

Lori D. Kendall, Ph.D., MBA | Curriculum Vitae

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Education

Ph.D., Management — Case Western Reserve University, Cleveland, OH May 2016
Concentrations: Organization Theory and Innovation
Beta Gamma Sigma Honor Society

MBA — Holy Names University, Oakland, CA May 2012
Concentrations: Leadership
Sigma Beta Delta Honor Society
Kappa Gamma Pi Catholic College Graduate Honor Society

BA, Business — Holy Names University, Oakland, CA May 2010
Summa Cum Laude and Student Commencement Speaker
Sigma Beta Delta Honor Society
Prior studies (non-degree or certificate programs) provided on request

Corporate & Academic Biography

30+ years as a serial entrepreneur, engineer, and technology executive for venture-backed firms Aion, Traveling Software, Wall Data, VOIS, Enkata Technologies, and Transera Communications and publicly traded firms including Polycom, Cisco, Alcatel, and Xerox. Silicon Valley alumna for technology companies in software, hardware, and networking sectors. New venture incubation and acceleration through hyper-growth and pivoting stalled firms through major inflection points. Core areas of expertise include cloud applications, digital innovation models, data analytics, agile/lean development, design thinking, leadership and culture, and entrepreneurship.

VP and senior leadership responsibilities for new product development, business operations, and cloud services. Executive leadership positions and co-founder for voice, video, and contact center industry leaders. Executive and staff R&D and Marketing positions for networking and computer equipment public firms and venture-backed AI and data mining startups.

Currently a senior lecturer at The Ohio State University and a prior associated faculty role at Case Western Reserve University, teaching graduate and undergraduate courses in entrepreneurship, leadership & professional development, experiential learning immersion, quantitative methods, information systems, and strategy & innovation. 2021 Recipient of the Fisher College of Business Pace Setters Daniel Westerbeck Graduate Teaching Excellence Award.

Consulting and research centers on entrepreneurial ventures and intrapreneurship within established firms. Mixed-methods researcher focused on micro and meso-level relational dynamics that affect organizational sensemaking under uncertainty, which subsequently impacts innovation and firm growth. Dominant theoretical approaches are from 1) organizational ambidexterity, 2) sensemaking and managerial cognition, and 3) relational practice. Publications include works on entrepreneurial cognition,

relational dynamics influencing contextual ambidexterity, and mental model shifts driving paradigm change with social benefit firms.

Practitioner & Teaching Summary

Core Areas of Expertise

- Organizational culture
- Team development
- Product development management
- Digitalization strategies
- Experimental field studies
- Experiential learning pedagogy
- Program management
- New business venturing/entrepreneurship
- Design thinking
- Agile/Scrum practices
- Leadership development
- Data science & business analytics

Industry Highlights

- New product development for over 20 unique product lines generating > \$3B in revenues.
- Revenue sharing agreements with over 30+ partners, including IBM, HP, Anderson Consulting, MCI/Worldcom, Sprint, Telstra, and British Telecom for market creation.
- Outsource leverage comprising of 1) contract outsourcing and manufacturing agreements, including Foxconn, Mindtree, and IPSoft, and 2) 8 offshoring transactions in Canada, India, Russia, and China for > 1800 employees.
- M&A transactions with product leadership role resulting in being acquired by Alcatel for \$1.5B - 2000); led M&A integration of Next Age Technologies 1999 (price not public); led contract and resource integration for IBM CallPath 2001; conducted due diligence and post-M&A integration of HP Halo (\$89M – 2011).
- Digital innovation business models disrupt value-chains, cost, and revenue structure to drive market share, e.g., Transera Virtual Call Center (cloud-based leveraging open-source) component-off-the-shelf technology) sold as monthly agent-based seat price for 50-75% less than regular license pricing.
- Service platform ecosystems to drive open innovation adoption, e.g., leveraging an open-source platform to deliver multi-media communications services without programming.
- Transformation of digital assets into service-oriented architectures to increase user access, e.g., delivery of a Polycom cloud-based video and telecommunication services delivered on Non-proprietary devices.
- Lean go-to-market horizontal business processes and value delivery chains matching organizational maturity from \$100M-\$5B. Developed and orchestrated end-to-end product roadmap/development processes at Genesys, Transera, Cisco, and Polycom, which resulted in products/services delivered on-time while meeting customer expectations in regional/global markets.
- Defend/grow strategies for acquired businesses while retaining existing customers and exceeding revenue objectives to deliver financially accretive and profitable acquisitions. Examples: Next Age Workforce Management (accretive at \$25M in <2 years) and Halo Telepresence Service (accretive at \$125M in 18 months).
- Partner relationship management by building and leading teams throughout Europe, JAPAC, and Americas to manage key partner relationships that delivered over \$150M within initial 12 months in annualized revenues. Relationships included Deutsche Bank, Bank of America, IBM, Telstra, and British Telecom.

Invited Talks (Academic & Industry)

The Dirt Podcast with Orchid Black's Jim Barnish: Why Is My Business Not Growing? (2022) [link](#)

National Association of Wholesalers Distribution Managers: What is Strategy? (2022)
Business Buckeyes and Breakfast: Organizational Change: Planning for a Post-Pandemic 'New Normal' (2022)
Entrepreneurship Education: The Value of Incubators Partners. Synapse Summit. (2019).
Organizational Agility for the Long-Haul: How Outperforming Companies Continue to Lead. Best Practices for Operational Excellence Conference. MoreSteam Annual Conference. (2018)
Building High-Performing Teams for Operational Excellence. OSU COE Annual Summit. (2018)
Innovation Pivots – Strategic or Kiss of Death? Innovate New Albany Accelerator. (2018)
The Evolving Role of the Data Scientist: Eggheads and Actors. Case Western Reserve University. (2017)
Connecting Purpose to Sustainability. Engaged Stakeholders Conference. (2015)
The Journey from Being a Manager to Becoming a Leader. Holy Names University. (2014)
Entrepreneurial Lessons for Market Leaders. DeVry Keller Business School. (2010)
Go-to-Market and the Struggle to Differentiate in a Crowded Market. Ohlone College. (2003, 2004)
Why Erlang Is Dead: A New Era for Predicting Workforce Schedule. ICMI. (2000)
The Future of the Multi-Skilled Customer Service Agent. GForce Global Customer Conference. (1999)
Why Development Teams Need Embedded Test Engineering. Washington State University. (1993, 1994)

