professor of design and innovation, will focus on two core priorities:

1. Creating knowledge to generate novel and valuable products, services and systems
2. Developing organizational leaders and entrepreneurs who are skilled in designing innovative ways to create value for customers, stakeholders and society

The Department of Design and Innovation embraces CWRU’s strategic focus on “forward thinking,” which includes an increased emphasis on innovation, technology development and cross-disciplinary activity. Through the cultivation of high-impact scholarship and practice at the intersection of faculty members’ diverse scholarly backgrounds, the department aims to improve business processes, marketing, strategy, policy and technology.

Susan Helper Named Chief Economist in U.S. Commerce Department

Susan Helper, PhD, Frank Tracy Carlton Professor of Economics, has been appointed the U.S. Commerce Department’s chief economist.

While on leave from the university, Helper served for the past year as a senior economist at the Council of Economic Advisers, an agency within the president’s office.

“I’m excited to contribute to the Commerce Department’s mission of promoting sustainable development,” Helper said. “I’m grateful to Case Western Reserve for this leave, which will give me a chance to build on my research and serve the public.”

Formerly chair of the Economics Department, Helper has focused her research on U.S. manufacturing and globalisation of supply chains.

The Economist Ranks Weatherhead EMBA #1 in Ohio, #34 in the World

Weatherhead’s Executive MBA (EMBA) curriculum was rated the best in Ohio and 34th internationally in The Economist’s first ranking of the world’s EMBA programs.

Our EMBA program, geared toward professionals with at least 10 years of experience, allows students to interact with faculty from Weatherhead’s Organizational Behavior Department, considered among the best in the world.

“We are delighted to be included in The Economist’s very first ranking of EMBA programs,” said Robert E. Widing II, PhD, dean of the school and Albert J. Weatherhead III Professor of Management. “As a school, we promote good global citizenship and value an international perspective. That our EMBA is ranked #34 among impressive institutions around the world is further recognition of the global relevance of what we teach and practice at Weatherhead.”

Rankings by the U.K.-headquartered publication were based on information about curriculum and faculty and feedback from current EMBA students and alumni from the last three graduating classes.

New Department Chairs for Accountancy, Design and Innovation, Economics, Organizational Behavior

The Weatherhead community congratulates Mark Taylor, PhD, Andrew D. Braden Professor of Accounting and Auditing and chair and professor of accountancy; Richard Buchanan, PhD, chair and professor of design and innovation; Robin Dubin, PhD, chair and professor of economics; and Diana Bilimoria, PhD, KeyBank Professor and chair and professor of organizational behavior.

“I would like to recognize and deeply thank the five outgoing chairs for their selfless and effective service,” said Dean Widing. “And I’d like to thank the incoming department chairs for their willingness to take on these important leadership roles.”

Outgoing chairs include Gary Previts, PhD, CPA, Distinguished University Professor and E. Mandell de Windt Professor of Leadership and Enterprise Development and former chair of the Accountancy Department; Matthew Sobel, PhD, William E. Umstattd Professor of Industrial Economics and former chair of the Economics Department; Richard Boland Jr., Elizabeth M. and William C. Treuhaft Professor of Management and former chair of the
Boyatzis Brings Emotional Intelligence Online

In May 2013, Case Western Reserve University dipped a toe into the rapidly expanding pool of massive open online courses, or MOOCs, and Richard Boyatzis, PhD, Distinguished University Professor and H.R. Horvitz Professor in Family Business, took the lead.

Boyatzis’ free online class, Inspiring Leadership through Emotional Intelligence, was offered in partnership with Coursera and was the first MOOC to focus on leadership. More than 90,000 participants signed up for the first offering; the course will start again on October 28, 2013.

Boyatzis spoke to The Plain Dealer about the initiative and the questions that surround the MOOC phenomenon; for example: Does the cost of providing MOOCs outweigh the benefits for universities?

“It’s almost too soon to know,” Boyatzis told The Plain Dealer. “It’s like Google or Amazon. Nobody knew for years whether they could make money on it.” What is certain is that an enormous appetite exists for free, accessible education: 2.7 million students have participated in Coursera MOOCs since the company launched its first in April 2012.

Michael Scharf, associate dean for global legal studies at the CWRU School of Law, offered the university’s second MOOC, Introduction to International Criminal Law.

Weatherhead’s Latest Rankings

The Financial Times ranked Weatherhead’s full-time MBA #94 worldwide and #45 in the U.S. in its 2013 roster of the top 100 programs. Thanks in part to improved alumni responsiveness, Weatherhead reappeared in the U.K.-based newspaper’s well-regarded ranking after missing the past two years.

The full-time MBA also made The Economist’s 2012 list of the best 100 such programs, appearing at #100 in the world and #47 in the U.S. Meanwhile, Weatherhead’s part-time MBA program claimed 30th place in U.S. News & World Report’s 2014 rankings, an improvement of seven places. The full-time MBA program maintained its #52 slot.

Celebrating the Weatherhead 100

The 2013 Weatherhead 100 awards will take place on December 3, recognizing the region’s fastest-growing companies based on their revenue from 2008 to 2012. The competition includes three categories:

Weatherhead 100: Companies whose net sales were at least $100,000 in 2008 and over $1 million in 2012. These companies must have employed 16 or more people full time in 2012.

Weatherhead Upstarts: Companies with sales growth that qualifies them for the Weatherhead 100, but that employed fewer than 16 people or had less than $1 million in net sales in 2012.

Weatherhead Centurions: Companies with 100 percent or more sales growth from 2008 through 2012 and net sales of $100 million or more in 2012.

Sam Thomas Continues a Tradition of Economic Predictions

In 1974, the late David A. Bowers, PhD, former chair of the Banking and Finance Department at Weatherhead, created the annual Economic Forecast luncheon to engage alumni and share his perceptive economic predictions. The Alumni Association-sponsored event was an immediate hit, and in 1991, Bowers further involved his audience by creating the Forecaster Competition. The competition—which is going strong in its 23rd year—offers attendees the opportunity to out-forecast the forecaster with their own projections for the coming year. Initially held exclusively for alumni and their guests, the luncheon was later opened to the Northeast Ohio community. The audience now includes regional business leaders from the financial services, legal, healthcare and manufacturing sectors.

Bowers gave his last forecast in 2000 after 27 years of insightful predictions—all while handling wild cards like wars, impeachments, and government regulations and re-regulations. In recognition of his lasting contribution to our community, Weatherhead renamed the luncheon in Bowers’ honor that year, and the Alumni Association...
In 2001, beloved educator Sam Thomas, PhD, professor of banking and finance, assumed forecasting duties at the annual event. Thomas’ intellect and wit have enlivened his thoroughly researched economic analysis since then. Each year, his expertise in integrating the global macro business cycle with trends in corporate finance and investment strategy attracts more than 600 attendees eager to hear his forecast and create their own.

Join us at the Renaissance Cleveland Hotel for the 40th anniversary of the David A. Bowers Economic Forecast Luncheon on Friday, December 13, 2013, at 11 a.m. Registration opens online on October 1, 2013.

The Peter B. Lewis Building Celebrates Its 10th Birthday

2012 marked the 10th anniversary of the completion of the Peter B. Lewis Building, an iconic structure designed by Frank Gehry. Gehry’s style has gained its share of both admirers and detractors as he has continued to test the boundaries of what buildings can look like and how they can work. In fact, philanthropist Peter B. Lewis declared our building provocative enough to start fights in bars.

Lewis, the head of Progressive Corporation, recruited his good friend Gehry to design Weatherhead’s new home on the CWRU campus. He also contributed $36 million of the $61.7 million cost. Lewis and Gehry reunited on CWRU’s campus on Commencement Day 2013 to receive honorary doctorates from the university. Lewis also addressed the graduating class.

Gehry used unique design techniques honed on previous projects with Lewis, including adapting the 3-D modeling program CATIA (used to design France’s Mirage jets) to plan the building’s curvaceous interior walls and sloping steel roof. He drew inspiration from sources that ranged from Picasso, Matisse, and the sculptor Claus Sluter to the Panthéon or Thomas Jefferson’s conference table at Monticello.

Perennial Favorites, New Ventures Among This Year’s Case Competitions

First-year MBA candidates Larremy Gray, Jessica Lehmann and Dominique Vargas formed a team that took fourth place in the 10th annual KeyBank Foundation Minority MBA Case Competition sponsored by the Fisher College of Business at the Ohio State University. Vargas received a special award for Best Q and A. The case focused on the future of the multifamily commercial mortgage industry and KeyBank’s position within it. The team worked closely with staff adviser Deborah Bibb and faculty adviser J.B. Silvers, PhD, John R. Mannix Medical Mutual of Ohio Professor of Health Care Management. It was the first case competition for all of the Weatherhead participants.

2013 marks the third consecutive year in which a team from Weatherhead has placed second at the Association for Corporate Growth (ACG) Cup. Cheng Gu, MSM-Finance ’14; Patrick Kelly, MBA ’13; Shane Rourke, MBA ’13; Dale Stewart, MBA ’13; and Mengying Xu, MSM-Finance ’14; won second place in a fiercely contested case study competition hosted by the Cleveland Chapter of the ACG. The competition attracted teams of graduate students from Case Western Reserve, Cleveland State University, Kent State University, Baldwin Wallace University, the University of Akron and Ohio State University.

Each year, the Urban Land Institute (ULI), a national professional association with a branch in Cleveland, chooses a real site in a U.S. city that is slated for redevelopment. Student teams enter competing plans for developing the site. This year was the first in which CWRU students joined in the competition, which is in its 11th year. First-year MBA student Abraham Weiner formed a team with a student from Cleveland State’s Master of Urban Planning, Design, and Development program and three students from Kent State’s Cleveland Urban Design Collaborative.

Out of 149 participating teams representing 70 American and Canadian universities, Weiner’s team received an honorable mention—the first time that a team from Cleveland has been recognized in the ULI competition. “There is work of great quality coming out of Kent State, Cleveland State and Case Western Reserve, so it felt good to see those names right next to Cornell and Columbia,” said Weiner.

Big Bump in Alumni Mentorship

Last year, more than 200 Weatherhead alumni connected with current graduate students through the Career Management Office’s (CMO) Coffee with Alumni program.

Students meet with alumni over coffee, where they learn about their alumni match, ask questions and share Weatherhead updates. “Our alumni are engaged more than ever before. We saw 35 percent more alumni participate in these programs this year and look forward to growing our Weatherhead community,” Jamie Elwell, associate director for career development, reported.

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Working with Gehry’s team influenced Design and Innovation faculty Richard J. Boland Jr., PhD, Elizabeth M. and William C. Treuhaft Professor of Management at Weatherhead, and Fred Collopy, PhD, vice dean, as they developed research on design practices in management.
Mark Taylor Named to New Braden Professorship

Mark Taylor, PhD, CPA, professor of accountancy, is the first to be named Andrew D. Braden Professor of Accounting and Auditing, an endowed chair established in honor of Andrew Braden (1916–2003), who taught accountancy at CWRU for more than 40 years. “Andy” Braden obtained his BA in education from Kent State and his MBA from Western Reserve University, served in the U.S. Navy during World War II and later worked at Ernst & Ernst (now Ernst & Young).

Braden joined the faculty at Western Reserve in 1946 and served over the course of his career as director of the BS in Accounting and MBA programs, and as assistant dean. Following his own motto, “Busy people are happy people,” Braden maintained a dynamic professional life as a CPA, consultant, speaker and expert trainer. Braden also contributed his practical and academic expertise to the body of accountancy knowledge in his publications, including, notably, several articles on techniques for teaching accounting and the widely used textbook Accounting Principles (1963, co-authored with Robert G. Allyn).

Since 2009, Taylor has been an esteemed and beloved professor of accountancy at Weatherhead, where he received the Excellence in Teaching Award in 2011. His scholarship, too, has garnered accolades; most recently, Taylor’s work on corporate governance and auditing has been recognized by the Center for Audit Quality (CAQ) in Washington, D.C. The CAQ awarded research funding to Taylor and Assistant Professor of Accountancy Yi-Jing Wu, PhD, CPA, along with a colleague at Brigham Young University, for their project entitled “Learning More about Auditing Estimates Including Fair Value Measurements.”

