

UNITED STATES DISTRICT COURT
NORTHERN DISTRICT OF CALIFORNIA
SAN JOSE DIVISION

APPLE INC.,)
)
 Plaintiff,)
)
 v.)
)
 SAMSUNG ELECTRONICS CO., LTD.;)
 SAMSUNG ELECTRONICS AMERICA, INC.;)
 and SAMSUNG TELECOMMUNICATIONS)
 AMERICA, LLC,)
)
 Defendants.)

Case No. 11-cv-01846-LHK

DECLARATION OF YORAM (JERRY) WIND

October 19, 2012

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I, Yoram (Jerry) Wind, declare as follows:

I. INTRODUCTION

A. Assignment And Objectives

1. I was asked by counsel for Samsung to evaluate the Expert Report of John R. Hauser (the “Hauser Report”) and the conjoint study discussed therein, and in particular, to comment on whether the conjoint study conducted by Professor Hauser demonstrates that the touchscreen features claimed in U.S. Patent Numbers 7,469,381 (“the ’381 patent”); 7,844,915 (“the ’915 patent”); and 7,864,163 (“the ’163 patent”) drive consumer demand for Samsung smartphones and tablets—*i.e.* that consumers buy Samsung smartphones and tablets because they are equipped with those features.

B. Qualifications

2. I am the Lauder Professor and Professor of Marketing at the Wharton School of the University of Pennsylvania. I joined the Wharton staff in 1967, upon receipt of my doctorate from Stanford University.

3. **Publications** – I have been a regular contributor to the marketing field, including 22 books and over 250 papers, articles, and monographs. My books and articles, which are frequently cited by other authors, encompass marketing strategy, marketing research, new product and market development, consumer behavior, organizational buying behavior, and global marketing strategy.

4. **Editorships** – I have served as the editor-in-chief of the *Journal of Marketing*, as a guest editor of numerous marketing journals, on the policy boards of the *Journal of Consumer Research*, and *Marketing Science*, and on the editorial boards of the major marketing journals. I am the founder of Wharton School of Publishing and served as its first Wharton editor from 2004

to 2008.

5. **Teaching and Consulting** – I have taught MBA, Ph.D., and executive development courses on a wide range of marketing topics. I also have consulted extensively for many Fortune 500 firms, including major consumer goods firms. In my teaching, consulting, editorial, and university positions I have designed, conducted, and evaluated thousands of marketing and consumer research studies.

6. **Expert Witness** – I have conducted and evaluated marketing and consumer research in a litigation context, have been qualified as a marketing and survey research expert, and testified in trial in a number of federal courts.

7. **Awards** – I have received various awards, including the four major marketing awards – The Charles Coolidge Parlin Award (1985), the AMA/Irwin Distinguished Educator Award (1993), the Paul D. Converse Award (1996), and MIT’s Buck Weaver Award (2007). I also received the first Faculty Impact Award by Wharton Alumni (1993). I was elected to the Attitude Research Hall of Fame in 1984. I have also been honored with a number of research awards, including two Alpha Kappa Psi Foundation awards. In 2001, I was selected as one of the ten grand Auteurs in Marketing and in 2003 I received the Elsevier Science Distinguished Scholar Award of the Society for Marketing Advances. In 2010, I was selected as one of the Ten Legends of Marketing, and Sage Publications is publishing eight volumes of my writings.

8. **Complete Resume and Compensation** – My resume and the legal cases in which I have testified in deposition or trial are included in Appendix A.¹ My total compensation for review and analysis of the relevant material and preparation of this expert report is based on my regular consulting rate of \$1,000 an hour.

¹ A copy of my CV can also be found at <https://marketing.wharton.upenn.edu/profile/196/cv>.

9. **Experience with Conjoint Analysis** – With Paul Green and Doug Carroll, I wrote in 1973 the first book on conjoint analysis – Multi-Attribute Decisions in Marketing: A Measurement Approach.² Since the early 1970s, as part of the research team including Paul Green and Abba Krieger, we developed many of the advances in conjoint analysis and have applied conjoint analyses in hundreds of academic and commercial studies. See, for example:

- “Subjective Evaluation Models and Conjoint Measurement”³
- “Consumer Menu Preference: An Application of Additive Conjoint Measurement”⁴
- “New Way to Measure Consumers’ Judgments”⁵
- “New Developments in Conjoint Analysis”⁶
- “Conjoint Analysis of Price Premiums for Hotel Amenities”⁷
- “Thirty Years of Conjoint Analysis: Reflections and Prospects”⁸

² Wind, Yoram, Paul E. Green, and J. Douglas Carroll. Multi-Attribute Decisions in Marketing: A Measurement Approach. Hinsdale: The Dryden Press, 1973.

³ Green, Paul E., Frank J. Carmone, and Yoram Wind. “Subjective Evaluation Models and Conjoint Measurement.” *Behavioral Science* 17.3 (May 1972): 288-299, available at http://dl.dropbox.com/u/9686940/windj/7205_Subjective_Evaluation_Models_and_Conjoint.pdf.

⁴ Green, Paul E., Yoram Wind, and Arun K. Jain. “Consumer Menu Preference: An Application of Additive Conjoint Measurement.” *Proceedings of the Third Annual Conference of the Association for Consumer Research*. Ed. M. Venkatesan. Chicago: Association for Consumer Research, 1972. 304-315, available at http://dl.dropbox.com/u/9686940/windj/7208_Consumer_Menu_Preferences_An_Application.pdf.

⁵ Green, Paul E. and Yoram Wind. “New Way to Measure Consumers’ Judgments.” *Harvard Business Review* 53 (July - Aug. 1975): 107-117, available at http://dl.dropbox.com/u/9686940/windj/7509_New_Way_to_Measure_Consumers'.pdf.

⁶ Wind, Yoram (Jerry). “New Developments in Conjoint Analysis.” Paper presented at the 25th Annual Midwest Conference of the American Statistical Association on What’s New in Statistical Techniques for Marketing Research, Mar. 1978.

⁷ Goldberg, Stephen M., Paul E. Green, and Yoram Wind. “Conjoint Analysis of Price Premiums for Hotel Amenities.” *Journal of Business* 57.1.2 (1984): S111-S132, available at http://dl.dropbox.com/u/9686940/windj/8403_Conjoint_Analysis_of_Price_Premiums.pdf.

⁸ Green, Paul E., Abba M. Krieger, and Yoram (Jerry) Wind. “Thirty Years of Conjoint Analysis: Reflections and Prospects.” *Interfaces* 31.3.2 (May - June 2001): S56-S73, available at http://dl.dropbox.com/u/9686940/windj/0102_Thirty_Years_of_Conjoint_Analysis.pdf.

- “Conjoint Analysis: Methods and Applications”⁹
- “Applying Conjoint Analysis to Legal Disputes: A Case Study”¹⁰

10. Additionally, the e-book I co-authored with Abba Krieger and Paul Green, Adventures in Conjoint Analysis: A Practitioner’s Guide to Trade-Off Modeling and Applications,¹¹ offers a summary of reflections on some of our work over the years, in which we applied conjoint analysis in the design of products and services, positioning, market segmentation, product assortment, pricing, and other marketing and business decisions. These applications included the design of the Courtyard by Marriott, and projects for numerous firms such as AT&T, Ford, IBM, Xerox, American Airlines, FedEx, MasterCard, Monsanto, Pfizer, GSK, and a number of other B2C and B2B firms. For an illustrative list of applications, see Table 2 of “Thirty Years of Conjoint Analysis: Reflections and Prospects.”¹²

C. Approach And Materials Reviewed

11. Approach and Criteria for Evaluation – In preparing this report, I relied on marketing, consumer behavior, and consumer research concepts, methods, and findings (a) as reflected in the professional literature and as taught by me and others at Wharton and other leading universities, and (b) as practiced by me and other leading professionals in conducting

⁹ Green, Paul E., Jerry Wind, and Vithala R. Rao. “Conjoint Analysis: Methods and Applications.” The Technology Management Handbook. Ed. Richard C. Dorf. Boca Raton, FL: CRC Press, 1998. 12-66–12-72, available at http://dl.dropbox.com/u/9686940/windj/9903_Conjoint_Analysis_Methods_and_Applications.pdf.

¹⁰ Wind, Yoram (Jerry), Abba M. Krieger, and Paul E. Green. “Applying Conjoint Analysis to Legal Disputes: A Case Study.” Wharton School Working Paper, 2002, available at http://dl.dropbox.com/u/9686940/windj/0601_Applying_Conjoint_Analysis_to_Legal.pdf.

¹¹ Krieger, Abba M., Paul E. Green and Yoram (Jerry) Wind. Adventures in Conjoint Analysis: A Practitioner’s Guide to Trade-Off Modeling and Applications. Philadelphia: The Wharton School, 2004, available at <https://marketing.wharton.upenn.edu/faculty/green/monograph/>.

¹² Green, Paul E., Abba M. Krieger, and Yoram (Jerry) Wind. “Thirty Years of Conjoint Analysis: Reflections and Prospects.” *Interfaces* 31.3.2 (May - June 2001): S56-S73, available at http://dl.dropbox.com/u/9686940/windj/0102_Thirty_Years_of_Conjoint_Analysis.pdf.

and evaluating marketing and consumer research for academic peer-reviewed publications and for management and courts as input into their decisions. These principles are consistent with the criteria outlined in the Manual for Complex Litigation (4th Edition) published in 2004 by the Federal Judicial Center.

12. **Material Reviewed and Research Team** – In reaching these conclusions, I reviewed and/or relied upon the items listed in Appendix B. These materials include, among other things, Professor Hauser’s report, deposition and trial testimony. I also have discussed issues in this case with my colleague and research collaborator, Professor Abba Krieger, and with Analysis Group. In addition, some of the analysis that supports the opinions expressed in this declaration was performed by staff members at Analysis Group working under my direction and supervision.

II. SUMMARY OF CONCLUSIONS

13. **Professor Hauser's Report and the conjoint analysis that it describes do not show that consumers bought Samsung smartphones or tablets because the devices were equipped with the features claimed in the utility patents.** That is, Professor Hauser’s conjoint analysis does not provide a reliable or valid basis for determining whether the touchscreen features claimed in the ’915, ’163, or ’381 patents (the “utility patents” or “patents at issue”) drove sales of the Samsung smartphones or tablets that incorporated those features. The reasons include the following.

14. **First, as Professor Hauser acknowledges, his analysis was not designed to show that consumers bought Samsung smartphones or tablets because they were equipped with the features claimed in the utility patents.** His surveys were designed to examine why respondents choose among Samsung smartphones or tablets and *not* why respondents select

Samsung smartphones or tablets over competing products or rather than choosing to make no purchase at all. He limited his surveys to owners of Samsung smartphones or tablets and forced those respondents to choose only Samsung devices. Respondents did not have the choice to select competing products, nor did they have the choice not to select Samsung devices because prices were too high or the devices did not meet their purchase requirements. Consequently, Professor Hauser's surveys do not provide a basis by which to analyze why survey respondents buy Samsung smartphones or tablets versus buying another brand of smartphone or tablet (or not buying such a device at all). Professor Hauser explicitly acknowledged this limitation of his survey design in his report, noting that "the survey was designed with the goal that respondents would not make comparisons with other devices available in the marketplace"¹³ and that "[t]his outside-option design is appropriate when a researcher wishes to estimate primary demand for smartphones,"¹⁴ where primary demand reflects the demand for the products explicitly examined in the survey relative to alternatives. As such, one cannot draw any conclusions from Professor Hauser's surveys as to whether the features claimed in the patents at issue drove purchases of Samsung smartphones or tablets equipped with those features. (See paragraphs 40-45)

15. **Second, Professor Hauser's methodology generates predictions that are inconsistent with market realities and common sense.** Specifically, Professor Hauser's estimates of the willingness-to-pay ("WTP") price premium associated with the features claimed in the utility patents are based on an underlying methodology that generates nonsensical predictions. For example, they suggest that:

- As many as 43 percent of survey respondents chose to purchase smartphones or

¹³ Hauser Report, p. 35.

¹⁴ Hauser Report, p. 35.

tablets that were priced higher than an identical lower-priced device. (See paragraphs 46-47.)

- As many as 35 percent of respondents preferred clearly inferior yet identically priced devices. (See paragraphs 48-51.)
- The smartphone WTP price premium associated with just the touchscreen features examined by Professor Hauser exceeds the \$152 average price paid by survey respondents. (See paragraphs 52-54.)

16. **Third, the design of the surveys that underlie Professor Hauser's findings embodies numerous flaws that appear to invalidate his analysis and/or inflate his price premium estimates.** Professor Hauser's WTP premium estimates associated with the features claimed in the utility patents:

- are conflated by systematically higher WTP price premium estimates associated with animated descriptions used to describe the features claimed in the utility patents. (See paragraphs 56-60.)
- appear to be inflated because his analysis failed to compare the willingness-to-pay for features associated with technologies claimed in the utility patents with non-infringing substitute technologies. (See paragraphs 61-65.)
- may be inflated by a survey design which forced respondents to choose Samsung devices by not including other brands or a "no choice option." (See paragraphs 66-67.)
- may not accurately reflect respondents' price sensitivity because respondents' survey responses are linked to hypothetical, and not actual, spending. (See paragraphs 68-69.)

- may be overstated because his survey omits a number of important features and benefits associated with the smartphone and tablet purchase decision. (See paragraphs 70-72.)

17. **Fourth, Professor Hauser failed to externally validate his model.** Professor Hauser conducted internal validity tests to determine whether his findings were consistent within his sample of respondents. However, Professor Hauser failed to conduct any external validity tests to determine whether his findings might be meaningful beyond the sample of respondents he surveyed and beyond his narrow survey environment. (See paragraph 73.)

III. BACKGROUND

A. Case Status

18. On August 24, 2012, a jury found that Samsung had infringed several Apple patents, including the '381 patent, the '915 patent, and the '163 patent.¹⁵ I understand that Samsung is appealing the verdict.

19. I further understand that Apple has asked the Court to permanently enjoin Samsung from selling certain smartphones and tablets. Among the arguments that Apple has made in support of its motion is that Samsung's infringement has caused "more than an insubstantial loss of market share" to Apple.¹⁶ To support that argument, Apple has argued that "Apple's iOS utility patents drive consumer demand."¹⁷

20. Apple has used the results of the Hauser Conjoint Analysis as evidence

¹⁵ Vascellaro, Jessica E. "Apple Wins Big in Patent Case," *The Wall Street Journal*, August 25, 2012, available at online.wsj.com/article/SB10000872396390444358404577609810658082898.html (viewed October 9, 2012).

¹⁶ *Apple's Motion for a Permanent Injunction and for Damages Enhancements*, p. 7.

¹⁷ *Apple's Motion for a Permanent Injunction and for Damages Enhancements*, p. 8.

demonstrating “strong consumer demand”¹⁸ for each of Apple's patented inventions. According to *Apple’s Motion for a Permanent Injunction and for Damages Enhancements*:

Using the same methods that major companies use outside of court, the results [of Professor Hauser’s analysis] show that Samsung consumers who purchased the infringing products would be willing to pay \$39 more for a smartphone or \$45 for a tablet that included the technology of the ’915 Patent and \$100 more for a smartphone or \$90 for a tablet that included the technology of all three of the utility patents. (Tr. 1929:12-16; 1946:4-9; PX30.) *This evidence demonstrates strong consumer demand for each patented invention.* (See also Musika Decl. ¶¶ 40-57; Robinson Decl. ¶¶ 34-42).¹⁹

B. Patented Features and Non-Infringing Alternatives

21. I understand that Samsung has been found to have incorporated touchscreen features claimed in the ’381, ’915, and ’163 patents in certain smartphones and tablets. I also understand that Samsung has developed and begun to employ non-infringing alternatives which provide customer benefits that are comparable to the features claimed in the Apple patents that Samsung was found to have infringed.

22. U.S. Patent No. 7,469,381 issued December 23, 2008 and is entitled “List Scrolling and Document Translation, Scaling, and Rotation on a Touch-Screen Display.”²⁰ I understand that the ’381 patent relates to the “bounce back” or “rubberband” feature that indicates when a user has scrolled to the end of a document on a touchscreen display.²¹ When

¹⁸ *Apple’s Motion for a Permanent Injunction and for Damages Enhancements*, p. 9.

¹⁹ *Apple’s Motion for a Permanent Injunction and for Damages Enhancements*, pp. 9. (emphasis added)

²⁰ U.S. Patent No. 7,469,381 B2.

²¹ Declaration Of Andries Van Dam, Ph.D. In Support Of Samsung’s Opposition To Apple’s Motion For A Permanent Injunction And For Damages Enhancements Regarding U.S. Patent No. 7,469,381, October 18, 2012 (“Van Dam Declaration”), pp. 5-6; U.S. Patent No. 7,469,381 B2, at column 21. *See also*, Reed, Brad. “Apple vs. Samsung: The gory details,” *BGR*, August 24, 2012, available at <http://www.bgr.com/2012/08/24/apple-samsung-trial-verdict-samsung-loses-big/> (viewed October 9, 2012); Arthur, Charles. “Apple v Samsung: the questions the jury has to answer,” *The Guardian*, August 22, 2012, available at <http://www.guardian.co.uk/technology/2012/aug/22/jurors-samsung-apple-questions> (viewed October 9, 2012).

the user scrolls to the end of a document, the screen continues past the edge of the document and temporarily displays a shaded area before bouncing or “snap[ing] back” to the edge of the document.²² I further understand that this functionality has been incorporated into certain Samsung smartphones and tablets.

23. I understand that Samsung has developed a non-infringing alternative to the ’381 patent that has been implemented in several of its smartphones and tablets.²³ This non-infringing alternative replaces the “rubberband” feature with a blue glow that emanates from the edge of the screen whenever the user attempts to scroll past the edge. I understand that, under the non-infringing alternative, the screen stops at the edge of the document such that no “rubberband” effect is implemented.²⁴

24. U.S. Patent No. 7,844,915 issued November 30, 2010 and is entitled “Application Programming Interfaces for Scrolling Operations.”²⁵ I understand that the ’915 patent claims an “autoswitch” feature that enables the device to distinguish between single finger gestures (such as scrolling) and multi-finger gestures (such as “pinch to zoom”).²⁶ I further understand that this functionality has been incorporated in certain Samsung smartphones and tablets.

25. I understand that Samsung has implemented a non-infringing alternative to the

²² Van Dam Declaration, p. 5.

²³ Van Dam Declaration, pp. 6-7.

²⁴ Van Dam Declaration, p. 6.

²⁵ U.S. Patent No. 7,844,915 B2.

²⁶ Declaration Of Stephen Gray In Support Of Samsung’s Opposition To Apple’s Motion For A Permanent Injunction And Damages Enhancement, October 18, 2012 (“Gray Declaration”), p. 5; Reed, Brad. “Apple vs. Samsung: The gory details,” *BGR*, August 24, 2012, available at <http://www.bgr.com/2012/08/24/apple-samsung-trial-verdict-samsung-loses-big/> (viewed October 9, 2012); Arthur, Charles. “Apple v Samsung: the questions the jury has to answer,” *The Guardian*, August 22, 2012, available at <http://www.guardian.co.uk/technology/2012/aug/22/jurors-samsung-apple-questions> (viewed October 9, 2012).

'915 patent that is being implemented in the Galaxy S II (T-Mobile) smartphone.²⁷ This non-infringing alternative modifies the underlying software but leaves the user's experience essentially unchanged. That is, a user will still be able to scroll (with one finger) and zoom on documents (using two fingers).²⁸

26. U.S. Patent No. 7,864,163 issued January 4, 2011 and is entitled "Portable Electronic Device Method, and Graphical User Interface for Displaying Structured Electronic Documents."²⁹ I understand that the '163 patent claims a method of navigating a document on a small screen device. More specifically, the '163 patent relates to a method by which the user can double-tap the screen to re-center and zoom in on a section of the screen.³⁰ The user can then double-tap on other portions of the screen to re-center the display while still zoomed in.³¹ I further understand that this functionality was incorporated in certain Samsung smartphones and tablets.

27. I understand that Samsung has developed a non-infringing alternative to the '163 patent that has been implemented in several of its smartphones and tablets.³² This non-infringing alternative modifies the approach presented in the '163 patent. Under this non-infringing alternative, after the user has performed a double-tap to zoom and re-center the screen, a subsequent double-tap causes the screen to zoom out rather than re-center on another portion of

²⁷ Gray Declaration, pp. 15-16.

²⁸ Gray Declaration, p. 15.

²⁹ U.S. Patent No. 7,864,163 B2.

³⁰ Gray Declaration, pp. 16-17; Reed, Brad. "Apple vs. Samsung: The gory details," *BGR*, August 24, 2012, available at <http://www.bgr.com/2012/08/24/apple-samsung-trial-verdict-samsung-loses-big/> (viewed October 9, 2012); Arthur, Charles. "Apple v Samsung: the questions the jury has to answer," *The Guardian*, August 22, 2012, available at <http://www.guardian.co.uk/technology/2012/aug/22/jurors-samsung-apple-questions> (viewed October 9, 2012).

³¹ Gray Declaration, pp. 16-17.

³² Gray Declaration, pp. 17-19.

the screen. Additionally, a subsequent single-tap results in no response from the device.³³

C. Background On Smartphones And Tablets

28. Smartphones are voice and data handheld mobile wireless communications devices that can be distinguished from other mobile handsets, referred to as “feature phones,” by their advanced operating systems.³⁴ A key feature distinguishing smartphones from other handsets is the ability to run third-party applications.³⁵ These phones offer a range of advanced features and functionalities, including email support, the ability to access the internet, and multimedia functions (such as gaming and streaming music and video).³⁶

29. A tablet is a hybrid of a computer and a smartphone that incorporates a flat touchscreen and typically measures 7 to 10 inches across.³⁷ Tablets typically offer Wi-Fi connectivity,³⁸ and while a subset of tablets offer cellular communications capability,³⁹ they are not primarily used for voice communications. Instead, they are primarily used for personal computing uses such as gaming, email, and web browsing.⁴⁰

30. Consumer surveys conducted by or for Samsung and Apple indicate that features

³³ Gray Declaration, p. 18.

³⁴ See e.g., “North American Smartphones Market,” Frost & Sullivan report number N81F-65, December 2010, p. 14; Kidron, Ittai and George Iwanyc, “2012 Handset Guidebook,” Oppenheimer Equity Research, November 13, 2011 (“Oppenheimer 2012 Handset Guidebook”), p. 93.

³⁵ Oppenheimer 2012 Handset Guidebook, p. 93.

³⁶ Oppenheimer 2012 Handset Guidebook, p. 93.

³⁷ Bell, Donald. “Tablet Buying Guide,” *CNET*, March 28, 2012, available at <http://reviews.cnet.com/tablet-buying-guide/?tag=auxPromo> (viewed October 16, 2012); Tablet Computer Definition, *PC Magazine*, available at http://www.pcmag.com/encyclopedia_term/0,2542,t=tablet+computer&i=52520,00.asp (viewed October 16, 2012); “Tablet Buying Guide,” *Consumer Reports*, May 2012, available at <http://www.consumerreports.org/cro/tablets/buying-guide.htm> (viewed October 16, 2012).

³⁸ “Tablet Buying Guide,” *Consumer Reports*, May 2012, available at <http://www.consumerreports.org/cro/tablets/buying-guide.htm> (viewed October 16, 2012).

³⁹ See, e.g., APLNDC-Y0000024130-333, pp. 160, 216-217.

⁴⁰ APLNDC-Y0000023361-427, p. 389; APLNDC-Y0000024130-333, p. 246.

relevant to smartphone customer purchase decisions include, among others, [REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]⁴¹ One website cited in the Hauser Report refers to approximately 30 smartphone features in its product comparisons,⁴² as do research reports from other third-party sources.⁴³ A number of indirect attributes also affect the consumer purchase decision, including the quality, cost, and brand name of the network service provider; the price of the monthly service plan; and recommendations from other users and salespeople.⁴⁴ The fact that many attributes contribute to the smartphone consumer's purchase decision is consistent with the way smartphones, such as the AT&T version of the Galaxy SII, are displayed on Samsung's website.⁴⁵ Similarly, there are a variety of features that are relevant to tablet customer purchase decisions.⁴⁶

31. The features claimed in the patents at issue contribute to, and make use of, touchscreen technology. However, the patents at issue do not cover touchscreen technology in and of itself, nor are they necessary for a touchscreen to be functional. I also understand that they do not cover many of the touchscreen features and functionalities that are incorporated in Samsung phones, such as the ability to type, scroll, or double-tap to select links. Consistent with

⁴¹ See, e.g., SAMNDCA00250503-557, p. 525; APLNDC-X0000006548-647, p. 566; APLNDC0002007608-704, p. 634.

⁴² <http://cell-phones.toptenreviews.com/smartphones/> (viewed October 12, 2012). See also, Hauser Report, p. 22.

⁴³ See, e.g., SAMNDCA00190144-243, at 195.

⁴⁴ See, e.g., SAMNDCA00252685-775, p. 707; "How to Buy a Cell Phone," *PC World*, November 29, 2011, available at http://www.pcworld.com/article/125653/cell_phone_guide.html (viewed October 16, 2012).

⁴⁵ See, e.g., Exhibit 1.