Teaching Experience

Industry Workshops

IQPC: Measuring Outsourcer Call Center Performance for Virtual Contact Centers. (2006-2008)
 Call Center Expo: Workforce Management Using Optimization. (1999, 2000)
 Genesys GForce: Business Routing for Multi-skilled Agents. (2000-2002),
 DCOM Component Programming. (1998)
 Novell: Product Lifecycle Re-engineering. (1996)
 Xerox: Advanced Page Descriptor Language Concepts for Electronic Publishing. (1986)
 Diagnosing PDL/FDL errors with PDP-11 RSX-11M Core Dumps. (1987)

Corporate Training Classes

MHP: Train the Embarc Collective Coach on Leveraging the MHP Entrepreneurship Methodology (2019)
 Cisco: High-Performance Leadership Teams for Organizational Health. (2018)
 Polycom: Action Learning (Strategy Blueprint) for Leading Change. (2011-2012)
 Cisco: Agile Scrum Master & Project Owner Fundamentals for R&D project teams. (2010-2011)

Academic Guest Lectures

EDMP/MGMT 646: Applied Advanced Research Analytics. (Fall 2019) – DM/Ph.D. Case Western
 MSBA 485B: Team Development. (Spring 2017, Spring 2018) – MSBA Case Western
 MGMT 201: Contemporary Business and Communications. (Spring 2015, Fall 2015) – UG Case Western
 MGMT 600: Business Planning Seminar. (Spring 2008, Fall 2010) – MBA Holy Names
 BUILD Venture Competition: Business Plan Guest Coach. (Spring 2003) – MBA DeVry

Tutoring/Mentoring

EDMP 643/649: Measuring Business Behaviors/Causal Analysis of Business Problems II.
 (Spring 2016, Spring 2015, Spring 2014) – DM Case Western
 EDMP 638/641: Qualitative Inquiry I/II. (Fall 2014, Fall 2015) – DM Case Western
 EDMP/MGMT 646: Applied Advanced Research Analytics. (Fall 2014) – DM/Ph.D. Case Western

Instructor

BUSMHR 2500: Foundations of Entrepreneurship. (Fall 2019 – current) – GE Ohio State
MBA 6292: Business Lab Challenge. (Spring 2020 – current) – MBA Ohio State
BUSMHR 7222: Leadership Legacy. (Fall 2019 – current) – MBA Ohio State
MBA 6981: Professional Development. (Spring 2019 – current) – MBA Ohio State
ACCTMIS 7810.1: IT Discipline Fundamentals. (Fall 2022) – GCITBS Ohio State
MKMR 310: Marketing Analytics. (Fall 2018) – Undergraduate Case Western
BUSMHR 7193: Leading Change. (Spring 2018-Fall 2018) – EMBA Ohio State
BUSMHR 3220: Leadership Legacy. (Spring 2019) – Undergraduate Ohio State
BUSMHR 7800: Professional Development. (Spring 2019-2020) – MBA Ohio State
MBAP 410: Strategic Issues and Applications. (Spring 2018) – MBA Case Western
MGMT 646: Advanced Research Analytics. (Summer/Fall 2016-2018) – Doctoral Case Western
EDMP 649: Causal Analysis II. (Spring 2017-2019) – Doctoral Case Western
Exec Ed: Disrupting through Innovation Certificate Program TCS (Fall 2021 – Current) – Ohio State
Exec Ed: Strategy Capstone Group Project using Design Thinking. (Spring 2019) – Ohio State
Exec Ed: Analyzing Data to Strategic Advantage: Driving Better Decisions. (Fall 2018) – Case Western

Academic Director

Graduate Programs: IT Business Strategist Graduate Certificate. (Fall 2022 – Current) – Ohio State
Undergraduate Programs: Entrepreneurship Programming (Fall 2022 - Current) – Ohio State

Research Agenda and Dissemination in Industry & Education

My transdisciplinary research agenda centers on entrepreneurial ventures and intrapreneurship within established firms. I focus on micro and meso-level relational dynamics that affect organizational sensemaking under uncertainty, which subsequently impacts innovation and firm growth. My dominant theoretical approaches are from 1) organizational ambidexterity, 2) sensemaking and managerial cognition, and 3) relational practice.

I'm especially interested in how managerial dynamic capability microfoundations drive organizational action through cognition and relational behaviors in times of uncertainty versus when stable organizations leverage institutional knowledge to replicate success. I focus on how micro and meso-level relational dynamics drive implicit or explicitly negotiated behaviors in high-velocity, uncertain contexts that foster innovation and firm growth, or lead to entrepreneurial failure. I also apply this in the context of how an organization alters its underlying business purpose through mental model shifts driving paradigm change.

My publications include works on entrepreneurial cognition, relational dynamics influencing contextual ambidexterity, and mental model shifts driving paradigm change with social benefit firms. As Distinguished Fellow at the Weatherhead Fowler Center, I led a student and faculty research team on behalf of the Goi Peace Foundation to show how firms evolve from shareholder value-focused towards becoming positive impact value-focused.

I incorporate this research agenda into my consulting practice, where I work with early-stage ventures and mature firms undergoing strategic pivots. My clients are typically experiencing sustained market pressures that have led the firm to factionalize internally, undergo organizational rigidity, and experience innovation or market failure. My clients hire me to 1) build cohesive teams by incorporating the disciplines of trust, constructive conflict, commitment, and accountability; and 2) design organizational

structures around work processes such as agile and design thinking that are consistent with the values, culture, and capabilities of the organization.