Among his many other accomplishments, Taylor was recently appointed vice president of academics for the auditing section of the American Accounting Association (AAA), the premier organization for accounting professionals and scholars.

Kip Lee Delivers TED Talk on Design Thinking

This year’s TEDxCLE event brought together 15 of Cleveland’s most innovative and creative people for an afternoon of deep discussion in the areas of technology, entertainment and design.

Among this collection of leaders was Weatherhead’s own Kipum (“Kip”) Lee. Lee is currently a doctoral candidate in the newly formed Department of Design and Innovation and teaches the graduate-level course Identifying Design Opportunities. He also co-teaches Design in Management: Concept and Practices to MBA and engineering students.

Lee’s presentation, titled “Master Builders of the 21st Century,” pinpointed the significance of master builders—people who are adept at both design and design thinking. Using examples from his own work and experiences, Lee provided insights into how master builders are able to think about design pluralistically while making connections at the same time.

Weatherhead Student Wins Best Student Paper at IAMB

Solange Charas, PhD ’14, won the 13th International Academy of Management and Business (IAMB) Conference Student Award for Best Student Paper. Charas’s paper, “Threats to board stability: understanding SME director behavior,” will be published in the International Journal of Management and Business.

This marks the third consecutive year which a Weatherhead student has won Best Student Paper at an IAMB conference. Nnaoke Ufere, PhD ’13, won in 2011, and Philipp Hensler, PhD ’13, won in 2012.

Leading Nonprofit Organizations Provides New Resource for Practitioners

As part of a renewed focus on the third sector, staff and alumni of Weatherhead’s Doctor of Management (DM) program created Leading Nonprofit Organizations (LNO), an online journal compiled by and for practitioners. LNO complements the scholarly journal Nonprofit Management and Leadership, also housed at CWRU, and is completely free to access.

Its creators envision LNO as a “how-to” and “how-to-better” resource serving the needs of those working in the nonprofit field. They invite submissions from professionals in all areas of the nonprofit sector as well as from students in doctoral or master’s-level programs in nonprofit management. Inquiries and submissions should be sent via email to Patricia Mintz, DM, editor of LNO, or to Marilyn Chorman, associate director of the DM program and managing editor of LNO, at leading-nonprofit-organizations@case.edu. Free subscriptions to the online-only resource can be obtained at lno.case.edu.

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Keep up with our news at weatherhead.case.edu/news-and-events.

Charas is enrolled in the PhD in management: Designing Sustainable Systems program; Ufere and Hensler also earned their doctorates in Designing Sustainable Systems. The program is an extension to the Doctor of Management and provides the opportunity for intensive, evidence-based inquiry into management issues.
In December 2009, delegates from nearly 200 countries gathered in Copenhagen for the United Nations Climate Change Conference. That year, as every year, delegates negotiated and renegotiated agreements to address climate change. With just a few days to go before the end of the conference, a sense of despair settled over the proceedings. They were going nowhere.

The U.S., second only to China in greenhouse gas emissions, continued to balk at legally binding reduction targets. But the U.S. delegation wanted to demonstrate that the country was making progress anyway, says Erin Fitzgerald, senior vice president for sustainability at the Innovation Center for U.S. Dairy. "The U.S. was saying, 'There are a lot of voluntary efforts underway—you just aren’t aware of them!'" she remembers. But a proof point was needed. "So literally in the last hours of negotiations, we got a phone call asking us to fly to Copenhagen."

Fitzgerald had recently been put in charge of the dairy industry’s sustainability commitment in her role at the brand-new Innovation Center. She had a tiny staff. She had a tiny budget. And she had an ambitious goal: reducing the dairy industry’s greenhouse gas emissions by 25 percent by 2020. The center’s "Roadmap" to get there identified 10 projects that could significantly improve the industry’s ecological footprint while building business value across the entire supply chain.

Now Fitzgerald found herself on her way to Copenhagen to represent the industry at the climate change negotiations. During the proceedings, U.S. Secretary of Agriculture Tom Vilsack announced United States Department of Agriculture (USDA) support for the industry’s greenhouse gas reduction goals and signed a Memorandum of Understanding with the Innovation Center to that effect.

Though the Copenhagen negotiations ultimately unraveled, the conference marked a paradoxical success for the Innovation Center. This global political stalemate served to highlight the fact that the dairy industry’s purely voluntary efforts were sorely needed. And USDA support came at an important time as the center worked furiously to get traction on its sustainability goals.

A “universe of strengths” in a single room

The seeds of their efforts were planted in 2008, when David Cooperrider, PhD, Fairmount Minerals Professor of Social Entrepreneurship, led an appreciative inquiry (AI) summit with more than 250 participants from every part of the dairy value chain. Also in attendance were scientists, suppliers, government and NGO employees, and young people representing the industry’s future.

AI is a change management technique that Cooperrider and colleague Ronald Fry, PhD, developed at the Weatherhead School of Management. Tom Gallagher, CEO of the Innovation Center for U.S. Dairy, had become certified in AI through Weatherhead Executive Education, along with Fitzgerald and members of his executive team.

An AI summit can help kick-start large-scale change by physically assembling all stakeholders—the private sector, government, nonprofits, everyday citizens—anyone who is touched by the issue at hand. In this way, it resembles the annual U.N. Climate Change Conference, where all parties, from a small island nation like Tuvalu to a large industrialized country like the U.S., are entitled to floor time. But in another important respect, an AI summit is the opposite of the Climate Change Conference: It starts from a place of strength, not weakness—of mutual admiration, not mutual suspicion.
"I think that we live in a multi-stakeholder world. And what AI does is, instead of seeing that as a conflict, it sees it as an expansion of the universe of assets, of strengths," says Cooperrider.

An AI summit invites attendees to address a problem in four phases: "discover," "dream," "design" and "deliver." After discovering individual and organizational strengths through storytelling, participants brainstorm solutions and prototype some of them on the spot.

"You come out of a summit not just with a good dialogue—people are tired of that," Cooperrider explains. "They don't want to just go to a conference, listen to speakers and come away saying, 'That was interesting.' They want to say, 'What can we do to contribute to building a better society and a better world?"

The 2008 U.S. Dairy Sustainability Summit tried to answer that question for the industry as a whole. Originally brought on as director of strategic planning for Dairy Management Inc. (DMI), the Innovation Center’s parent company, Fitzgerald had become keenly aware that the long-term health of the industry was inextricably tied to the health of the planet. In creating a 10-year strategic plan for Gallagher, Fitzgerald says, she confronted "threat of substitution, a changing land base, and this environmental thing—sustainability—coming down the pike."

Gallagher and DMI’s board of directors asked Cooperrider and former Fowler Center Fellow Dave Sherman, DM ’07, to help bring the whole industry together around sustainability as a business strategy. Sherman’s strategy company, Blu Skye, assisted.

By definition, an AI summit is a diverse affair. And this was no exception: Many of the dairy industry’s Sustainability Summit invitees had never worked together, and some were competitors. Fitzgerald did extensive advance preparation, making hundreds of personal calls to convince invitees to come to the meeting. These included farmers, of course. There were also milk processors and dairy manufacturers, truckers and retailers, academics and environmentalists. Even the banking and energy sectors were represented.

"People said things like, 'I didn't realize the extent to which my decisions impacted other segments of the dairy industry. Now I see I'm part of a system,'" Fitzgerald recalls.

The "discovery" phase was crucial to bringing all of these disparate parties together. Group exercises prompted participants to reflect on past examples of leadership and innovation in the dairy industry.

"There's such a lot of heritage, pride and culture in dairy. The first questions were based on that, and people shared really beautiful stories," Fitzgerald says. Through these stories, the strengths that define the dairy industry began to emerge. Participants were asked to imagine their ideal future for the industry and how these strengths might contribute to it.

On day two, the "dreaming," or brainstorming, stage of the summit began, as participants suggested ideas to move the industry toward the future they had imagined. As brainstorming gave way to the "designing," or rapid prototyping, phase, Fitzgerald recalls, "it was chaos." But by the end of the third day of the summit, participants had come up with a list of 27 concrete ideas that could reduce greenhouse gas emissions while enhancing business value. They also signed on to a vision statement and guiding principles.

"There was this shared sense of commitment that emerged," Fitzgerald remembers. "Even to this day, a gentleman who just retired said to me that being part of it was the greatest professional experience of his life."

The 27 proposals were narrowed to the 10 projects deemed most feasible in the near term. These were presented to the Innovation Center’s board of directors.

"We conservatively estimated that the 10 projects were worth more than a quarter of a billion dollars," Fitzgerald says. "So we challenged the CEOs [on the board] to take a proactive leadership stance. We asked, 'If these projects can help the industry reduce emissions by 12 percent by 2020, would you set a stretch goal of 25 percent by 2020?' And they said yes."

With that, Fitzgerald says, "we launched these 10 projects in a newly formed organization with no money to do it—and a big, hairy, audacious goal!"

Step one was to conduct a life cycle assessment (LCA) measuring the baseline greenhouse gas emissions of milk and cheese "from grass to glass," Fitzgerald says. Scientists compiled information from 536 dairy farms, more than 65 milk and cheese processing plants, and more than 210,000 transportation trips from farm to processor. The data represented 25 percent of the flu-
id milk and 22 percent of the cheese produced in the U.S. Next, the center conducted comprehensive LCAs (including factors like water quality and energy use in addition to emissions) for fluid milk, cheese, and processing and packaging.

Using this data, the Innovation Center could target the greatest opportunities for improvement, empowering companies to address energy and water use, as well as greenhouse gas emissions, throughout a product’s life cycle.

Spreading the news of sustainable innovation

In April 2013, almost five years after the Sustainability Summit, Gallagher and Secretary Vilsack renewed the Memorandum of Understanding between the USDA and the Innovation Center. The second annual U.S. Dairy Sustainability Awards were held in conjunction with the occasion to honor achievements in dairy farm sustainability, processing and manufacturing, energy efficiency and renewable energy.

In addition to the awards, the industry communicates its sustainability progress using a new Stewardship and Sustainability Guide and through stories featured on dairygood.org.

“I feel like we’re finally to the place where we’re putting points on the board,” says Fitzgerald. “I think for a while, my job was just to keep it going. And now I feel like we’re getting there. As we measure our progress, we’re more equipped to assure consumers that their choice of dairy products is not only good for them, but also good for the planet.”

Fitzgerald says one of the most important things she learned from the AI process was, ‘Plan for success. Be careful what you wish for, because the ‘delivering’ stage is the hardest. We took on more scope than we could do…Year one and year two was, for me personally, the toughest thing I’ve ever done.”

What kept her, and others, going was that “it became a cause for everybody, and there’s a danger in that too,” Fitzgerald observes. Indeed, while the importance of the cause cannot be overstated, there is only so much that one industry—even one as motivated as the U.S. dairy industry—can do. In the U.S., dairy production represents only two percent of total greenhouse gas emissions and just over five percent of water use.

The Innovation Center conducted LCAs to measure the environmental impact of dairy production at nine stages in the life cycle of a dairy product: feed production, milk production, delivery to the processor, processing, packaging, distribution, retail, consumption of the product and disposal of the packaging. They uncovered opportunities for greater sustainability at every stage.

The Innovation Center’s 2012 sustainability report showed that their projects reduced dairy industry greenhouse gas emissions by the equivalent of 1,459,075 metric tons of carbon dioxide that year. That is no mean feat, but the dairy industry alone cannot counterbalance a business-as-usual climate scenario: The EPA’s most recent data found the U.S. emitted the equivalent of more than 6.7 billion metric tons of carbon dioxide in 2011.

Nevertheless, what Secretary Vilsack recognized in inviting the Innovation Center to Copenhagen was that the dairy industry is blazing a trail for others to follow.

In a sense, the Innovation Center’s work is important not just in itself but as evidence that change is possible. Cooperrider, who facilitated the 2013 awards ceremony, explains why celebrating such accomplishments matters.

“That is the way learning happens: through narrative and story,” he says. “In any large-scale effort to change, oftentimes change feels slow, and part of it is because you can’t see a flower growing in front of your eyes. But using motion capture photography you can, and that is like the concentration effect of gathering stories. The concentration effect gives us a time-lapse view of the change with the texture of the actual.”

Fitzgerald, too, derives satisfaction from stepping back to look at the whole picture.