⁴⁶ APLNDC-Y0000023361-427, p. 387; APLNDC-Y0000024130-333, p. 233; <http://tablets-review.toptenreviews.com/> (viewed October 12, 2012). See also, Hauser Report, p. 22.

this, while the Samsung website for the AT&T version of the Galaxy SII smartphone lists the touchscreen among the many features and attributes of the device, it describes the touchscreen broadly as “[t]echnology that enables users to interact with a phone by touching images, words, or icons on the display.”⁴⁷ As such, the functions claimed in the patents at issue contribute, at most, some incremental value to the overall user experience of the touchscreen, which is just one of the many features relevant to smartphone and tablet customer purchase decisions.

D. Overview Of Professor Hauser’s Analysis

32. The Hauser Report, dated March 22, 2012, describes and reports the results of the conjoint analysis that he undertook related to his assignment “to determine the price premium, if any, that Samsung consumers are willing to pay for...features”⁴⁸ in smartphones and tablets associated with the patents at issue, including the ’915 patent, the ’381 patent, and the ’163 patent.⁴⁹

33. Professor Hauser used a web-based conjoint analysis survey procedure⁵⁰ along with a hierarchical Bayes choice-based conjoint (“HB CBC”) statistical methodology to develop his price premium estimates.⁵¹ His approach included the following elements:

- i. A series of 20 interviews were conducted with smartphone and tablet consumers to develop an understanding about consumers’ use of smartphones and tablets.⁵²
- ii. Using this information, a questionnaire was developed. This questionnaire was

⁴⁷ Exhibit 2.

⁴⁸ Hauser Report, p. 6.

⁴⁹ The Hauser Report also addresses U.S. Patent No. 7,663,607 as it relates to tablets and U.S. Patent No. 7,812,828 as it relates to smartphones; however, I understand that those patents were dropped from the litigation.

⁵⁰ Hauser Report, p. 8.

⁵¹ Hauser Report, p. 17.

⁵² Hauser Report, p. 20.

pre-tested with another 20 respondents to examine the design and clarity of the survey instrument.⁵³

- iii. Survey respondents completed a set of screener questions to determine eligibility for the conjoint survey.⁵⁴ Respondents who passed the screener section proceeded immediately to the conjoint survey introduction, which included instructions for completing the survey as well as lengthy descriptions of each of the features included in the survey.⁵⁵ Three of the feature descriptions were accompanied by text, static images, and multimedia animations that further explained the features, while others were accompanied only by text and static images.⁵⁶ The following features were included in the survey: (1) capabilities of the touchscreen; (2) size and weight; (3) camera; (4) storage/memory; (5) connectivity; (6) number of apps; and (7) price.⁵⁷
- iv. The survey considered four levels of each feature.⁵⁸ For the touchscreen, “three of the touchscreen capability levels (for both smartphones and tablets) were intended to be chosen such that they would represent a product that included a

⁵³ Hauser Report, p. 24.

⁵⁴ Hauser Report, pp. 29-30.

⁵⁵ Hauser Report, pp. 32-33.

⁵⁶ Animations were used for the descriptions of touchscreen capability, camera, and connectivity. The remaining four features (size and weight, number of apps, storage/memory, and price) used only static images. Hauser Report, p. 33.

⁵⁷ Hauser Report, pp. 9, 33. Respondents were told “[a]side from these features below, you should assume that all other smartphone features are the same for every smartphone offering you see.” Hauser Report, p. 36.

⁵⁸ Exhibit 3 lists the features and feature levels for Professor Hauser’s smartphone survey. Exhibit 4 lists the features and feature levels for Professor Hauser’s tablet survey. The level descriptions are largely similar in the smartphone and tablet surveys, though they differ somewhat for the touchscreen, connectivity and size and weight features.

non-infringing alternative for one or more of the patents at issue.”⁵⁹

- v. For both smartphones and tablets, each survey respondent was asked to choose among four hypothetical products composed of sets of product features. The exercise was repeated 16 times for each respondent. Professor Hauser does not specify the approach he employs to determine the composition of the products shown on each choice screen.⁶⁰ However, it appears that the features used in each smartphone or tablet on a given choice screen were determined using a randomized sampling without replacement approach.⁶¹
- vi. As described by Professor Hauser, respondents were forced to choose among the four options presented to them. Respondents were asked, “[i]f these were your only options and you were choosing a new smartphone [tablet], which Samsung smartphone [tablet] would you choose?”⁶² That is, the survey was designed such that respondents would not make comparisons with other devices available in the marketplace.

34. The smartphone and tablet surveys were taken by 604 and 599 individuals, respectively, who had purchased an infringing Samsung product in the prior two years.⁶³ After eliminating certain of the survey respondents, samples of 455 Samsung smartphone users and

⁵⁹ Hauser Report, p. 32.

⁶⁰ Professor Hauser states only that the examples used in the choice screens were generated randomly to avoid order effects. Hauser Report, pp. 23, 34-35, 37.

⁶¹ More specifically, each choice screen contained four phones (or tablets), and each feature had four possible levels. For each feature, the first device was randomly assigned one of the four possible levels, then the second device was randomly assigned one of the three remaining levels, then the third device was randomly assigned one of the two remaining levels, and finally the last level was assigned to the fourth device. Thus, each level of each feature was represented in exactly one device on each choice screen. The randomization was done using Sawtooth software.

⁶² Hauser Report, p. 35.

⁶³ Hauser Report, p. 30, 37.

415 Samsung tablet users were analyzed.⁶⁴ All surveys were administered via the internet.⁶⁵

35. From the survey results, Professor Hauser estimated a series of “partworths” for each respondent, which represent the partial contribution to utility of each level of each feature from consuming a product. Professor Hauser supplemented these partworths with prior information about the estimated partworths based on consumer-behavior theory.⁶⁶

36. Professor Hauser then applied an approach known as Randomized First Choice (“RFC”) market simulation (“RFC Simulation”) to the partworth estimates to estimate the price premium for features associated with the patents at issue.⁶⁷ More specifically, Professor Hauser estimated the price premium associated with a particular product attribute by using the RFC Simulation to determine the price at which *half* of the survey respondents would select a higher price phone with a given attribute over an otherwise identical phone that lacks that attribute.⁶⁸ The WTP price premium is the difference in the prices between the two phones (that vary by a single feature but are otherwise identical).

37. Exhibit 5 summarizes the steps employed by Professor Hauser to determine his estimate of the WTP price premium for the “autoswitch” feature claimed in the ’915 patent. This involves a comparison of two phones: Phone A and Phone B. With respect to the touchscreen features, Phone A includes the “autoswitch” feature as well as the “reliable touch,” “rubberband,” and “tap to re-center after zoom” features. Phone B includes only the reliable touch, rubberband, and tap to re-center after zoom features, but not autoswitch. The phones are

⁶⁴ Hauser Report, p. 17, 38.

⁶⁵ Hauser Report, p. 28.

⁶⁶ See, e.g., Hauser Report, pp. 41-42, 45.

⁶⁷ Hauser Report, pp. 50-52.

⁶⁸ Hauser Report, pp. 51, 55.

identical with respect to the other non-price features.⁶⁹ The benchmark price for Professor Hauser's WTP price premium calculations is \$199.⁷⁰

38. When priced at that benchmark price, the RFC Simulation predicts that 67 percent of the survey respondents would prefer Phone A. The RFC Simulation predicts that half of the survey respondents would prefer Phone A at price of \$238 relative to Phone B at a price of \$199, hence the \$39 WTP price premium associated with the '915 patent/autoswitch feature.⁷¹ Exhibit 6 summarizes the steps employed by Professor Hauser to determine the \$100 price premium associated with the features claimed in the '915, '163, and '381 patents collectively.⁷² Using the same approach for tablets, Professor Hauser estimated a WTP price premium of \$45 associated with the '915 patent/autoswitch feature and a \$90 price premium associated with the features claimed in the '915, '163, and '381 patents collectively. Exhibits 7 and 8 are the tablet analogues of Exhibits 5 and 6.

39. Professor Hauser summarized his WTP estimates as follows:

...for both smartphones and tablets, Samsung consumers are willing to pay a significant price premium for the tested features that are covered by the patents at issue. For smartphones with a base price of \$199, the estimated price premium is \$39 for the '915 Patent alone... [and] the estimated price premium is \$100 for the '915, '163 and '381 Patents taken together. For tablets with a base price of \$499, the estimated price premium is ... \$45 for the '915 Patent alone, and \$90 for the '915, '163 and '381 Patents taken

⁶⁹ According to Professor Hauser, "In the simulation, the levels of other features do not affect the consumer's choice as long as they are held constant between the two product options." Hauser Report, p. 51. However, this is true only if there are no interaction terms between levels across features. Hauser chose to fit a model without interaction terms (even though they might be relevant) which is why his statement holds.

⁷⁰ Hauser Report, p. 53.

⁷¹ Exhibit 5.

⁷² It is important to note that Professor Hauser's methodology implicitly limits his WTP price premium estimates to \$100 for any given feature level. The reason is that maximum price level in the Hauser survey is \$299, and by using a benchmark price of \$199, Professor Hauser does not allow the price of the preferred smartphone to be increased by more than \$100.

together.⁷³

IV. ANALYSIS OF HAUSER REPORT

A. The Surveys Upon Which Professor Hauser's Findings Are Based Were Not Designed To Estimate The Magnitude Of Samsung Smartphone And Tablet Sales Attributable To The Protected Features

40. Interpreting Professor Hauser's survey results requires understanding his underlying survey design. Two central features of his survey design involve the selection of survey participants and the smartphone and tablet choices presented to survey respondents. First, survey participants were required to have purchased at least one Samsung smartphone or tablet in the last two years.⁷⁴ The screening questions excluded any consumer who did not previously own a Samsung smartphone or tablet but intended to purchase one in the near future,⁷⁵ while not excluding any recent Samsung owners who no longer used their Samsung smartphone or tablet as their primary device.⁷⁶

41. Second, survey participants who satisfied the screening requirements were restricted to choosing Samsung devices.⁷⁷ Survey respondents were not given the option of selecting devices that compete with Samsung smartphones (*e.g.* Apple iPhones) or tablets (*e.g.* Apple iPads). Nor were survey respondents presented with the option to not, effectively, buy a device because, for example, none of the smartphones met their purchase requirements.

⁷³ Hauser Report, pp. 7-8.

⁷⁴ Hauser Report, p. 30.

⁷⁵ The screening questions specify that any person who has not owned at least one Samsung smartphone or tablet in the last two years will be terminated from the survey. Hauser Report, Exhibit D, p. 3 and Exhibit E, p. 3.

⁷⁶ The screening questions specify that any person who has owned a Samsung phone in the last two years and can identify the device are allowed to continue with the survey. This may include, for example, people who have purchased a Samsung device in the last two years before switching to a different manufacturer's device or people who have purchased a Samsung device in the last two years but already decided their next device will be from a different manufacturer. Hauser Report, Exhibit D, pp. 3-4 and Exhibit E, pp. 3-4.

⁷⁷ Hauser Report, p. 35.

42. Professor Hauser acknowledged the limitations of his survey with respect to constraining respondents to choices of Samsung smartphones and tablets alone:

For each set of four alternative smartphones in a choice task, respondents were asked: “If these were your only options and you were choosing a new smartphone [tablet], which Samsung smartphone [tablet] would you choose?” By explicitly asking respondents to focus only on the four options provided to them, *the survey was designed with the goal that respondents would not make comparisons with other devices available in the marketplace.*⁷⁸

This approach does not correspond with the reality of the marketplace in which consumers are free to choose among different brands of smartphones and tablets that differ in many ways including price levels, features, and other benefits not included in Professor Hauser’s study.

43. Professor Hauser further described how his survey design omitted an option that would have allowed him to estimate what he refers to as “primary demand” for the products analyzed in his survey:

In some instances researchers augment the choice among profiles in the choice task by allowing the respondent to choose an “outside option,” that is, to choose not to choose among the options (this is also known as the “no-choice” option). *This outside-option design is appropriate when a researcher wishes to estimate primary demand for smartphones.*⁷⁹

Professor Hauser, however, does not explicitly describe what primary demand reflects and, in turn, what his surveys fail to account for. Marketers use the term “primary demand” in reference to demand for the product category as a whole.⁸⁰ In the context of Professor Hauser’s surveys, however, “primary demand” by virtue of the surveys’ design reflects *the demand for Samsung smartphones and tablets*. As such, Professor Hauser has essentially acknowledged that his

⁷⁸ Hauser Report, p. 35 (emphasis added).

⁷⁹ Hauser Report, p. 35 (emphases added).

⁸⁰ See, e.g., Pride, William M. and O.C. Ferrell, Marketing, South-Western College Publishing, 2012, p. 512.

surveys were *not* designed to analyze the demand for Samsung smartphones or tablets.

44. Because Professor Hauser's conjoint study does not accurately depict market reality by allowing respondents to choose options other than Samsung smartphones and tablets, the survey data collected by Professor Hauser was not used – and cannot be used – to estimate the extent to which the patents at issue drove sales that Samsung would not have otherwise made. That is, the data collected by Professor Hauser cannot be used, for example, to estimate the extent to which people bought Samsung smartphones instead of competing smartphones because of the patented features, or the extent to which people would choose to purchase another brand of smartphone if the Samsung smartphones did not have the patented features. Nor can the survey be used to estimate the extent to which people purchased a Samsung smartphone rather than not buying a smartphone at all. This is inherent in the design of Professor Hauser's surveys. Because respondents are not given any “outside options,” whether they are for competitor smartphones or no smartphone purchase at all, the survey response data collected by Professor Hauser does not allow for a systematic examination of the product features associated with Samsung smartphones versus an alternative. All 13,920 choices from all 870 respondents reported in Professor Hauser's survey data involve the selection of a Samsung device, regardless of the product features.⁸¹

45. Importantly, Professor Hauser's estimates of the amounts consumers are willing to pay for the patented features – even if reliable and valid, which they are not – do not provide any guidance regarding the extent to which the feature claimed in the utility patents drove Samsung sales. It is perfectly conceivable that consumers who place a high willingness-to-pay

⁸¹ Professor Hauser reported results from 455 smartphone respondents and 415 tablet respondents. Each respondent provided 16 choice responses. Hauser Report, pp. 17, 19. $(455 + 415) * 16 = 13,920$.

on the features claimed in the utility patents would purchase Samsung devices even without the features claimed in those patents. These consumers may have a strong affinity for the [REDACTED] [REDACTED] or any of a number of other features⁸² and benefits⁸³ that consumers regularly identify as being central to their decision to purchase smartphones and tablets.⁸⁴ Conjoint analysis/surveys are widely used to examine which product features drive consumer purchases among “competing” alternatives. Professor Hauser, however, did not conduct such a survey.

B. Professor Hauser’s Estimates Of The WTP Price Premium Associated With The Features Claimed In The Utility Patents Are Based On An Underlying Methodology That Generates Nonsensical Predictions

1. Professor Hauser’s Methodology Suggests That A Substantial Portion Of Survey Respondents Prefer To Pay Higher Prices For Otherwise Identical Smartphones And Tablets

46. In order to further evaluate the reliability and validity of Professor Hauser’s WTP price premium estimates, I employed the RFC Simulation technique underlying those estimates to evaluate predictions not reported by Professor Hauser in his report. Specifically, I employed the RFC Simulation relied on by Professor Hauser to evaluate predictions related to a benchmark smartphone – a smartphone that embodies the highest level attributes for each of the non-price

⁸² Examples of other important features not included in Professor Hauser’s survey include [REDACTED] [REDACTED]. See, e.g., SAMNDCA00250503-557, p. 525; APLNDC-X0000006548-647, p. 566; APLNDC0002007608-704, p. 634; APLNDC-Y0000023361-427, p. 387; APLNDC-Y0000024130-333, p. 233.

⁸³ Consumers consider many additional factors when making a smartphone or tablet purchase decision, including quality of network service, network coverage, cost of service (voice and/or data) plans, consumer reviews, word of mouth recommendations, etc. See, e.g., SAMNDCA00252685-775, p. 707; “How to Buy a Cell Phone,” *PC World*, November 29, 2011, available at http://www.peworld.com/article/125653/cell_phone_guide.html (viewed October 16, 2012).

⁸⁴ See, e.g., SAMNDCA00250503-557, p. 525; SAMNDCA00252685-775, p. 707.

features⁸⁵ – that differed only in terms of price. Exhibit 9 shows specific predictions of the RFC Simulation employed by Professor Hauser, including the following:

- 32 percent of survey respondents would prefer to pay \$199 rather than \$99 for the benchmark smartphone;
- 43 percent of survey respondents would prefer to pay \$99 rather than \$0 for the benchmark smartphone;
- between 19 percent and 43 percent of survey respondents would pay an additional \$100 for an otherwise identical smartphone;
- as many as 31 percent would pay an additional \$200 for an otherwise identical smartphone; and
- 16 percent would prefer to pay \$299 for a smartphone they could have for free (but, in both cases, come with a two-year carrier contract).

Exhibit 10 shows qualitatively similar predictions associated with Professor Hauser's tablet analysis. For example, 41 percent of respondents would prefer to pay \$359 rather than \$199 for an otherwise identical tablet, while 15 percent of respondents would prefer to pay \$659 rather than \$199 for an otherwise identical tablet.⁸⁶

47. These results are at odds with common sense. They demonstrate that the RFC Simulation upon which Professor Hauser bases his WTP price premium estimates generates predictions in which survey respondents are unrealistically insensitive to price. This renders his WTP price premium estimates unreliable and invalid because they are, ultimately, a measure of

⁸⁵ Professor Hauser notes that feature levels that are held constant between the two phones will not affect the consumer's choice. Hauser Report, p. 51. However, this is true only if there are no interactions between the features and feature levels used in the conjoint exercise.

⁸⁶ Exhibit 10.

survey respondent price sensitivity as they relate to the claimed in the patents at issue.

2. **Professor Hauser's Methodology Suggests That A Large Portion Of Samsung Owners Prefer Clearly Inferior, Yet Identically Priced, Smartphones And Tablets**

48. I also employed the RFC Simulation to generate predictions involving pairs of smartphones where one is clearly superior to another. For example, I compared a \$199 benchmark smartphone,⁸⁷ with 64 GB of memory capacity, to an otherwise identical \$199 smartphone with only 8 GB of memory capacity. The RFC Simulation predicted that 35 percent of survey respondents would select the 8 GB smartphone.⁸⁸ Similarly, I compared a \$499 benchmark tablet,⁸⁹ with 64 GB of memory capacity, to an otherwise identical \$499 tablet with only 8 GB of memory capacity. The RFC Simulation predicted that 31 percent of survey respondents would select the 8 GB tablet.⁹⁰ By way of reference, a 64 GB micro SD memory card that can be inserted into many Samsung smartphone models retails for prices in the range of \$50.⁹¹ Similarly, upgrading from the 16 GB Samsung Galaxy SIII to the otherwise identical 32 GB Samsung Galaxy SIII costs consumers \$50.⁹²

49. Similar comparisons were conducted involving other features. For example, the RFC Simulation predicted that 25 percent of respondents would select the \$199 benchmark

⁸⁷ The benchmark smartphone is one that embodies the highest level attributes for each of the features aside from the one being varied in the current example (in this case, memory).

⁸⁸ Exhibit 11.

⁸⁹ The benchmark tablet is one that embodies the highest level attributes for each of the features aside from the one being varied in the current example (in this case, memory).

⁹⁰ Exhibit 12.

⁹¹ See, e.g., http://www.amazon.com/SanDisk-SDSDU-064G-A11-Ultra-UHS-I-Class/dp/B007B5RJA6/ref=sr_1_94?s=pc&ie=UTF8&qid=1350430546&sr=1-94&keywords=sandisk+64 (viewed October 10, 2012). See also, <http://www.samsung.com/us/mobile/cell-phones-accessories#container> (viewed October 8, 2012)

⁹² See, e.g., http://shop.sprint.com/mysprint/shop/phone_wall.jsp?filterString=smartphone&isDeeplinked=true&INTNAV=ATG:HE:Smartphones (viewed October 18, 2012).

smartphone with only the cellular and Wi-Fi connectivity features over an otherwise identical smartphone with cellular, Wi-Fi, Tethering, Micro USB, and HDMI connectivity features.⁹³ In addition, the RFC Simulation predicted that 24 percent of respondents would select the \$199 benchmark tablet with only Wi-Fi connectivity over an otherwise identical tablet with Wi-Fi, Bluetooth, Micro USB, and HDMI connectivity features.⁹⁴ The consumer benefits of these additional connectivity features are discussed widely.⁹⁵

50. The breadth of app availability is also widely discussed.⁹⁶ Yet the RFC Simulation predicted that 43 percent of survey respondents would select the \$199 benchmark smartphone that had access to 150,000 apps over one that is otherwise identical, but with access to 600,000 apps.⁹⁷ The comparable figure for the \$199 benchmark tablet is 44 percent.⁹⁸

51. These findings are nonsensical. Similar to the comparisons of phones that differ only in price, the findings demonstrate that the RFC Simulations upon which Professor Hauser

⁹³ Exhibit 13.

⁹⁴ Exhibit 14.

⁹⁵ See, e.g., Ziegler, Chris. "Why Is Verizon's iPhone 5 Unlocked? Don't Thank Google or the FCC." *The Verge*. September 25, 2012, available at <http://www.theverge.com/2012/9/25/3405610/verizon-iphone-5-unlocked-open-access-fcc>. (viewed October 17, 2012); Ziegler, Chris. "AT&T adding an extra 2GB to phone tethering plans, launching Mobile Hotspot app February 13th." *Engadget*, February 2, 2011, available at www.engadget.com/2011/02/02/atandt-adding-an-extra-2gb-to-phone-tethering-plans-launching-mob/ (viewed October 17, 2012); Purewal, Sarah Jacobsson. "The ultimate Android tethering guide." *PC World*, September 5, 2012, available at http://www.peworld.com/article/261928/the_ultimate_android_tethering_guide.html (viewed October 17, 2012); "Motorola Droid Razr Maxx review (Verizon Wireless)." *CNET*, October 17, 2012, available at http://reviews.cnet.com/smartphones/motorola-droid-razr-maxx/4505-6452_7-35128051-2.html (viewed October 17, 2012); Miller, Matthew. "ACCELL MHL adapter turns the HTC Flyer into a portable media server (review)." *The Mobile Gadgeteer*, September 8, 2011, available at <http://www.zdnet.com/blog/mobile-gadgeteer/accell-mhl-adapter-turns-the-htc-flyer-into-a-portable-media-server-review/5095> (viewed October 17, 2012); Bennett, Brian. "New iPad first tablet with Bluetooth 4.0: Should you care?" *CNET*, March 9, 2012, available at http://news.cnet.com/8301-1035_3-57394350-94/new-ipad-first-tablet-with-bluetooth-4.0-should-you-care/ (viewed October 18, 2012).

⁹⁶ For example, Apple's website highlights that its "App Store has the world's largest collection of mobile apps." (<http://www.apple.com/iphone/from-the-app-store/>, accessed October 18, 2012). See also, Pogue, David, "Just How Many Android Tablet Apps Are There?," *The New York Times*, July 1, 2011, available at <http://pogue.blogs.nytimes.com/2011/07/01/mystery-how-many-android-tablet-apps/> (viewed October 18, 2012).

⁹⁷ Exhibit 15.

⁹⁸ Exhibit 16.

bases his WTP price premium estimates generate predictions that are inconsistent with central tenets of consumer behavior. The findings also demonstrate that Professor Hauser's WTP price premium estimates cannot be relied on.

3. **Professor Hauser's Estimates Of The WTP Price Premium Associated With Just The Touchscreen Features Examined Exceed The \$152 Average Smartphone Price Paid By Survey Respondents**

52. The results of Professor Hauser's WTP analysis also appear nonsensical when compared against the actual market prices of consumers' devices. Respondents in Professor Hauser's smartphone survey reported spending an average of \$152 on their Samsung smartphones.⁹⁹ Professor Hauser's own WTP estimates imply that the price premium for the individual touchscreen features – reliable touch (\$65), rubberband and tap to re-center (\$75), and autoswitch (\$39) – amount to \$179.¹⁰⁰ That is, the WTP estimates of the touchscreen features analyzed by Professor Hauser – which comprise only a fraction of the total number of touchscreen features, which, in turn, comprise only a small fraction of all smartphone features – exceed the actual amount, on average, survey respondents paid for their smartphone.

53. Professor Hauser's WTP estimates are similarly out of line with market realities when estimated based on a different benchmark price. With respect to his smartphone calculations, Professor Hauser generated his WTP price premium estimates based on a benchmark smartphone arbitrarily priced at \$199 and noted that doing so was conservative.¹⁰¹ However, as noted earlier, basing his WTP estimates on the \$199 benchmark price also has the

⁹⁹ Hauser Report, p. 53. Professor Hauser's survey instructed smartphone survey respondents to assume that the price shown was for a smartphone purchased with a 2-year service contract. Hauser Report, Exhibit D, p. 14.

¹⁰⁰ Exhibit 17.

¹⁰¹ Hauser Report, p. 53.

effect of limiting his WTP estimates to, at most, \$100.¹⁰²

54. Exhibits 18 and 19 demonstrate the unrealistic WTP estimates generated by Professor Hauser's methodology when the estimates are based on a benchmark smartphone priced at \$0 (with a two year contract). Specifically, Professor Hauser's methodology generates a WTP price premium of \$164 for the features associated with the '915 patents (autoswitch) and a WTP price premium of \$266 for the features associated with the '915, '381, and '163 patents, collectively.¹⁰³ These WTP figures, too, stand in stark contrast to the actual prices survey respondents reported paying for smartphones (in their entirety) and further demonstrate the unreliability and invalidity of Professor Hauser's findings.