I bring my research into the classroom, where I offer practical explanations of my research and industry work to help students explore how leaders and teams within organizations must navigate the high rate of change required to adapt, innovate, and remain competitive.

Journal Publications

Pavez, I., **Kendall, L.D.**, and Laszlo, C. (2021). Positive-impact Companies: Toward a New Paradigm of Value Creation. *Organizational Dynamics* (ISSN# 0090-2616) volume 50, issue 4, October-November 2021, 100806 <https://doi.org/10.1016/j.orgdyn.2020.100806>.

Ladd, T., **Kendall, L.D.** (2017). Resolving the Risk Paradox: Entrepreneurial Cognition in the Lean Startup Method. *The Journal of Applied Business and Economics* (ISSN# 1499-691X), volume 19(11/12), Dec 2017: 28-42.

Kendall, L.D., Pavez, I., and Bao, L. (2014). The Business Sector Path Towards a Civilization of Oneness with Diversity: A Research Study on Behalf of the Goi Peace Foundation (United Nations NGO). Republished (2015) in *World Futures: The Journal of New Paradigm Research* (E. Laszlo, Ed).

Publications in Refereed Proceedings and Academic Paper Presentations

Cohen, M.P., Johnson, G., Krummaker, S., Koonce, R., Haley U., Coomber, N. Sheehan, R., Palmer, J., Pitsis, T., Olsen, J.E., Bumblauskas, D., Prochno, P., Sackmann, S., Perkins, K., Dastidar, P., Hand, C., **Kendall, L.D.**, Hillon, Y.C., Pierce, A., Madonna, C., Anzengruber, J., Markman, G. (2022) “Translating Theory into Practice: Organizations and the Future of Work.” Academy of Management Annual Conference (AOM). Professional Development Workshop #411.

Cohen, M.P., Johnson, G., Krummaker, S., Koonce, R., Haley U., Coomber, N. Sheehan, R., Palmer, J., Pitsis, T., Olsen, J.E., Bumblauskas, D., Prochno, P., Sackmann, S., Perkins, K., Dastidar, P., Hand, C., **Kendall, L.D.**, Hillon, Y.C., Pierce, A., Madonna, C., Anzengruber, J., Markman, G. (2021) “The Third Mission and the Transformation of the Business School in the New Economy.” Academy of Management Annual Conference (AOM). Professional Development Workshop #370.

Cohen, M.P., Seaver, G., Backhaus, C., Dharm, B., Johnson, G., Krummaker, S., Koonce, R., Haley U., Coomber, N. Sheehan, R., Palmer, J., Pitsis, T., Olsen, J.E., Bumblauskas, D., Prochno, P., Händschke, S., Sackmann, S., Ruigrok, W., Sander, G., Norman, R.T., Perkins, K., Dastidar, P., Hand, C., **Kendall, L.D.**, Hillon, Y.C., Pierce, A., Madonna, C., Anzengruber, J., Markman, G., (2019). TRANSLATING THEORY INTO PRACTICE: Developing Strategic Objectives and Actions. Academy of Management (AOM). PTC, ODC, MED, MC, OB Professional Development Workshop, #424.

Thundiyil, T., Vardaman, J., Smendzuik-O’Brien, J., Woodman, R., Manning, M., **Kendall, L.D.**, Stensaker, I., Baker, M., Bernerth, J. (2017). Becoming Scholars and Scholar-Practitioners in Organization Development and Change. Academy of Management (AOM).ODC Professional Development Workshop, #406.

Ladd, T., and **Kendall, L.D.** (2017). Entrepreneurial Cognition in the Lean Startup Method. Academy of Management (AOM). ENT Divisional Paper Presentation, #1419.

Rochford, K., and **Kendall, L.D.** (2016). Relational Climate, Product Innovation, and the Mediating Role of OCB-Voice. Academy of Management (AOM). TIM Divisional Paper Presentation, #16090.

Kendall, L.D. (2015). The Effects of Emotional Intelligence and Relationship Quality on Innovation and Performance. *2016 Conference Proceedings*. Fourth International Conference on Innovation and Entrepreneurship. Conference Paper Presentation. Ryerson University. ISSN (2049-6834).

Kendall, L.D. (2016). Antecedents of Contextual Ambidexterity. Fourth International Conference on Innovation and Entrepreneurship. Poster Presentation.

Kendall, L.D., Van Esch, C., Delbecq, A., Stoner, J., Case, S. et al., Pavez, I. et al., Leah, J. et al. (2016). Transformation through Inclusion: Business as an Agent of World Benefit (All Academy Symposium). *2016 Annual Meeting Proceedings* (J. Humphreys, Ed.), Academy of Management (AOM), #14345.

Eisenberg, J., Antonacopoulou, E., Byrne, B., Cearley, P., **Kendall, L.D.**, and others. (2015). Business School Rankings: Is it Time to Click the 'Refresh' Button? (Symposium). MED Best Symposium Award. *2015 Annual Meeting Proceedings* (J. Humphreys, Ed.), Academy of Management (AOM), #12455.

Pavez, I., and **Kendall, L.D.** (2015). The Arc of Interconnectedness: A Theory of Business Evolution Towards Flourishing. *2015 Annual Meeting Proceedings of the Alliance for Research on Corporate Sustainability* (D. Minor, Ed). Roundtable Presentation, Northwestern University.

Kendall, L.D. (2014). When Businesses Falter: How Relational Climates Foster or Hinder Recovery. *2014 Annual Meeting Best Paper Proceedings* (J. Humphreys, Ed.), Academy of Management (AOM). ODC Divisional Paper Presentation, #1703.

Dissertation

Kendall, L.D. (2016). A Theory of Micro-Level Dynamic Capabilities: How Technology Leaders Innovate with Human Connection.

Working Papers

Kendall, L.D. (2019). Antecedents of Contextual Ambidexterity: Situated Dynamics of Innovation. Status: *Revising*.