“One of the biggest lessons we have learned is the power of a true systems approach,” she says. “Especially when we talk about these sustainability issues, they’re so vast that it can’t be just one organization or one segment of the supply chain. I think what we’re proving is that a whole industry is so much more powerful than one brand.”

Cooperrider says that the next industry he’d like to see embrace wholesale transformation is the energy industry; he points out that energy, like dairy, is actually many industries.

“We have the opportunity over the next 30 years to completely transition away from a fossil fuel economy, and that is the opportunity of a civilization,” Cooperrider says. “At the end of my career, I’d like to say we were part of that—the total eradication of poverty and the complete transition to a clean renewable energy economy.”

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Economics

Shale Gas:
At the Intersection of
Economics+

When, in early 2011, Matthew Sobel, PhD, and Xiangwu “David” Zeng, PhD, decided to collaborate on a project related to shale gas development, they could find hardly any information on it in scholarly publications.

“There were a few articles in the popular press. Not a tremendous number. And there was next to nothing in the research literature,” Sobel recalls.

By the time they launched their project in the fall of that year, however, things had changed. There was daily media coverage of the issue. Industry spokespeople talked optimistically about job creation. On the other hand, environmental groups warned of water and air pollution. The popular radio program This American Life devoted a whole show—“Game Changer”—to the phenomenon. Technical terms like “horizontal drilling” and “hydraulic fracturing” (“fracking” for short) became household words. And suddenly, rock formations like Ohio’s Utica and Marcellus shale became of interest to more than just geologists.

“What I didn’t realize when we began this project is that it’s like riding a tiger,” Sobel says.
He and Zeng had decided to collaborate after the Great Lakes Energy Institute (GLEI) and the Weatherhead School of Management’s Fowler Center for Sustainable Value put out a call for proposals to stimulate collaboration among Case Western Reserve University faculty in different schools.

Sobel is the William E. Umstattd Professor of Industrial Economics and acting chair of the Economics Department in addition to his faculty appointment in operations. (He also has an appointment in CWRU’s Department of Electrical Engineering and Computer Science.) He is fascinated by the effects of timing and risk on decision making. An example, post-Katrina and -Sandy, might be preparing coastal cities to withstand hurricanes. Burying power lines and erecting storm barriers are expensive proposals. But they might cost less than rebuilding after a natural disaster—or disasters—down the line. How does a city decide whether mitigating the risk of extensive storm damage is worth the expense?

Environmental issues, with their comparatively long time scales and uncertain outcomes, provide ready fodder for Sobel’s core research interests. “Mitigating climate change is a subject that can be looked at in this context,” he says. “So is shale gas.”

**Engineering**

Xiangwu “David” Zeng, PhD

*Frank H. Neff Professor and Chair of Civil Engineering*
A holistic view of shale gas exploration’s economic effects

Sobel decided to concentrate his efforts on describing the areas in which the economic impact of shale gas development would be felt. Using seed money awarded by GLEI and the Fowler Center, Sobel hired three undergraduate assistants to research effects on real estate, public health and infrastructure.

But in contrast to what he describes as a “landslide” of information in newspapers and magazines, on the radio and online, impartial scientific data about shale gas extraction remained scarce.

“What information there was was restricted: It was typically paid for by the industry, and one consequence was that it focused on criteria favorable to the industry,” he says. “Secondly, it used only readily available public data. That boiled down to jobs and taxes paid. Even at a glance, one could tell there were other kinds of economic impacts.”

And Sobel wanted to determine what the spectrum of impacts might be. Some of them would presumably be positive, as out-of-town workers booked hotel rooms, ate at restaurants, and filled up at gas stations in shale-rich rural areas. Other impacts—for example, on real estate value, on infrastructure, on the environment or on public health—might be deleterious. All, however, are quantifiable.

“Thirty years ago, it would have been an exercise in whimsy to say that when streams get polluted, there’s an economic impact to that. Even if people saw the impact, they didn’t have any idea of how to measure it. And that’s changed,” he says. "Do the aggregate winnings outstrip the aggregate losses? This is an empirical matter.”

In other words, evaluating the total economic benefits and drawbacks of shale gas development is not a matter of opinion. It is a matter of measurement. But what, exactly, do you measure? Sobel wanted to help answer that question.

The repercussions of shale gas-related activities can be complex, and the winners and losers aren’t always obvious. Take infrastructure.

“If you’ve ever seen the places where shale gas is extracted, and you’ve seen them while fracking was occurring, there are prodigiously large trucks typically on very narrow roads that were not constructed to carry that kind of traffic,” Sobel says.

A keen long-distance cyclist, he has seen this firsthand while navigating the wooded hills and rolling farmland of Northeast Ohio.

So who pays to restore the roads after a well site is closed down? In some states, oil and gas companies put up a bond with the state for road repair, and the state makes grants to counties from that bond.

“But how they use those grants is up to the county,” Sobel cautions. “Townships, villages and municipalities often make the road repairs.”

If those smaller units of government do not receive sufficient funding from the county, road maintenance can suffer. (In Ohio, counties and municipalities agree on a predetermined distribution formula for what’s known as the Local Government Fund, which minimizes the risk that a village, township or municipality is left holding the bag for infrastructure repair, says Wendy Patton, senior project director at Policy Matters Ohio.)

Even job creation can have a flip side.

“Proponents of fracking say, ‘How can this be bad? Welders are making a hundred dollars an hour!’” says Sobel. “But say you live in Carroll County and run a farm machinery repair business. Or just a farm where you have machinery to repair. Can you match the wages welders are paid by the industry?”

While shale gas development may save one person’s business, then, it might drive another person out of business.

Things get even more complicated when you look beyond state borders. A recent study by Cleveland State University found that while the money spent in shale-rich counties in Ohio has increased considerably since the natural gas boom started, the hoped-for jobs haven’t materialized. This may indicate that the workers hired to operate drilling rigs are from outside of Ohio. Energy companies do bring experienced drillers from states like Oklahoma or Texas, where oil and gas exploration are a way of life, to run their operations elsewhere. But of course, these workers don’t stay.
"You could have hundreds of workers suddenly coming to your village. Land leases, corporate leases, lots of cash. And then when the work is done, people leave. Boom and bust," Zeng explains.

This may be dismaying to public officials like Ohio Governor John Kasich, whose priority, naturally, is to keep Ohioans employed. But Sobel points out that out-of-state workers need jobs, too. Not only that, but workers flow both ways.

"On a personal level, I have relatives who have been hit very hard by the recession, and who are sleeping in truck beds in North Dakota working in this industry so that they can feed their families," he says.

So, does an influx of highly paid workers that disappears just as suddenly benefit a community overall? Does increased revenue for local businesses compensate for damage to infrastructure?

"What are the economic impacts of health effects? Anecdotes [about health effects] are legion, and epidemiological studies will likely emerge in the near future," Sobel continues. "From the scholarly point of view, my goal was to delineate the range of impacts, some positive, and some negative."

**Pipes, pumps, nuts and bolts: the mechanics of hydraulic fracturing**

Asked what his research specialty is, Zeng deadpans, "I study rocks and dirt." The "dirt" in question is more exotic than it sounds. Zeng, who is the Frank H. Neff Professor and chair of civil engineering at CWRU, is on the advisory panel for the Mars Curiosity Rover. Previous projects have included involvement in NASA’s plans for a permanent lunar study station. The project was canceled, but Zeng still has jars of simulated lunar dust on his office bookshelves.

Closer to home, Zeng also studies earthquakes to design buildings that will survive them. These are big earthquakes, not the minor temblors in Youngstown, Ohio, that were caused by the disposal of fracking wastewater in injection wells. Though these incidents left residents shaken—literally—Zeng says they caused no real damage.

In his collaborative study with Sobel, Zeng’s focus was the technology of shale gas development. (He also looked at the effects of development on rural communities.) "I got into shale gas research three or four years ago. My background is in geotechnical engineering, and in our department we have environmental engineering, so water pollution is a major issue related to shale gas that we wanted to look at," Zeng says.

Hydraulic fracturing involves pumping millions of gallons of water laced with chemicals thousands of feet underground. The chemical cocktail changes the water’s viscosity so that it can squeeze into tiny cracks in the shale, fracturing it. Another additive is sand, something that, as a self-proclaimed specialist in "dirt," Zeng knows quite a lot about.

If you think all sand is alike, think again. The sand used in fracking must be strong enough to hold open the cracks in the shale while the oil, gas and water flow out of the well. If the sand is not strong enough, it will be pulverized as the cracks in the rock close again.

"But sand creates damage to pipelines. Because there’s corrosion under high pressure and high velocity, the sand will rust your pipes and go into your high-pressure pumps," says Zeng. Cracks in the concrete casing around pipes, pipe ruptures, and accidents can result in water contamination, Zeng explains. "So far hardly any cases have occurred, but on the other hand, all it takes is just one terrible incident like Deepwater Horizon, and the whole operation could be stopped."

Zeng says companies are working on alternative methods of hydraulic fracturing that use less water, or even no water. One candidate for a replacement is carbon dioxide.

"But using a gas has its own problems," Zeng explains. "Gases escape much more easily than water."

And the economics are just as complex. Methane leakage is a case in point.

"It leaks from well heads during fracking activities, but it also leaks from the many miles of pipes involved," says Sobel. "The industry says, 'We don't want to lose that methane, because it's worth money.' But is it worth enough to install and maintain devices to capture the methane?"

"It's always a cost issue," Zeng agrees. "Economics plays a very important part—if they can make money, they'll do it. If not, they will not do it."
The university as referee

Sobel and Zeng shared their research in a set of teaching materials and served twice on panels organized by the Shaker Heights Unitarian Church, providing their scholarly perspective to the public. Additionally, Zeng (along with Gary Previts, PhD, CPA, Distinguished University Professor and E. Mandell de Windt Professor of Leadership and Enterprise Development) served on the steering committee for a June 2013 conference at CWRU, Shale Gas: Promises and Challenges. The speakers’ affiliations were “one-third industry, one-third academic, and one-third other organizations, for a balanced view,” Zeng says.

Faculty from diverse disciplines are also in the early stages of planning a center for shale gas research at CWRU.

“I think this is such an important topic that we cannot completely remain outside of it,” says Zeng. In addition to issues of energy security and independence, Zeng says, shale gas will influence manufacturing, the petrochemical industry, and rural communities both in Ohio and across the country.

“Shale gas is an important part of the energy picture for Ohio, the U.S. and the globe—it has impacts in everything,” Sobel agrees. A non-partisan research center could help policymakers and the public think through the complex trade-offs inherent in developing the resource.

“Of course, industry and the current state government are very pro-fracking, and environmental groups and some communities are very concerned. Both are understandable,” Zeng says. “The purpose of business is to create jobs and make money, and the government wants revenue. But if anything happens, communities will be impacted.”

Sobel notes that “rigid opposition on both sides discourages the search for a middle ground.” The evidence for his statement is everywhere. Cities ban fracking within their borders and energy companies sue to overturn the resolutions. Signs urging opposing viewpoints spring up on rural lawns and attest to disagreement that exists even between neighbors. Even Hollywood weighed in with Promised Land, a feature film starring Matt Damon.

“Both sides have legitimate viewpoints, and as a university we are kind of an independent stakeholder in this,” Zeng says. “We can be the one to step back a little bit, to look at this more objectively, to say, ‘OK, what are the real opportunities and the real challenges? And how do we address them? If this is going to move forward, how do we do it the right way?’ At the same time we can help create new technology, improve safety, improve efficiency, and reduce cost, so we can maximize the benefit and reduce the risk, or minimize it.”

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Learn how Weatherhead faculty address contemporary issues at weatherhead.case.edu/news-and-events.
A dual-degree graduate student at Case Western Reserve University who also serves as president of the Entrepreneurship Club, JeShaune Jackson somehow found the time to create BioComm, a student-run organization that he hopes will help an overlooked technology find its way to the marketplace. And Jackson knows it’s all too easy for promise to be overlooked. The excitement he feels at the prospect of finding a hidden technological treasure mirrors what he felt in June as he presented the very first JeShaune D. Jackson Scholarship to Taylor Williams, a 2013 graduate of his own Bedford Heights high school.

Jackson started the scholarship to assist one male African-American student every year in pursuing a science degree. The really unusual part? Straight-A students need not apply.