C. The Surveys Underlying Professor Hauser's Findings Embody Numerous Design Flaws That Invalidate His Analysis And Appear To Inflate His Price Premium Estimates

55. The predictions generated by Professor Hauser's analysis strongly suggests problems with the underlying survey design. My review reveals a number of such problems that invalidate Professor Hauser's price premium estimates.

1. Professor Hauser's WTP Price Premium Estimates Associated With The Features Claimed In The Utility Patents Are Conflated By An Apparent Bias Associated With Animated Feature Descriptions

56. Any findings associated with a conjoint analysis depend critically on the manner in which the features of interest are presented to survey respondents. In addition, the reliability and validity of the findings depends on respondents clearly understanding the product features upon which the survey is based. The reliability and validity of the findings also depend on a

¹⁰² This is because the RFC Simulation is limited to prices with the range explicitly considered in Professor Hauser's survey. For smartphones, prices range from \$0 to \$299. Hauser Report, Exhibit D, p. 14.

¹⁰³ Exhibits 18 and 19.

survey design that does not artificially influence respondents' choices so as to introduce bias.

57. As noted above, in addition to price, Professor Hauser's surveys consider features associated with the smartphone or tablet's: (i) touchscreen, (ii) connectivity, (iii) camera, (iv) storage/memory, (v) app availability, and (vi) size and weight. The touchscreen features associated with the utility patents were described to survey respondents on a web-based interface employing text, static images, and multimedia animations.¹⁰⁴ The connectivity and camera features were also described using text, static images, and multimedia animations.¹⁰⁵ In contrast, the other non-price features – related to storage/memory, app availability, and size and weight – were described only with text and static images. They did not rely on multimedia animations.¹⁰⁶

58. There are numerous reasons why an analysis that uses different visual stimuli for some of the features being tested could produce biased results for those features. First, multimedia animations may be easier for survey respondents to comprehend, particularly in instances in which the subject feature involves actions that can be difficult to depict in static images or describe in words. Second, multimedia animations can be more engaging to respondents, such that respondents may pay substantially more attention to features that are accompanied by multimedia animations than to those without multimedia animations. Third, the use of multimedia animations for a subset of the features being tested might signal to respondents that those features may be more important than features that are accompanied only by static images. For example, respondents may perceive that the features that have multimedia animations are more important to the survey creators due to the extra time and effort that was expended in developing the animations (relative to developing a static image). For these reasons,

¹⁰⁴ Hauser Report, p. 33 and Exhibit D, pp. 9-10.

¹⁰⁵ Hauser Report, p. 33 and Exhibit D, pp. 7, 12-13.

¹⁰⁶ Hauser Report, p. 33 and Exhibit D, pp. 7-9, 11, 13-14.

it is customary in conjoint analysis to use the same presentation approach for every feature in the survey.

59. In Exhibit 20, I summarize the WTP price premium estimates for the smartphone feature and level combinations not reported by Professor Hauser by employing the RFC Simulation in the same manner as Professor Hauser.¹⁰⁷ In particular, I present the respective WTP price premium estimates for each feature relative to a \$199 benchmark phone that embodies the highest attribute level for each of the six non-price features (consistent with Professor Hauser).¹⁰⁸ This leads to 18 distinct WTP price premium estimates.¹⁰⁹ These WTP price premium estimates range from \$11 to \$100 (Professor Hauser's externally imposed cap). The estimates associated with the nine attribute levels associated with the features that did not employ a multimedia animated description – storage/memory, app availability, and size and weight – range from \$11 to \$31.¹¹⁰ The estimates associated with the nine smartphone attribute levels associated with the features that did employ a multimedia animated description – touchscreen, connectivity, and camera – range from \$33 to greater than \$100.¹¹¹ Thus there is a clear distinction between the features described with multimedia animations and those that were not: the smartphone WTP price premium estimates are uniformly higher for the features described with multimedia animations. The results are depicted graphically in Exhibit 21. Exhibits 22 to 24 depict the smartphone WTP price premium estimates by level and show an

¹⁰⁷ Note that these estimates were generated based on the methodology employed to generate Table 4 in Professor Hauser's Report. They are not based on the alternative "robustness check" methodology described in Paragraph 104 of his Report based on the "median-consumer."

¹⁰⁸ Exhibit 20.

¹⁰⁹ There are 6 six non-price features with four levels each, allowing for three WTP price premium estimates per level (relative to the highest level of a given feature).

¹¹⁰ Exhibit 20.

¹¹¹ Exhibit 20.

even more pronounced distinction between the features that were described with multimedia animations in contrast to those that were not. Exhibit 25 summarizes the WTP price premium estimates for the tablet feature and level combinations not reported by Professor Hauser. Exhibits 26 to 29 show a similarly strong tendency for tablet features described with multimedia animations to be associated with high WTP price premium estimates.

60. These findings imply that the WTP price premium estimates reported by Professor Hauser for the features claimed in the utility patents are likely driven, at least in part, by the manner in which they were presented to respondents when taking the survey. Additionally, while Professor Hauser employs multiple methods to test the “fit and predictive ability” of his model, none of these are able to account for the influence of the animated descriptions.¹¹² For example, the hold-out analysis Professor Hauser describes in his report¹¹³ seeks only to test the predictive ability of the model by using a subset of choices from each respondent to estimate the model and predict the respondent’s behavior for the remaining “hold-out” choices. More importantly, there is no clear or conventional method by which to analyze and, effectively, disentangle the role that preferences of the survey respondents had in driving Professor Hauser’s WTP price premium estimates from the role of the animated descriptions. More generally, the apparent effect of the multimedia animations relied on by Professor Hauser further undermines the reliability and validity of his findings.

2. **Professor Hauser’s Failure To Incorporate Appropriate Non-Infringing Alternative Features Results In Apparently Inflated WTP Price Premium Estimates**

61. Professor Hauser’s conjoint survey did not appropriately account for the

¹¹² Hauser Report, pp. 42-46.

¹¹³ Hauser Report, pp. 42-45.

possibility of non-infringing alternatives to the patented features.¹¹⁴ Despite Professor Hauser's claim that the touchscreen capability levels "were chosen such that they would represent a product that included a non-infringing alternative,"¹¹⁵ Professor Hauser's survey did not account for alternative, non-infringing technologies that Samsung could have, and ultimately has (as described above in paragraphs 21-27), employed to provide consumer benefits that are comparable to those provided by the features claimed in the utility patents.

62. The touchscreen features included in Professor Hauser's Smartphone survey levels included combinations of the following features: autoswitch/ no autoswitch, rubberband/no rubberband, and tap to re-center after zoom/no tap to re-center after zoom.¹¹⁶ As such, Professor Hauser's analysis can, at best, estimate consumers' incremental utility and willingness-to-pay for the infringing feature *relative to having no feature at all*. The analysis was not designed to provide, *nor can it provide*, an estimate of the incremental utility and willingness-to-pay for the patented features relative to non-infringing alternative versions of those features. Because Professor Hauser's survey did not present respondents with appropriate non-infringing benchmarks against which to compare the patented features, his results appear to overestimate the relevant partworth measures and lead to invalid and apparently inflated willingness-to-pay inferences related to each of the three patented features.¹¹⁷

¹¹⁴ Professor Hauser states that "[t]hree of the touchscreen capability levels (for both smartphones and tablets) were chosen such that they would represent a product that included a non-infringing alternative for one or more of the patents at issue." Hauser Report, p. 32. However, Professor Hauser's non-infringing alternatives *are to remove the infringing features completely from the device*, rather than to implement the feature in a different way (as the non-infringing alternatives implemented by Samsung have done). Professor Hauser's survey does not contemplate *any* alternative design to the features claimed in the utility patents that would allow some (or all) of the functionality to be implemented in the device in a non-infringing way.

¹¹⁵ Hauser Report, p.32.

¹¹⁶ Hauser Report, p. 49 and Exhibit D, pp. 9-10.

¹¹⁷ Furthermore, Professor Hauser's results likely overestimate the range of relative values by measuring against the wrong benchmark. In conjoint analysis, the relative importance of an attribute depends on the range of attribute

63. For example, Professor Hauser measures the WTP price premium for the rubberband feature against an alternative of no rubberband feature, rather than against the “blue glow” non-infringing alternative (described above) developed and, ultimately, implemented by Samsung. Doing so provides, at best, an indication of respondents’ willingness-to-pay for the rubberband feature as compared to no alternative feature. Yet, it does not account for the customer benefits associated with the blue glow feature. As a result, Professor Hauser’s analysis will likely overstate the importance of the ’381 patent.

64. Similarly, Professor Hauser measures the WTP price premium for the “tap to re-center after zoom” relative to “no tap to re-center after zoom.” As noted above, Samsung has designed and begun to implement a design around to this feature where after the user has performed a double-tap to zoom and re-center the screen, a subsequent double-tap causes the screen to zoom out rather than re-center on another portion of the screen. Professor Hauser does not account for the non-infringing alternative implementation. Consequently, his analysis will likely overstate the importance of the ’163 patent.

65. Finally, as discussed above, Samsung has developed a design around for the “autoswitch” patented feature that, based on software changes, provides a user experience that is essentially the same as the patented feature. Professor Hauser did not account for this. As a result, Professor Hauser’s WTP estimates associated with the ’915 patent will likely overstate the importance of the patent.

levels used in the conjoint survey. Here, Professor Hauser’s survey presents only two levels of each infringing feature – the inclusion of the infringing feature and the complete absence of any version of that feature. Using “no feature” as the baseline increases the range of WTP values that result from Professor Hauser’s analysis. Inclusion of a non-infringing alternative would generate more precise results.

3. **Professor Hauser's WTP Price Premium Estimates May Be Inflated Because Respondents Were Forced To Choose Samsung Smartphones**

66. As noted above, Professor Hauser surveys forced respondents to choose Samsung phones. He did not provide them with a "no choice option," a topic that has been the subject of considerable academic research. A recent publication by Brazell *et al.* noted the following:

It has long been advanced that one should include a [no-choice option] in choice-based conjoint designs... Inclusion of the no-choice option increases design efficiency (Anderson and Wiley, 1992), better mimics the choice process in many situations (Louviere and Woodworth, 1983) directly measuring demand for specific tested products in the context of the entire market, and allows one to model market growth as more attractive alternatives are introduced.¹¹⁸

In addition, researchers have noted that including a "no choice option" enhances the realism of the choice tasks and survey.¹¹⁹

67. Brazell *et al.* further describe the results of an experiment comparing a survey that incorporates forced choices with one that incorporates a no choice option. They find that respondents can exhibit less price sensitivity, sometimes substantially less, when faced with forced choices.¹²⁰ This lower level of price sensitivity has the effect of increasing the price premium associated with given attribute values. The observation that excluding the "no choice option" from a conjoint survey can lead to higher estimated price premiums undermines the

¹¹⁸ See Brazell, Jeff D., Christopher G. Diener, Ekaterina Karniouchina, William L. Moore, Valérie Séverin and Pierre-Francois Uldry, "The no-choice option and dual response choice designs," *Marketing Letters*, Vol. 17, No. 4 (Dec., 2006), pp. 255-268 ("Brazell *et al.*"), p. 256.

¹¹⁹ See, e.g., Orme, Bryan K. Getting Started with Conjoint Analysis: Strategies for Product Design and Pricing Research, Research Publishers, Madison, WI, 2010, p. 22 ("Choice-based conjoint questions closely mimic what buyers do in the real world – choose among available offerings. Including *none* as an option enhances the realism, and allows those respondents who are not likely to purchase to express their disinterest." Emphasis in original.); Johnson, Rich and Bryan Orme: "Getting the Most from CBC," *Sawtooth Software Research Paper Series*, 1997, p. 5 ("We think it is usually a good idea to include the "None" option in the questionnaire, for these reasons... It makes the choice tasks more realistic, because that option is usually available when shopping.")

¹²⁰ Brazell *et al.*, at Table 1.A.

reliability and validity of the Professor Hauser's findings.

4. **Professor Hauser's WTP Price Premium Estimates May Be Biased Upward Due To The Fact That There Are No Actual Consequences To Purchasing More Expensive Products In A Hypothetical Survey**

68. There is a difference between the amount that a consumer indicates they would be willing to pay in a hypothetical transaction and the amount that they would pay when actual money is involved. Consumers' hypothetical willingness-to-pay may overstate the extent to which they would *actually* pay for a feature given that they are not engaging in a transaction that involves real money changing hands.¹²¹

69. This inflated willingness-to-pay is consistent with the observation that, based on Professor Hauser's survey analysis, several features examined had WTP price premium estimates that were comparable to (or greater than) the average price respondents actually paid for their Samsung smartphones. For example, respondents in Professor Hauser's survey reported spending an average of \$152 on their Samsung smartphones.¹²² However, as discussed above, Professor Hauser's WTP price premium estimates for the touchscreen, connectivity, and camera features alone equal almost double the amount that respondents reported spending on their actual smartphones.¹²³ In light of this problem, one cannot rely on the findings and estimates that result from Professor Hauser's analysis.

¹²¹ See, e.g., Harrison, Glenn W. and Elisabet E. Ruström. 2008. "Experimental Evidence on the Existence of Hypothetical Bias in Value Elicitation Methods." In Charles R. Plott and Vernon L. Smith (eds.), Handbook of Experimental Economics Results. New York: Elsevier B.V.

¹²² Hauser Report, p. 53. Professor Hauser's survey instructed smartphone survey respondents to assume that the price shown was for a smartphone purchased with a 2-year service contract. Hauser Report, Exhibit D, p. 14

¹²³ Exhibit 20. The combined WTP price premium estimates for touchscreen, connectivity, and camera are at least \$268. Note that the estimates for touchscreen and camera are both capped at \$100.

5. **Professor Hauser's WTP Price Premium Estimates May Be Overstated Because His Survey Omits A Number Of Important Features And Benefits Associated With The Smartphone And Tablet Purchase Decision**

70. There are, as noted in paragraphs 30-31, numerous features and benefits that are known to affect consumers' purchase decisions related to smartphones and tablets. For example, a pair of 2008 presentations prepared for Samsung highlights a number of these features and related attributes that affect the smartphone purchase decision. These features include the smartphone's screen size, connectivity options, music & video capabilities, Bluetooth, camera, GPS, email access, battery life, keyboard, brand name, and touchscreen.¹²⁴ Similarly, Apple has identified numerous additional product attributes that are important to the purchase decision, including [REDACTED]

[REDACTED].¹²⁵ There are also a variety of features that are relevant to tablet customer purchase decisions.¹²⁶ The websites cited by Professor Hauser include many more features, including 30 smartphone features and 26 tablet features in their product comparisons,¹²⁷ as do research reports from other third-party sources.¹²⁸ A number of indirect attributes also affect the consumer purchase decision, including the quality, cost, and brand name of the network service provider; the price of the monthly service plan; and recommendations from other users and salespeople.¹²⁹

71. It is important for the design of the conjoint survey to incorporate the features that

¹²⁴ SAMNDCA00250503-557, p. 525; SAMNDCA00252685-775, p. 707.

¹²⁵ See, e.g., APLNDC-X0000006548-647, p. 566; APLNDC0002007608-704, p. 634.

¹²⁶ APLNDC-Y0000023361-427, p. 387; APLNDC-Y0000024130-333, p. 233; <http://tablets-review.toptenreviews.com/> (viewed October 12, 2012). See also, Hauser Report, p. 22.

¹²⁷ <http://cell-phones.toptenreviews.com/smartphones/> (viewed October 12, 2012); <http://tablets-review.toptenreviews.com/> (viewed October 12, 2012). See also, Hauser Report, p. 22.

¹²⁸ See, e.g., SAMNDCA00190144-243, p. 195.

¹²⁹ See, e.g., SAMNDCA00252685-775, p. 707; "How to Buy a Cell Phone," *PC World*, November 29, 2011, available at http://www.peworld.com/article/125653/cell_phone_guide.html (viewed October 16, 2012).

are known to be important consumer purchase decision drivers along with the features that the survey is designed to test.¹³⁰ Omitting known important features can cause survey respondents to overvalue the features that are included in the survey.¹³¹ A design that omits important purchase decision drivers can fail to capture interaction effects between features that are included and those that are not, biasing the values of the included features.¹³²

72. Professor Hauser's survey includes some of the features known to be important to the consumer purchase decision, but excludes many others identified in Samsung¹³³ and Apple¹³⁴ internal documents, as well as the websites Professor Hauser cited as validation for his feature selections¹³⁵ and the product websites for Samsung's smartphones.¹³⁶ According to Professor Hauser, "[b]ecause consumers are told to make choices among profiles assuming 'all else equal,' as is the standard in conjoint analysis, the set of features does not need to be exhaustive.

¹³⁰ In constructing a conjoint survey, generating the attributes and levels is a critical step. *See, e.g.*, Orme, Bryan, "Formulating Attributes and Levels in Conjoint Analysis," Sawtooth Software, Inc., 2002. The features and benefits of the product in question should be presented in the survey in a way that closely mimics the consumer purchase decision process for the product. *See, e.g.*, Orme, Bryan K. Getting Started with Conjoint Analysis: Strategies for Product Design and Pricing Research, Research Publishers, Madison, WI, 2010, p. 45.

¹³¹ *See, e.g.*, Huber, Joel. "What We Have Learned from 20 Years of Conjoint Research: When to Use Self-Explicated, Graded Pairs, Full Profiles or Choice Experiments," *Proceedings of the Sawtooth Software Conference*, August 1997 ("Evaluation tasks intentionally force respondents to attend to attributes that they might otherwise not notice. In doing so, attention can elevate the importance of particular attributes to a level that is greater than would occur in the marketplace.") *See also*, McFadden, Daniel. "The Choice Theory Approach to Market Research," *Marketing Science*, Vol. 5, No. 4, Special Issue on Consumer Choice Models (Autumn, 1986), p. 291. ("When the items under study have a large number of attribute dimensions, of which only a small number can be characterized and varied experimentally, the subject's imputation of the missing variables introduces noise, and possibly bias.")

¹³² *See, e.g.*, Green, Paul E. and V. Srinivasan, "Conjoint Analysis in Marketing: New Developments with Implications for Research and Practice," *Journal of Marketing*, Vol. 54, No. 4 (Oct., 1990), pp. 3-19. ("It has been typical in conjoint studies to estimate only the main effects and assume away interaction effects. In certain cases, interaction effects, particularly two-way interaction effects, may be important.")

¹³³ *See, e.g.*, SAMNDCA00250503-557, p. 525.

¹³⁴ *See, e.g.*, APLNDC-X0000006548-647, p. 566; APLNDC0002007608-704, p. 634; APLNDC-Y0000023361-427, p. 387; APLNDC-Y0000024130-333, p. 233.

¹³⁵ <http://cell-phones.toptenreviews.com/smartphones/> (viewed October 12, 2012); <http://tablets-review.toptenreviews.com/> (viewed October 12, 2012). *See also*, Hauser Report, p. 22.

¹³⁶ *See, e.g.*, Exhibits 1 and 2.

However, a reasonable set of features makes the choices more realistic and minimizes demand artifacts.”¹³⁷ While it is true that a conjoint analysis does not need to include every available feature, the omission of features known to be important to the purchase decision, and thus known to have value to consumers, can create an upward bias on the values of the features that are included in the survey, including the features related to the patents at issue here. In light of this problem, one cannot rely on the findings and estimates that result from Professor Hauser’s analysis.

D. Professor Hauser Failed To Externally Validate His Model

73. Professor Hauser failed to externally validate his model. Professor Hauser conducted internal validity tests to determine whether his findings were consistent within his sample of respondents. Specifically, he examined the predictive ability of his model by estimating the model on a subset of the data and then testing the predictive ability of the results obtained from that subset using two statistics, the U^2 and the hit rate.¹³⁸ However, Professor Hauser failed to conduct any *external* validity tests to determine whether his findings might be meaningful beyond the sample of respondents he surveyed and beyond his narrow survey environment.

V. CONCLUSION

74. **In summary, Professor Hauser's Report and the conjoint analysis that it describes do not show that consumers bought Samsung smartphones or tablets because they were equipped with the features claimed in the utility patents.** Professor Hauser’s analysis was not designed to determine whether consumers bought Samsung smartphones or

¹³⁷ Hauser Report, p. 20.

¹³⁸ Hauser Report, pp. 42-43

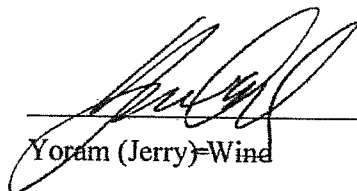
tablets because the devices were equipped with the features claimed in the utility patents. His methodology, moreover, generates predictions that are inconsistent with market realities and common sense, and includes numerous flaws (described in paragraphs 46-72). Those flaws, summarized in the figure below, render the WTP results unreliable and invalid.

Component of Professor Hauser's Survey Design	Paragraphs	Effect
WTP Estimation Produces Numerous Nonsensical Results	46-54	Undermines Reliability and Validity of Results
Selective Use of Multimedia Animations in Feature Descriptions	56-60	Appears to Inflate WTP
Lack of Non-Infringing Alternatives in Survey Design	61-65	Appears to Inflate WTP
Respondents Not Provided with a "No Choice" Option	66-67	May Inflate WTP
Results are Linked to Hypothetical Spending Scenarios	68-69	May Bias WTP Upwards
Survey Excludes Several Features Critical to Consumer Purchase Decision	70-72	May Bias WTP Upwards

When taken as a whole, the result is an unreliable analysis, which appears to generate highly-inflated WTP estimates for what are, at most, tertiary touchscreen features, and which has not been externally validated.

75. I reserve the right to update my analysis and conclusions should new information become available.

I declare under penalty of perjury that the foregoing is true and correct. Executed on
October 19, 2012.



Yoram (Jerry) Wine

APPENDIX A

YORAM (JERRY) WIND

Academic Positions: Jerry Wind is The Lauder Professor and Professor of Marketing at The Wharton School of the University of Pennsylvania. He is the founding director of the Wharton "think tank," *The SEI Center for Advanced Studies in Management*. The Center's mission is to assure, through research and development, the quality, relevance, and impact of management research, education, and practice. Dr. Wind joined the Wharton faculty in January 1967, upon receipt of his doctorate from Stanford University.

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

Publications: Dr. Wind is one of the most cited authors in marketing. His regular contributions to professional marketing literature include 23 books and over 250 papers, articles, and monographs encompassing the areas of marketing strategy, marketing research, new product and market development, consumer and industrial buying behavior, and global marketing. Dr. Wind's books have received wide acclaim and many have been translated into a number of languages. His most recognized recent publications include: *Competing in a Flat World*, with Victor and William Fung (Wharton School Publishing 2007), *The Power of Impossible Thinking: How Changing Your Mental Models Will Transform the Business of Your Life and the Life of Your Business*, with Colin Crook (Wharton School Publishing 2004), *Convergence Marketing: Strategies for Reaching the New Hybrid Consumer* with Vijay Mahajan (Financial Times/Prentice Hall 2002), and *Driving Change* with Jeremy Main (Free Press 1998). Both *The Power of Impossible Thinking* and *Convergence Marketing* were selected by Executive Book Summaries as one of the thirty best business books of 2002 and 2004. His recent edited books— *The Network Challenge: Strategy, Profit and Risk in an Interlinked World* (Wharton School Publishing, June 2009), *New Product Diffusion Models* (Kluwer 2000), *Digital Marketing* (Wiley 2001), and *Marketing Research and Modeling: Progress and Prospects* (Kluwer 2004)—include the works of the leading experts on these topics. In 2012, Sage will publish an 8-volume edited anthology of Dr. Wind's publications through the *Legends of Marketing* Series.

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

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

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

in faculty seminars and executive programs in over 50 universities worldwide.

Awards: Dr. Wind is the recipient of various awards, including the four major marketing awards—The Charles Coolidge Parlin Award (1985), the AMA/Irwin Distinguished Educator Award (1993), the Paul D. Converse Award (1996) and the Buck Weaver Award (2007). He is the recipient of the first Faculty Impact Award given by Wharton Alumni (1993). In 1984, he was elected as member of the Attitude Research Hall of Fame and has won a number of research awards, including two Alpha Kappa Psi Foundation awards and a recent inclusion in *JAR Classics* issue of 18 articles that have withstood the test of time. In 2001 he was selected as one of the 10 *Grand Auteurs in Marketing* and later named as the 2003 recipient of the Elsevier Science Distinguished Scholar award of the Society for Marketing Advances. In May 2004 he was awarded as Honorary Fellow of the Decade by the Interdisciplinary Center Herzliya (Israel). In 2009, Dr. Wind was selected as one of the 10 *Legends of Marketing* and in 2012 Sage will publish 8 edited volumes anthologizing his various publications.

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ACADEMIC EXPERIENCE

EDUCATION

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

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

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

UNIVERSITY POSITIONS

A. University of Pennsylvania, The Wharton School

Faculty Positions:

The Lauder Professor, 1983-

Professor of Marketing, 1973-

Associate Professor of Marketing, 1970-1973

Assistant Professor of Marketing and International Business, 1967-1970

Selected Administrative Positions:

Founding Academic Director, The Wharton Fellows platform and program, 2000-

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

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

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

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

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

Secondary Faculty Appointments:

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

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

Senior Fellow of the Leonard Davis Institute, 1977-1980

Secondary Appointment as Professor of Management, 1981-1984

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

B. Other Universities

The Interdisciplinary Center (IDC) Herzliya Israel, Co-Founder (for specific activities since 1994, see p. 48).