Kendall, L.D. (2018). The Adverse Consequences of Toxic Leaders on Organizational Resiliency. Status: *Submitting*.

Kendall, L.D. (2019). Relational Dynamics and Product Innovation. Status: *Revising*.

Kendall, L.D., McCullough, I. (2021). Instinctive Drives in Sensemaking and Resilience: A Mixed-Method Study. Status: *In progress*.

Kendall, L.D. (2020). Thriving in Rapidly Changing Markets: How Technology Leaders Innovate with Human Connection. Status: *In Book Proposal (based on the thesis)*.

Association Memberships

Academy of Management
Entrepreneurship (ENT)
Organization Development and Change (ODC)

Management Education and Development
Organizational Neuroscience (NEU)

Beta Gamma Sigma International Honor Society for Business
Institute of Electrical and Electronics Engineers
Kappa Gamma Pi, The National Catholic College Graduate Honor Society
Product Development Management Association
Project Management Institute
Sigma Beta Delta International Honor Society for Business

Service

Reviewer Experience

Academy of Management Annual Meeting. (2014-current)
Engagement Management Review. (2016-current)
Midwest Academy of Management Annual Meeting. (2015-2016)

Dissertation/Thesis Committee Member

J. Krist Schell, "Emergence and Strategy in SBIR Project Innovation Outcomes of Radicality And Commercial Success." Case Western Reserve University. (2018-2019). Ph.D. Thesis.

Nancy Sayer, "The Development and Practices of Benevolent Leaders: A Mixed Methods Study." Benedictine University. (2017-2018). Ph.D. thesis. Ph.D. Thesis.

Avi I. Turetsky, "Intra-Industry Performance Distributions: Their Shapes, Parameters, and Implications for Management Research." Case Western Reserve University. (2017-2018). Ph.D. Thesis.

Nicholas D. Frederick, "Transforming Ohio's Rural Economy: The Case of Milan Township's Business Incubator Program." Ohio State University (2020). Baccalaureate Honors Research Distinction Thesis.

University Committee Service

Committee Member, Entrepreneurship Programs Working Group, Ohio State University. (2021-2022)

Committee Member, MBA Programs, Ohio State University. (2020-2021)

Faculty Advisor, D³ (Design, Develop, Deploy) Student Group, Ohio State University. (2020-2021)

Committee Member, Ph.D. Curriculum Design, CWRU. (2020)

Committee Member, Executive Ph.D. in Business Strategy Review, CWRU. (2019)

Council Member, DM Alumni Council, CWRU. (2016-2020)

Business Advisory Committee, Office of the President, Holy Names University. (2014-2016)

Organization Service

Board member, Women in Leadership Development (WELD) National Organization. (2018-2021)

Board member, Executive/Practitioner Representative-at-Large, AOM Organization Development, and Change Division. (2016-2019)

Communications Director, AOM Organization Development and Change Division. (2016-2018)

Membership Committee, AOM Organization Development, and Change Division. (2015-2018)

Honors and Awards

Westerbeck Teaching Excellence Award - Graduate, Fisher College of Business. The Ohio State University. (2020)

Buckeye Access All-Star, Student Life Disability Services, The Ohio State University. (2020)

New Faculty FIT Teaching and Learning Teaching Endorsement, Michael V. Drake Institute for Teaching and Learning. The Ohio State University. (2020).

Online Teaching Endorsement, Michael V. Drake Institute for Teaching and Learning. The Ohio State University. (2020).

Distinguished Fellow, Fowler Center for Business as an Agent of World Benefit. Case Western Reserve University. (2016-2018)

Outstanding Reviewer. Midwestern Academy of Management. (2016)

Beta Gamma Sigma Honor Society Initiate. Case Western Reserve University. (2016)

Mitchell V. Morse Scholarship. Case Western Reserve University. (2015)

Doctor of Management Fellow, Fowler Center for Sustainable Value. CWRU. (2013)

Kappa Gamma Pi Honor Society Initiate. Holy Names University. (2012)

Sigma Beta Delta Honor Society Award. Holy Names University. (2012)

Dean's List (every semester). Holy Names University. (2008-2010)

Sigma Beta Delta Honor Society Initiate. Holy Names University. (2010)

SBC/AT&T Sales Award. Genesys/Alcatel. (2002)

CEO Innovators Award. Novell Inc. (1996)

Employee Recognition. Novell Inc. (1994-1995)

Employee Recognition. Xerox Printing Systems, Business Systems Group. (1986, 1987, and 1988)

Presenter Innovator's Award. Xplor International. (1985)

Experience

Academic

2018 – current **The Ohio State University** Columbus, OH

Fisher College of Business

Senior Lecturer (full-time), Management and Human Resources

2019-current

Lecturer (part-time), Management and Human Resources

2018-2019

Teaching faculty responsible for undergraduate and graduate courses in entrepreneurship, leadership, experiential learning, professional development, innovation, IT & business strategy, organizational change, and strategy capstone projects. Responsible for all aspects of curriculum design, course delivery, and undergraduate/graduate advising of students.

Appointments:

Academic Director, Entrepreneurship Programs, Fisher College of Business, 2022-2023
Academic Director, Graduate Certificate in IT Business Strategy, 2022-2023.