“I graduated high school with a 2.4 GPA,” Jackson explains. “But somebody gave me a chance to prove myself.” He recalls that a high school teacher suggested he should look into trade schools because “not everyone is cut out for college. But two master’s degrees later, I’m offering a scholarship at the same high school, just to be able to give that testimony to others on the same pathway—to say, ‘You may not look like it right now, but give yourself some time to develop, and you can be better than you would even imagine.’”

The true value of the scholarship, Jackson continues, lies not in the money but in the mentorship that comes with it. Jackson invited Williams and two other applicants on a tour of Cleveland Clinic and CWRU and to a luncheon with prominent male African-American scientists, surgeons and physicians.

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“It’s really about exposure,” Jackson says. “Growing up, I wasn’t exposed to the career possibilities that were available to me.”

This fall, Jackson started the second year of his MBA at the Weatherhead School of Management, where he is a PNC Scholar. Over the summer, he wrapped up his thesis for a Master of Science degree in entrepreneurial biotechnology. Jackson credits mentors in college and beyond with recognizing and nurturing his gifts. After graduating from Bowling Green State University in 2010 with a degree in biology, he entered the job market in the ongoing recession. His grandmother encouraged him to explore what Case Western Reserve had to offer.

“That’s when I kind of stumbled into [the School of Graduate Studies], and the lady was literally out for lunch,” he remembers. “I was walking away from her door and she said, ‘Who are you looking for?’”

The admissions officer, Julia Brown, invited Jackson in and described some of the graduate degrees on offer, including the master’s program in entrepreneurial biotechnology. “I kind of fell in love with it,” he says. Jackson had minored in entrepreneurship in college. “She said, ‘This program would be perfect for you. But I need you to take the GRE next week.’”
Turning a bad idea into a good one

With the GRE behind him, Jackson enrolled at CWRU that fall. He founded BioComm in 2012 after a semester of Weatherhead classes. The idea came to him as he listened to an MBA student pitch what he candidly admits was “probably the worst idea” for a product.

“But they were super-enthusiastic about pitching it,” he continues. “I thought, imagine what this super-enthusiastic student could do with a really good technology that we have doing nothing here at [CWRU].”

The university’s Technology Transfer Office is charged with filing for patents on behalf of researchers. The staff also prepare business plans to take products to market. But staff time and resources are limited. Jackson saw opportunity in the fact that the Technology Transfer Office is, in his words, “swamped” with the inventions of CWRU scientists.

“They may get 180 to 200” submissions every year, “but you only see one or two companies start up, and then they’ll license out maybe 40 percent to somebody else, which to me means you lose a lot of value. And we feel we can recapture that,” he says. By partnering with the Technology Transfer Office to choose an invention that has merit but is not a priority for its staff, BioComm could help bring a product to market and earn revenue for the university. At the same time, the students involved would ride out the ups and downs of commercialization on a level that can’t be replicated in the classroom.

Jackson has already experienced those ups and downs as an intern with Cleveland Clinic Innovations, which spins off companies that take inventions to market. He is writing his master’s thesis on a Cleveland Clinic product that he managed; recently, it experienced a setback. The product consists of pulverized bone infused with adult stem cells; it can be used to heal severe breaks.

“We use this like spackle to pack inside the gap, and the bone will fuse and grow. It’s like science fiction stuff is becoming nonfiction,” says Jackson.

The product was licensed to a company and available for use for about five years, he explains, but because of an inconsistency in its technical description, the FDA required that it be taken off the market and resubmitted for approval. The intricacies of FDA approval mean BioComm must choose its projects carefully. For their first project, BioComm’s founders considered a device that would improve bladder control in elderly and paraplegic patients.

“But FDA approval for an implantable device? We wouldn’t see any results any time soon.”

The average time to market of a new medical product is 20 years, he says. Graduate students spend only two or three at CWRU. For the optimal student experience and for continuity in managing the commercialization process, BioComm must focus on “research closer to commercial translation,” Jackson explains.

BioComm’s internal advisers include experts from the Technology Transfer Office, the School of Law, and Weatherhead. Their external advisory board comprises C-level executives from Cleveland Clinic, University Hospitals, the biotechnology accelerator BioEnterprise, the entrepreneurship support system JumpStart, and venture capital firms. Jackson recruited friends in the MBA program to serve on BioComm’s executive board (he is president of the organization) and established an elected board of student representatives from law, medicine and engineering.

“So, for example, law students can contribute to the intellectual property searches and MBAs can deal with revenue forecasts,” Jackson says. “We feel like collectively we all can do a decent job comparable to a seasoned individual in the workforce. If we can help get a product to market even one day sooner, you never know if that one day could potentially save someone’s life.”
Life outside the lab

Last year, BioComm earned second place in Johnson & Johnson’s BE VITAL Challenge for student organizations. Contestants from 74 different colleges and universities submitted videos and advanced to the next round based on public voting. (Johnson & Johnson selected the winners.) Finalists included groups from Harvard and Cornell, and BioComm ended up in a tie for second place with an organization from Penn State.

UCLA and Rutgers tied for first place, “but we could come back to [CWRU] and say, ‘We are a really innovative school and are really trying to be advocates for humanity,'” says Jackson. “What we’re about, and I think that’s what makes us different, and that’s what attracted me to the MBA program as well, is that we’re not just, like, churning out students and churning out managers,” he goes on. “It’s really about who you are, being placed with who you need to meet and that personal development.”

Jackson is a natural at making personal connections. He is an outreach fellow with CWRU’s Blackstone LaunchPad, a program that supports aspiring student entrepreneurs; he is also an “ambassador” to CWRU from Bizdom, a startup accelerator created by Quicken Loans founder Dan Gilbert. Yet he admits with a smile that he still misses that solitary pursuit: lab work.

“I guess my entire life I was trying to figure out exactly what I wanted to do and what I was good at,” Jackson says. “And it came naturally to me.”

Friends and business contacts have tried to entice Jackson to pursue a corporate career, citing more generous compensation, but “that’s never what drove me. I’m a guy of faith, so I always say [medicine] is my ordained pathway,” he says. He also wants to stay involved in product innovation and commercialization. And, he says, Cleveland is the perfect place to launch such a hybrid career.

“We’re the medical capital of the world. We don’t have a Pfizer or something like that, but we have really good hospital systems and a fertile environment for biotechnology. I want to capitalize and leverage what we have here in Cleveland to uplift the entire city as well,” Jackson says.

Jackson has included in his LinkedIn profile an anonymous quotation that speaks to the source of his confidence—in his city, in his fellow students (“We are a force to be reckoned with,” he says), and in the life-saving potential of untapped innovations. It reads, “To achieve the impossible, one must think the absurd; to look where everyone else has looked, but to see what no one else has seen.” His confidence, then, is not merely youthful optimism; it arises from a rare gift to perceive not only what is, but what can be.

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Since its conception in 2008, the Weatherhead School of Management’s Leadership Deep Dive has brought close to 150 executives to the campus of Case Western Reserve University for an experience that is often deemed “transformative.” Now the course is starting to have an impact outside the United States. In 2012, Leadership Deep Dive was offered in New Zealand for the second time; it also launched in Dubai in the United Arab Emirates.

“Once they’re exposed to it, people [from all over the world] are excited about expanding it and taking it elsewhere themselves. It’s organic, how it’s growing.”

The initial expansion, in fact, was the brainchild of a New Zealand lawyer, David Patterson. An avid reader of Richard Boyatzis, PhD, Distinguished University Professor and H.R. Horvitz Professor in Family Business, Patterson got in touch with Weatherhead to find out if Boyatzis would fly to New Zealand to deliver a seminar on his concept of resonant leadership.

“Richard had the foresight to say, ‘You know, we’re starting this program and we’re going to do a lot of this [material]. Why don’t you contact the folks in Executive Education?’” Smith recalls. The team invited Patterson to attend the first Leadership Deep Dive for free, and the experience made him even more determined to bring Weatherhead’s leadership development curriculum back home.

“He became our partner,” says Smith. “He used his personal network and contacts to fill the class.” After two successful runs, Leadership Deep Dive will be offered for the third time in New Zealand in 2013–14.

New Zealand presents an interesting case study for the dissemination of the signature Weatherhead approach to leadership development. Smith notes that the country’s population is not quite 4.5 million—just a shade larger than the population of approximately 4.1 million who live in Northeast Ohio.
“You can have an impact on a countrywide level, especially if you can do multiple waves over time” in a country the size of New Zealand, says Smith. “People know one another and are connected, so it doesn’t take long before people start to have shared language and shared knowledge” and a leadership movement is born.

The movement started in Dubai last year. A student in Weatherhead’s Doctor of Management (DM) program had a business partner who managed CCM Consultancy, a training and development firm in Dubai, and who knew Boyatzis’ work.

“Richard is the common theme here,” Smith says. “They thought, ‘Well, we do leadership development throughout the Middle East. What if we brought that Leadership Deep Dive program here and offered it through our organization and in partnership with Weatherhead?’”

The first leadership Deep Dive in Dubai wrapped up in May 2013. Next, CCM Consultancy would like to partner with Weatherhead to expand the program in the region.

“They want to take it beyond Dubai,” Smith says.

Over the three 3-day residencies of Leadership Deep Dive, attendees become different, better leaders by focusing first on the self.

“Leadership is all about understanding and leading yourself; that’s the core,” Smith says. Many executives are so preoccupied with the needs of their employees or their organizations as a whole that they forget about their own needs.

“People give, and give, and give of themselves in leadership roles and don’t realize that that constant sacrifice—dealing with threats and crises and stress—sometimes they’re not able to sustain it over time, and their effectiveness slips as they become less enthused about their work,” says Smith. He says recognizing the need to address their stress with renewing activities (whether that means spending time with family, meditating, or just getting some exercise) is “a big insight” for many executives.

Americans have particular trouble embracing the idea that they must take breaks to maintain their effectiveness, Smith says. In New Zealand, by contrast, “They look at us and think we’re crazy. For example, we’re over there delivering the program, and they’ll say to us, ‘So, are you going to stay two or three weeks and explore the country?’ We go, ‘Two or three weeks? I have another program next week. As soon as this program is over I’m catching a plane!’”

Unfortunately, American workaholism has started to spread to New Zealand, too. But programs like Leadership Deep Dive should serve to slow that process and help New Zealanders maintain their “more relaxed and laid-back approach to work–life balance and to taking time for yourself for renewal,” says Smith.

Interestingly, the content of Leadership Deep Dive needs little or no modification for audiences halfway around the world.

“The things that we teach are fundamental things that transcend culture.”

So while there are slight cultural nuances and adjustments that you make, the basic underlying message is still the same and is received in the same way,” Smith says. The expansion to India of the Master of Science in Positive Organization Development and Change (MPOD) confirmed his feelings.

“The whole MPOD experience is relatively unique, and we had that same experience in India,” Smith remembers. “What we believe and teach holds true.”

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Explore all our professional development options at weatherhead.case.edu/executive-education.
The first thing students learn in the course Analytics for Insight is that “we are living in the age of ‘big data’,” says Jagdip Singh, PhD, AT&T Professor of Marketing in the Department of Design and Innovation. “Every online transaction, every visit to a website is being recorded and stored somewhere. And the data gets bigger by the second, because every second there are probably millions of searches, transactions and exchanges worldwide.”

Imagine you go online to research a purchase—maybe a new pair of high-end headphones. You type “best headphones” into Google and read an article in an audiophile magazine where an expert breaks down the top brands. You check out some of the expert’s recommendations at your favorite online retailer. Pretty soon, ads for headphones start appearing alongside your Google search page and all over Web pages you visit. You click on one of them and add a pair of headphones to your virtual shopping basket. Would it surprise you to learn that your search for the perfect headphones was tracked by marketers using your computer’s IP code and cookies placed on your browser? That analysts were pondering the sites you visited, scrutinizing the ad you clicked to determine its unique appeal?

Your purchase is, of course, a win for the company you bought from. But information about your decision-making process is valuable whether or not you bought anything. It can help companies understand what you want and how best to deliver it to you.

“We want to understand not a customer’s order, but their purchase path,” says Singh. “They may visit Consumer Reports to get some info on a product, then the manufacturer’s or producer’s site to look at pricing and features, and then a competitor’s site to look at what they offer. They may go offline to visit a store in the middle and come back online to place an order. Can that person’s experience help you better serve your customers?”