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

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

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

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

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

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

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

PUBLICATIONS

I. BOOKS

1. Fung, Victor K., William K. Fung and Yoram (Jerry) Wind. *Competing in a Flat World: Building Enterprises for a Borderless World. Upper Saddle River: Wharton School Publishing, 2007. [Translated editions: Bahasa Indonesia; Chinese Simplified; Chinese Traditional; English (India); Italian; Korean; Polish; Portuguese; Spanish; Italian; Bahasa Indonesian; Turkish.]
2. Wind, Jerry, Colin Crook and Robert E. Gunther. *The Power of Impossible Thinking: Transform the Business of Your Life and the Life of Your Business. Upper Saddle River: Wharton School Publishing, 2004. Selected by Executive Book Summaries as one of the thirty best business books of 2004. [Translated editions: Arabic; Bahasa Indonesia; Bulgarian; Chinese (simplified and traditional); English (Singapore); Italian; Japanese; Korean; Polish; Portuguese; Russian; Serbian; Spanish; Thai; and Turkish.] Selected by Executive Book Summaries as one of the thirty best business books of 2004; finalist in *Fast Company* Reader's Choice Award for the October book of the month; among CEO READ top 25 books of August 2004. A paperback edition was published in 2006.
3. Krieger, Abba, Paul E. Green and Jerry Wind. Adventures in Conjoint Analysis: A Practitioner's Guide to Trade-Off Modeling and Applications. Philadelphia: The Wharton School, 2004 < <https://marketing.wharton.upenn.edu/faculty/green/monograph/> >.
4. Wind, Yoram (Jerry), Vijay Mahajan and Robert Gunther. *Convergence Marketing: Strategies for Reaching the New Hybrid Consumer. Upper Saddle River: Prentice Hall, 2002. Selected by Executive Book Summaries as one of the thirty best business books of 2002. Translated editions: Chinese (simplified), Tsingua University Press; Chinese (traditional), Prentice Hall Taiwan; Bahasa (Indonesia); Spanish; Portuguese; Italian [*Consumatore Centauro: Orvaro il Marketing Della Convergenza*, ETAS LAB. IT. 2002]; Korean; and Japanese.
5. Fields, George, Hotaka Katahira, Jerry Wind and Robert E. Gunther. Leveraging Japan: Marketing to the New Asia. San Francisco: Jossey-Bass, 1999.
6. Wind, Yoram and Jeremy Main. *Driving Change: How the Best Companies are Preparing for the 21st Century. New York: The Free Press, 1997. Translated editions in U.K. by Kogan (Page Ltd.), 1998; China by Shanghai Jiao (Tong University Press), 1999; Hungary by Veres István (Geomeédia Szakkönyvek), 2000. Adaptation to local condition: Brazil by Luiz Felipe Monteiro Jr. (IBMEC Qualitymark Editoria), 2002.
7. Bauer, Roy A., Emilio Collar, Victor Tang, Jerry Wind and Patrick R. Houston. The Silverlake Project: Transformation at IBM. New York: Oxford University Press, 1992. Translated to Chinese, Huaxia Publishing, 2000.
8. Wind, Yoram. *Product Policy: Concepts, Methods and Strategies (Addison-Wesley Marketing Series). Reading: Addison-Wesley, 1982. Reviewed in the *Journal of Marketing*, Summer 1981.
9. Wind, Yoram. *Marketing and Product Planning (in Spanish). Mexico: Expansion, 1979. This book is based in part on sections from *Product Policy* which was selected by the editors of Expansion as the "Book of the Year" 1979.
10. Wind, Yoram, Paul E. Green and Douglas Carroll. Multi-Attribute Decisions in Marketing: A Measurement Approach. Hinsdale: The Dryden Press, 1973.
11. Webster, Frederick E. and Yoram Wind. Organizational Buying Behavior (Foundations of Marketing). Englewood Cliffs: Prentice Hall, 1972. Translated to Portuguese (Editor, Atlas, Sao Paulo, Brazil, 1975). Reviewed JMR, August 1974.
12. Wind, Yoram, Ronald E. Frank and William F. Massy. Market Segmentation (International Series in Management). Englewood Cliffs: Prentice Hall, 1972. Reviewed JMR, November 1972; August 1974.

13. Wind, Yoram, Homer Dalby and Irwin Gross. Advertising Measurement and Decision Making. Boston: Allyn & Bacon, 1968.
14. Robinson, Patrick J. and Yoram Wind. Industrial Buying and Creative Marketing. Boston: Allyn & Bacon, 1967.
Contributed two chapters; co-authored with Patrick J. Robinson three chapters; and participated in the overall organization and preparation of the book.
15. Yoram Wind. Industrial Buying Behavior: Source Loyalty in the Purchase of Industrial Components. Unpublished Ph.D. dissertation, Stanford University, 1966.

II. EDITED BOOKS

1. Wind, Yoram and Paul Kleindorfer, eds., The Network Challenge: Strategy, Profit and Risk in an Interlinked World. Wharton School Publishing, 2009.
2. Wind, Yoram (Jerry) and Paul E. Green, ed., *Marketing Research and Modeling: Progress and Prospects. Norwell: Kluwer Academic Publishers, 2004.
3. Wind, Jerry and Vijay Mahajan, ed. Digital Marketing: Global Strategies from the World's Leading Experts. New York: John Wiley & Sons, 2001.
4. Mahajan, Vijay, Eitan Muller and Yoram Wind, ed. New-Product Diffusion Models. Boston: Kluwer 2000.
5. Mahajan, Vijay and Yoram Wind, ed. Innovation Diffusion Models of New Product Acceptance. Cambridge: Ballinger Publishing Co., 1986.
6. Wind, Yoram, Vijay Mahajan and Richard N. Cardozo, ed. New-Product Forecasting: Models and Applications. Lexington: Lexington Books, 1981.
7. Wind, Yoram and Robert J. Thomas, ed. Advances in Organizational Buying Research: The Case of Acquisition of Scientific and Technical Information. Washington, D.C: National Science Foundation, 1979.
8. Wind, Yoram and Marshall Greenberg, ed. Moving Ahead with Attitude Research: Proceedings of the Seventh Attitude Research Conference. Chicago: American Marketing Association, 1977.
9. Nicosia, Francesco M. and Yoram Wind, ed. Behavioral Models for Market Analysis: Foundations for Marketing Action. Hinsdale, IL: The Dryden Press, 1977.

III. BOOKS UNDER DEVELOPMENT

1. Wind, Yoram and the Future of Advertising Team. The Future of Advertising...is Now. A forthcoming iPad app.

2. Wind, Yoram, ed. "Paul Green Contributions to Clustering and Segmentation." Paul Green Sage Series on Legends of Marketing, Forthcoming.
3. Wind, Yoram. "Marketing Strategy Analysis," NOW The Essence of Knowledge: Foundations and Trends in Marketing, Forthcoming.
4. Bell, David and Wind, Yoram. "Market Segmentation Uncut: A Practitioner's Guide to Understanding and Implementing The Most Powerful Concept in Marketing." NOW The Essence of Knowledge: Foundations and Trends in Marketing, Forthcoming.
5. Wind, Yoram. A Manager's Guide to Creativity.
6. Wind, Yoram, Colin Crook, Howard Moskowitz & Stephen Rappaport. "Rethinking Education: Current & Needed Models to Address the Education Challenge."
7. Wind, Yoram and Herb Addison. "Creating a Creative Organization."
8. Wind, Yoram and the Future of Advertising Team. "Rethinking Advertising" A forthcoming e-book in development as a collaboration platform featuring insights, innovations and debates among the FoA Program's Advisory Board, Wharton faculty and other industry experts.
9. Yoram Wind Legends in Marketing: forthcoming 2012 from Sage Publications:
Organizational Buying Behavior, Bob Thomas
Consumer Behavior, Barbara Kahn, Bob Meyer
Product and New Product Management, Vijay Mahajan,
Marketing Strategy, David Reibstein
Market Segmentation, David Bell
Global Marketing, Arun Jain
Marketing Research and Modeling, Vithala Rao
The Future of Marketing, George Day

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

The papers are grouped by the following topics:

- A. Portfolio analysis and strategy
- B. Marketing and business strategy
- C. Marketing and product strategy
- D. Research on industrial buying behavior
- E. Research on consumer behavior
- F. Marketing research and modeling
- G. International marketing
- H. International management education and the Lauder Institute
- I. Management practice and education in the 21st Century
- J. Convergence Marketing
- K. Mental Models – Power of Impossible Thinking
- L. Network-Based Strategies
- M. Advertising
- N. Entries in Dictionaries, Encyclopedias, and Handbooks

A. Portfolio Analysis and Strategy

1. Wind, Yoram. "Product Portfolio: A New Approach to the Product Mix Decision." Combined Proceedings. Ed. Ronald C. Curhan. Chicago: American Marketing Association, Aug. 1974. 460-464.
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3. Wind, Yoram, Victor Fung and William Fung, "Network Orchestration: Creating and Managing Global Supply Chains Without Owning Them," a chapter in Kleindorfer and Wind (eds), The Network Challenge: Strategy, Profit and Risk in an Interlinked World. Wharton School Publishing, 2009.
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4. Wind, Yoram and Robert J. Thomas. "Symbiotic Innovation: Getting the Most Out of Collaboration" chapter in Evolution of Innovation Management, Brem and Viardot (eds), Palgrave Macmillan, forthcoming 2012.
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M. Advertising

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N. Entries in Dictionaries, Encyclopedias, and Handbooks

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2. Wind, Jerry, and David Schmittlein. "Definitions of Marketing Models." Dictionary of Marketing Terms. Ed. Peter D. Bennett. Chicago: American Marketing Association, 1988. 1-30.
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V. EDITOR OF SPECIAL ISSUES

- *Marketing Science* – "Empirical Generalizations in Marketing" (with Frank M. Bass), Vol. 14, No. 3, Part 2, 1995. <http://marketingscience.info/assets/documents/209/4038.pdf>
- *Journal of Marketing Research* – "Market Segmentation," August 1978. <http://www.jstor.org/discover/10.2307/3150580?uid=3739864&uid=2129&uid=2&uid=70&uid=4&uid=3739256&sid=56007102433>
- "Innovation and New Products," February 1997.
- *Marketing Research* – "Marketing Research Forum: The State of the Art in Quantitative Research," Winter 1997. http://dl.dropbox.com/u/9686940/windj/9702_Issues_and_Opportunities_in_New.pdf
- *Marketing Science* – "Empirical Generalizations in Marketing" (with Frank M. Bass), Vol. 14, No. 3, Part 2, 1995.

- *Management Science* (with John Farley and Diana L. Day) – “The State of The Art in Theory and Methods for Strategy Research,” 1990.
- *The Wharton Quarterly*, “Marketing,” Fall 1972.
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- *Wharton Knowledge in Action Column* on *Think with Google Forum*, 2012.
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VI. EDITORIALS

<i>Journal of Consumer Research</i>	June 1977:	"New Directions for <i>JCR</i> "	
<i>Marketing News</i>	July 1978:	"New Directions for <i>JM</i> "	
<i>Journal of Marketing</i>	Winter 1979:	"The <i>Journal of Marketing</i> at a Crossroad"	
	Spring 1979:	"Repositioning the <i>Journal</i> "	
	Summer 1979:	"Bridging the Gap Between Practitioners and Academicians"	
	Fall 1979:	"On the Status of Marketing Theory"	
	Winter 1980:	"Marketing in the 80's"	
	Spring 1980:	"Strategic Planning and Marketing: Time for a Constructive Partnership," with George Day	
	Summer 1980:	"International Marketing: The Neglect Continuous," with John Farley	
	Fall 1980:	"Industrial Marketing: The Sleeping Giant," with Frederick Webster	
			http://www.marketingpower.com/ResourceLibrary/JournalofMarketing/Pages/1980/44/4/4997918.aspx
		Winter 1981:	"Journals and the Development of a Discipline"
	Spring 1981:	"Research and Management"	
	Summer 1981:	"A Positive Perspective on Marketing"	
		http://connection.ebscohost.com/c/editorials/4996997/from-editor-positive-perspective-marketing	
	Fall 1981:	"Reflections"	
	Summer 2009:	"Is Marketing Academia Losing its Way?"	
		http://www.iimahd.ernet.in/library/PDFs/NICMAN/Is%20marketing%20academia%20losing%20its%20way.pdf	
<i>The Lauder Quarterly</i>	All editorials from initiation in 1986 to July 1988.		

VII. ILLUSTRATIVE RECENT OP ED AND COMMENTARIES

- Orchestra needs to change tune in contract negotiations: Settling the score must rest on the idea of working toward a collective goal, *Philadelphia Inquirer*, Commentary, November 4, 2004.
- The Wisdom of the Flip Flop, *Wharton School Publishing Newsletter*, November 2004.
- Rethinking our mental models for elections, *Newsletter of the Wharton Fellows*, November 2004.
- "Reverse mentoring can solidify collaboration among functional groups, but it cannot be the only tool that enforces such teamwork or the sole catalyst for change." Commentator on HBR "Too Old to Learn?" Case Study. *Harvard Business Review*. November-December 2000.
- "E-Learning Crossfire," *Information Week*, February 26, 2001.
- "Capitalism 3.0: Commentaries" on Jed Emerson and Sheila Bonini, "Capitalism 3.0" in *VALUE* and www.valuenetwork.com, February/March 2006.

VIII. EDITED PUBLICATIONS OF THE SEI CENTER – ILLUSTRATIVE LIST

- Creating and Implementing a Corporate Vision, January 1990.

- Human Resources: Management for the 21st Century, January 1990.
- The Impact of Artificial Intelligence on Management Decision Making and Organizational Design, February 1990.
- Creating and Implementing Quality in Organizations, March 1990.
- Corporate Governance: Who's in Charge?, May 1990.
- Strategic Information Architecture: Increasing Productivity, Managing Risks, June 1993.
- Management in the 21st Century: Predictions From Top Think Tanks, September 1990.
- The Individually Empowered Organization, November 1990.
- Innovation and New Product Development for the 21st Century Enterprise, November 1990.
- Ethical Standards for Global Corporations? December 1990.
- Managing Infrastructure Costs; What is the Best Strategy for Long-Term Controls? February 1991.
- Lessons from the Malcolm Baldrige Award: Implications for Management Practice, Research, and Education, February 1991.
- Innovation in Services, May 1991.
- Visionary Leadership, October 1991.
- The Impact of Information Networking on Organizational Design and Strategy, November 1991.
- Frontiers in Electronic Commerce: Experimental Systems for Communication, Coordination, and Negotiation, February 1992.
- Innovation and Learning, March 1992.
- Historical Perspectives in Management Education, April 1992.
- Decision Making in Highly Uncertain Political Environments: Investing in the Russian Oil and Gas Industry, March 1992.
- Issues and Advances in New Product Development, June 1992.
- Rewarding the Workforce of the Future: Competence-Based Performance Measures and Incentives, October 1992.
- Designing Corporate Governance for the 21st Century Global Enterprise: International Perspectives, January 1993.
- Dr. Peter Drucker on "The New Organization," April 1993.
- Corporate Performances: Beyond Financial Measures, April 1993.
- The Horizontal Organization, October 1993.
- The End of Diversity: Rights, Responsibility and the Communication Agenda November 1993.
- Deploying Strategic Assets: Beyond Core Capabilities, November 1993.
- Research Challenges in Linking Quality: Profitability and Organizational Architecture, December 1993.
- Empirical Generalizations in Marketing, February 1994.
- Beyond Quality: Organizational Transformation for the 21st Century Enterprise, March 1994.
- Exploratory Conference on Business Ethics: Building the Common Ground, March 1994.
- Interactivity is Two-Way: Life on the Net April 1994.
- Interactive Industry 2000: Who's Gonna Buy this Stuff: Research for the Interactive Television Business, July 1994.
- Leadership in the 21st Century Enterprise, November 1994.
- A New Management Paradigm for the 21st Century, December 1994.
- The Virtual University, January 1995.
- Go West Young MBA, Far Far West: Adventures on the World's Business and Management Frontier, January 1995.
- Information Technology and the Changing Boundaries of the Firm, January 1995.
- EMU – The Road to Europe, February 1995.
- The New Science and Emerging Paradigms in Business, April 1995.
- Innovation in New Product Development: Best Practices in Research, Modeling and Applications, May 1995.
- The Bamboo Network, November 1995.
- Corporate Growth Engines, December 1995.
- A Trapezoidal Corporation, February 1996.
- The Impact of Computers and Information on Management: 1946-1996-2001, May 1996.
- European Venture Capital Industry, November 1996.
- The CEO Challenge: Implementing Strategy in a Constantly Changing Marketplace, December 1996.
- The Future of Impact of Information Management: A Lecture Series from July 1996-January 1997.

- New Media, February 1997.
- From Detection to Action: Processes and Insights Gained from an Early Warning Signal System, March 1997.
- Toward New Corporate Governance Models: Lessons from the Japanese and U.S. Experience, March 1997.
- When Is It Worthwhile Targeting the Majority Instead of the Innovators in a New Product Launch? November, 1997.
- Consumer Choice Behavior in On-line and Regular Stores: The Effects of Brand Name, Price, and Other Search Attributes, January 1998.
- The Systems Approach: The New Generation, February 1998.
- Managing Workteam Diversity, Conflict, and Productivity: A New Form of Organizing in the 21st Century Workspace, September 1998 (by Ety Jehn, The Diversity Research program with Bob Holland).
- GM for the 21st Century: From “Make and Sell” to “Sense and Respond,” March 1999 (by Vince Barabba).
- The Limits of Privacy, March 1999 (by Amitai Etzioni).
- Japan at the Great Divide, April 1999 (by Yasuhisa Shiozaki).
- Into the 21st Century: The First Decade and Beyond: A Report on the SEI Center for Advanced Studies in Management, 1990-2000.
- Insights and Impact: 20th Anniversary Report of the SEI Center for Advanced Studies in Management, March 2010.

IX. EDITOR: WHARTON SCHOOL PUBLISHING BOOKS

2008

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

2007

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

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

2006

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

2005

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

17. Craig Vogel, Jonathan Cagan, and Peter Boatwright, *The Design of Things to Come: How Ordinary People Create Extraordinary Products*.

2004

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

X. ILLUSTRATIVE PUBLISHED ABSTRACTS OF PAPERS DELIVERED IN PROFESSIONAL MEETINGS

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

XI. CASE STUDIES

- During the academic year 1962-1963, I wrote a number of marketing cases at the Hebrew University, Jerusalem (Israel). One of these cases, The Ozi Ballpoint Pen III, was published in Harper W. Boyd, Jr. et al., (eds.), *Marketing Management: Cases from the Emerging Countries* (Reading, MA: Addison-Wesley Publishing Company), 1966.
- During the academic year 1968-1969, several marketing cases were written under my supervision at the Leon Recanati Graduate School of Business Administration, Tel Aviv University.

CONSULTING EXPERIENCE

A. Marketing, Business Strategy, and Marketing Research Consulting

1. Information and Telecommunication Industry

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

2. Financial Services

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

3. Health Care

- ConvaTec: Marketing Driven Business Strategy (2008)
- Bristol-Myers Squibb (BMS): Marketing strategy consulting (1997-2002)
- Merck, Sharp, and Dome: General marketing research consulting (1981)
- Merck & Co.: Marketing Strategy and Marketing Research and Modeling (1991-1996)
- Pfizer, Inc.: 1975-1990. Design and analysis of most of the marketing research projects of Pfizer Laboratories and Roerig. Occasional marketing strategy consultant to the Hospital Products Group (1984-1986) and Pfizer Pharmaceuticals (1987-1990).
- SmithKline Beckman: Marketing strategy development for TAGAMET (1987-1988); evaluation of strategy implementation (1989)
- SmithKline Clinical Laboratories: Marketing planning (1984)
- Sterling Drug, Inc.: Development of marketing driven portfolio of R&D projects (1986-1991); Pricing study for innovative new product (1991-1992)
- Upjohn: Strategic planning consulting (1981)
- West Jersey Health System: Marketing and Business Strategy (1985)

4. *Transportation*

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

5. *Consumer Goods*

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

6. *Industrial Products and Services*

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

7. *Retailing*

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

8. *Professional Service Firms*

- Applied Communication Research (1974-1976)
- BBD&O (on an occasional basis, 1974-1985)
- Cunningham and Walsh, Inc. (1978)
- DMB&B (1993)
- Doyle Dane Bernbach: Evaluation of a campaign claim (1980)
- Gahagan Research Associates, Inc. (selected projects, 1972-1978)
- Hakuhodo. Marketing Strategy for the 21st Century (1992-1995)
- IMS America (1997)
- Market Research Corporation of America (MRCA) (1975-1987)
- McConnel Advertising (Montreal), (1974)
- Medicus (1989-1997)
- Morgan, Lewis & Bockius: Development of Business Strategy (1992-1994)
- MS&L: Marketing consulting (1995-1997; 2001-2002)
- National Analysts (1975-1976)
- Oxtoby-Smith (selected projects, 1972-1978)
- Price-Waterhouse Coopers LLP (marketing and corporate strategy consulting, 1996-2001).
- Professional Marketing Research, Inc. (1977-1978)
- Robinson Associates (1969-1975)
- Standard & Poors (1997-2000)
- Whittlesey and Partners (1972-1973)
- Y & R (1989)

9. *Trading Companies, Real Estate Development*

- Li & Fung: Business Strategy consulting (1998-)

- Dewey Companies: Marketing and Business Strategy consulting (2003)

B. Directorship

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

C. Illustrative Advisory Boards

- Cisco Collaboration Consortium (2009-)
- Arshiya (India) (2007-)
- Decision Lens (2005-)
- Mutual Art (2003-)
- NetXentry (WebForPhone) (2000-)
- Ad4ever (2000-2003)

D. Expert Witness: Marketing and Marketing Research Consulting in Legal Cases

- Alschuler, Grossman and Pines: Packard Bell vs. Compaq, 1995-1996
- Arent, Fox, Kitner, Plotkin & Kahn: Marketing research consulting re: Estee Lauder, 1987
- Arnold, White and Dunkee: The Clorox Co. vs. Dow Brands Inc. re: Smart Scrub v. Soft Scrub, 1995
- Arnold & Porter:
 - (a) Schering v. Pfizer, Perceived sedation of Zyrtec, 2000
 - (b) Pfizer: Physicians' beliefs concerning prescription antihistamine products in terms of their sedating/non-sedating characteristics 2002
- Baker & McKenzie:
 - (a) G.D. Searle & Co. and subsidiaries litigation in the U.S. Tax Court, 1982
 - (b) American Republic Insurance Co. vs. Americare Inc. and American Dental Centers P.C., 1988
- Berle, Kass and Case: Evaluation of public attitude re: Burlington County Bridge Commission, 1992
- Bilzin Sumberg Attorneys at Law, Lennar Corporation vs. Michael C. Morgan, 2007
- Bingham McCutchen LLP: Sharp Computer v. Dell Inc., 2010
- Maurice Blackburn Cashman Commercial (Australia), Biota Holdings Limited vs. GlaxoSmithKline re. Relenza, 2007-2008.
- Blanchard, Krasner & French, Consulting Re. Aerus, 2006-2007
- The Calorie Control Council vs. FTC re: the Saccharin case, 1979
- Covington and Burling:
 - (a) The Proprietary Association vs. FTC re: over-the-counter (antacids) drugs, 1979
 - (b) FTC Staff Report on cigarette advertising investigation 1981-1983 including appearance before congressional committee in hearing on H. R. 1824: "The Comprehensive Smoking Prevention Education Act"
 - (c) International Telecharge Inc. vs. AT&T, 1992-1994
 - (d) Dream Team Collectibles vs. NBA Properties (re: Dream Team), 1996
 - (e) G. A. Modefine S.A. v. Armani.com, 2003-2004
 - (f) Defence in Class Action Re: IBM REAP Educational Benefit, 2006-