Business Lab Challenge Course (MBA 6292) Core Course for Full-Time MBA students

- 2022-2023. MBA 6292 Core Course: Business Lab Challenge. Following loss of key project manager responsible for sourcing and managing client relationships for all experiential learning courses at Fisher, simplified client engagement model to reduce what would otherwise be an unmanageable workload. Worked with GA to setup and run client onboarding and check-ins, and established Thursday client meeting sessions concurrent with class time. Brought in prior year clients for follow-up from 2021-2022 with both cohort years prior to current first year MBAs to form new core teams and bid on 2023 projects. Kept prior year emphasis on personal and professional development during the experiential learning course immersion process, including use of Instinctive Drives and 360 leadership assessments prior, during, and after the semester.
- 2021-2022. MBA 6292 Core Course: Business Lab Challenge. Redesigned following return to in-person instruction during COVID-19 pandemic. Redesigned for emphasis of personal and professional development during the experiential learning course immersion process. Added Instinctive Drives and 360 leadership assessments prior, during, and after the semester.
- 2020-2021. MBA 6292 Core Course: Business Lab Challenge. Redesigned for online synchronous delivery during COVID-19 pandemic. Modified engagement with clients to start in late fall after finals, dropped previous textbooks in favor of shorter online learning modules using Harvard Business Publishing (the Manage Mentor series), and developed Course Packs with specific subject matter content for each client issue.
- 2019-2020. MBA 6292 Core Course: Business Lab Challenge. Designed the inaugural experiential FT MBA Business Lab Challenge core course to incorporate an integrated action learning project which is semester-long client project for small teams of 4-5 students each. Reviewed and approved client agreements, developed administration tools to manage client relationships, and created portfolio tools to simulate consultancy operations on behalf of the students. Key course components included a simplified model of project management, forming and managing term interpersonal dynamics, and management consulting skills and strategies.

Leadership Legacy Course (BUSMHR 7222) Elective Course for any Fisher Graduate Student

- 2022-2023. BUSMHR 7222 Graduate Elective Course: Advanced Topics in Leadership: Leadership Legacy. Moderate modifications to prior year course design in course learning objectives and pedagogy to lower overall GPA and make introspective part of course easier to objectively evaluate. Added asynchronous online lecture materials, anticipating WP objectives to offer as an online elective in upcoming sessions.
- 2021-2022. BUSMHR 7222 Graduate Elective Course: Advanced Topics in Leadership: Leadership Legacy. Redesigned course for in-person instruction, following limited return to campus during COVID-19 pandemic.
- 2020-2021. BUSMHR 7222 Graduate Elective Course: Advanced Topics in Leadership: Leadership Legacy. Took survey feedback from prior two years and split into two core frameworks to support in-person and WPMBA online course delivery, leveraging best practices from ODEE.
- 2019-2020. BUSMHR 7222 Graduate Elective Course: Advanced Topics in Leadership: Leadership Legacy. Redesigned existing course. Moved away from anecdotal leadership books (e.g., Bill George's *True North*) in favor of published longitudinal studies and resulting books from transformational leadership scholars Posner & Kouzes (*The Leadership Challenge* and *Your Leadership Legacy*). Emphasis placed on reflective learning practice focused on *how* to lead teams for high-performance, and *how* to develop one's leadership legacy through systematic development of skills and competencies such as BUILD™ and Instinctive Drives Inventory®.

Link: <https://www.instinctivedrives.com/>. Through professional prior industry connection to Australian firm “Linkup International,” obtained Instinctive Drive (ID) psychometric instrument for Legacy courses taught. ID measures unconscious information seeking and sensemaking cognition. Paid for instrument and consulting fees out of pocket (\$5000 USD) and retained Linkup Coach to guest lecture on the practical strategies to overcome bias of one’s thinking style to build more “thinking” diversity across teams.

Professional Development Course (MBA 6281) Core Course for Working Professional MBA students

- 2022-2023 MBA 6281 Core Course: Professional Development. Moderate modifications to prior year course design in course learning objectives and pedagogy to lower overall GPA and make public speaking performance easier to objectively evaluate. Modified evaluation rubrics for group and individual speeches in Carmen and AI speech evaluation platform and added peer evaluations to in-class performances (synchronously and asynchronously).
- 2021-2022 MBA 6281 Core Course: Professional Development. Split both sections into in-person only and online-only design and delivery to support WPMBA online program. Redesigned course materials with an ODTI instructional designer, and professional recorded asynchronous lectures in Mason Hall studio. Kept cloud-based/AI public speech evaluator for peer-based/instructor-based feedback delivered outside of class time over the seven-week course.
- 2020-2021 MBA 6281 Core Course: Professional Development. In response to development of the WPMBA online option to replace the Saturday program, redesigned in-person delivery model as a hybrid course, delivered over seven weeks and will leverage a distant learning cloud-based/AI public speech evaluator so that peer-based/instructor-based feedback is both asynchronously and synchronously delivered over the seven-week course. This allows the students (even in classes of 40-50) with many more speaking opportunities with multiple points of qualitative and quantitative feedback instead of only “classroom time.” Live instruction emphasized online digital video communication techniques, while asynchronous assignments required students to record delivering speeches and talks and submit for offline critique.
- 2018-2019 MBA 6281 Core Course: Professional Development. Redesigned and taught presentation and public speaking skill as a three-day Saturday course, focusing on visual techniques, use of multi-media, and public speaking for persuasive communication.

Foundations of Entrepreneurship (BUSMHR 2500) GE Course for any OSU undergraduate student

- 2022-2023 BUSMHR 2500 GE Course Foundations of Entrepreneurship. Moderate modifications to prior year course design in course learning objectives, pedagogy, instructional materials, and rubrics to lower overall GPA and permanently separate in-person and online asynchronous instruction. With an eye towards revisions to Entrepreneurship minor and greater visibility of course throughout the university as core foundational component of the minor, focus on the socio-technical aspects of entrepreneurship and simulation practice. Revised and maintained use of digital stack components from prior years. Continued working with other business units to provide practicum experience exposure. Continued with DEI themes from prior year. Featured guest lectures with student-age entrepreneurs and recent alums, along with respected industry serial entrepreneurs, with a special emphasis on women and minorities. Incorporated additional topics of social enterprise and triple-bottom accounting. Professionally recorded over 45 hours of asynchronous lectures in Mason Hall and home studio. Given huge jump in autumn enrollment over prior academic years, expect to reach more than 1000 students across autumn, spring, and summer.