Liz Smith, BS ‘10, is a senior associate in analytics and optimization at Rosetta, a national interactive marketing agency with a presence in Cleveland. Smith majored in finance, and she is one of two alumni at Rosetta who currently collaborate with Singh, offering their industry knowledge to marketing students. She co-teaches Analytics for Insight.
Math wizardry a plus, but not required

With this course, Weatherhead is venturing into new territory. Intensive collaboration of this kind between faculty and a private company is otherwise unknown at Weatherhead.

Analytics for Insight was officially launched in fall 2012. The course is designed for juniors and seniors who already have a grasp of statistics and basic marketing principles. It is offered in the fall so that if they wish, students can take a follow-up course in the spring that further prepares them for an analytics certification test offered by IBM.

The class covers 11 analytics tools that fall into several categories:

- **Predictive analytics**: Forecasting the customer’s future behavior
- **Web analytics**: Analyzing trends and patterns using data generated from user experiences on the Web
- **Data mining**: Interpreting data about customer visits to a Web page and what they did as a result
- **Attribution analytics**: Looking at the entire purchase path and the effectiveness of different aspects of a digital marketing campaign

Singh says that Analytics for Insight upends the still-prevalent assumption that you don’t need math to do marketing.

“You certainly don’t have to be a math wizard to be good at marketing,” he says. But every marketing professional must, at a minimum, know how to estimate the return on his or her investment in a campaign.

Although Singh says a majority of the students who take Analytics for Insight do admit to a fear of math, extensive hands-on practice with software tools means that many end up surprising themselves with what they can do.

“Students often tell me that the case study approach and relating data to the soft side of marketing helps them make better sense of the numbers,” he says.

The “soft side” to which Singh refers is what might be called the “art” of marketing: designing websites and graphics, writing advertising copy, devising promotions. Analytics provides the hard science.

“So the course puts the two pieces together to say, the way we know the soft side is working is to look at the hard side,” Singh explains. This used to be done by showing marketing materials to test groups, still a common practice. But the kind of experiments that are done in the lab can be done on a larger scale in the real world—or rather, the virtual world of the Internet. Images, words and website layout can all be tested for their effectiveness.

“All we have to do is serve half our visitors with one design and half with the other to find out which wins,” says Smith.

A site optimization team within Rosetta’s analytics group constantly tests the effectiveness of messaging, page layout, and look and feel. The tests help companies segment their customer base to serve each segment better. And the segments can be very minutely delineated. Current technology allows companies to gather intelligence about customer behavior at a granular level—tracking an individual’s meandering path to the purchase of headphones, for example. Companies can, in other words, point to a segment of one.

“Today we want to be individualized. Now I don’t want to know a segment’s bounce rate”—the frequency with which visitors to a Web page leave without looking at a second page on the site—I want to know your bounce rate,” says Singh.
Although it may not be cost-effective to target an audience of one right now, it could be soon. Meanwhile, analytics allow for finely tuned analysis of user experience on the Web.

For example, imagine that a website has a 60 percent overall bounce rate.

“60 percent is an aggregate of potentially millions of customers,” says Singh. Say those millions fall into three segments. In that case, 60 percent may not be a faithful representation of the website’s effectiveness.

“I need to know by segment, and preferably by individual customer, what the bounce rate is,” Singh explains.

The bounce rate for segment A, for example, may be 30 percent. For segment B, it may be 60 percent, and for segment C, 90 percent. Clearly, the website is working well for customers in segment A, 70 percent of whom stick around to look at a second page. But the site is much less successful in retaining the interest of segment C. The 60 percent figure is an oversimplification. It offers little insight into the website’s performance.

Singh explains, “Since our goal is to train students for tomorrow, not today, students need the vision, the sensitivity, to see that all percentages, all aggregates, are deceptive, because they hide the heterogeneity of our world.”

In other words, what you learned in kindergarten is true: Everyone is unique. Market segments are a useful fiction because, in reality, each person responds to a stimulus a little differently. And the decisions each person makes online trace a singular pattern. That is heterogeneity.

Singh continues, “The basic principle in marketing is that heterogeneity is an opportunity. Meaning that the difference between people is our opportunity to create products which meet their individual, customized needs.”

Has analytics completely replaced gut instinct in the marketing world?

“I think there is still some gut instinct involved, but that’s more like the Mad Men days,” says Smith.

Rosetta’s analytics team, she adds, is constantly surprised by the results of their tests. They can measure the effectiveness of something as subtle as a picture of a person with an object versus a picture of a person with no object, Smith says as an example. And because of the flexibility of the digital space, a new test pitting the “winner” of the previous match-up against a fresh contender can begin almost immediately.

A mutually beneficial partnership

Students are not the only ones who discover new knowledge and test new skills in Analytics for Insight.

“Rosetta tells me they have learned a lot from this partnership, because they can apply the rigorous statistical procedures of academia to move to a more advanced stage of analytics for their clients,” says Singh.

Has he, in turn, learned anything new by partnering with the private sector?

“Oh yeah,” Singh says with a laugh. “They say Web and attributional analytics and related areas are moving so fast no academic can keep track of it. I think that answers the question! That’s why this partnership works, because they have what I don’t have. This space is moving so fast, you need a partnership.”

Singh and Smith collected student surveys at the end of the fall 2011 pilot class and the official debut class the following year. Student feedback will help them adjust the content, cases and teaching methods used in the course. What they learned from students in the fall 2012 section was that they wanted more. Of everything.

“They want more data. They want more analytical work, and they want a final project that is data-based. They want more cases, more rich case studies,” says Singh.

“They’re saying, ‘Give us big data—we can deal with it!’”

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Read more about the undergraduate experience at weatherhead.case.edu/degrees/undergraduate.
At 16 percent of the U.S. population, Hispanic-Americans attract great interest from politicians hoping to secure votes and companies looking to broaden their customer base. But to talk about “the Hispanic vote” or “the Hispanic consumer” as an undifferentiated mass is to ignore great diversity within the Hispanic community, says Gary Hunter, PhD, assistant professor of Design and Innovation. That diversity has to do not just with ancestry or country of birth, but with the interplay of Hispanic and American identity.

“The largest minority in the U.S. is quite a sizable market, and if you think about that whole market and treat it as one homogeneous set, it’s going too far. It’s an oversimplification,” Hunter explains.

In their article, Hunter and his colleagues describe acculturation as “the phenomenon of culture change that occurs as a result of extensive contact between cultural groups.” The U.S. has absorbed wave after wave of immigrants who have acclimatized to American culture while at the same time shaping it with their own mores. Ultimately, linguistic and cultural barriers tend to blur and dissolve as immigrant communities assimilate into what’s known in the field as the “host culture.”

Hispanic-Americans are no different, becoming increasingly likely to identify with American culture with each succeeding generation. But Hunter and his co-authors point out that acculturation does not necessarily mean shedding one’s national or ethnic heritage. Instead, their study proposes biculturalism, a theory that originated in sociology and psychology, as a widespread third way to be American.

“A lot of people present it as a false dichotomy: You have to choose to be American or be your own culture,” says Hunter. “The bicultural proposition goes against that notion and says you can be both.”
To develop their acculturation-based segmentation scheme, the researchers designed a questionnaire and contracted with a marketing research firm to survey a random sample of Hispanic consumers in Los Angeles, New York, Chicago, Miami and Houston. Together, these cities are home to over 40 percent of the Hispanic population in the U.S. The questionnaire covered demographic information and information about language use. We take our cultural cues from the people who surround us, so respondents were also asked about the people whom they spent the most time with. Were their family and friends mainly Hispanic? What about colleagues at school and work?

In addition, the survey included two sections geared toward assessing cultural identification. One section addressed the question directly, asking respondents about their pride in their Hispanic and American identities. The other section related to a deeply embedded value in Hispanic culture: familism. Hunter and his colleagues define familism as “a strong identification and attachment to family members (nuclear and extended) along with a deep awareness and pride in family membership.”

“Familism is a concept I learned a lot about through this research and from Cecilia. She is Mexican-American and had a lot of interesting insights,” Hunter says. “The Hispanic perspective on family is different from the American perspective, which is more individualistic. They’re more collectivist, and everything is focused more on extended families—not just mothers, fathers, sisters and brothers but uncles, aunts and cousins.”

Familism is one of the most enduring aspects of Hispanic culture. Even as Hispanic-American families integrate down the generations into the host culture, family may remain of central importance. The researchers focused on familism as a kind of barometer of biculturalism among Hispanic-Americans.

“Familism is one of those core values of Hispanic culture, so it’s something that I think Hispanics strive hard to keep in their culture,” Hunter says. “It’s okay to identify with America, but stay loyal to your family’ is part of what they’d advocate.”

Biculturals and assimilators tend to have resided in the U.S. for longer, or they may be second- or third-generation Americans. Both groups tend to prefer using English. But while biculturals strongly identify with their Hispanic heritage and American culture both, assimilators identify more with American culture. Retainers and non-identifiers mainly prefer using Spanish, but while retainers, who were often born in a Latin American country, strongly identify with Hispanic culture and not American culture, non-identifiers do not display a strong affinity for either. (The authors cite behavioral science research indicating that non-identification may result from cultural discrimination.)

So what should a company do if it wants to reach Hispanic consumers? For one thing, stop assuming that Spanish-language messages via Spanish-language media will have universal appeal.

“If you’re trying to target markets that are high in Hispanic identification”—biculturals and retainers, in this scheme—“then Spanish is going to work better than with assimilators, who might reject the use of Spanish language in promotional activity. Or they could be non-identifiers, and that could be alienating to them, as well,” Hunter explains.

Understanding familism can also help companies target certain segments. For example, people who strongly identify as Hispanic may prioritize their children’s education over other goods and services.

“So, do I invest in a new car or do I invest in my son’s or daughter’s education? If you are selling a higher-end product, high Hispanic identification would predict that’s going to be a harder trade,” says Hunter. “But if you’re selling tuition, like we are? High Hispanic identification is actually a positive for universities.”

The purpose of this study, however, is not to tell companies how to target Hispanic-American segments. Instead, its purpose is to prove that segmentation based on cultural identification works. Another equally important purpose is to show that biculturalism is a measurable phenomenon.

“The biculturalism proposition is out there, but there’s been very little work on the empirics,” says Hunter. “So people have thought about these ideas, but then to go out and show a way to measure these things is a major part of the contribution.”

Hunter finds the concept of biculturalism compelling and distinctly American.

“I like the fact that you can be in any of these segments and still be American,” he says. “It’s very American to say, ‘We’re okay with whatever identifications you want to establish.’ We have to keep reminding ourselves of that to keep that, but I think that is an American strength.”
Tylenol or Top Care? Bayer or Home Best? When you buy an over-the-counter medication, do you reach for the name brand’s familiar packaging? Or do you check the price of the generic option first? Mariana Carrera, PhD, assistant professor of economics, recently conducted a study to determine why more consumers don’t purchase generic over-the-counter drugs when these products so often cost substantially less than the name brand.

The word “experiment” often conjures up laboratories with microscopes and test tubes, but this one took place in a supermarket. Twelve supermarkets, actually. Carrera collaborated with Sofia Villas-Boas, a colleague at the University of California-Berkeley, on fieldwork that they hoped would shed light on the relatively small market share of generic over-the-counter medications. Where a generic equivalent for a prescription drug exists, a study found that it is prescribed 89 percent of the time. But by analyzing in-store pharmacy sales at a major supermarket chain, Carrera and Villas-Boas found that only about half of over-the-counter drug purchases were generic. This was despite the fact that the brand equivalents cost 40 to 60 percent more. Why would a consumer pass up the opportunity to save that much? Carrera and her colleague started out with three hypotheses.

**Hypothesis 1**: Consumers aren’t aware that generic drugs contain the same active ingredients in the same formulations as brand-name drugs, or that they are subject to the same stringent quality control.

**Hypothesis 2**: Consumers aren’t aware of the magnitude of the price difference between some brand-name drugs and their generic equivalents.

**Hypothesis 3**: Consumers erroneously assume generics are inferior to brand-name drugs, a bias that could be cleared up by providing information about other shoppers’ purchases.