- (g) Spirits Int Nv vs. S.S. Taris Zeytin Vezeytinyagi Birliei, Re: Moskovskaya, 2006-2008
- (h) Cunningham v. International Business Machines Corp., 2007.
- Cravath Swain and Moore:
 - (a) Amertech Corporation, *et. Al.* v. Lucent Technologies Corporation [Arbitration], 1997
 - (b) Louis Vuitton v. Dooney & Bourke, Inc., 2004
- Crude Oil Resellers vs. U.S. Department of Energy Economic Regulatory Administration re: the proposed crude oil reseller price regulations, 1979, including presentation at public hearing
- Darby and Darby. Proctor & Gamble vs. Colgate, Palmolive, and Y&R re: China advertising, 1997
- Davis Polk & Wardwell LLP
 - (a) P&G and Sanofi-Aventis US vs. Hoffman-La Roche Inc and GlaxoSmithKline, Inc. Re. Boniva, 2007
 - (b) Procter & Gamble Pharmaceuticals, Inc., and Sanofi-Aventis US LLC, v. Hoffman-La Roche Inc. and Glaxosmithkline, Inc., 2006
- Dechert Price & Rhoads:
 - (a) The Mutual Assurance Co. vs. American Council of Life Insurance and Health Insurance Association of America (re: The Green Tree), 1983-1984
 - (b) INC vs. Manhattan, Inc., 1985
 - (c) Tunis Brothers Co. vs. Ford Motor Credit Co., 1988
 - (d) Allerest vs. Alleract, 1988-1990
 - (e) Campbell Soup Co. vs. Conagra, Inc. (Various deceptive advertising cases) 1991-1996
- Department of Justice, Antitrust Division: Consulting in a number of cases since 1996, including Microsoft Network, ski resorts, Echostar's proposed acquisition of DirecTV, and dental supplies
- Dilworth, Paxson, Kalish, Levy and Kauffman: Prince Castle vs. Le-Jo Enterprises, 1977-1978
- Fitzpatrick, Cella, Harper & Scinto: The Gap, Inc. and Gap (Apparel) LLC v. G.A.P. Adventures, Inc., 2010
- Forrest, Hainline III, American Pasta Co. vs. New World Pasta Co. (re: "America's favorite pasta"), 2002
- Fulbright & Jahorski: Deere and Co. vs. MTD Holdings, 2003
- Gibson, Dunn, & Crutcher:
 - (a) Pfizer, Inc. vs. International Rectifier Corp., 1982-1983
 - (b) Thompson vs. General Nutrition Corp., 1985
 - (c) New Vector vs. Metro Mobile, 1986;1992
 - (d) Air Passenger CRS Antitrust Litigation vs. American Airlines, 1987-1990
 - (e) Quintons/Mahurkar vs. Shiley
 - (f) McCaffrey vs. Pfizer re: Plax, 1990
 - (g) The Travel Difference vs. The Time Mirror Co. (LA Times), 1992
 - (h) Toyota re: class action defense vs. Staples Stillwell on the "destination charge" on Monronery Stickers, 1995-1996; 1999-
 - (i) Hewlett-Packard vs. Nu-Kote Int. Inc., Anti-trust, 1998-1999
 - (j) LA Cellular AT&T Wireless class action defense, 2002, 2004-
 - (k) Hewlett Packard defense vs. Staple Stilwell in class action suit re economy cartridge, 2003
- Gold, Farrel & Marks: Miramax Film Corp. vs. Columbia Pictures Entertainment, re: *I Know What You Did Last Summer* (1997)
- Goodwin Procter LLP:
 - (a) FTC vs. New Balance re: "made in USA", 1995-1996 [FTC Hearing] and consulting, 1998
 - (b) Public Media Center and People of the State of California vs. Tri-Union Seafoods, Delmonte Corp & Bumble Bee Seafoods. Re: Proposition 65 Mercury In Tuna, 2006
 - (c) Environmental World Watch, Inc. v. The Procter & Gamble Distributing Co., Los Angeles Superior Court No. BC 338895; Council for Education & Research on Toxics v. McDonald's Corp., et al., Los Angeles Superior Court No. BC 280980; and People of the State of California v. Frito-Lay, et al., Los Angeles Superior Court No. BC 337618, 2007.
- Greenberg Traurig LLP
 - (a) Chatham et al v. Sears Roebuk & Co. Re: Craftsman Made in USA, 2007-
 - (b) Whirlpool Corp. vs. Sensata Technologies and Texas Instrument, Inc., 2011
 - (c) Curt Schlesinger v. Ticketmaster, 2011
 - (d) Santamarina , et. al. v. Sears Roebuck & Company, 2012
- Hapgood, Calimafole, Kalil, Blaustein & Judlowe: Merrill Lynch vs. Paine Webber (re. RMA), 1985
- Heller, Ehrman, White, and McAuliffe: Apple Computer Securities Litigation, 1985-1986.
- Herling, Lindeman, Goldstein and Siegal: Roli Boli vs. Pizza Hut, 1997

- Hill, Betts, and Nash: Fender Musical Instruments Inc. vs. E.S.P. Co., 1985
- Howrey, Simon, Arnold & White:
 - (a) Sands, Taylor and Wood vs. The Quaker Oats Co. re: Thirst-Aid, 1987
 - (b) Syntex, Inc. vs. Schering-Plough Healthcare Products, Inc. re: Femcare, 1992
 - (c) Anheuser Busch (re Bud Dry commercials), 1993
 - (d) Anheuser Busch vs. Labbatt (re: Ice Beer), 1994-1995
 - (e) Anheuser Busch vs. Samuel Adams, 1995
 - (f) Anheuser Busch vs. United Guinness Distillers (re: Red Label from Budweiser), 2002
 - (g) Nissan North America vs. BMW (re: “Z”), 2002
 - (h) Consulting Re: Schering Plough, 2007
- IT&T Continental Baking vs. FTC re. Fresh Horizons advertising, 1977-1978
- Jenner & Block:
 - (a) General Dynamics vs. AT&T. re: Antitrust litigation, 1987-1990
 - (b) AT&T vs. MCI re: Telemarketing Practices 1990
 - (c) Recording Industry Association of America, Re: Adjustment of Rates & Terms for Satellite Digital Radio Services (Copyright Royalty Board), 2006-2008
 - (d) In Re: Adjustment of Rates and Terms for Preexisting Subscription Services and Satellite Digital Audio Radio Services before the Copyright Royalty Board, 2007
- Kaye, Scholer, Fierman, Hays & Handler:
 - (e) Automated Bread Dist. Corp. vs. General Foods Corp. (Re: Freihofer Baking Co.), 1991-1992
 - (f) Zone Perfect Nutrition Co. vs. Hershey Foods Co., 2004
- Kenyon & Kenyon:
 - (a) Mead Data Control, Inc. vs. Toyota Motor Sales, U.S. re: Lexis vs. Lexus, 1988
 - (b) Hiram Walker and Sons vs. White Rock Distilleries re: Kapala-Kahlua
 - (c) America Online vs. AT&T Corp. re: ATT&T’s “You Have Mail”, 1999
 - (d) Twentieth Century Fox Film vs. Marvel Enterprises, Inc. (re: Mutant X), 2002
 - (e) Petition for Cancellation of the Registration of the Gakic Mark, 2006
- Kirkland and Ellis
 - (a) Kraft Foods Inc. and Capri Sun vs. Minute Maid, 1997
 - (b) Time Inc. vs. Peterson Publishing Co. re: Teen vs. Teen People, 1997-1998
 - (b) Brach and Brock vs. James River re: Royals candies, 1998-1999
 - (c) Hermes vs. Lederer, re: the Kelly Handbag, 1998-2001
- Kirkpatrick and Lockhart: McPalland et al v. Keystone Health Plan Central, Inc. (re: class certification of SeniorBlue Customers, 2001-2002
- Kleinfeld, Kaplan and Becker: re: Iron-Kids Bread Package, 1991
- K&L Gates LLP:
 - (a) Quia Corp. v. Mattell Inc. and Fisher-Price Inc., 2010.
 - (b) Sara Lee Corporation v. Kraft Foods, Inc. and Kraft Foods Global, Inc., 2011
 - (c) Sara Lee Corporation v. Kraft Foods, Inc. and Kraft Foods Global, Inc., 2012
- Kramer Levin LLP: Finjan, Inc. v. McAfee, Inc., Symantec Corp., Webroot Software, Inc., Websense, Inc., and Sophos, Inc., 2012
- Lee, Toomey, and Kent Pfizer Pharmaceuticals vs. the IRS, 1978-1979
- Lempres & Wulfsberg and Kutak, Rock, & Campbell: Evaluation of Expert Reports, re: International Pharmaceutical Products, Inc., 1985-1990
- Liddy, Sullivan, Galway, and Begler:
 - (a) Coopervision, Inc. vs. CTL, Inc. (re: Permatint), 1985
 - (b) Johnson & Johnson, Inc. vs. Oral-B Laboratories (re: Minute-Gel), 1987
 - (c) Soft Sheen’s Care Free Curl vs. Revlon’s I of Nature (Trademark), 1986-1987.
 - (d) Oral-B Laboratories, Inc. vs. Johnson & Johnson, Inc. (re: Reach Advertising), 1986-
- Locke Lord Bissell Liddell: The Gap, Inc. and Gap (Apparel) LLC v. G.A.P. Adventures, Inc., 2009.
- Lowenstein, Sandler: Princeton Economics Group vs. AT&T (re: class action defense of spirit), 1994-1995
- Maurice Blackburn Cashman Pty Ltd: Biota Holdings Ltd and Anor vs. Glaxo Group Ltd. & Ors. Re: Relenza, 2006-
- Mitchell, Silberberg & Knupp: Stella Foods Inc. vs. Cacique IC, re: Ranchero, 1997-1999
- Morgan, Lewis and Bockius: Scott paper defense in the Turnabout Marketing Case, 1983
- Morison, Cohen, Siner, and Weinstein, Hertz v. Avis, 1994.

- Morrison & Foerster [and Bingham McCutchen; Arnold & Porter; Goodwin Procter; Greenberg Traurig]
 - (a) Prop 65 [Re Acrylanide in Potato Chips and French Fries]: Environment World Watch Inc. v. P&G Distributing Company
 - (b) Council for Education and --- on Toxins v. McDonald's Corp
 - (c) People of the State of California v. Frito-Lay Inc., 2007-2008.
- Moses & Singer:
 - (a) THOIP (A Chorion Limited Company) v. The Walt Disney Company, 2009.
 - (b) THOIP (A Chorion Limited Company) v. The Walt Disney Company, 2010
- Munger, Tolles and Olson:
 - (a) FTC vs. Polygram Holdings et al. re: Three Tenors Case 2001-2002
 - (b) Universal vs. MGM (re: Rollerball) 2002
- Odutola Law: Spirits Int. Nv. vs. Distilleries Melville Ltd. Re: Moskovskaya vs. Moskova, 2007-
- Pattishall, McAuliffe, Newbury, Hilliard, & Geraldson:
 - (a) S.C. Johnson and Son, Inc. vs. Carter Wallace ("Edge" vs. "Rise"), 1983
 - (b) Anheuser Busch vs. Stroh Brewery Co. and vs. Miller and Heillman, (re: LA beer), 1984-1985
 - (c) S. C. Johnson & Son Inc., re: L'envie, 1986-1987.
 - (d) Shelby Motor vs. Ford, 1988.
 - (e) GFA Brands Inc. and Fitness Foods Inc. vs. Canbra Foods Ltd. and Campbell Mithun/Esty, Inc. re Heartlight, 1990-1991.
 - (f) AT&T vs. MCI (various deceptive advertising cases) 1991-
 - (g) Walt. Disney vs. Good Times, 1993
 - (h) Car Freshener Corp. vs. S.C. Johnson and Son, Inc. (re:Glade Plug Ins Air Freshener Design), 1994
 - (i) International Telecharge, Inc. vs. AT&T, 1992-1994
 - (j) S.C. Johnson and Son, Inc. vs. Avon (re: Skin So Soft) 1996
 - (k) GTE Card Services Inc. vs. AT&T, 1996
 - (l) SunAmerica Corp. vs. Sun Life Assurance Co. of Canada 1993-1995, 1997-1998 [W.H. Covington and Burling]
 - (m) Blue Cross Blue Shield vs. American Medical Association, re: CPT, 1998
 - (n) Encyclopedia Britannica, Inc. vs. Britannica Home Fashions, Inc., 1999
 - (o) Simon Property Group, L.P. v. mySimon Inc., 2001-
 - (p) Montblanc – Simplo Gmbh v. Savonerie et Parfumerie Bernard, 2001
 - (q) Old World Industries, Inc. vs. AutoMeter Products, 2002
 - (r) JLJ Inc. v. Santa's Best Craft (Christmas tree lights), 2004
 - (s) Energy Brands Inc. (Glaceau) vs. Pespico Inc. + South Beach Beverage Co., Inc Re: Sobe Life Water, 2006
 - (t) Auto Meter Products Inc. v. Maxima Technologies & Systems LLC, 2007
- Paul, Weiss, Rifkin, Wheaton and Grasser:
 - (a) Revlon vs. L'OREAL re: Colour Endure Commercials 1995
 - (b) Revlon vs. Cover Girl self-renewing lipstick advertising, 1996 [NAD]
 - (g) Castrol vs. Penzoil (re comparative advantage) 2008.
- Pepper, Hamilton and Scheetz:
 - (a) Del Monte Corp. vs. Sunkist Growers, Inc. Arbitration, 1990-1991
 - (b) Sun Oil Company defense against class action certification, 1996-1997
- Pennie & Edmonds IT&T Continental Baking (C&C Cola): defense against Coca Cola re: C&C Cola, 1978
- Pillsbury, Madison & Sutro: Consulting re:
 - (a) Thrifty Rent-A-Car vs. Elder, 1991-1992
 - (b) Green Giant American Mixtures, 1994
 - (c) Chrysler Corp. vs. Replacement Sheet Metalparts Distributors, 1992-1993
- Pillsbury Winthrop LLP
 - (a) Mulligan v. Pacific Bell Telephone Co. (inside wiring), 2004
 - (b) State of California vs. Tri-Union Seafoods, et al. (Canned Tuna, Proposition 65)
- Quinn Emanuel: Louis Vuitton Malletier, S.A. v. Hyundai Motor American, 2011
- Rogers and Wells [and the Italian Trade Commission], re: Italian pasta dumping case, 1996

- Sidley and Austin:
 - (a) Industrial Gas litigation, 1986
 - (b) Land O'Lakes, Inc. vs. Bakers Franchise Ltd., 1987
 - (c) Ultramar, Inc. vs. CITGO Petroleum Corporation, 1997
 - (d) AT&T vs. US West Communications, re: US West advertising, 1998
- Sills, Cummis, Zuckerman, Radin, Tischman, Epstein and Gross: E.R. Squibb and Sons, Inc. vs. Stuart Pharmaceuticals, 1991.
- Skadden, Arps, Meagher, & Flom:
 - (a) American Home Products vs. Beecham re: Delicare commercials, 1986
 - (b) Tambrands, Inc. vs. Warner-Lambert Co. re: EPT commercials, 1986-1987
 - (c) Beecham Inc. vs. Yankelovich, Clancy, Shulman and Saatchi & Saatchi Holdings, Inc., re: projections for Delicare, 1986-1988
 - (d) American Express vs. MasterCard re: Goldcard, 1988
 - (e) Challenge to the networks by Sterling Drug re: Bristol Myers Tribuffered Bufferin commercials, 1988
 - (f) Challenge by Dow Brands, Inc. of the TV advertisement for Reynolds Metals Company's "SURE-SEAL" food storage bags, 1989
 - (g) Anheuser-Busch Company vs. Coors Brewing Company (various deceptive advertising cases) 1991-1993
 - (h) R.H. Donnelley vs. Sprint Publishing and Adv. Inc., re: Sprint Yellow Pages, 1996
 - (i) Anheuser Busch vs. Boston Beer re: A-B advertising [NAD], 1997
- Spirits International BV: N.V. vs. S.S. Taris Zeytin, Opposition No. 91163779 before the Trademark Trial and Appeal Board, 2006
- Steptoe & Johnson LLP: DirectTV Inc. and EchoStar Satellite LLC v. William W. Wilkins, Tax Commissioner of Ohio 2006-2007
- Sullivan & Cromwell: Remington Rand Corp. vs. Amsterdam-Rotterdam Bank N.V., 1991
- Van Hagey & Bogan, Ltd.: Consulting re: The Quaker Oats Co, 1991
- Vinson & Elkins LLP: Wal-Mart Stores, Inc. v. GFA Brands, Inc., 2009.
- Weil, Gotshal and Manges:
 - (a) Johnson & Johnson vs. SmithKline Beecham, Re: Tums Advertising, 1991
 - (b) Schering-Plough Healthcare Products vs. Johnson and Johnson, Inc. re: Neutrogena Chemical-Free Sun Block, 1996
 - (c) Pharmacia Corp. vs. Glaxosmith Kline Consumer Healthcare (re: NicoDerm advertising), 2002-2003
 - (d) Priceline.com re: NAD, 2003
- White & Case:
 - (a) Trovan Ltd. and Electronic Identification Devices vs. Pfizer Inc. re: Trovan's trademark, 1999
 - (b) Frederick E. Bouchat vs. Baltimore Ravens, Inc. and NFL Properties Inc., (re: the Ravens Logo), 2001-2002
 - (c) Oakland Raiders vs. TBB and NFL, 2003 [with Bingham McCutchen]

- Whiteman, Breed, Abbott & Morgan:
 - (a) Pepsi Cola Company: Defense against Coca Cola Co. re: The Pepsi Challenge, 1978; 1981; 1995 [Mostly with the NAD]
 - (b) Burger King Comparative Advertising Campaigns vs. McDonald's and Wendy's, 1982-1990
- Winston & Strawn, LLP
 - (a) Verizon Directories Corp. vs. Yellow Book USA, Inc., 2004
 - (b) Merix Pharmaceuticals vs. GlaxoSmithKline, Re: Releev, 2006
 - (c) Dyson Technology Ltd. vs. Maytag Corp., 2006-2007
 - (d) Procter & Gamble Co. vs. Ultero Inc. 2007
 - (e) Dyson Technology Limited v. Hoover, Inc. and Maytag Corp., 2007
 - (f) GlaxoSmithKline Consumer Healthcare LP v. Merix Pharmaceutical Corp, 2007
 - (g) Doctor's Associates Inc. vs. QIP Holders LLC & iFilm Corp.: Subway vs. Quiznos, 2008
 - (h) LG Electronics USA, Inc. v. Whirlpool Corp., 2009.
 - (i) The Scotts Company LLC v. Central Garden & Pet Company and Gulfstream Home & Garden, Inc., 2009.
 - (j) Dyson, Inc., v. Oreck Corporation, Oreck Holdings, LLC, Oreck Direct, LLC, Oreck Merchandising, LLC, Oreck Sales, LLC, Oreck Homecare, LLC, and Oreck@Home, LLC 2009.
 - (k) LG Electronics USA Inc. v. Whirlpool Corporation, 2010.

E. Illustrative Marketing Research Clients:

1. Air Canada (1973)*
2. American Cyanamid (1972-1973)*
3. Atlantic Richfield Company (1971-1972)*
4. Bankers Trust Company (1973-1974)*
5. Bell Telephone Company of Pennsylvania (1974;1977)
6. BBD&O (1974-1982)
7. Bissell, Inc. (1969-1971)*
8. Bristol Myers Squibb (1998-)
9. Brown & Williamson Tobacco Corp. (1978-1979)
10. Bureau of Newspaper Advertising (1974)*
11. CBS (1972)
12. Campbell Soup Company (1972-1973)*
13. Chrysler (via BBD&O) (1975-1978)
14. Clorox Company (1975-1976)
15. Colonial Penn Group, Inc. (1973-1979)
16. Commercial Union Assurance Companies (1974-1975)
17. Connecticut Bank and Trust Company (1972)*
18. Downe Publishing, Inc. (1972-1973)
19. Eastman Kodak Company (1973)*
20. E.F. Hutton (1981-1984)
21. Edward D. Jones (1985-1987)
22. First Pennsylvania Banking and Trust Company (1971-1972; 1974-1975)*
23. General Electric (via BBD&O 1977) (1982)
24. General Foods Corporation: the Jell-O and Kool-Aid divisions and various departments of the corporate product development division (1969-1972)*
25. Geometric Data (1981)
26. International Air Transport Association (1973-1975)*
27. International Harvester Credit Corporation (1973-1974)*
28. International Harvester Company (1975)
29. IT&T Continental Baking Company (1972-1978;1982)
30. Lever Brothers Company (1971-1973)*
31. Marriott Corp. (1982)
32. Modern Medicine (1970)*
33. MRCA (1975-1987)
34. Pacific Bell (1981-1982)

35. Pepsi Cola (1981)
36. Pfizer Pharmaceuticals, Inc. (1975-)
37. Pillsbury (1975)
38. Pioneer Electronics of America (1978)
39. RCA Computer Division (1972)*
40. Sears Roebuck & Company (1972-1973)*
41. SEI Investments (1988-)
42. Singer (1973)
43. SmithKline and French (1971)*
44. Snelling and Snelling, Inc. (1973-1974)
45. Sterling Drugs (1985-1986; 1990-1992)
46. Stroh Brewery Company (1970)*
47. Sun Oil Company (1972)*
48. Syntex Laboratories, Inc., (1976-1977)
49. Twentieth Century Fox (via the Data Group, Inc.) (1972)
50. UNICOM (1973)
51. U.S. Dept. of Commerce, Office of Telecommunications (1972)
52. The Wool Bureau, Inc. (1975)
53. Western Airlines (via BBD&O) (1979)

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

F. Illustrative Marketing Research Program Evaluation and Redesign:

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

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

1. American Medical International (1978)
2. Amoco Fabrics Co. (1984; 1988)
3. ARA (1983)
4. Asociacion Mexicana de Ejecutivos en Planeacion (1979)
5. Atlantic Richfield Company (1971)
6. AT&T (1972-1978)
7. Bank of East Asia (2005)
8. BBD&O (1974-1983)
9. Bell Atlantic (1983)
10. Bell Canada (1980)
11. Black and Decker (1981)
12. Bristol Myers Squibb (1998)
13. The Bunge Group (1982)
14. Campbell Soup (1972)
15. Career Futures, Inc. (1975)
16. Certain-Teed Corporation (1983)
17. The Clorox Company (1975)
18. Colonial Penn Group (1975-1980)
19. Computer Science Corporation (1975)
20. Contel (1989)
21. Daymon (2004)
22. Di Giorgio Corp (1980-1981)

23. Deutsche Bank (2004)
24. Edward D. Jones & Co. (1983)
25. E.F. Hutton (1979-)
26. Ethicon, Inc. (1979)
27. The Executive Forum (1979)
28. General Foods (1970)
29. Gray Advertising, Inc. (1977)
30. IBM – Applied Business Systems (1988)
31. International Harvester (1974-1975)
32. Intermountain Health Care, Inc. (1978)
33. ITT Water Technology Group (2004)
34. Li & Fung (2005)
35. Los Angeles Times (1993)
36. Machinist Publishing Co., Ltd., Japan (1977)
37. Miles Laboratories Ltd., Canada (1973)
38. MRCA (1978)
39. New York Telephone Company (1976)
40. Pfizer Pharmaceutical, Inc. (1975-1987)
41. Phillips Petroleum Company (1992-1993)
42. The Pillsbury Company (1976)
43. Rhodia, Brazil (1979)
44. Schlachman Research, U.K. (1975)
45. SEI Corporation (1990-)
46. SmithKline & French (1970)
47. Spectra-Physics (1983)
48. Standard & Poors (1998)
49. Syntex Laboratories, Inc. (1976)
50. 3M's Marketing Council(1986)
51. Tektronix, Inc. (1978)
52. Unilever, U.K. (1975)
53. Union Mutual (1981)
54. Wyeth International Ltd. (1980)
55. Xerox (1981)

H. Selected International Consulting

1. UNIG, Singapore, Business Strategy (2000)
2. Li & Fung, Hong Kong: Business Strategy (1998-)
3. Wickes, plc., UK: Marketing and business consulting (1988-1996)
4. Hakuhodo, Japan: Design of a 21st Century Advertising Agency (1993-1997)
5. McKinsey, Milan: New Developments in Marketing Strategy, Research, and Modeling (1988)
6. Sunstar, Japan: Marketing and Business Strategy (1985)
7. Bunge Group, Brazil: Marketing planning (1982-1986)
8. Meridian Group U.K.: Marketing and Business Strategy (1985-1986)
9. P.E. Consulting Group, South Africa: Strategic planning & Marketing Consulting and Conducting Executive Seminars (1982)
10. Bell Canada, Canada: Market Segmentation Study (1979-1981)
11. Cooperative de Seguros de Vida, Puerto Rico: Design of a marketing planning system (1980)
12. Discount Bank, Israel: Marketing planning (1980)
13. Bank Leumi Ltd., Israel: Marketing planning (1978)
14. Fuji electric, Japan: Design of a management planning process (1977)
15. Koor Industries, Israel: Designing and organizing the marketing function for the corporation's 34 companies (1968-1969)

I. Consulting to Government Agencies

1. FinCen/BENS project on Terrorist Financing, 2003-2004
2. U.S. AIR FORCE: Evaluation of the Air Force resource allocation procedure (1980-1981)

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

J. Consulting/Advising to Research Organizations

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

UNIVERSITY ACTIVITIES

University of Pennsylvania, The Wharton School

A. Program Development

1. Help the MBA Review Committee to develop a Fast Track MBA, 2010.
2. The Wharton Fellows
In 2010, Wharton Fellows created a partnership with the Conference Board (<http://www.conference-board.org/wharton/>) to enhance the Wharton Fellows approach of combining experiential learning with visits to best-practice companies around the globe. Wharton Fellows Master classes Dr. Wind designed and directed included:
 - November 27-December 2, 2000: Philadelphia
 - January 7-January 12, 2001: Silicon Valley
 - February 18-February 24, 2001: Barcelona
 - March 15-March 17, 2001: Philadelphia
 - May 6-May 12, 2001: Philadelphia, Wharton Fellow in e-Business
 - June 3-June 7, 2001: Barcelona
 - June 8-June 9, 2001: Helsinki
 - July 8-July 14, 2001: Silicon Valley
 - March 17-March 22, 2002: CEO Forum & Foundations I: Philadelphia
 - April 21-April 25, 2002: Foundations II: Silicon Valley/San Francisco

- June 9-June 11, 2002; Munich
 - November 3-November 8, 2002: Foundations I: Philadelphia
 - January 5-January 9, 2003: Foundations II: San Francisco
 - September 7-September 9, 2003: Top Line Growth in Turbulent Times: Philadelphia
 - January 7-January 9, 2004: Success: What's Next?: Seattle
 - April 25-April 28, 2004: Milken & the Media: Los Angeles
 - June 1-June 8, 2004: Leveraging Japan: Tokyo; China: Transformation from the Inside: Shanghai
 - September 12-September 14, 2004: Toward a New Europe: Prague, Czech Republic
 - December 12-December 14, 2004: Merger, Acquisition and Renewal: New York
 - March 6-March 9, 2005: Market & Sourcing Opportunities in India: Mumbai & Bangalore, India
 - June 26-June 27, 2005: Working with Government, Washington D.C.
 - September 22-September 27, 2005: Design, Innovation and Strategy: Copenhagen/Milan
 - December 4-December 6, 2005: Opportunities in Latin America and the US Hispanic Markets: Miami
 - February 25-February 27, 2007: Doing Business in an Evolving World, Philadelphia
 - May 21-May 23, 2007: Globalization Revisited, Shanghai
 - October 14-October 16, 2007: The Next Big Thing, Silicon Valley
 - January 7-10, 2008: Marketing to Electronics Savvy Consumers, with David Reibstein, Las Vegas.
 - May 4-6, 2008: Creativity and Innovation, with Karl Ulrich, Philadelphia.
 - October 11-14, 2008: Islam and the West: Insights and Opportunities, with Bulent Gultekin, Dubai.
 - May 17-18, 2009: Philadelphia: Finding Opportunity in Times of Economic Crisis
 - October 25-27, 2009 Washington DC: Opportunities in Times of Crisis: The Changing Relationship between Business and Government
 - July 6-10, 2010: China: Insights and Opportunities, Shanghai, China.
 - October 8-12, 2010 Israel: The Holy Land of Innovation and Entrepreneurship
 - February 20-22, 2011 Philadelphia: What's Next in Management Disciplines and Business Transformation?
 - October 9-11, 2011 Buenos Aires: Argentina: Insights and Opportunities
 - October 13-15, 2011 São Paulo: Brazil: Insights and Opportunities
3. The MBA X-Functional Integration Initiative (2003-2005)
 4. A number of Executive Development Programs including :
 - Winning in the Next Millennium: Strategies for Driving Change: Initiator and Director, December 1998.
 - Wharton on the New Reality of Business: Co-Academic Director with Bob Mittlestaedt, December 2001.
 - IDC's MBA @ Wharton Program, 2003-2004, October 2007, 2008, 2009, 2010 (co-director with Ziv Katalan).
 5. The e-Curriculum R&D Initiatives. Initiator/Chair of the Committee that designed the new program platform and the e-Curriculum R&D Initiatives (1999-2000) and continued direction and reinvention of the program.
 6. The Advanced Management Program (AMP) Design Team (1998).
 7. Wharton's Information Management Initiatives (1998-1999). Founder and co-chair (with Paul Kleindorfer) of its faculty council.
 8. The Revised MBA Curriculum (1990-1991). Chaired the committee that developed the new curriculum.
 9. The SEI Center for Advanced Studies in Management, founding Director. Develop and direct all Center activities and chair its faculty council, 1988-.
 10. The Joseph H. Lauder Institute of Management and International Studies, founding Director and chairman of its faculty council. Designed and directed all the Institute's programs, including the establishment of the Institute MBA/MA program which admitted its first class of 50 students in May 1984, February 1983-July 1988.