- 2021-2022 BUSMHR 2500 GE Course Foundations of Entrepreneurship. Course redesign required between online distant learning requirements due to COVID-19 pandemic in fall, and return to in-person instruction in spring, followed by request for online asynchronous-only instruction for summer session. Maintained use McGraw-Hill Connect into CarmenBooks for accessibility and affordability, along with use of Packback, TopHat, and online simulation partnership with OpenForge (Startup Wars). Partnered with Keenan center for autumn and spring practicums (BOSS and Launch U). Brought in student-age entrepreneurs and recent alums to incorporate DEI themes and accessibility, along with accomplished founders and serial entrepreneurs. Over the summer, recorded over 20 hours of asynchronous lectures in home studio. Between Zoom, in-person, and asynchronous distance learning, taught more than 850 students.
- 2020-2021 BUSMHR 2500 GE Course Foundations of Entrepreneurship. Redesigned Foundations of Entrepreneurship to support online distance-learning modalities due to COVID-19 pandemic. Incorporated the use of McGraw-Hill Connect into CarmenBooks for accessibility and affordability. Incorporated use of Packback and TopHat for online engagement. These changes resulted into a flexible pedagogical model, such that the course could be delivered via traditional in-class methods, distant learning, or hybrid-delivery models as an integrated stack of online learning technology, along with video teleconference guest speakers, and digitally focused student engagement/exploration techniques. Delivered course over Zoom for autumn, spring, and summer sessions for more than 740 students.
- 2019-2020 BUSMHR 2500 GE Course Foundations of Entrepreneurship. Redesigned the only general education course (social science) taught by Fisher faculty. Over 25 students participated during the inaugural semester with the BOSS (Best of Student Startups) competitions, with one student team in the final competition. Incorporated semester-long simulation experience with industry partner *Open Forge* to run entrepreneurial game “Startup Wars” in which the students both participated in an interactive game where they acted as individual CEOs of an online dating app business, while also going behind the scenes weekly with company designers, developers, and leaders to see how a new venture is started. Pivoted to online instructed (synchronous) during spring break due to COVID-19 pandemic. Delivered course to more than 625 students.

IT Discipline Fundamental (ACCTMIS 7810.1) Core Course Graduate Certificate in IT Business Strategy

- 2022-2023 ACCTMIS 7810.1 IT Discipline Fundamentals Core Course for GCIBS. Developed online (synchronous/asynchronous) core course for graduate certificate program after instructor couldn’t be sourced in time for autumn launch of program (approvals for program came late in spring of 2022). Course design support IT-centric audience. As part of pedagogical design, ACCTMIS 7810 front-load BUSMHR 7461 by taking students on the journey of IT business fundamentals through the lens of how IT strategy fulfills the objectives of business strategy. Designed ACCTMIS 7810 to have students ask questions about their organizations, see digital competencies, and identify gaps. This will be critical for the capstone project.

Graduate Certificate in IT Business Strategy Program

- 2022-2023 As Academic Director launched inaugural first cohort of 10 students in Graduate Certificate, IT Business Strategy in autumn 2022. Recruited students, participated in marketing and sales development, partnered with Executive Education in numerous recruitment activities (information systems, podcasts, conferences, Central CIO forum, and phone calls). Built out program-level materials. Interviewed and sourced faculty for courses in Finance, Accounting, IT Fundamentals, Innovation, Strategy, Professional Development, and Leadership.

- 2021-2022 Revised IT Strategist Program for a 13-credit hour graduate certificate program with coursework including Finance, Accounting, IT fundamental, Innovation, Strategy, Professional Development, and Leadership. Initial approval received from the Graduate Council in November. Resubmitted revised proposal in late December for “online only” graduate certificate, with reapproval received in March.
- 2020- 2021 Engaged with Executive Education as proposed Academic Director to research, design, and develop a graduate certificate proposal for high-potential Information Technology Leaders called the “IT Strategist Graduate Certificate.” Completed market research and met with members of the Central Ohio CIO forum to develop a 20-credit hour graduate certificate program comprised of 13 tailored but off-the-shelf courses (except for two new classes that are new to Fisher). These courses are abridged versions from the graduate catalog, Core to this proposal includes a capstone project and exit exam to demonstrate competency and proficiency in the acquired skills.

Entrepreneurship Minor, Ohio State University Initiative

- 2022-2023 As Academic Director for Entrepreneurship Programming continued work to redesign the minor and increase the number of electives to broaden appeal of minor to more interested students. Recommended inclusion of courses from all interested colleges of the university, and increased visibility and accessibility of required practicums to provide more experiential learning opportunities. Partnered with Keenan center to award credits for experiential learning through formalization of learning objectives and assurance of learning outcomes.
- 2021-2022 As advisor to Senior Associate Dean for Fisher, worked on proposal to revamp the Entrepreneurship and Innovation minor, to identify a more appealing curriculum and draw more interest in the program. Revised minor to simplify required coursework and broaden elective choices, including making GE 2500 a core course for the minor.

Adjunct Faculty, Undergraduate and MBA Programs, Executive Education

- 2018-2019. Adjunct faculty teaching undergraduate and graduate courses in organizational change, leadership, professional development, and executive education strategy capstone including BRIGHT New Leaders for Ohio Schools program.
 - Responsible for creating curriculum for associated courses, including self-assessment capacity to lead transformational change, large system intervention OD, micro-organizational behavior, strategy capstone design thinking, leadership/professional development.
 - ✓ Led EMBA cohort students through spring residency sessions on developing “first 90 days” intervention strategies, performing organizational assessments, developing resonant leaders, and conducting Appreciative Inquiry Summits.
 - ✓ Led executive education Capstone course for Honda using design thinking to drive strategy “out of the box thinking” capstone strategy group projects for 32 students in teams of four.