Carrera and Villas-Boas tried different ways of influencing customer behavior in six of the twelve participating stores (the others formed the control group). They stuck labels to the store shelves beneath the price tags of selected generic drugs to convey information that might prompt customers to purchase the generic over the brand-name drug.
The researchers tested their first hypothesis with three varying labels. One used reassuringly technical language drawn from the FDA—for example, “The FDA determined this product to be bioequivalent and therapeutically equivalent to Zyrtec tablets.” The second type of label was less specific—for example, “This product contains the same active ingredient as Zantac 150 and has been approved by the FDA.” The third, most noncommittal version of the label informed consumers, “This product contains the same active ingredient as Bayer regular-strength aspirin.”

Carrera and Villas-Boas found that while the first statement bumped up the purchase rate of the labeled product by 11 percent, the other two had a negligible impact.

“One possible interpretation is that most people do know what the generic is, but don’t trust it for some reason. We don’t feel like we’ve nailed down that part of it,” says Carrera. “The evidence suggested that the first framing, the one using the word ‘bioequivalent,’ was effective, but the simpler statements were not.”

To test the second hypothesis, Carrera and her colleague spelled out the savings consumers could expect from buying generics. They created two different labels. The first type stated the percentage that customers saved by choosing the store brand, and as might be expected, these labels worked well. In fact, the market share of labeled generics jumped 20 percentage points, and the store sold 20 percent more of these drugs.

The second type of label reframed the information, highlighting the percentage by which the price of the name-brand medication exceeded the price of the generic version. The researchers were surprised to find that this kind of label appeared to have a very slight negative effect on generic sales. Perhaps this was because these labels were posted under the generics, and their mere proximity affected consumers’ perception of generics. However, the impact was so slight as to be statistically insignificant.

To test their third hypothesis—that some consumers are biased against generic drugs, but that their biases can be dispelled by information about other consumers’ beliefs—Carrera and Villas-Boas decided to stimulate “observational learning” among shoppers. The theory was that if shoppers knew that many satisfied customers purchased generic drugs, they would revise their feelings toward them. They simply lacked information about their peers’ preferences. Who rifles through their friends’ medicine cabinets to figure out what to buy?

The researchers again made two different types of label. For the first type, they calculated the percentage of customers who purchased the generic version of a given drug in 2011. The second type featured the percentage for the first quarter of 2012 (the experiment was conducted in summer 2012). Carrera and her colleague wanted to determine if variation in the percentage caused the sales of generics to vary, also.

Once they knew more about other shoppers’ purchasing habits, consumers did indeed shift their behavior: Sales of generics increased by more than 20 percent. But the shift was most noticeable when the label noted that 50 percent or more of shoppers chose the generic drug. When that was the case, the market share of the labeled drug rose an additional 10 to 14 percentage points. In fact, the greater the percentage posted on the label, the greater the bump in a drug’s subsequent sales.

Carrera and Villas-Boas plan to follow up their study with a consumer survey that they hope will help them better understand the assumptions we make about over-the-counter medications.

“The idea of the survey is to confirm what the results of the study make you suspect, which is that people who buy the brand name underestimate how many people buy the generic,” says Carrera. “So we’re going to ask them to make a hypothetical choice. Here are two packages, one of Advil and one of generic ibuprofen. Which would they buy? Regardless of their choice, we’ll ask them what percentage of other shoppers they think make that choice.”

Carrera and Villas-Boas also intend to expand their experiment to randomly selected stores nationally. The supermarket chain will roll out versions of their labels as part of its weekly price changes. Net revenue from sales of a house brand is greater than that from brand-name sales, so it is in the retailer’s interest to promote these products.

“The company] might just continue with the most successful approach themselves,” Carrera says.

But this study has implications beyond the interests of a supermarket or pharmacy chain. Carrera points out that consumer preferences for brand-name products over generics are relevant to debates about “patient engagement” in healthcare decisions—a current industry buzzword. She writes, “When given more say over treatment choice, patients may reveal firm preferences for more advertised products, or biases toward more costly products or procedures because they are presumed to be superior.” To keep costs down for everyone, it would help to know where these assumptions come from and how they can be changed.

“What I have been thinking about as the motivation for the paper is healthcare spending and the disconnect between consumers choosing what they want and others paying for it. How do you get the cost to resonate?” Carrera explains. “And this is an interesting setting, because people are paying the whole cost themselves but are willing to pay extra for something they feel better about. So I think it’s useful to figure out where people are getting the information that leads them to choose one over-the-counter drug over another. It’s so relevant to many healthcare decisions.”

The benefit of patient engagement is thus dependent upon patient education. Parsing treatment decisions made independently of expert advice, as Carrera’s study does, suggests opportunities for education that could improve our health, financial and otherwise.

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Visit weatherhead.case.edu/faculty to read about current research interests.
More movies are made in India than in any other country. In fact, twice as many movies are made in India as in the U.S. (home to the world’s second largest film industry). These days, multiplexes are replacing older single-screen cinemas, especially in India’s big cities. Access to the Internet and social media is spreading apace among city-dwellers, so cinephiles can check in with their peers and the critics before they spring for tickets.

Does all of that online information—the informal thumbs-ups and thumbs-downs that crop up on Twitter and comment boards, above and beyond professional reviews—affect a film’s box-office performance? Rakesh Niraj, PhD, an associate professor of marketing in the Department of Design and Innovation, decided to find out. A review of the academic literature around word of mouth and what are known as user generated reviews (UGRs) found previous studies yielded only mixed evidence. But Niraj and co-author Jagdeep Singh, PhD, AT&T Professor of Marketing in the Department of Design and Innovation, hypothesized that both the quality and quantity of online reviews, including those on social media, would correlate positively with ticket sales.

How do you quantify the public’s response to a movie? Niraj hired two student research assistants, Sandeep Kumar, MBA ’11, and Priyanka Pawar, MBA ’11, to help with data collection and processing. Being a movie buff was one of the qualifications for the job. Kumar came recommended by Arindam Jha, MBA ’11.

“Arindam said, ‘I know that last summer, Sandeep was watching four Indian movies a day, so he’s the one you want on your project!’” Niraj laughs.

The researchers followed the 48 Bollywood movies released between October 15, 2010, and April 15, 2011, in real time. “Bollywood” refers to movies in Hindi, one of the most widely spoken languages in India and elsewhere: About half a billion people speak Hindi within India and across the world. There are thriving industries that produce films in a dozen other official languages of India, but those have a more limited, regional distribution than Bollywood movies.

Niraj is a fan of Indian cinema, which he usually enjoys in the company of his wife and daughter. In fact, the two of
them got involved in the project, too, helping to analyze and summarize information about the films from trade and popular magazines and websites. The family also watched 10 or so of the movies.

“All kinds of movies came out, and the bottom 20 percent were like, really? Someone thought this would be a good movie?” Niraj says. The whole family agreed that the worst idea was a twist on the traditional horror movie.

“This one was a daytime horror movie. They actually said that in the trailer: ‘A daytime horror movie, a new concept…’” says Niraj. “Even if I wanted to watch it, I don’t think I could. It came out and it was quickly killed.”

While most U.S.-based studies of this kind are based on data from Yahoo! Movies, Niraj says, no single Indian site is as comprehensive.

“That’s where our MBA students came in very handy,” he explains. “We said, ‘Talk to your friends and figure out where they get that information.’”

Aggregated critical reviews came from a website called BookMyShow.com and box-office performance numbers from the top Bollywood trade magazine and a trade website. Pawar created a Java-based program to “scrape” UGR data from sites including yahoo.co.in, rediff.com, Twitter, YouTube, popular newspapers and a forum called BollySpice.com.

Pawar’s program trawled these sites for all of the tweets, posts and comments that mentioned the 48 movies in question, and fed the relevant text—English, Hindi and “Hinglish” (a hybrid of the two languages)—into a spreadsheet. The prevalence of English and Hinglish reflected a base of mainly young, urban users.

“India is a very youth-dominated economy in some ways, and also a developing country, so broadband access is behind,” says Niraj. “So when you get this data, it is only from that certain segment that has access to these things.”

Would the fact that the data came disproportionately from a young, urban segment affect the outcome of the study?

“In Indian movie-watching has changed and become more big-city dominated and multiplex-dominated. And the bigger cities are getting more and more influential in determining the total box office,” Niraj says. Even though there are still more single-screen theatres in India than multiplexes, tickets at the smaller theatres cost less and therefore represent a smaller share of box-office revenue.

“So because multiplexes were a big part of the business, it was reasonable to focus on social media chatter by primarily city-based youth,” Niraj explains.

In order to accurately assess the impact that word of mouth and UGRs had on box-office sales, Niraj and Singh had to take into account many other factors that would influence those sales—for example, the marketing budget allotted to the films.

“Even to write a terrible review, you have to have seen the movie,” Niraj explains. “So movies that are really advertised and promoted well, those are the ones that get a lot of reviews. And especially in this particular context, some people just like certain stars, so they’ll go ahead and write positive things.”

He continues, “What we wanted to see, over and above these factors that are well known, was: Do social media and word of mouth and positivity still add value? Do they still add more explanatory power?”

A lexicon of about 700 words culled from UGRs and critical reviews were coded according to the sentiments they expressed, from very negative to very positive—from “maha bakwass” (“Maha means supremely and bakwass means, like, really bad,” Niraj explains) to “mind-blowing” (“Everyone in India keeps saying ‘mind-blowing. It’s just taken off’”).

For each of the 48 movies, it was then possible to calculate the number and level of positivity (or “valence”) of reviews.

The study confirmed Niraj’s hypothesis: UGRs and social media did influence ticket sales. And both quantity and valence mattered. The cumulative effect of review upon review sprinkled with phrases like “pakka script” (pakka means solid) was box-office gold…up to a point.

Niraj had also hypothesized that the data would show positivity to have a saturation effect. In other words, he predicted that better reviews would lead to better ticket sales, but that beyond a certain threshold, increasing positivity would cease to help (and might even harm) a movie’s box-office performance. The results vindicated his theory.

“If you think about it, it makes sense, because people are always on the lookout for bought media,” Niraj explains. “So they’ll say, ‘That reviewer is saying only positive things because they are in the pocket of the producer.’ So to maintain some level of credibility, you need some negativity.”

Niraj and Singh presented the resulting paper, “Revenue impact of positivity ratio of user generated reviews,” at a December 2012 marketing conference in Chennai, India. To build on their study, they then approached Casey Newmeyer, PhD, Nancy and Joseph Keithley Fellow of Business Marketing and assistant professor of marketing in the Department of Design and Innovation, about adding her consumer behavior expertise to the mix.

Together, the three scholars designed a survey that they hope will tease out the difference between professional reviews and UGRs. Does a positive review from a critic mean more or less to a movie-goer than a peer’s opinion?

“Some of it is a trust thing; consumers tend to not trust experts like they do their own peers, so they tend to trust user reviews more than expert reviews,” says Newmeyer. She cites the movie Transformers as an example. Eighty percent of audience members liked the movie, she points out, even though it was panned by the critics.

Newmeyer was fascinated by the data that Niraj, Singh and their research assistants had compiled—though she admits to complete unfamiliarity with the Bollywood oeuvre.

Niraj sees that as an upside. He jokes, “That was the idea, bring it to a dispassionate observer!”
DIANE MCDANIEL EXTENDS GRATITUDE TO MENTORS AND A HELPING HAND TO WEATHERHEAD STUDENTS

Diane McDaniel will never forget the phone call she received on her birthday in 1968.

The conversation offered the best present she could have imagined—and one that affects her life to this day.

Her Glenville high school principal was on the other end of the line with news from Baldwin Wallace University. The school had a scholarship for minority students, and he wanted to recommend her. To her delight, she began her undergraduate career that fall.

The financial assistance did not simply make attending college easier: It made it possible.

McDaniel was in the top 10 percent of her graduating class, but her family lacked the resources to pay tuition. A brief conversation with her principal opened up an option that changed her post-high school plans altogether.

Having obtained her bachelor’s degree, McDaniel wanted more—her MBA. Once again, the support she needed appeared. Chuck Ames, then-CEO of Acme-Cleveland Corporation and McDaniel’s boss, learned that she had applied to a local MBA program. Ames, a longtime friend of the Weatherhead School of Management, asked why she hadn’t applied to the school he considered the best in the region. McDaniel indicated that the cost of tuition stood in her way. Nevertheless, she applied to Weatherhead. A few months later, McDaniel learned that she had been accepted into the Executive MBA program—and her employer covered the cost.