11. Wharton International Forum. Initiated and designed the original program and chairman of its faculty council, 1987-1998.
12. Wharton Ph.D. with M.A. in International Studies. Initiated the joint program, 1988.
13. Wharton Center for International Management Studies (renamed as the Wurster Center, 1988) founding director. Designed/directed all the Center's activities aimed at the stimulation of international research at Wharton and the internationalization of the faculty and programs, 1980-1983.
14. The Wharton/SIA (Security Industry Association) Marketing Program. Initiated and designed the program which held sessions on April 1982 and November 1982.
15. The Wharton Recanati Multinational Marketing and Management Program, Co-founder, 1978.
16. The Wharton Executive MBA (WEMBA) program, chaired the committee that developed the program, 1974.
17. Marketing Programs, participated in the redesign of the marketing MBA programs, 1970; Ph.D. 1971; and Undergraduate, 1973 and 1981; including the initiation of The Wharton Dual MBA Major in Marketing/Multinational Enterprise.

B. Courses Developed and Taught

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

C. Committee Responsibility:

1. Marketing Department Committees:
 - Founding Director and Member, SEI Center for Advanced Studies in Management Board of Directors, 1989-
 - Computer Committee 2009-2010.
 - Curriculum Committee 2008-2010.

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

2. Wharton School Committees:

- Founder and Member, Wharton Fellows Program CEO Global Advisory Board, 2009-
- Dean Advisory Council (since its inception in 1983 to 2000) and 2007/2008; 2008/2009; 2009.
- Initiator of a faculty group to generate creative curriculum options as input to the MBA Review Committee 2010.
- Co-Chair, Search Committee for the new Director of the Lauder Institute (2006)
- Initiator and developer of *Wharton School Publishing* in conjunction with Pearson/FT, Founding Editor and member of the Faculty Editorial Board (2003-)
- Chairman, Dean's Committee on Cross-Functional Integration (2002-2004)
- Member of the Executive Development Faculty Advisory Board (2002-2004)
- Member of the Alfred West, Jr. Learning Lab Faculty Committee (2001-2005)
- Chairman of a Faculty Committee to assure cross program dissemination of e-Curriculum Developments (2000)
- Member of the Strategic Planning Steering Committee, 1999-2000
- Member of the Committee to prepare the strategy for "Management, Leadership, and Organizational Priority" area of the University's Agenda for Excellence, 1998
- Senior Faculty Committee to Review the Global Presence strategy (Summer 1997)
- Chairman of the Graduate Curriculum Committee focusing on a critical examination of the MBA program and its appropriateness for preparing the leaders of the 21st century enterprises. The Committee developed the new MBA curriculum which was tested in 1991/1992 and 1992/1993 and which was fully implemented starting in 1993/1994.
- Initiated and organized the Management Education Council – the vehicle for corporate support and funding of the new MBA curriculum, 1992-
- The Wharton International Committee: Chairman, 1978-1981, 1982/1983, 1995-1997. [The 1995-1997 committee developed the Wharton globalization strategy.] Member: 1967-1968, 1983-1987, 1989-1991.
- Member of Boards of the following Wharton Centers:
 - The SEI Center for Advanced Studies in Management (Founder), 1988-
 - The Lauder Institute (Founder) 1983-
 - Knowledge@Wharton (2011-present)
 - The Alfred West, Jr. Learning Lab (Initiator of the Lab and Founder of the External Advisory Committee), 2001-2005
 - Risk and Decision Process Center, 1984-
 - The Manufacturing and Logistics Forum, 1992-2000
 - The Wharton/PIMS Research Center (Co Founder), 1985-1998
 - U.S. Japan Management Studies Center, 1989-1992
 - Wharton Emerging Economics Program, 1992-1995
 - The Wharton Center of International Management Studies (Founder), 1981-1983
- Member of the Advisory Committee on Faculty Personnel, 1976-1978; 1984-1985; 1987-1989; 1994-1995.
- Dean's Planning Task Force (1986).
- Member of the School's Executive Education Policy Committee, 1987-1989.

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

D. Doctoral Dissertations Supervised

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

E. Addresses to Alumni Club and Other Groups Regarding The Joseph H. Lauder Institute

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

1. Alumni Clubs addressed include:
 - Dallas (December 1984)
 - Cleveland (April 1986)
 - Hong Kong (July 1985)
 - London (May 1984)
 - Long Island (January 1984, March 1986)
 - Milan (October 1987)
 - Philadelphia (January 1984, January 1986)
 - Paris (December 1983)
 - San Francisco (November 1983)
 - Taipei (July 1985)

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

F. Illustrative presentations to alumni groups and others regarding the Management 2000 project, the SEI Center for Advanced Studies in Management, and the revised MBA curriculum

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

G. Illustrative presentations regarding Wharton's Globalization Strategy

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

H. Illustrative presentations regarding Wharton's Information Management Initiatives (WIMI)

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

I. Illustrative presentations regarding Cross-Functional Integration of the MBA Curriculum

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

J. Illustrative presentations regarding the Wharton Fellows Program

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

K. Illustrative presentations regarding Wharton School Publishing

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

L. Illustrative presentations regarding The Power of Impossible Thinking

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

M. Illustrative presentations regarding Competing in a Flat World

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

University of Pennsylvania – University Committees:

- Chair, Penn Social Responsibility Advisory Committee, 2008-2009 and 2009-2010.

- Committee for generating new revenues by medical education initiatives, University of Pennsylvania Health System, 2007-2008.
- Member of the Institute for Strategic Threat Analysis & Response @ Penn (ISTAR) Advisory Board, 2007-
- Integrated Product Design – Overseer, 2008-
- Research Foundation Committee, Social Science and Management Review Panel, 1999-2006.
- Member of the Faculty Advisory Group to Campus Development Planning Committee, 2005-2006.
- Member of the Committee on International Programs, 2002-2006
- Member of The Ackoff Center Advisory Board, 2001-2006
- Member of the Provost Art and Culture Committee, 2002-2004
- Faculty Senate Committee on Administration, 1995-1998.
- Chair, Subcommittee of the Faculty Senate Committee on Faculty Teaching Evaluations, 1997-1998.
- Chairman of Special Presidential Committee on Borderless Education, 1997-1998.
- Provost's Task Force on the University of the Global Information Age, 1996-1997.
- Faculty Editorial Board, University of Pennsylvania Press, 1996-1997.
- Member of the Provost's Committee on Information Science and Technology, 1996-1997.
- Member of the Provost's Committee on Distance Learning, 1996-1997.
- Chairman of a new university committee focusing on innovative revenue generation, 1992/1993 and 1993/1994. Members include the President, Provost, Chairman of the Board of Trustees, 3 deans, 3 trustees, and 3 faculty members.
- Member of the Provost International Council, 1990-1992.
 - Chairman of a Subcommittee for the Evaluation of the University Office of International Programs, 1990-1991 and of a Subcommittee to Evaluate the University's Off-Campus Programs, 1991-1992.
- Member of the Provost Task Force on International Programs (1992/1993; 1993/1994).
- Member of the Commission for the 250th Anniversary Celebration of University of Pennsylvania (1987-1990)
- Advisory Board of the PBS series on The Global Economy, 1990.
- University of Pennsylvania correspondent for PBS program on Geo-economy, moderated by Ted Koppel, May 1990.
- Chairman of the Faculty Council of the Joseph H. Lauder Institute, 1983-1988.
- Member of the Board of Directors of the Joseph H. Lauder Institute, 1983 to present.
- Member of the Advisory Board of the office of International Programs, 1980 to present.
- Chairman, the Wharton Dean Search Committee, (selected Russ Palmer)1982/1983.
- The Senate Committee on the Economic Status of the Faculty, 1978/1979 (member); 1979/1980 (chairman).
- Member of the FAS – Wharton Committee, 1975-1977.
- Member of the University's Committee on Research, 1977/1978. Chairman of its subcommittee for evaluation of the University's Policy and Conduct of Research Programs.
- Member of the subcommittee of the University's Academic Planning Committee for the Measurement of Academic Performance, 1972/1973.

The Interdisciplinary Center (IDC), Herzliya, Israel

- Co-founder (1994)
- Chairman, International Academic Advisory Board, 1994-
- Faculty Promotion and Appointment Committee: Chairman 1999-2005; Member 2005-
- Chairman, Higher Academic Council 1999-
- Delivered the first Graduation Address, October, 1998
- Delivered the first Zoltan Wind lecture, 1996
- Delivered the first graduation address of the Wharton IDC Marketing Communication Program, March 1999
- Occasional lectures in various courses, faculty seminars, and public addresses since 1995
- Founder of the American Friends of IDC 1998 and a Member of the Board, 2003-
- Designed the week-long programs at Wharton for its visiting MBA class (2002, 2003, 2004, 2007 and 2008) and the Zell Entrepreneurial Program, (2002)
- Member, Advisory Board of IDC's New School of Communication (2005-)

Other Universities

1. Courses Taught

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

2. Faculty Promotion Review – Illustrative Universities

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

3. Program/School Review

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

OTHER PROFESSIONAL ACTIVITIES

A. Development of Research Programs [Illustrative List]

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

B. Editorial Activities

1. Founding editor, Wharton School Publishing, 2003-2008 [published books are listed on pages 24-26]
2. Initiator and editor of *Advances in Marketing Research and Modeling: Progress and Prospects – A Tribute to Paul E. Green*, Kluwer Academic Publishers, 2002.
3. Initiator and editor of *The Wharton School Publishing Newsletter* (monthly since July 2005)
4. Initiator and Co-Editor of the *Wharton Fellows Newsletter* (quarterly 2003-4; monthly January-December 2005).
5. Initiator and editor of *Wharton Executive Library* (published by Oxford University Press), 1984-1987. The series was aimed at familiarizing top management with recent developments in the various management disciplines. Books published include:
 - Gerard Adams, *The Business Forecasting Revolution, Nation-Industry-Firm*, 1986.
 - Leonard M. Lodish, *The Advertising and Promotion Challenge, Vaguely Right or Precisely Wrong?*, 1986.
 - David Solomons, *Making Accounting Policy: The Quest for Credibility in Financial Reporting*, 1986
 - James C. Emery, *Management Information Systems: The Critical Strategic Resource*, 1987.
6. Initiator and editor of the Scientific Press *Computer Based Marketing Series*. 1984-90. The series offers short books on specialized marketing topics with accompanying PC software. Books published include:
 - Paul E. Green, *CAPPA Electronic Questionnaire Display and Analysis*, 1986
 - Gary Lilien, *Marketing Mix Analysis with Lotus 1-2-3*, 1987
 - John Hauser, *Applying Marketing Management: Four PC Simulations*, 1987

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

- Occasional reviewer of applications for research grants for the Social Science Research Council (London, England) since 1972; and the National Science Foundation, Division of Science Information and Advanced Productivity Research and Technology, since 1977.
- Reviewer of manuscripts for a number of publishers and universities, including the MacMillan Company, the Center for Research of the College of Business Administration of Pennsylvania State University, the Graduate School of Business, Columbia University, Prentice Hall, Jose Bass and others.

C. Offices Held in Professional Associations

AMA

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

TIMS

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

IAM – The International Academy of Management

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

MASB – Marketing Accountability Standards Board

1. Member of the Board of Directors since 2010.

MSI – Marketing Science Institute

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

Other

1. The Diebold Institute Entrepreneurship and Public Policy Project, Committee of Advisors (1999-____).
2. World Management Council. Member of the Academic Advisory Board (1988–1989).
3. Member of the interdisciplinary task force (organized by AMA) for the design of the *Journal of Consumer Research*, (October 1971–July 1972). Founding member of the Policy Board of the *Journal of Consumer Research* (1972–1983); Chairman of the Board (1977–1978); Chairman of the 1976 and 1981 Editor Search Committees.
4. Member of the Philadelphia's International City Steering Committee (1983–1985, 1987–1988).
5. Member of the Publication Committee of AAPOR (1973-1974).
6. Member of Program Committee of 1979 ACR Conference.
7. Member of the Advertising Research Foundation 75th Anniversary Convention Program Committee (2010)

D. Planning and Organizing Professional Programs at the University

1. Chair, "Network-Based Strategies and Competencies," a joint project with INSEAD co-directed with Paul Kleindorfer, Initial Workshop, May 3, 2007. Conference, November 2007.
2. Chair, "The Future of Advertising," a joint project with the ARF, Workshop, March 30, 2007. Conference, December 2008.
3. Initiated and chaired a task force to develop a Marketing Certification Program (2003-____)
4. Co-Designed with Bob Mittelstaedt an executive education program on "Wharton on the New Reality of Business," December 2001 [including the design of the "Wharton Post 9/11 Business Scenario" (October 2001-)] and May 2002.
5. Designed and directed the executive programs, "Winning in the Next Millenium," December 1998.
6. Initiated "The Impact of Computers and Information Technology on Management: 1946, 1996, 2001," May 13-14, 1996 program for the ENIAC at 50 celebration (1994-____).
7. Initiated the "Computers and Art" program for the ENIAC at 50 celebration (1994-____).
8. Participated in the original design of the Wharton – AT&T Marketing Management Program. Taught in the 1973, 1975 -1980 programs.
9. Developed, organized and taught a Marketing Research Seminar for U.P. Clinical Scholars Group (February–May 1975 and February–April 1976).
10. Planned and taught the marketing management section of a number of advanced management programs of the University of Pennsylvania:
 - Dean Witter - Wharton Account Executive Program, 1986.
 - Securities Industry Association Program, annually since 1982.
 - Advanced Management Program for Overseas Bankers, 1975, 1976.
 - Program for Health Care Executives, 1973, 1975, 1982.
11. Participated in various executive development programs of the Marketing Department of the University of Pennsylvania:
 - Marketing for the Postal Service, 1983.
 - Marketing Strategy Seminar, since 1981 (January & May).
 - Pharmaceutical Advertising Council, 1980/1981.
 - Wharton Salesforce Management Seminar, since 1980 (January & May).
 - Dixie/Marathon (American Can Company), May 1977.
 - Marketing Research Seminar 1977-1983.
 - General Building Contracting Association, Inc., January 1977.
 - Center de Promotion du Commerce International, Chambre de Commerce et d'Industrie de Nantes, 1976, 1978-1980.
12. Planned and taught (with Thomas Robertson) a number of seminars on Health Care Marketing for:
 - The Virginia Hospital Association, February 1978.
 - The New York Management Center, September and November 1977.
 - The Wharton School's Lifelong Education Program, October 1976.
13. Co-founder, organizer of the Wharton teaching component, and frequent lecturer in the Wharton/Israel Binational Marketing Management Program [The Consulting Practicum] 1979-1995.

E. Award Committees

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

F. Planning and Organizing Professional Programs Outside the University

1. KMDC Program, Kuala Lumpur, The Power of Impossible Thinking and Its Implications for Marketing Innovations, March 15-16, 2005.
2. Co-director (with Hotaka Katahira) of the Marunouchi Global Center Management Program, 2002.
3. Planned and taught a number of two-day seminars on "Recent Developments in Marketing Research Methodology" for:
 - The Management Center, University of Bradford, February 1975 and May 1976.
 - The University of Laval, Canada, November 1973.
 - The University of Social Sciences at Grenoble, France with (Paul E. Green), May 1973.
4. Planned and taught various AT&T Executive Development Seminars on:
 - "Multivariate Analysis in Marketing," March and August 1975.
 - "Market Analysis," December 1974, and June 1975.
 - "Market Segmentation," September 1974, November 1975 and March 1976.
 - "How to get the Most Out of Your Marketing Research," Spring 1974.
 - "Consumer Behavior," October 1972, January 1978.
5. Planned and taught two one-day executive seminars on Conjoint Analysis and New Product Policy at the University of New South Wales (Australia), June 1977.
6. Planned and taught a number of executive seminars at the University of Tel Aviv: Marketing Strategy (1969); Product Policy (1977); Marketing and Corporate Strategy (1978, 1980); New Development in Product and Marketing Research (1980).
7. Planned and taught the marketing research section of the Bank Marketing Program of the Graduate School of Bank Marketing, April 1977.
8. Planned and taught a series of two-day seminars on Marketing Strategy for the New York

Telephone Company, February and April 1976.

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

G. Lecturing

Illustrative Keynote Addresses at various conferences including:

- "The Power of Impossible Thinking," Opening Session: Transform Your Business with New Thinking and New Models, The 51st Annual ARF Convention, Research Powered Marketing: New Models for Growth, April 2005.
- "The Power of Impossible Thinking," A Wharton Fellows Dinner Event, Kuala Lumpur, March 2005.
- "The Power of Impossible Thinking in Meeting the Jim Stargel Challenge," ARF Breakthrough Conference, November 4, 2004.

- “Should We Challenge Our Mental Models for Building Better Brands?” Med Ad News Conference on Building Better Brands, Philadelphia, July 28, 2004.
- “The Changing Nature of Marketing: Implications for Research, Teaching, and Practice,” The Elsevier Science Distinguished Scholar Award Lecture at the Society for Marketing Advances, November 6, 2003, New Orleans.
- “The Challenge of Corporate Governance,” IAM Conference, Barcelona, Fall 2003.
- “Corporate Transformation: Lessons for Japan,” Marunouchi Global Center First Executive Program, November 2002.
- “Convergence Marketing: The Challenge for the On-Demand Era,” IBM’s 2002 WW Summit for the On-Demand Era, 2002.
- “Leading Transformation Lessons for Mexico,” TeleTech’s Top Executive Program, October 2002.
- “Disruptive Technology—Rethinking Your Mental Models,” Forbes Global CEO Conference, Singapore, September 19-21, 2001.
- “e-Business: The Lessons to Date and Implication to Management Practice, Research and Education,” opening lecture of the PriceWaterhouseCoopers Management Consultants e-Bus Chair at the Graduate School of Business Studies at Katholieke Universiteit Leuven, Belgium, February 2001.
- “Reinventing Training for the Global Information Age,” Delphi e-Learning Summit, Phoenix, AZ, January 2001.
- “Customerization: The New Management Challenge,” The President’s Forum of the Interdisciplinary Center in Herzliya, Israel, September 2000.
- “e-Transforming an ‘Old Economy’ Business,” Wharton-Singapore Management University Conference: e-Business in the New Millennium, July 2000.
- “Creating a University for the Global Information Age,” The Inaugural Lecture of the Wharton-Singapore Management University, July 2000.
- “Implications of the New e-Business Environment and Models for Management Research and Education,” International Academy of Management, Barcelona Meeting, March 2000.
- “New Trends in Marketing Research,” IDC, Herzliya, March 2000.
- “Reinventing the Business School for the Global Information Age,” plenary session, The EFMD Deans and Directors Meeting 2000, Helsinki, Finland, January 2000.
- “Digital Marketing: Implication for the Future of Marketing Management Research and Research in Marketing,” plenary session presentation AMA Marketing in the 21st Century, San Francisco, August 1999.
- “Towards a New Marketing Paradigm,” AMA Winter Marketing Educators’ Conference, February 1998.
- “Creating a 21st Century Enterprise: Implications for Marketing Practice, Research and Education,” Keynote Address, 2nd International Workshop on Economics and Management, Santiago, Chile, October 1996.
- “Marketing in the Pharmaceutical Industry: Emerging Challenges and Opportunities,” P.A.C. Pharmaceutical Meeting: New Thinking, New Customers. February 28, 1995.
- “Marketing in the Pharmaceutical Industry: Emerging Challenges and Opportunities,” The Keynote address of The International Conference on AHP Washington, DC, July 11, 1994.
- “AHP in Top Management Decisions,” The Keynote address of The International Conference on AHP Washington, DC, July 11, 1994.
- Neuhauf Lecture, “The Impact of Marketing Science on Industry and Academia: Applications, Results and Lessons,” at Rice University, March 23, 1994.
- Third Workshop on Marketing and Competitive Advantages with Ambrosetti Group, Milan on “The Customer Driven Company: From Concept to Reality,” November 27-28, 1992.
- Amoco Fabrics and Fibers Co-Leadership Council, address on “What a Difference a Difference Can Make,” May 1988.
- A special meeting of the Chinese Management Association and the Taiwan Ministry of Trade, address on “Marketing to the U.S.” (Taipei), July 1985.
- MRCA Conference on “The Affluent Market: New Data and Methodologies in Financial Services Planning,” November 1984.

- The 1983 ESOMAR congress August 1983 at Barcelona. Keynote address on "The contribution of Research to Product Management and New Product Development.
- The 1983 Research and Planning Conference of the Bank Marketing Association. Keynote address on the Integration of Marketing into Strategic Planning," April 1983.
- The 1982 AMA Faculty Consortium on "Industrial Marketing and the Changing Environment." Ohio State University, July 1982.
- S.F. Chapter of the AMA, address on "Increasing Marketing Productivity, March 1982.
- Philadelphia Chapter of the AMA, Conference on Market Segmentation, January 1981.
- The First Delaware Valley Meeting of the Product Development and Management Association (PDMA), December 1980.
- AMA International Conference Workshop, Philadelphia, June 1978.
- National Agricultural Marketing Association, Philadelphia, March 1977 and February 1978.
- Marketing Planning Conference, The AMA Western Michigan Chapter, Grand Rapids, March 1976.
- The 11th Annual "New Horizons in Science," Conference of the Council for the Advancement of Science Writing, New York, November 1973.

Presented papers at various national conferences of the American Marketing Association, December 1967; June and August 1968; August 1969; August 1970; June and August 1974; April and August 1975; August 1976; August 1977; June and August 1978; June and August 1979; June and August 1980; August 1981-1990, March 1990, August 1991; August 1991, April 1993; February & August 1994, August 1995, August 1996, August 1997, February 1998, August 1999.

Speaker in various conferences and workshops of:

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

Speaker in a number of the AMA Attitude Research Conferences, 1967, 1971, 1973, 1976, 1987.