2016 – 2019 **Case Western Reserve University** Cleveland, OH

Weatherhead School of Management

Distinguished Fellow, Fowler Center & Adjunct Faculty, Doctor of Management Program, Design & Innovation department

- Adjunct faculty teaching strategy & innovation in the part-time MBA program (Spring 2018), undergraduate marketing analytics (Fall 2018), intermediate and advanced analytics methods in the doctoral program (Fall 2016-2018 and Spring 2017-2019).
- Executive education instructor for design & delivery of business analytics course focusing on advances in big data, AI, and machine learning methods.
- Methods advisor and dissertation committee member for Ph.D. candidates from Case Western and Benedictine University
- Develop research and business plans for non-profits (NGOs, academia).
 - ✓ [GOI Peace Foundation](#). Led team to conduct business sector research for Fuji Declaration (UN Peace Initiative). Qualitative research describes how businesses evolve to become positive-impact firms in tackling complex societal and environmental challenges.
 - ✓ Cited publications: [Google Scholar Citations](#). Sample contributions include:
 - ✓ “Entrepreneurial Cognition in the Lean Startup Method” in *Journal of Applied Business and Economics* (Vol 19/2017).
 - ✓ Led team to research UN Fuji Declaration describing how businesses tackle complex societal challenges.
 - ✓ Research published in spring of 2015 through GOI Peace Foundation and republished in *World Futures: The Journal of New Paradigm Research* (E. Laszlo, Ed). [Fuji Declaration](#).
 - ✓ Part of the research team to assess MOOC “Beyond Silicon Valley,” to study entrepreneurship outcomes.

Executive Career History

21018 – Current **Orchid Black (Morgan Hill Partners), LLC** St. Petersburg, FL
Operating Partner

- Provide advisory services for technology and technology-enabled startups, focusing on capability assessments in organizational culture and leadership, cloud-based business models, and product development.
 - ✓ Completed comprehensive market assessment and business strategy recommendation for SAGE, the large LGBTQ elder care advocacy organization in the US to pilot and launch a nationwide concierge elder care service.
 - ✓ Advised C-level teams and founders on growth strategies, fundraising market adjacencies, and product commercialization.
 - ✓ Developed and delivered course curriculum for major new incubator/accelerator in the southeastern US, providing “train the coach” course content to guide technology-based startups in the early stages of formation and business validation.
 - ✓ Co-developed business strategy to take entrepreneurial training into new markets, including regional innovation centers and accelerator programs for maker spaces, economic development, and higher education incubator programs.

2014 – Current **DIT Advisors, LLC** (*Founded*) Oakland, CA & Columbus, OH
Managing Director, Founder

- Provide innovation and technology management advisory services for startups and established firms in high-tech, engineering/manufacturing, and telecom. Services include innovation strategy, patent creation, technology selection, organizational design using Agile/Scrum methods, data analytics (multi-variate regression, mixed methods, structured equation modeling), and leadership coaching.
 - ✓ Provided lean agile training materials and PMO services for financial analytics transformation for a Fortune 100 company.
 - ✓ Developed organization design to provide innovation pivot for next-generation cloud services business unit within large established company to reduce cycle time and increase revenue.
 - ✓ Advised health-care startup focusing on chronic disease management to get the organization to MVO and Series A funding.
 - ✓ Provided PMO services for multi-billion PE-held mobile services firm to deliver financial & tax reporting transformation project to reduce workday closing timeframes.
 - ✓ Drove operations transformation for increasing GM.

2011 – 2013 **Polycom, Inc.** San Jose, CA
Vice President, Business Operations 2012-2013
Director/Sr. Director, Corporate Development (M&A) 2011-2012

- Drove innovation for a \$1.5B organization in voice and video conferencing in strategic planning, ops reviews, and performance metrics, including program management, business operations, documentation, and localization with engineering teams located in North America, EMEA, India, Israel, and China.
- Direct reports included Program Management Office (PMO) and project/program management for R&D, as well as documentation, internationalization (translation), and dotted lines from services and Halo program management.

As Director, Corp Development:

- Led post-term sheet due diligence and closed acquisition from HP with no conditions and delivered transition services, license agreements, carrier novation agreements, inventory transfers, quote to cash, and financials.
- The deal generated over forecasted revenue with no loss of significant customers.
 - ✓ Headed post-M&A integration of Halo team into core business locating roles for every employee.

As Sr. Director, Chief of Staff:

- Assessed leadership and organization capabilities and recommended reconfigurations of business to be more agile and adaptive to current market conditions.

- ✓ The assessment resulted in a 6-month leadership immersion program for 15 high-potential director and VP leaders from R&D, Finance, Operations, Product Management, and Services producing organizational realignment and accountable/autonomous operational management layer across functions previously held by senior staff.
- Wrote comprehensive video conferencing strategy analysis that assessed viability of continuing to pursue differentiated best-cost provider strategy competitively.

As Vice President, Global Business Operations:

- Delivered portfolio management processes and that solved two significant issues:
 - ✓ Translated headcount into highly accurate activity-based costs (within 1% +/- of financial actuals).
 - ✓ Isolated incremental revenue for given investment opportunity from run-rate revenue.
- Led company-wide release of Polycom RealPresence suite 7 of hardware and software products.
- Developed Product Plan of Record company-wide interlock process to shorten release cycles based on Agile/Scrum resource planning model.

2010 – 2011 **Cisco Systems, Inc.** Milpitas, CA

Sr. Manager, Business Operations, Unified Communications

- Managed operations, including the long-range planning process, ops reviews, and performance metrics. Led program management within unified communications, with engineering teams located in the US, EMEA, India, and China.
 - ✓ Negotiated changes to vendor contracts, saving operating costs.
 - Spun out the mature business to BPO in less than 12 months from start to finish.
 - Implemented Agile/Scrum for all lines of business.
 - Delivered portfolio management processes and tools for technology group, to headcount into highly accurate activity-based costs within 1% +/- of financial actuals and identify incremental revenue for given investment opportunity from run-rate revenue.
 - ✓ Drove conversion from Waterfall to Agile/Scrum product development methodology for all lines of business, resulting in reducing major release schedules.
 - ✓ Negotiated changes to vendor contracts.
 - ✓ Headed unified communication releases supporting Cisco Call Manager 7.