After 25 years at Acme-Cleveland Corporation, where she progressed from personnel clerk to vice president of human resources, followed most recently by eight and a half years as director of human resources at Cleveland Metroparks, McDaniel is now retired and recognizes the pivotal role that help from mentors played in advancing her academic and professional aspirations.

“I had an incredible experience at Weatherhead,” McDaniel says, “and was given an opportunity that many individuals are not given today.”

Immediately after graduating, McDaniel began supporting Weatherhead both with her dollars and her time. She received the Weatherhead Outstanding Alumnus Award in 1993 for her years of service, leadership and financial
support for the school.

But she wanted to do more. Reflecting on her past, McDaniel decided that she wanted to support the next generation of minority students. Financial support had been the deciding factor in her educational pursuits, so it made sense for McDaniel to back student scholarship at Case Western Reserve University.

“I always thought that you needed millions of dollars to set up a scholarship,” says McDaniel, who was happy to learn that this was not the case. With a bequest of $50,000, she worked with Weatherhead’s development team to establish the Diane O. McDaniel Endowed Scholarship Fund, which will be used to provide merit scholarships to African-American and Latino students studying in the MBA or Master of Science in Positive Organization Development and Change (MPOD) programs.

McDaniel decided to begin funding the scholarship now so that she can see its impact and meet its beneficiaries in her lifetime. “I would like to give other minority students access to the same experiences I have been blessed with throughout my life and career,” she says. “I want to reach back and help pull them forward.”

McDaniel was offered life-changing opportunities by people who saw her potential and extended financial support and encouragement. She is excited and proud that her legacy will allow her to do the same for others.

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Accounting

Karen Braun, PhD, CPA, associate professor of accountancy, was recently an invited speaker for the Pearson Education Accounting Symposium for Educators in both Las Vegas and Tampa. Her presentation in both locales was titled “Strategies and Tools for Integrating Sustainability into Introductory Accounting Courses.”

The following trio of professors co-authored a paper which was recently accepted by the *Journal of Accounting Education*: Timothy Fogarty, PhD, CPA, professor of accountancy; Gregory Jonas, PhD, CMA, assistant professor of accountancy; and Larry Parker, PhD, CPA, professor of accountancy. “The medium is the message: Comparing paper-based and Web-based course evaluation modalities” explores the shift of student evaluations from the classroom to the Internet, based on experiences at Case Western Reserve University in recent years. This paper won a best manuscript award at the American Accounting Association’s 2012 Ohio Regional Conference and was accepted for presentation at the American Accounting Association’s annual meeting.

Fogarty and Jonas also collaborated on another article, titled “Author characteristics for major accounting journals: Differences among similarities 1989–2009.” Published in *Issues in Accounting Education*, this paper examines a 20-year publication history of three highly ranked accounting journals to determine if there are differences in the preferred author characteristics.

In other news, Jonas has been selected to chair the subcommittee for the Institute of Management Accountants’ Research Foundation, which funds timely research on accounting and financial management subjects that can be applied to current and emerging business issues.


Banking and Finance

**Professor of Banking and Finance Scott Fine** was quoted in *The Plain Dealer* on Sherwin-Williams’ $9.5 billion record sales in 2012, pointing out the fact that very little of the company’s increase in sales was a result of acquisitions. *The Plain Dealer* also quoted Fine on another Cleveland-based company, American Greetings Corp., after members of the controlling Weiss family proposed taking the company private again. Fine said that going private might allow the company to take some risks without having to keep shareholders happy. He also cautioned, however, that they would take on a lot of debt, which they would have to focus on repaying.

Leonardo Madureira, PhD, associate professor of banking and finance, presented his paper “Sell-side benchmarks” at the Financial Management Association meeting in Atlanta in October. Another paper, “Analysts’ industry expertise,” was published as the lead article in the October–December 2012 edition of the *Journal of Accounting and Economics*. Finally, he presented “Stock picking, industry picking and market timing in sell-side research” at a recent meeting of the American Finance Association in San Diego.

So far in 2013, William Mahnic, associate professor of banking and finance, has appeared on the WKYC-Channel 3 television program *Live on Lakeside* three times to discuss five ways to make more money, handling student loan debt and why 401K savings are a must. In February, his first post as a guest blogger for *Crain’s Cleveland Business* appeared on that publication’s website explaining how 2013 might be a very good time for business owners to consider selling their firms.

J.B. Silvers, PhD, John R. Mannix Medical Mutual of Ohio Professor of Health Care Management, was quoted in a WKSU piece on baby boomers and retirement. According to Silvers, most people don’t do a very good job selecting the investment opportunities that are right for them because they don’t have the knowledge necessary to do so.

Silvers, who is also a MetroHealth board member, participated in a panel discussion on a screening of *The Waiting Room*, a documentary film about a public hospital in Oakland, Calif., that mainly serves uninsured patients. The documentary came to Northeast Ohio in March and was screened at the Cleveland Museum of Art.
The research of Silvia Prina, PhD, assistant professor of economics, was used in a blog post for the Consultative Group to Assist the Poor. In her experiment, Prina looked at whether informal savers would move to formal savings accounts. The post’s author says that Prina’s study, among others, is driving important policy decisions and “showing how research on improving access to savings for the poor can be translated into useful insights to inform development programs.”

In February, Scott Shane, PhD, A. Malachi Mixon III Professor of Entrepreneurial Studies, was quoted in an *Inc.* magazine article about why banks are still not lending to small businesses. He argued that while small business lending is no longer declining, numbers are still far below where they were before the recession. Shane was also quoted in the *Dayton Daily News* in an article regarding fewer Ohioans starting their own businesses. One reason for this, according to Shane, is due to Ohio’s economy being heavily reliant on industries like auto and steel production, where self-employment is impossible.

Similarly, in a commentary on the *Entrepreneur* website, Shane pondered what is keeping Americans from self-employment. While reasons like lack of a business idea or insufficient resources are part of the equation, Shane argued that most people don’t go into business for themselves because they are afraid of what will happen if they don’t succeed.

Among his recent contributions to *Businessweek*, Shane discussed how Ohio’s budget plan could increase hiring and economic growth for small businesses, argued that the worker-classification rules for the U.S. Internal Revenue Service are not working because they are too confusing, and explored a new trend in patent enforcement: Patent holders are seeking royalties from unsuspecting companies for using intellectual property that protects commonly used products like office equipment.

In his Small Business Trends blog, Shane examined IRS findings that small business owners are more likely than other Americans to underpay on their taxes. And at the start of the sequester in April 2013, Shane explained its impact on small business contractors. While Democrats on the House Small Business Committee estimated that small companies would lose $7.6 billion in federal contracts, Shane argued the amount would be much smaller.

In a *Plain Dealer* article in March, Mark Votruba, PhD, associate professor of economics, weighed in on the Cleveland Clinic’s recently established partnership with Community Health Systems in Nashville. Votruba said that this partnership amounts to “consulting services” and that the value should come from major healthcare players sharing their strengths.

**Economics**

**Design and Innovation**


Gary Hunter, PhD, assistant professor in the Department of Design and Innovation, was quoted in a *Plain Dealer* article regarding the J.M. Smucker Company’s intentions to make even more of its best-selling Jif and other peanut butter brands. According to Hunter, Smucker’s expansion is not only good for the company but also good news for the Northeast Ohio economy.
Kalle Lyytinen, PhD, Iris S. Wolstein Professor in Management Design, was named a visiting professor at the London School of Economics (LSE) department of management for 2012–2015. He visited LSE in early March and gave lectures on scalable sociomaterial work system analysis and reviewing practices in the information systems field. Lyytinen also published an article in Design Issues, titled “Oscillating between four orders of design: Designing digital magazines,” and an article in Management Information Systems Quarterly, titled “Toward a generalizable sociomaterial inquiry: An approach for analyzing patterns of association in sociomaterial routines.” He was also ranked third most productive scholar in the top six information systems journals between 1992 and 2012.

Casey Newmeyer, PhD, Nancy and Joseph Keithley Fellow of Business Marketing and assistant professor of marketing in the Department of Design and Innovation, presented a paper titled “Retail co-brands and consumers’ attributions of responsibility,” which was included in the conference proceedings for the American Marketing Association Winter Educators’ Conference in February.

Rakesh Niraj, PhD, associate professor of marketing in the Department of Design and Innovation, won the 2012 Journal of Business-to-Business Marketing Outstanding Article Award for his paper “Uncovering customer profitability segments for business customers.” The main criteria used in the selection for this award are the article’s overall contribution to the discipline of business marketing and its potential for impact in the future.

Organizational Behavior

The Plain Dealer featured Distinguished University Professor Richard Boyatzis, PhD, H.R. Horvitz Professor in Family Business, in an article regarding Case Western Reserve’s first free massive open online courses (MOOCs). Boyatzis taught Inspiring Leadership through Emotional Intelligence, a six-week course, through video lectures, electronic discussions, assignments and tests.

Diane Bergeron, PhD, assistant professor of organizational behavior, won the 2013 Diekhoff Award for Distinguished Graduate Teaching. “I have found that everyone has a perspective, something to bring to the table. So teaching is about doing what you need to do to get that out of people,” Bergeron told Case Western Reserve’s e-newsletter The Daily. She also recently shared tips with Fox Business on building employee loyalty and retaining top talent.

Susan Case, PhD, associate professor of organizational behavior, was recently appointed to the Academy of Management Committee that will select the Sage Award for Scholarly Contributions to Management for 2013. She was also invited to speak in March to the International Fellows at the University of Maryland Smith School of Business on religion, business and global leadership.

Case also wrote a chapter, “The genesis of integrity: Values and virtues illuminated in Judaism, Christianity, and Islam for workplace behavior,” in the book Integrity in Organizations: Building the Foundations for Humanistic Management, which was published by Palgrave Macmillan in December 2012, as part of its series Humanism in Business.

The expertise of Associate Professor of Organizational Behavior Chris Laszlo, PhD, was cited in a recent Rocky Mountain Institute (RMI) blog post about retrofitting buildings as part of an energy management portfolio. The post’s author discusses Laszlo’s insight into how “sustainability helps humans and enterprises ‘flourish’ in addition to how it creates competitive advantage.”
CLASS OF 1969

James Herget, MBA, and Pamela Bowes Davis, MD, PhD, were married on March 30, 2013, at Harcourt House near the Case Western Reserve University campus in Cleveland Heights. Reverend Sana Loue, an interfaith minister and professor of bioethics at the university, officiated.

Davis is vice president for medical affairs and dean of the medical school at Case Western Reserve. Herget is an independent executive search consultant in Cleveland. Their story began in 2008, when they met at a reception at Harcourt House, across the street from where Herget has lived for more than 60 years.

CLASS OF 1985

The Federal Reserve Banks’ Financial Services Policy Committee (FSPC) support office, which works out of the Federal Reserve Bank of Cleveland, appointed Terrence “Terry” Roth, MBA, to senior vice president. Roth brings 39 years of experience to his new role, including three years in the FSPC support office, nine years in the Federal Reserve system’s retail payments office, and the balance of his career in the Federal Reserve Bank of Cleveland’s marketing, quality check, and data systems support departments.

CLASS OF 1987

In July 2013, Mark Weinberger, MBA/JD, assumed the role of global chairman and CEO of Ernst & Young, a professional services organization specializing in accounting, tax, advisory and transactions with 170,000 employees in more than 140 countries. Weinberger joined the company’s Washington, D.C., office in 1987 and has held many senior roles with a track record of leadership both inside and outside of Ernst & Young. He previously served as global vice chair – tax, leading Ernst & Young’s global tax practice. He has been part of the company’s highest governing body, the Global Executive Committee, as well as the Global Policy and Global Markets Executive Committees and the Americas Executive and Operating Committees.

Weinberger has also had senior roles in government, and is recognized as a leading authority on tax and regulatory policy. He is married and has four children.

CLASS OF 1990

Christopher A. Coughlin, MBA, was appointed group president of the Mobile and Process Industries of The Timken Company.

Greg Mulach, MBA, was appointed Erie Shores market president at FirstMerit Bank.