Member of the Faculty of the AMA Doctoral Consortiums

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

Member of the AMA Faculty Consortium, Chicago 1997

Illustrative papers delivered in various professional workshops

- Applications of Multidimensional Scaling to Marketing and Business, sponsored by the University of Pennsylvania and Bell Laboratories, June 1972.
- Planning Data for STI Managers, Sponsored by NSF office of Science and Information, December 1976.
- Synthesis of Knowledge of Consumer Behavior, sponsored by the RANN Program National Science Foundation, April 1975.
- Multinational Product Management, sponsored by the Marketing Science Institute and the AMA International Marketing Division, January 1976.
- Consumer and Industrial Buying Behavior, sponsored by the University of South Carolina, March 1976.
- Organizational Buying Behavior, sponsored by the University of Pittsburgh, April 1976.
- Consumer Research for Consumer Policy, sponsored by the MIT Center for Policy Alternatives, July 1977.
- Analytical Approach to Product-Marketing Planning, sponsored by the AMA and MSI, University of Pittsburgh, November 1977, October 1981.
- Interfaces Between Marketing and Economics, sponsored by the University of Rochester, 1978, 1983.
- Industrial Marketing, Penn State University, May 1982.
- Market Measurement and Analysis, renamed Marketing Science Conference sponsored by ORSA/TIMS:
 - Centre HEC-ISA, Jouy-en-Josas, France, 1987.
 - University of Texas at Dallas, 1986
 - Vanderbilt University, 1985
 - University of Chicago, 1984
 - University of Southern California, 1983
 - Wharton, March 1982
 - New York University, March 1981
 - University of Texas, Austin, March 1980
 - Stanford University, March 1979

Illustrative addresses at various top management conferences and meetings in the U.S. and abroad:

- Moderator of Key Issue Forum on Social Media and Brand Opportunities, ARF Re:think Conference, New York, NY, March 23, 2010
- "Moving From Me to We: The New Competitive Edge," Milken Global Conference, Los Angeles, April 28, 2008.
- "The Wisdom of Crowds in Today's Digital World: We vs. Me," Milken Global Conference, Los Angeles, April 23, 2007.
- "Innovation," Telenet Top Executive Strategic Workshop, June 19, 2006.
- "The 1st Mover Advantage Challenge," Telenet Top Executive Strategic Workshop, June 19, 2006.
- "Getting More with Less," Telenet CEO Strategy Review, June 19-20, 2006.
- "Advances in the Management of Technological Innovation," Executive Briefing at Samsung Electronics, June 2, 2006.
- "Brand Names and Logos," Penn Humanities Forum on Word and Image, February 2006.
- "New Frontiers in the Practice of Management" with Paul Kleindorfer, CEO Workshops at IDC Israel, January 2006.
- "Strategic Trends on the Global Marketplace," The Sixth Herzliya Conference on The Balance of Israel's National Security, January 2006.

- "Recent Developments in Marketing and Branding Strategies," presented to the Board and top management of IDT HK, August 2005.
- "Tapping Opportunity in the Developing World: Innovative Solutions for Companies and Communities," Milken Institute Global Conference, April 2005.
- "Return on Marketing Investment: Progress, Problem, and Prospects," Council of Marketing Executives, The Conference Board, October 6, 2004.
- "The Power of Impossible Thinking: A Prerequisite for Profitable Growth," Milken Institute Global Conference, April 27, 2004.
- "The Transformation Challenge," YPO at SEI, March 2004.
- "Technology for Profitable Growth: Progress, Problems, and Prosperity, eBRC Board of Directors meeting, Philadelphia, May 2003.
- "Business and the Pending Wars," a global senior executive Web conference, February 2003.
- "e-Business Revolution: R2R (Return to Reality)," World Leadership Forum of the Foreign Policy Association, New York, September 2000.
- "UNIG Top Executive Forum," Singapore, August 2000.
- "The Future of the Marketing Organization," MSI Board of Trustees Meeting, April 2000.
- "Preparing for 2002: Creating a Leading Global Medical Communication Company for the 21st Century," Top Management of Medius Group Int. Paris, May 1997.
- "The Next Enterprise: Creating a Successful 21st Century Enterprise," The Hong Kong Management Association, January 1996.
- "Building the 21st Century Corporation Today: A Marketing Perspective," A one day session for CEOs who participate in the MASTERSHIP program (LA) January 1990.
- "Growth Outlook for Consumer Products and Services" to the policy committee of Anheuser-Busch Company, 1986.
- "Marketing Management in Securities Firms" SIA Regional conference, 1986.
- "Recent Developments in Marketing Strategy," to Dutch top executives by Horinga & DeKoning, October 1986.
- A number of 1-day Top Management Seminars organized by Studio Ambrosetti (Italy)
 - Developing and Launching New Products (1986)
 - Marketing and Corporate Strategy (1987)
 - Marketing for Financial Institutions (1987)
 - Domestic and International New Business Entry Strategies (1988)
 - Strategic Marketing and New Product Development (1989)
 - How to Develop Products More Often and Get Them to Market Faster (1991)
 - The Consumer Goods Scenario: The Challenge (1992)
 - Marketing Driven Bus Strategy in the Global Information Age (2000)
- "The Challenge of Marketing" Board of directors and top management of Grand Metropolitan, 1985.
- "Advances in marketing and Business Strategies" Top management group of the John Fluke Manufacture Co., 1985.
- "Global Marketing Strategies" YPO Chapter of Hong Kong, 1985.
- "Marketing for Hospitals" Hospital presidents program of the J&J Leonard Davis Institute program, 1985.
- "Global Marketing Strategies" Top executive group of MARS pet food business, 1984.
- "Marketing for the Evolving Company" Conference on "Financing & Managing the Evolving Company" sponsored by Arthur Andersen & Co. and the GSB University of Texas at Austin, April 1984.

Illustrative Other Top Management groups addressed:

- MSI Trustees, Cambridge, Massachusetts, October 1983.
- Securities Industry Association Fall Meeting, N.Y., October 1982, Spring Meeting, April 2000, Homestead, Virginia, May 1982: keynote speaker.
- Three sessions at the 1979 YPO Central Area Conference, Williamsburg, October 1979.
- Two sessions at the YPO International University, Rio de Janeiro, May 1979.
- Two sessions at the 1978 YPO, Eastern/Northeastern Area Conference, Sea Island, Georgia, November 1978.

- Eastern Pennsylvania Chapter of YPO, October 1978.
- Two-day seminars for top executives of Latin American countries sponsored by Expansion Publishing Group, Mexico City, June 1978, (Marketing Strategy); June 1979 (the Marketing Audit); and December 1980 (Marketing for Top Executives).

Guest lecturer at faculty research seminars and executive development programs of various universities and research institutes, including:

Bell Laboratories (Applied Statistics Area), 1978
Columbia University, 1974, 1976-1978
Drexel University, 1977, 1984
Erasmus University, The Netherlands, 1993
Escola de Administrao de Empresas de Sao Paulo, Brazil, 1979
European Institute for Advanced Studies in Management, Brussels 1981
Florida Atlantic University, 1972
Harvard University, 1981
IESE Universidad de Navarra, 1999
Indian Institute of Technology (IIT) Bombay, 1989
INSEAD, France, 1992, 2000
Institut Superieur des Sciences Economiques et Commerciales, Paris, 1981
Interdisciplinary Center Herzliya, 1996, 1997, 1998, 1999, 2000
Koc University, Turkey, 2000
Laval University, Canada, 1973
Katholieke Universiteit, Leuven, 2001
Monash University, Australia, 1977
Nanzan University, Nagoya, Japan, 1977
New York University, 1979, 1984
Northwestern University, 1980
Norwegian School of Management, Norway, 1993
Pennsylvania State University, 1978
Southern Methodist University, Texas, 1982, 1984, 1986
Stanford University, 1976, 1982
State University of New York at Buffalo, 1975
University of Bradford, 1975-1976
University of California at Berkeley, 1975
University of California at Los Angeles, 1976, 1980, 1990
University of Capetown, S.A., 1982
University of Chicago, 1981
University of Groningen, 1986
University of Houston, 1977
University of Illinois, 1985
University of Iowa, 1971
University of Minnesota, 1973
University of New South Wales, Australia, 1977
University of Ottawa, 1974
University of Pittsburgh, 1988
University of Social Sciences, Grenoble, France, 1973
University of Southern California, 1979
University of Tel Aviv, 1977-1980, 1982
University of Texas at Austin, 1984, 1997
University of Tokyo, Japan, 1992, 1993, 1995, 1997
University of Washington, 1979
Yale University, 1982

Speaker at various executive programs of the University of Pennsylvania (illustrative list):

- "Achieving Profitable Growth Challenging Your Mental Models," Perry Ellis International, December 13, 2010.

- “Organizational Networks for Effective Competition in the Flat World”, Tyco Electronics Leadership at Wharton, November 16, 2010.
- “Challenging Your Mental Models”, Tyco Electronics Leadership at Wharton, November 16, 2010.
- “The Challenge of Customer Centricity”, GSK Executive Leadership, November 9, 2010.
- “The Future of Advertising,” Cheil Worldwide, August 30, 2010.
- “Challenging your Mental Models,” Wharton Global Leadership Fellows Program WEF:
- Personal Power and Influence, July 14, 2010.
- “Rethinking Marketing Strategy,” LA CEO Global Program, May 14, 2010.
- “Creating a New Business Paradigm,” LA CEO Global Program, May 10, 2010.
- “Challenging your Mental Models,” LA CEO Global Program, May 6, 2010.
- “Organizational Networks for Effective Competition,” Tyco, February 4, 2010.
- “Challenging your Mental Models,” Tyco, February 4, 2010.
- “Challenging Your Mental Models,” ConvaTec, December 16, 2008.
- “Market Driven Strategy,” and “Integrated Global Marketing Strategy,” Newell Rubbermaid Marketing Excellence Program, September 17 and 19, and December 10 and 11, 2008.
- “Creative Thinking and Action,” and “Competing in a Flat World in a Time of Crisis,” FirstCaribbean Leadership Programme, December 8, 2008.
- “Challenging Your Mental Models,” ConvaTec, November 12, 2008.
- “Creative Thinking and Action,” (3 Sessions) Toyota Executive Development Program, July 21, 2008.
- “The Innovation Challenge,” (2 Sessions) Raytheon Executive Leadership Development Program, June 9, 2008.
- “Challenging Your Strategic Thinking,” Animas/Lifescan Senior Leadership Strategy Program, December 3, 2007.
- “Destroy Your Brand,” Animas/Lifescan Senior Leadership Strategy Program, December 3, 2007.
- “Challenging Your Mental Models,” Animas/Lifescan Senior Leadership Strategy Program, December 3, 2007.
- “Expand Customers, Value Creation and Diabetic Pathways,” Animas/Lifescan Senior Leadership Strategy Program, December 3, 2007.
- “Integrating Strategies and Leveraging Synergies,” Animas/Lifescan Senior Leadership Strategy Program, December 3, 2007.
- “Stretch Objectives, Synthesis and Strategy,” Animas/Lifescan Senior Leadership Strategy Program, December 3, 2007.
- “Stretch Objectives, Synthesis and Strategy: Regional Prospects,” Animas/Lifescan Senior Leadership Strategy Program, December 3, 2007.
- “The Power of Impossible Thinking,” Animas/Lifescan Senior Leadership Strategy Program, December 3, 2007.
- “Action Plans,” Animas/Lifescan Senior Leadership Strategy Program, December 3, 2007.
- “Creative Thinking and Action,” FirstCaribbean Leadership Programme, November 19, 2007.
- “Challenging Your Mental Models,” LinKS @ Wharton, November 12, 2007.
- “The Evolving World,” LinKS @ Wharton, November 12, 2007.
- “Innovative Approaches to the Design of Strategy,” LinKS @ Wharton, November 11, 2007.
- “The Power of Impossible Thinking,” Wharton Connect, November 1, 2007.
- “Creative Thinking and Action,” Toyota Executive Development Program, September 17, 2007.
- “Rigor & Relevance: A Key Marketing Challenge,” The Buck Weaver Award Presentation, September 7, 2007.
- “Global Branding & Marketing,” TEVA Israel Leading Your Business, June 28, 2007.
- “Leadership Challenges in the Pharmaceutical Industry,” TEVA Israel *Leading Your Business*, June 28, 2007.

- “Online Panels: Where We Are Today and Where We Are Headed In The Future,” CASRO, June 22, 2007.
- “The Power of Impossible Thinking and Global Strategic Management,” CEIBS @ Wharton, June 18, 2007.
- “The Power of Impossible Thinking,” Alumni Leadership Conference, May 24, 2007.
- “The Creative Economy: Art and Culture at Penn and in Philadelphia,” Penn Arts Leadership Conference, May 9, 2007.
- “Network Orchestration,” Network-Based Strategies & Competencies Workshop, May 3, 2007.
- “Network-Based Strategies and Competencies,” Network-Based Strategies and Competencies Workshop, May 3, 2007.
- “Network-Based Strategies and Competencies: Toward a Framework,” Network-Based Strategies and Competencies Workshop, May 3, 2007.
- “Wroe Alderson,” 2007 Wroe Alderson Lecture & Reception, April 26, 2007.
- “The Wisdom of Crowds in Today’s Digital World We vs. Me,” Milken Global Conference, April 23, 2007.
- “The Challenge of Managing Creativity,” The Biological Basis of Creativity: Defense Sciences Office Workshop, April 17, 2007.
- “Succeeding in a Flat World,” The Wharton Economic Summit, April 12, 2007.
- “Thought Leadership,” The Wharton Economic Summit, April 12, 2007.
- “Brand Names and Logos: Implications to Language Instruction,” Penn’s Language Faculty, March 22, 2007.
- “The Future of Management Education,” International Academy of Management @ IMD, March 16, 2007.
- “Final Session Reflections and Action Plans,” Wharton Fellows Philadelphia Master Class, February 27, 2007.
- “Innovation Strategies for Profitable Growth,” Wharton Fellows Philadelphia Master Class Managing in an Evolving World, February 27, 2007.
- “The Evolving World,” Wharton Fellows Philadelphia Master Class, February 27, 2007.
- “Challenging Your Mental Models,” Estée Lauder Companies General Management Program, January 28, 2007
- “The Power of Impossible Thinking,” Wharton Staff Workshop, September 12, 2006.
- “Creative Thinking and Action,” Toyota Executive Development Program, September 26, 2006.
- “Advances in Innovation Management and New Product Innovation,” LINKS @ Wharton, August 26, 2006.
- “Advances in Innovation Management and New Product Innovation,” Quad-C Executive Session, July 10, 2006.
- “A View from the Top: The Perspective of the Enlightened CEO,” Wharton Executive Leadership Program for AICPCU, April 2005.
- “Challenging Your Industry’s Mental Models,” KPMG Global Insurance Institute, December 2003 and November 2004.
- “Market-Driven Organization,” AICPCU and IIA Advanced Executive Education, Wharton, September 10, 2003.
- Strategy Discussion with Telenet’s Top Management, March 11, 2003.
- “Organizational Change: Problems, Progress, and Prospect,” Price-Waterhouse-Coopers Strategy Master Class, July 26, 2002.
- “Capturing Business Opportunities in a Changing World,” SIA Institute, 50th Anniversary Program, March 2002.
- “Marketing Driven Strategies in a Global Economy,” IBM’s Managing Director Executive Development Program, February 2002.
- “Enhancing Creativity and Innovation,” The Wharton e-Fellows I Program, March 2001.
- “World Class Marketing: Implications for Spencer Stuart,” The Wharton/Spencer Stuart Leadership Assessment Program, June 2000.
- “Preparing for Leadership in the Changing e-Business Environment,” CEO Circle, May 2000.
- “Innovation and Change in the Turbo-Global Environment: Lessons from the Transformation of ‘Old Economy’ Firms [and Universities] and the Challenges to

- Congress," Stennis Congressional Staff Fellows Program on Leadership in e-Business Environments: What Congress Might Learn, May 2000.
- Winning in the Next Millennium, "Driving Change," 1998.
 - Stennis Congressional Fellows Program at Wharton, "Driving Change: Creating Winning 21st Century Organizations," 1997.
 - Competitive Marketing Strategies, "Preemptive Strategies," 1997, 1998.
 - Sales Force Management Program, "Segmentation and Positioning for Sales Force Effectiveness," 1987, 1990, 1997.
 - Healthcare Marketing and Communications, 1996.
 - Re Engineering Pharmaceutical Marketing, 1994.
 - Executive Development 1992, 1993.
 - AMP -- Advanced Management Program, 1988, 1989, 1990, 1991, 1997, 1998.
 - "Marketing Strategy" in the J&J-Wharton Fellows Program in Management for Nurses, 1983, 1984, 1985, 1986.
 - "Marketing Strategy" in the Delaware Valley Hospital Strategic Planning Program, May 1980.
 - "New Developments in Social Research," in the Symposium on Corporate Awareness, February 1977.

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

Guest speaker at special seminars:

- The Australia and New Zealand Marketing Societies in Sydney and Melbourne, June 1977.
- Various conferences of the Israel Advertisers' Association, The Technion Research and Development Foundation, Ltd., The Ministry of commerce and Industry, 1968/1969.
- Foreign market entry and import protection strategies, The Israel Institute of Management, October 1984.

Illustrative Presentations

- "Challenging Your Mental Models," Estee Lauder Companies Finance Forum, March, 5, 2012.
- "Israel Innovation for Global Social Impact: Accomplishments and Opportunities," Wharton Global Webinar, February 3, 2012.
- "Rethinking Marketing and Advertising Research," FoA Global Advisory Board Meeting, December 9, 2011.
- "Lesson From Art & Challenging Your Mental Models," Daimler Advanced Executive Program For Vice Presidents, December 6, 2011.
- "Surviving & Thriving in a Hyper-Connected World: An Ideal Design," WEF Risk in a Hyper-connected World Project, November 13, 2011.
- "Orchestration in a Flat World," LinkS Next in Line @ Wharton, November 10, 2011.
- "Challenging Your Mental Models," LinkS Next in Line @ Wharton, November 10, 2011.
- "Background Discussion for GIP Israel Program," GIP Israel Program, November 8, 2011.
- "From Firm Centric to Network Orchestration," MARS, November 8, 2011.
- "Conversations with MARS Catalyst & Marketing Lab, MARS, November 8, 2011.
- "Designing TV Commercials That Maximize Social Diffusion," MARS, November 8, 2011.
- "Setting the Scene and Program Introduction," LinkS Global Executive Program @ Wharton, November 7, 2011.
- "Challenging Your Mental Models in the Age of Empowered Consumers and Networks," SEI Executive Network, November 2, 2011.

- “Challenging Your Mental Models,” Estee Lauder Companies Global Marketing Symposium, November 1, 2011.
- “Director’s Report,” SEI Center Annual Board Meeting, October 28, 2011.
- “Toward a New Mental Model of Advertising: Implications to Orchestration, Business & Revenue Models,” FoA Orchestration Session, October 27, 2011.
- “Creativity,” AMP, October 26, 2011.
- “Argentina & Brazil: Insights and Opportunities,” The Wharton Fellows at the Conference Board: San Paulo Master Class, October 13, 2011.
- “Argentina & Brazil: Insights and Opportunities,” The Wharton Fellows at the Conference Board: Buenos Aires Master Class, October 9, 2011.
- “The Myth of the Four-Minute Mile and its Implication to B2B Marketing,” Google’s Think B2B: Deconstructing Today’s B2B Customers, October 6, 2011.
- “Challenging Your B2B Mental Models,” Google’s Think B2B: Deconstructing Today’s B2B Customers, October 6, 2011.
- “The Future of Advertising,” Havas/Euro University Leadership Excellence Program, October 4, 2011.
- “Managing Change in Higher Education: Challenges, Approaches & Action Plans,” NACUBO Conference on Managing Change, September 30, 2011.
- “Challenging your Mental Models,” IDC @ Wharton, September 19, 2011.
- “Marketing and Business Strategies in the Age of the Empowered Consumer,” IDC @ Wharton, September 19, 2011.
- “Challenging Your Mental Models,” LinKS@Wharton WWI, September 15, 2011.
- “Setting the Scene and Program Introduction,” LinKS@Wharton WII: Global Business, Alliances, Welfare,” September, 12, 2011.”
- “The Power of Impossible Thinking,” Austria Connect, September 9, 2011.
- “The Future of Advertising,” Cheil Worldwide, Global Marketing Program, September 6, 2011.
- “Challenging your Mental Models,” WEF Wharton Global Leadership Fellows Program: Personal Power and Influence, July 13, 2011.
- “Challenging Your Mental Models: The What, Why, How and Beyond,” IBM Wharton Executive Forum, July 11, 2011.
- “Growth, Interactive Marketing and Business Strategies in the Age of the Empowered Consumer,” Wharton Global Alumni Forum, June 24, 2011.
- “Challenging your Mental Models,” Wharton & Citi Asia: Leadership Program, June 21, 2011.
- “The Challenge of Creativity,” AMP, June 20, 2011.
- “Marketing and Business Strategy in the Age of the Empowered Consumer,” SEI Private Banking Executive Network, June 16, 2011.
- “Marketing and Business Strategy in the Age of the Empowered Consumer,” Wharton Fellows @ The Conference Board: Fellows Breakfast & Program, June 3, 2011.
- “Rethinking Your Innovation and NPD Strategies,” IDC’s CEO Forum, May 24, 2011.
- “Challenging Your Mental Models,” NESS Executive Session and IDC, May 23, 2011.
- “Challenging Your Mental Models,” Perry Ellis Session, May 17, 2011.
- “Challenging Your Mental Models,” PMA BP CFO Executive Module 3, May 9, 2011.
- “MSI- The Philadelphia Story,” MSI 50th Anniversary, April 26, 2011.
- “Marketing Communication in the Digital Era,” MSI 50th Anniversary, April 26, 2011.
- “The Future of Brand Building and Brand Experience: Blurring Boundaries Between Advertising and Retailing,” Workshop Session with the Jay H. Baker Retailing Initiative, April 21, 2011.
- “The Challenge of Ethical Leadership Lessons from ‘Inside Job’,” The Leadership in Film Series, April 20, 2011.
- “The Challenge of Ethical Leadership,” Leadership in Film Series, April 11, 2011.
- “Think with Google,” Think with Google, April 11, 2011.
- “The Future of Sports Advertising,” WSBI Alumni Advisory Committee Mtg, April 7, 2011.
- “The Future of Marketing & Advertising: An opportunity for Preeminence,” Wharton External Affairs Director’s Meeting, March 21, 2011.
- “Should We Challenge our Mental Models of Creative,” FoA Future of Creatives and

- Creative Ideas in a Digital World, March 18, 2011.
- The Future of Sports Advertising, Innovations and Experiments with Multi Touch Point Portfolios,” Leverage Sports Agency, March 16, 2011.
 - “Challenging Your Mental Models of Advertising,” Austrian Executive “Future of Advertising” Program, March 7, 2011.
 - “Organizational Networks for Effective Competition in the Flat World, Leadership Development Program at Wharton, February 28, 2011.
 - “Challenging Your Mental Models, Tyco Electronics Leadership Development Program, February 28, 2011.
 - “The Future of Advertising, The Wharton Club of London, February 18, 2011.
 - “Marketing and Business Strategies in the Age of the Empowered Consumer,” The Wharton Club of London, February 15, 2011.
 - “Marketing: What’s Next,” Wharton Fellows at the Conference Board: Philadelphia Master Class, January 22, 2011.
 - “Challenging Your Mental Models” Wharton Fellows at the Conference Board: Philadelphia Master Class, January 21, 2011.
 - “Insights from The Wharton Future of Advertising Project” Wharton Fellows at the Conference Board: Philadelphia Master Class, January 20, 2011.
 - “Accelerating & Improving GTM Strategies Via Effective Experimentation,” SEI Marketing Group Meeting, January 2011.
 - “Revitalizing Brands and Reinventing Marketing,” SEI, December 14, 2010.
 - “Getting the Most Out of Your Interactive Marketing Dollars,” Wharton Club of Southern California, November 18, 2010.
 - “Israel: Insights and Opportunities: Background Discussion for GIP Israel Program,” GIP Israel Program, November 16, 2010.
 - “Career Panel,” Wharton Marketing Conference, November 12, 2010.
 - “Go To Market Strategies 10 Interrelated Questions” SEI Marketing Leaders Workshop, November 9, 2010.
 - “Innovation in Retailing: Progress, Problems and Prospects”, Discussion at the Jay H. Baker Retailing Center, October 28, 2010.
 - “The Future of Advertising”, Havas/Euro University Leadership Excellence Program, October 26, 2010.
 - “Challenging Your Mental Models”, IDC at Wharton, October 18, 2010
 - “Management Education 2020”, Wharton Combined Boards Meeting, October 15, 2010.
 - “The Network Challenge,” SEI Executive Network, June 28, 2010.
 - “Challenging your Mental Models,” 10th LinKS Wharton Program, June 9, 2010.
 - “Business Models of the Future,” 10th LinKS Wharton Program, June 9, 2010.
 - “The Network Challenge,” SEI Connections Conference, June 8, 2010.
 - “Making the Case for Israel,” IDC Panel Discussion, Israel, May 26, 2010.
 - “Challenging your Mental Models,” Mellanox Technologies, Israel, May 25, 2010.
 - “Challenging your Mental Models,” Discount Bank, Israel, May 25, 2010.
 - “The Future of Advertising is Now,” IESE, May 17, 2010.
 - “Marketing of Israel,” Gratz College, May 6, 2010
 - “7 Advertising Myths,” M Factor, May 5, 2010.
 - “7 Advertising Myths,” Wharton Alumni Webinar, April 22, 2010.
 - “Global Business Branding,” America-Israel Chamber of Commerce, April 14, 2010.
 - “Future of Advertising,” Future of Advertising Project Global Advisory Board Working Session, March 10, 2010.
 - “Marketing Implications of the Changing Economy,” AMA Winter Marketing Conference, February 20, 2010.
 - “Perspectives on the Changing Economy,” AMA Session, February 20, 2010.
 - “Leveraging Social Media,” The Fox Chase Cancer Center Leadership, December 15, 2009.
 - “Challenging Our Mental Models,” Jay H Baker Advisory Board Meeting, November 30, 2009.
 - “Profitable Growth Opportunities in times of Crisis and Rebirth,” Jay H Baker Advisory Board Meeting, November 30, 2009.