2009 – 2011 **Lori Kendall & Associates, Inc. (Founded)**

Oakland, CA

President and Founder

- Provided contact center industry strategy, voice technology, vendor selection, contact center operational best practices, telecommunications infrastructure assessment, and consulting services to solve problems or uncover key trends in business and markets.
- Developed gap assessment and wrote the master plan for rolling out global voice/data infrastructure. Wrote a 3-year plan to guide technology selection, IT implementation, and rollout

plan for voice technology migration to IP global contact centers. Built business strategy options, including M&A options and capital markets.

- ✓ Cloud-Services Virtual Call Center. Built gap assessment and wrote the master plan for rolling out global voice/data infrastructure to increase uptime.
- ✓ US Market- Leader in Window Blinds & Shades Manufacturing/Sales. Developed a 3-year plan to guide technology selection, IT implementation, and rollout plan for voice technology migration to IP global contact centers.
- ✓ Managed Services & Professional Services Firm. Created business strategy, including M&A options and capital markets, resulting in successful M&A exit.

2003 – 2008 **Transera Communications, Inc. (Co-Founded)** Sunnyvale, CA

Vice President, Products & Services and Co-Founder

- Co-founded startup; managed pre-funding activities in products area and marketing definition/business planning, requirements, use cases, and service portal for use by staff and white-labeling to others (e.g., Verizon). Led team in professional services, project management, customer care, service operations, and technical support.
- Oversaw product management in cloud application call center solution, including business and market plan, product requirements, pricing, competitive analysis, and product definition.
- Developed PCI/DSS compliance requirements for data security. Negotiated all service-related contracts, including infrastructure contracts with Tier1 carrier co-location vendors and SLA agreements.
 - ✓ Created services organization in California and Bangalore for enterprise market launch that delivered 24/7/365 availability and built voice/data infrastructure.
 - ✓ Raised Series A venture capital round from top-tier venture investment firms, including Accel Partners, Apex Ventures, and Storm Ventures led by Accel Partners.
 - ✓ Company acquired by Broadsoft in early 2016 and subsequently acquired by Cisco in 2017.

2002 – 2003 **Enkata Technologies, Inc. (Series B startup)** San Mateo, CA

Vice President, Product Marketing

- Acting Corporate Marketing VP leading lean staff to drive company pivot from professional services offering to product-based offering. Created product marketing and corporate marketing functions for an early-stage business analytics startup that had just received Series B investment from Comm Ventures (now Fuse Capital) and pre-commercial managed service that offered data and text mining and business analytics.
- Launched company at ICCM; secured front-page exclusives with fundamental analysts from Aberdeen Group and Gartner Research.

1998 – 2002 **Alcatel/Genesys Telecommunications Labs, Inc.** San Francisco, CA

Vice President, Strategic Programs

- As VP, led the team in crucial partner and customer relationships, stealth development programs, and significant customer escalations requiring designated executive. Managed key relationships, including Deutsche Bank, Telstra, and Bank of America.

- Started as Product Manager for proposed next-generation platform (company's first IVR product). As Product Director, managed six employees in enterprise applications comprising five products and ~ half of the firm's revenues.

1997 – 1998 **Micron Electronics Inc.**

Milpitas, CA

Product Line Manager

- Product line management responsibilities focused on defining product strategy, requirements, and delivery of high-end clustering products for mission-critical applications.

1997 **VOIS Corporation** (*Angel funded startup*)

Sunnyvale, CA

Product Line Manager

- Product line management for internet telephony market early-seed startup. Focused on voice self-service applications for telecommunications and financial services verticals.

1994 – 1997 **Novell, Inc.**

San Jose, CA

Sr. Manager, Quality & Product Marketing Manager

- Second-line management overseeing quality, system, and customer engineering organization for Novell management products, including third-party lab certification for partner ISVs.
- Recipient of Novell's CEO Innovators Award for driving PLC process re-engineering, reducing product cycle time.
- Product marketing responsibilities for desktop management products. Developed market launch plans, white paper, coordination of channel-oriented program launch, advertising, and promotion.

1992 – 1994 **Interconnections, Inc. (Emulex)**

Bellevue, WA

Manager, Test Engineering

- Staffed and managed the QA department for terminal and print emulation products. Managed joint development with Novell for next-generation gateway platform implementing LAT for IPX/SPX networks.

1991 – 1992 **Wall Data, Inc.** (*Series D startup*)

Redmond, WA

Sr. Software Engineer

- Supervised and conducted performance, competitive analysis, and benchmark evaluations. Designed and wrote white-box tests for LU 6.2 APPC API set.

1991 – 1992 **National Park Service**

Davenport, WA

Park Ranger (Seasonal subject to furlough)

- Commissioned federal law enforcement ranger, a 15-ranger patrol team for the southern district of Grand Coulee Dam. Certified firefighter, park medic, and search and rescue team member.

1990 – 1991 **Traveling Software, Inc.**

Bothell, WA

Software Engineering Consultant

- Developed test designs for major components of the new PC connectivity product (LapLink Pro). Set CUA benchmark guidelines and upgraded departmental QA testing strategy.

1988 – 1990 **Aion Corporation** (*Series C startup*)

Palo Alto, CA

Manager, Engineering

- Started, staffed, and managed a new SQA department for artificial intelligence startup venture-backed Pitch Johnson. Developed and implemented quality assurance processes and procedures, including bug tracking, localization, and documentation reviews.

1985 – 1988 **Xerox Corporation**

El Segundo, CA

Sr. National Systems Support Consultant

- Provided Level 1-3 technical support to customers for centralized printing product family (Xerox 9700/8700). Developed customer and field training. Coordinated beta tests. Field engineer for system testing of mainframe software in external data centers.

1982 – 1985 **Candle Corporation**

Los Angeles, CA

Jr. System Programmer & Operations Analyst

- Maintained software components and program products related to text processing and printing software.