Jeffrey Ponsky, MD, EMBA, has taken on a new role as the associate dean for alumni affairs at the Case Western Reserve School of Medicine. An accomplished alumnus, surgeon and teacher, Ponsky will broaden and strengthen relationships with alumni of the medical school and develop opportunities to engage its global network of alumni as advocates, partners and philanthropic supporters.

CLASS OF 1992

Mark Froimson, MD, EMBA, quality review officer for the Orthopaedic & Rheumatologic Institute of the Cleveland Clinic Health System, has been elected to the board of the Arthritis Foundation’s Northeast Ohio chapter.

Dawn Minotas Gainer, MACc, who specializes in accounting for small businesses and income tax preparation for small businesses and individuals, started her own firm, Minotas Financial Solutions.

CLASS OF 1993

Deborah Miller, MBA, was appointed as senior advancement officer at Baldwin Wallace University. Prior to this position, Miller was director of development at Cleveland Hearing & Speech Center for seven years.
CLASS OF 1994

Safeguard Properties named Sandy Opacich, MBA, vice president of human capital. Opacich is stepping into a newly created executive position, where she will handle talent acquisition, employee development, compensation, benefits and general human resources.

Tojo Thatchenkery, PhD, is a professor and director of the Master of Science in organization development and knowledge management at the George Mason University School of Public Policy. He is also a member of the NTL Institute of Applied Behavioral Science and the Taos Institute policy, MBA, organization development and executive development programs in the United States, Canada, South America, Europe, Australia and Asia. Thatchenkery is also on the editorial board of the *Journal of Applied Behavioral Sciences* and the *Journal of Organizational Change Management*.

CLASS OF 1995

Robert Cutler, MBA, joined HP as a member of its field sales organization for the enterprise software business unit. In his new role, he will sell the operations management portfolio of solutions to select commercial accounts in the Southwestern United States.

Ted Evans, MBA, was elected secretary of the board of the Leukemia & Lymphoma Society, Northern Ohio Chapter. In addition, he was recently elected to the board of the Cleveland Zoological Society and to the board of Rainbows for All Children in Chicago. Evans is director of business development at Newry Corp.

CLASS OF 1996

Michael DeAloia, MBA, assumed the role of regional vice president for Expedient’s Cleveland operations. Expedient offers colocation, connectivity and managed services to its clients, operating eight data centers in six cities, including two in Cleveland.

CLASS OF 1998

David Bouffard, EMBA, was promoted to vice president of public relations at Sterling Jewelers Inc.

Preet Jesrani, MBA, has worked as an entrepreneur and as a business, IT and mobile strategy manager for Fortune 500 clients; as a political fundraiser for the Ohio Democratic Party; and most recently, as a senior policy advisor in the Ohio treasurer’s office under former governor Ted Strickland’s administration. In addition to his MBA, he has an undergraduate degree from the Krannert School of Management at Purdue University. He resides with his wife and two children in Sandusky, Ohio.

CLASS OF 1999

Michael Barnes, EDM, has been named founding dean of the School of Business & Economics at Tan Tao University, Vietnam.

The Timken Company appointed A. Marcin Binczyk, MBA, to the position of general manager of supply chain design and engineering of the steel segment.

A native of Sosnowiec, Binczyk earned a bachelor’s degree in business administration at the National Louis University in Chicago. He resides in North Canton, Ohio, with his family.
CLASS OF 2000

David Mariano, BS, rejoined Western Reserve Partners as a director and will lead the firm’s buy-side advisory practice. Prior to returning to the firm, Mariano spent three years at the Horsburgh & Scott Co. in roles including business analysis, marketing, business development, strategy development, management and operations. Mariano also founded and operated two businesses and regularly writes about leadership at davidpmariano.com.

CLASS OF 2001

Rose Abood, MBA, was named director of marketing and communications at Tucker Ellis LLP.

Rebecca Feder, MBA, assumed a new role as the HR business partner for Tyco International’s CFO and worldwide finance team. Feder will work closely with the Tyco leadership team to create a world-class finance organization, helping Tyco deliver its mission to advance safety and security, by finding smarter ways to save lives, improve businesses and protect where people live and work.

Richard Simon, MBA, was appointed manager of assurance services for Schlabig & Associates LTD, a professional accounting firm.

CLASS OF 2002

Richard Bonaccorsi, DM, joined Harrison College as vice president of international operations. He most recently spent more than eight years as director and senior lecturer in graduate management programs at the Illinois Institute of Technology.

CLASS OF 2003

Michael Brink, MBA, was appointed president of the board of trustees for the HELP Foundation Inc., a nonprofit social services agency that assists individuals with intellectual and developmental disabilities in Cuyahoga, Geauga, Lake and Summit counties. Brink is counsel in the Cleveland office of Tucker Ellis LLP.

Andrew Connors, MBA, has been appointed partner and equity shareholder at Fairport Asset Management, a private wealth management firm in Cleveland that provides the high-net-worth community with a broad range of wealth management and investment management services. Connors heads up the firm’s Closely Held and Family Business Owner practice groups, spending much of his time advising clients on strategies to achieve their personal, business and financial goals.

Patricia J. Mintz, DM, is the first editor of Leading Nonprofit Organizations (LNO), a free online practitioner newsletter. Mintz continues to engage in professional relationships with graduate students, faculty and alumni as a member of the DM Nonprofit Research Affinity Group. She is the principal strategic adviser for PJM & Associates and serves as a volunteer board member for three nonprofit organizations.

CLASS OF 2004

Libra Industries announced that Jennifer Altstadt, EMBA, has joined the electronics contract manufacturer as president. Altstadt previously served as president of Weatherchem Corporation in Twinsburg, Ohio. In her position at Libra Industries, she will be responsible for overseeing all operations to ensure profitable growth and strengthen customer relations by improving time to market, reducing total systems cost, and increasing quality. Altstadt, who has a strong engineering background, is a respected industry leader whom many recognize as a visionary. She lives with her husband and two sons in Solon, Ohio.
CLASS OF 2005

Aram Nerpouni, EMBA, has been named interim president of BioEnterprise.

Jared Oakes, MBA/JD, has been named a partner in Thompson Hine’s Real Estate and Corporate Transactions and Securities practice groups. He regularly represents real estate investment trusts, real estate operating companies, institutional investors, lenders, private equity funds and other public and private investors, developers and owners of commercial real estate. His particular focus is on retail and shopping center assets.

Michele Seyranian, MNO, joined Hospice of the Western Reserve’s management committee as its new business development officer. In her new leadership role, Seyranian plans and implements business development activities and programs supporting the nonprofit agency’s mission and long-term goals. Prior to joining Hospice of the Western Reserve, Seyranian held several executive leadership roles at KeyCorp. Seyranian holds a bachelor’s degree in marketing and has extensive nonprofit and volunteer experience. She currently serves on the boards of The Gathering Place, the Armenian Bone Marrow Foundation and the Niagara University board of advisors. Seyranian lives in Beachwood, Ohio.

CLASS OF 2006

Robert Detwiler, MS, MM, BA ‘05, accepted a new job at Lourdes University as director of academic advising.

CLASS OF 2007

Jason Bogniard, MBA, has been named shareholder principal of Apple Growth Partners, an accounting and business advisory firm in northeast Ohio.

Susan Pho Burnoski, BS, MAcc, was appointed audit manager for Apple Growth Partners.

Matthew Maloney, MBA, was named director of the Master of Science in Management-Operations Research and Supply Chain Management (MSM-OR/SC) program at Weatherhead. This newly created role was created to help MSM-OR/SC students with their professional and career development and focus on corporate relations for the program.

Jimmy Schwarzkopf, DM, is research fellow and managing partner of STKI, the foremost analysis firm covering the IT scene in Israel. He teaches a course in IT innovation for seniors at the Academic College of Tel Aviv Yafo in the undergraduate program in information systems. Schwarzkopf is a father of three and grandfather of two.

CLASS OF 2008

Betty Moon, DM, MSODA ‘99, was recently recognized by the Bank Insurance & Securities Association with its highest honor, the Circle of Excellence Award. The Circle of Excellence Award recognizes senior financial services executives for their commitment and significant contributions to the insurance and securities industry.

Moon is currently principal of MoonInsights LLC, a consulting practice focused on delivering strategic counseling, risk management, executive coaching and sales performance in the highly complex fields of financial services.

Perry Stuckey III, MPOD, currently vice president of global human resources for Eastman Chemical Company, will become senior vice president and chief human resources officer.

Joseph Tichar, BS, has been promoted to senior vice president of corporate operations and retains the title of chief of staff at DDR Corp. Tichar will continue to serve as a member of the management, executive, compensation, enterprise risk management and charitable contributions committees; participate in all board meetings and play an integral role in quarterly earnings announcements, press releases and all investor relations activities; serve as a critical conduit in the continued development and refinement of the company’s branding and corporate communications strategy; and lead the management training program and all aspects of the company’s summer internship program. Additionally, Tichar has become increasingly active in DDR’s pursuit of untapped investors in company stock and regularly represents the company before the retail and institutional investment communities.
CLASS OF 2009

At United Way’s 2013 annual meeting, the 2012–2013 Spotlight Awards were given to volunteers, including Marilyn Chorman, MBA, who were recognized by their agencies for giving their time and talent. Chorman is a member of the board of directors of Fairhill Partners, whose mission focuses on connecting people to opportunities for lifelong learning, intergenerational relationships and successful aging. In addition, Chorman commits her time and energy to several of Fairhill Partner’s many initiatives, including the CATCH Healthy Habits program and Kinship Camp.

As managing editor of the Leading Nonprofit Organizations (LNO) publication, Chorman reviews submissions of stories, interviews, podcasts, videos and book reviews.

In July, Tom Creegan, BS, MAcc, joined the mergers and acquisitions group of KeyBanc Capital Markets as an analyst. He also serves on the Case Western Reserve University Young Accountancy Advisory Board, established by the Accountancy Department in April 2012 to enrich the CWRU accountancy community.

Tejas Maniar, MBA, has joined Google as manager —strategy, planning and analysis. He will provide project management, business judgment, analytic guidance and strategic insight to support key strategic and operational initiatives.

CLASS OF 2010

Jill Malone, BS, MAcc, has been named customer service representative at Paytime Payroll Processing, a professional payroll service company.

CLASS OF 2011

Maura Slater, MBA, is manager of category development at Corporate United, the nation’s largest group purchasing organization. In this role, she serves as a category manager for various agreements within Corporate United’s category portfolio and leads the strategic planning and execution initiatives. She also assists in supplier relationship management and activities related to market development and data analysis. Slater also collaborates with the marketing and implementation department to create category collateral and other materials. Before earning her MBA, Slater received her BA in communication from the University of Colorado at Boulder.

CLASS OF 2012

Jyothi Swaroop Kaza, MBA, has been appointed principal associate at Capital One, where he will serve as a risk management associate and will track all compliance team reporting. Kaza will analyze risk to assist management in making key decisions. Prior to obtaining his MBA, Kaza worked for three years at Infosys Technologies LTD. He also holds a bachelor’s degree in mechanical engineering.

Aneta Ardelian Kuzma, EMBA, has been appointed as director of digital acquisition at KeyBank. Kuzma is responsible for KeyBank’s overall digital acquisition efforts focused on growth in new clients and deepening of relationships with existing clients via digital channels. Kuzma has been at KeyBank for 16 years, most recently as senior vice president of specialty programs. In addition to her EMBA, Kuzma holds a BA from Miami University.

Dawn Meyer, CNM, was named vice president of Neighborhood Alliance.

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In this edition of the *Collection*, you read about MBA student JeShaune Jackson. You learned about research and practice by Matthew Sobel, Jagdip Singh and David Cooperrider. You heard from our new dean, Robert E. Widing II. Each of these extraordinary individuals benefits from the vision of community leaders who established scholarships to improve students’ options or endowed chairs to ensure that faculty could pursue important, complex and relevant research topics to help business and society.

Our leadership, faculty and students—and ultimately, our community and the world—benefit from gifts made years ago by people and organizations who were inspired by the Weatherhead School of Management’s innovative approach to management education. Today, you can help ensure that Weatherhead remains among the best business schools by investing in students, faculty, curriculum and programs through Case Western Reserve University’s *Forward Thinking* Campaign. This book is devoted to extraordinary examples of the power of collaboration made possible through philanthropy. We hope that you, too, are inspired to learn what your investment in Weatherhead can accomplish.

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