- “Marketing Innovation: Reinventing your Marketing and New Product Launch,” Marketing Management Program, MA Industries, IDC, November 23, 2009.
- “Challenging the Mental Models of Top Management,” IDC’s CEO Forum, November 19, 2009.
- “Future of Advertising: Progress and Prospects,” Board Meeting of Ehrenberg-Bass Institute, November 10, 2009.
- “The Network Challenge,” SEI PB&T Management Team, November 9, 2009.
- “Challenging your Mental Models,” Wharton Combined Boards Meetings, October 23, 2009.
- “Reinventing Marketing,” IDC/CEIBS@Wharton, October 21, 2009.
- “Challenging your Mental Models,” IDC/CEIBS@Wharton, October 15, 2009.
- “Director’s Report and 20th Anniversary Report,” SEI Center Annual Board Meeting, October 9, 2009.
- “Opportunities in Times of Crisis,” SEI Center Annual Board Meeting, October 9, 2009.
- “Reinventing Management Education,” SEI Center Annual Board Meeting, October 9, 2009.
- “Research and Action Agenda,” SEI Center Annual Board Meeting, October 9, 2009.
- “Socially Responsible Capitalism Approaches to Improving Business and Government Relations,” SEI Center Annual Board Meeting, October 9, 2009.
- “The Future of Advertising Project and The New Marketing Channel,” SEI Center Annual Board Meeting, October 9, 2009.
- “The Network Challenge,” SEI Center Annual Board Meeting, October 9, 2009.
- “The Future of Advertising Project (Project Update),” Future of Advertising Project Global Advisory Board Meeting, October 8, 2009.
- “Future of Management and Management Education,” SEI Center Annual Board Meeting, October 8, 2009.
- “The Financial Crisis and the Changing Relationship between Business and Government,” Chiefs of Staff Meeting, September 15, 2009.
- “Leveraging the PMA’s Marketing and Pricing Strategies,” A Discussion on Reverse Marketing for the PMA, July 20, 2009.
- “The Challenge of Marketing Israel,” Wharton Alumni Club of Pacific Palisades, July 8, 2009.
- “What We Know about Advertising: Implications for Management and Measurement,” Audience Measurement 4.0, June 24, 2009.
- “Opportunities in Times of Crisis,” Baker Retailing Initiative, June 23, 2009.
- “Member Managed Relationship: Opportunities for Growth,” AAA Management Meeting, June 11, 2009.
- “Business Models of the Future: Orchestrating Alliances,” LinKS@Wharton, June 10, 2009.
- “Challenging Your Mental Models,” LinKS@Wharton, June 10, 2009.
- “New Mental Models for Capitalizing on Opportunities in Times of Crisis,” LinKS@Wharton, June 10, 2009.
- “Challenging Your Mental Models,” Partner, June 2, 2009.
- “Innovation and Creativity in Time of Crisis,” The Israeli Innovation Forum at IDC, May 31, 2009.
- “Opportunities in Reinventing Marketing,” Wharton Fellows, May 18, 2009.
- “Opportunities In Times of Crisis,” Wharton Fellows, May 17, 2009.
- “Approaches for Redesigning the Total Wharton Experience,” The Wharton School, May 15, 2009.
- “Opportunities In Times of Crisis and Recession,” Knowledge@Wharton Advisory Board, May 14, 2009.
- “Progress, Problems, and Prospects,” Wharton Fellows, May 12, 2009.
- “SEI Center for Advanced Studies in Management,” Wharton External Affairs Meeting, May 8, 2009.
- “The Changing Business Environment: Context for the Strategic Review,” SEI EPS Meeting, May 5, 2009.
- “Creating a New Business Paradigm,” Latin America CEO Program, April 27, 2009.

- “Challenging Your Mental Models,” Latin America CEO Program, April 27, 2009.
- “Global Economic Crisis,” Latin America CEO Program, April 26, 2009.
- “Latin America CEO Global Program Philadelphia Segment Introduction,” Latin America CEO Program, April 26, 2009.
- “The Challenge of Marketing Israel,” Israeli MBA Conference, April 19, 2009.
- “Marketing Research in Times of Crisis,” Navigating a New World Conference hosted by Greater NY and Phila Marketing Research Association, April 16, 2009.
- “Growth and Leadership in a Changing World,” SEI Meeting, April 7, 2009.
- “Growth and Leadership in a Changing World,” SEI EPS Meeting, April 7, 2009.
- “Wharton Combined Boards Meeting Spring 2009 Opening Plenary Session,” Wharton Combined Boards Meeting, April 2, 2009.
- “Empirical Generalizations in Advertising: What We Know, Don’t Know, Can’t Know, and Should Know,” Rethink The ARF Annual Convention, March 31, 2009.
- “Marketing Strategy Discussion Guideline,” PhD Seminar, March 27, 2009.
- “Some Observations on the Changing Retail Scene,” The Wharton Retail Club Seminar on Industry Trends, March 18, 2009.
- “Future of Advertising Project Overview,” The Wharton School, February 13, 2009.
- “Can We Brand Our Customers and Not Our Products?” MPlanet, January 27, 2009.
- “Competing in a World of Network Orchestration: Implications For Marketing,” MPlanet, January 27, 2009.
- “IKI – Israel Korea Initiative,” IDC Discussion Guideline, January 9, 2009.
- “Taking Stock of Existing Advertising Empirical Generalizations,” Wharton Impact Empirical Generalizations in Advertising Conference, December 4, 2008.
- “Is Marketing Driving Your Business Strategy?,” The Conference Board 2008 Marketing Excellence Conference, November 13, 2008.
- “Network Orchestration and Open Innovation Models,” SEI Center Board Meeting, November 7, 2008.
- “The Future of Advertising if NOW: Project Overview and Update,” SEI Center Board Meeting, November 6, 2008.
- “Challenging Your Mental Models,” linKS @ Wharton, October 27, 2008.
- “Competing in a Flat World,” The Wharton Club of Monterrey, October 12, 2008.
- “Islam and the West: Challenging Your Mental Models,” Wharton Fellows Dubai Master Class, October 12, 2008.
- “The Future of Advertising is NOW,” Cheil Communications Project Based Learning in Marketing, August 19, 2008.
- “Creative Thinking and Action,” Toyota Executive Development Program, July 21, 2008.
- “Addressing the Challenges of Competing in a Flat World,” Li & Fung Management Group, July 10, 2008.
- “The Innovation Challenge,” Raytheon Executive Leadership Development Program, June 9, 2008.
- “Competing in a Flat World,” Wharton Club of Madrid, June 4, 2008.
- “Making Your Way in the New Flat World Economy,” CASRO International Research Conference, May 6, 2008.
- “Competing in a Flat World,” Wharton Club of Southern CA, April 24, 2008.
- “Wharton Fellows Philadelphia Master Class: Innovation and Creativity,” Wharton Fellows, April 6, 2008.
- “Challenging Your Mental Models,” Wharton Fellows, April 6, 2008.
- “Philadelphia Master Class: The Power of Impossible Thinking,” Wharton Connect, April 3, 2008.
- “Selling Scents: Innovative Approaches to the Age Old Selling Challenge in a Flat World of Empowered Consumers,” The Fragrance Foundation Conference, March 12, 2008.
- “Competing in a Flat World,” Wharton Fellows, February 26, 2008.
- “Competing in a Flat World,” Wharton Club of NY, February 5, 2008.
- “Challenging the Current MBA,” January 1, 2008.
- “IDC@Wharton Summary and Reflections,” IDC@Wharton EMBA Program, October 19, 2007.

- “Wharton Fellows Getting the Most out of Silicon Valley: “The Next Big Thing,” Wharton Fellows Silicon Valley, October 14, 2007.
- “The Future of Advertising,” SEI Center Board Meeting, November 16, 2007.
- “Network-Based Strategies and Competencies,” SEI Center Board Meeting, November 16, 2007.
- “Network Orchestration: Core Competencies for a Borderless World,” Wharton-INSEAD Impact Conference: Network-Based Strategies and Competencies, November 9, 2007.
- “Advances in New Product Development and Innovation,” Mutual Art Lecture Series, November 2, 2007.
- “Rigor & Relevance: A Key Marketing Challenge,” The Buck Weaver Award Presentation, September 7, 2007.
- “Online Panels: Where We Are Today and Where We Are Headed in the Future,” CASRO, June 22, 2007.
- “The Creative Economy,” Art and Culture at Penn and in Philadelphia, Penn Arts Leadership Conference, May 9, 2007.
- “Network Orchestration,” Network-Based Strategies & Competencies Workshop, May 3, 2007.
- “The Challenge of Managing Creativity,” The Biological Basis of Creativity: Defense Sciences Office Workshop, April 17-18, 2007.
- “Succeeding in a Flat World,” The Wharton Economic Summit, Philadelphia, April 12, 2007.
- “Brand Names and Logos: Implications to Language Instruction,” Penn’s Language Faculty, March 22, 2007.
- “The Future of Management Education,” International Academy of Management @ IMD, March 22, 2007.
- “The Future of Management Education,” International Academy of Management @ IMD
- Lausanne, Switzerland, March 16, 2007.
- “Innovation Strategies for Profitable Growth,” Wharton Fellows Philadelphia Master Class *Managing in an Evolving World*, February 27, 2007.
- “Web 2.0 & Social Networking: Implications for Management,” The Worldwide J&J Diabetes Franchise Leadership Team, January 3, 2007.
- “The Future of the Corporation Survey Results,” SEI Center Board Meeting, November 16, 2006.
- “The Future of the Corporation: Vision, Objectives, Strategy, Architecture, and Governance,” SEI Center Board Meeting, November 17, 2006.
- “The Power of Impossible Thinking: Implications for OD,” Organizational Development Network of Greater NYC, October 17, 2006.
- “Should the Alumni Leadership Challenge their Mental Models?” Alumni Leadership Conference, October 14, 2006.
- “Perspectives on Research: Innovation, Impact, and Fun,” The Joseph Wharton Scholars Senior Research Seminar, October 11, 2006.
- “Reinventing the MBA,” Panelist at the MBA Roundtable Session on MBA 2020: Curricular Innovation for Tomorrow’s Business School,” October 6, 2006.
- “Customer Value: Strategies for the Long Term,” Marketing Precision Conference: The Value of Marketing, September 27, 2006.
- “Does Korean Marketing Need Reform?” Korean Marketing Club, Seoul, June 5, 2006.
- “Redefining Marketing for the 21st Century,” Wharton Club of Korea, Seoul, June 3, 2006.
- “Advances in the Management of Technological Innovation,” Executive Briefing at Samsung Electronics, June 2, 2006.
- “WSP Editorial Board: Focused on Addressing the Challenges,” WSP Editorial Board Meeting, April 10, 2006.
- “The Changing Nature of Corporations: Competing in a Flat World,” organizer and chair of a panel at the Milken Institute Global Conference, April 2006.
- “Challenging Your Mental Models,” Wharton’s Business Initiative re: Building Winning an Profitable Organization in Professional Team Sports, March 19, 2006.
- “Brand Names and Logos,” Penn Humanities Forum on Word and Image, February 2006.

- “New Frontiers in the Practice of Management” with Paul Kleindorfer, CEO Workshops at IDC Israel, February 2006.
- “Strategic Trends on the Global Marketplace,” The Sixth Herzliya Conference on the Balance of Israel’s National Security, January 2006.
- “Creativity – A Must for Marketing Success,” back-to-class session at the 2005 Wharton Marketing Conference, October 28, 2005.
- “How Should Directors Think About Directing?” The Governance Summit, October 27, 2005.
- “The Management Challenges: Initial Responses,” SEI Center Board Meeting, October 7, 2005.
- “Toward a New Theory of the Firm,” SEI Center Board Meeting, October 7, 2005.
- “Wharton School Publishing and the Power of Impossible Thinking,” Presentation to the Board of the Jay H. Baker Retailing Initiative, October 6, 2005.
- “An Extended Example of New Risks and their Management in Supply Chains,” SEI Meeting, September 26, 2005..
- “Adaptive Experimentation” The Sammy Ofer School of Communications and Information,” IDC Herzliya, September 9, 2005.
- “Recent Developments in Marketing and Branding Strategies,” IDC Board of Directors Meeting, August 25, 2005.
- “Barcelona 2020: Strategic Options and Action Plans,” The Barcelona Group Philadelphia Meeting, July 18, 2005.
- “DEWARS Premium: Challenges, Strategic Options and Action Plans,” Dewars New York, July 16, 2005.
- “The Lauder Institute: 1984-2005: A Reexamination,” The Lauder Institute, July 12, 2005.
- “Decision Aiding Technologies and the New Theory of the Firm,” with Paul Kleindorfer, Mack Center for Technological Innovation Conference on Using Technology to Improve Decision Making, May 27, 2005.
- “The Silver Lining: Seeing Opportunities in Risk,” Recent Advances in Operations and Risk Management Conference in Honor of Paul Kleindorfer, May 2005.
- “Effective Marketing Planning: What It Is and How to Produce It,” JCCA Conference, April 2005.
- “Strategic Shifts and the Balance of National Security: Summation,” J. K. Herzliya Conference, Israel, December 2004.
- “Return on Marketing Investment: Progress, Problems and Prospects,” Address to the CMO Group of the conference board, October 6, 2004.
- “Challenges of Identifying, Developing, and Capturing Opportunities: A Fresh Look at Marketing,” SEI Center Board Meeting, October 1, 2004.
- “Thought Leadership Survey Results,” Presentation to WSP Editorial Board, October 2004.
- “Challenging the Mental Models of Marketing,” A State of Marketing Symposium, Does Marketing Need Reform? Boston, August 9, 2004.
- “Growth Strategies and New Mental Models,” Wharton Fellows, August 2003.
- “The Interdisciplinary Challenge of Marketing,” Ph.D. Proseminar, February 2003.
- “Business and the Coming War on Iraq,” Webcast with Wharton Fellows, February 2003.
- “Convergence Marketing: Strategies for Reaching the New Hybrid Consumers,” a Webcast of the University of Wisconsin Consortium for Global e-commerce, January 2003 and a Soundview Teleconference, May 2003.
- “Managing the Complexities of the Convergent and Multi-Channel Marketing,” CMO Summit, October 30, 2002.
- “Assessing Vulnerabilities,” System Approaches to Terrorism Conference at George Washington University, July 15, 2002.
- “Marketing Driven Strategies for Today’s Economy,” presentation at Alumni Weekend, May 2002.
- “Pioneer and Late Entrants: Winning Strategies,” Viagra, Cardura, Darifenacin WWT Meeting, April 9, 2002.
- “Wharton on the New Reality of Business: Insights from Our Experience,” presentation with Robert Mittelstaedt to the Wharton Combined Boards, March 8, 2002.

- “The Interdisciplinary Challenge of Convergence Marketing,” Wharton Ph.D. Proseminar, March 8, 2002.
- “Marketing Driven Strategies in a Global Economy,” IBM’s Managing Director’s Executive Development Program, February 13, 2002.
- “Should You Have a Chief Marketing Officer?” January 2002.
- “Target Audience, Public Opinion and Foreign Policy – A Marketing Perspective,” Balance of National Strength and Security – The Herzliya Conference, December 2001.
- “Capturing Opportunities and Developing New Mental Models,” Wharton on the New Business Reality, December 2001.
- “Capturing Opportunities in the Post 9/11 Reality,” The Wharton Club of Israel, December 2001.
- “Research Challenges in the Management of Extreme Events: The Case of the Office Homeland Security,” with Paul Kleindorfer, Advisory Board Meeting of the Wharton Managing and Financing Extreme Event Project, December 2001.
- “The 5 Cs of Marketing: Capitalizing on the New Opportunities of Convergence Marketing,” The Wharton Club-Atlanta, GA, November 2001.
- “Advances in Customer Focused Marketing and Business Strategy: The 5 Cs of Convergence Marketing,” The International Academy of Management, Claremont Graduate University, November 2001.
- “Capturing Internet Opportunities Above the Low-Hanging Fruit,” Business Week “Rethinking the Internet,” Conference, Chicago, October 2001.
- “What Keeps Us Up At Night?: Post 9/11 Survey of US CEOs – Top Line Results,” SEI Center Board, October 2001.
- “Disruptive Technology—Rethinking Your Mental Models,” Forbes Global CEO Conference, Singapore, September 2001.
- “Making Strategy Happen: Problems, Progress and Proposed Actions for Winning in the Changing Global Information Age,” Li & Fung Distribution Annual Conference, Hong Kong, July 2001.
- “Convergence Marketing: A New Marketing Strategy for the Global e-Business Environment,” The Wharton European Forum, May 2001.
- “The e-Bus Challenge,” the Top Executives of the Bank of East Asia, March 2001.
- “Globalization of Technology Startups,” Wharton-Israel Global Alumni Conference on the Globalization of Technology Intensive Business-Panel 5, March 2001.
- “Global Business Strategy of a Technology Start Up,” Wharton-Israel Global Alumni Conference, March 2001
- “Developing a Strategy,” ICA Board, March 2001.
- “e-Bus: The Curriculum and Research Challenge: A Discussion with Jerry Wind,” Faculty Seminar, Graduate School of Business Studies, Katholieke Universiteit Leuven, Belgium, February 2001.
- “Driving Change: New Business Models for the Global Digital Age,” Opening Lecture of the PriceWaterhouse Coopers Management Consultants, e-Business Chair, Graduate School of Business Chair, Graduate School of Business Studies, Katholieke Universiteit Leuven, Belgium, February 2001.
- “Reinventing Training for the Global Information Age,” Delphi e-Learning Conference, January 2001.
- “The Impact of the e-Bus Revolution on the Marketing Discipline,” Wharton Fellows in e-Business, The Impact on the Discipline, December 2000.
- “Whither System Thinking: Will Taking a Marketing Perspective be an Oxymoron?,” Inaugural Conference of the Achoff Center for Advanced Systems Appraisal, September 2000.
- “New Marketing Rules for e-Business Success,” UNIG, Singapore, August 2000.
- “New Marketing Rules for the Global Information Age,” IBM Global Services Academic Conference, August 2000.
- “Creating an e-Business,” Wharton-Singapore Management University Conference: e-Business in the New Millennium, July 2000.
- “Marketing Driven Business Strategy in the Global Information Age,” Managing Change in the New Millennium, Wharton-Singapore Management University Conference, July 2000.

- “Digital Marketing: Towards a New Paradigm for the Global Information Age,” Faculty Session-INSEAD, France, June 2000.
- “Innovation and Change in the Turbo—Global Environment: Lessons from the Transformation of ‘Old Economy’ Firms [and Universities] and The Challenges to Congress,” Stennis Congressional Staff Fellows Program on Leadership in e-Business Environments: What Congress Might Learn, Washington D.C., May 2000.
- “A New Marketing Paradigm for the Global e-Business Environment: A Catalyst for Bridging the Gaps,” Building Bridges & Broadening Perspectives: A Paradigm for the Next Millennium, 29th EMAC Conference, Rotterdam, May 2000.
- “Preparing for Leadership in the Changing e-Business Environment,” CEO Circle, May 2000.
- “Building Communities,” Virtual Communities and the Internet, April 2000.
- “Valuation: Valuable or Value Less,” Entering the Virtual Millennium, Wharton North American Regional Forum, April 2000.
- “The Future of the Marketing Organization,” The Future of the Marketing Organization, MSI Board of Trustees Meeting, Cambridge, Massachusetts, April 2000.
- “Research Priorities in e-Commerce and Internet Marketing,” Web Consortium, Pennsylvania State University’s ISBM, March 2000.
- “Marketing Driven Business Strategy in the Global Information Age,” Studio Ambrosetti’s top executive seminar in Padova and Milan, March 2000.
- “Customization Strategies for Financial Services in the Global Information Age,” the Citigroup and Simon Graduate School conference on Electronic Banking Commerce, New York. February 17-18, 2000.
- “Emerging Trends in the Pharmaceutical Industry and the Expected Scenarios,” Innovative Managed Care Contracting, January 2000.
- “Marketing Science: Accomplishments and Challenges in the Global Information Age,” Informs, November 1999.
- “Towards a Research Agenda in E-Commerce and Internet Marketing,” AMA Educators’ Conference, San Francisco, August 1999.
- “Creativity and Innovation,” in Wharton Workshop on Creativity and Knowledge Creation, April 1999.
- “Innovation Strategy,” New Product Development and Launch, April 1999.
- “Marketing Strategy in the Global Information Age: Implications for Research and Modeling,” PhD. And Faculty Seminar IESE Universidad de Navarra, Barcelona, March 8, 1999.
- “Marketing Research in the Global Information Age: Practice, Problems, and Prospects,” Wharton-IDC Marketing Communications Program, March 1999.
- “Implementation and Feasibility Issues of New Forms of Organizations: A Marketing Perspective,” Wharton Impact Conference, March 1999.
- “Implementation and Feasibility Issues of New Forms of Organizations: A Marketing Perspective,” Wharton Impact Conference, March 1999.
- “A Marketing Perspective on Communitarian Policies,” The Communitarian Summit, Washington, D.C., February 28, 1999.
- “The Information Revolution and the Emerging Management Education Paradigm,” On Line Educa, Berlin, December 1998.
- “Towards a New Management Education Paradigm,” IDC Faculty Workshop, June 1998.
- “An Extended Marketing Perspective on Corporate Architecture for the 21st Century,” Japan Marketing Association, World Marketing Conference, Tokyo, April 1998.
- “Winning the high Tech Wars: Strategies for Driving Change,” NEC Management Team, Tokyo, April 1998.
- “The Challenge of Customer-Driven Product and Service Customization,” Senior management of Convatec, March 1998.
- “Towards a New Marketing Paradigm,” AMA Winter Marketing Educators=Conference, February 1998.
- “Positioning and Segmentation in the Global Information Age,” IMS Marketing Management Meeting, January 1998.
- “The Challenge of Market Leadership,” Bristol-Myers Squibb Medical Devices Group, January 1998.

- “Driving Change: Preparing for the 21st Century,” Business Writers=Seminar, December 1997.
- “Marketing Strategy in the Global Information Age,” AMP Program, October 1997.
- “Integration of Marketing and other Business Functions: The Wharton Experience,” AMA: 1997 Faculty Consortium B Chicago, August 1997.
- “Positioning and Segmentation Opportunities for Synergy and Growth,” Cognizant Group’s Marketing Council, July 1997.
- “Preemptive Strategies,” Wharton Executive Education Competitive Marketing Strategies, June 1997.
- “Creative Joint Ventures and the Potential Role of the University,” Philadelphia-Israeli Chamber of Commerce, June 1997.
- “Communicating and Marketing Your Excellence,” Volunteer Committees of Art Museums - VCAM Conference, Philadelphia, April 1997.
- “The Challenge of Information Technology to Marketing and Retailing in the 21st Century,” University of Tokyo, April 1997.
- “Toward a New Corporate Governance Model: Lessons from the Japanese and U.S. Experience,” With Masaru Yoshitomi, the Corporate Governance Workshop, March 1997.
- “Creating a Leading Global Medical Communication Company for the 21st Century,” Medicus Group International, Inc., March 1997.
- “Segmentation and Positioning for Sales Force Effectiveness,” Sales Force Management, Wharton Executive Education, March 1997.
- “Marketing Strategy in the Global Information Age: Implications for Modeling and Research,” Ph.D. Proseminar, March 1997.
- “Choices and Strategies for Universities in the Global Information Age,” Provosts Seminar on Information, February 1997.
- “The Use of Conjoint Analysis-Based Survey to Determine Consumer Price Elasticities,” Debriefing Session for the Anti-Trust Division, Washington, D.C., February 1997.
- “The Challenge of Competitive Strategies in the Global Information Age,” The Interdisciplinary Center for the Study of Business, Law and Technology, Herzliya, Israel, December 1996.
- “Innovation and New Product Development,” Tutorial at the 2nd International Workshop, Santiago, Chile, October 1996.
- “Creating a 21st Century Enterprise,” Universidad Adolfo Ibanez, Vina del Mar, Chile, October 1996.
- “Marketing: The State of the Art,” Conference of the 2nd International Workshop on Economics and Management, Santiago, Chile, October 1996.
- “The Technology Challenges for Family Business,” Technology Day: The Web, The Future and You, the 1996 Family Firm Institute Conference, October 1996.
- “Innovative New Product and Service Development: Best Practice and Opportunities for Experimentation,” The Israel-North America Business Conference, New York, October 1996.
- “Creating a 21st Century Enterprise: Implications for Boards of Directors,” Enhance Board of Directors, September 1996.
- “Innovation in New Product Development: Best Practice in Research, Modeling and Applications,” Presentation to the JMR Editorial Board on the Special issue, August 1996.
- “Marketing Strategy in the Global Information Age: Implications for Research and Modeling,” AMA 1996 Doctoral Consortium, July 1996.
- “Creativity and Innovation: The Management Edge in the Technological Age,” the First Wind Lecture at the Interdisciplinary University of Law, Management and Technology (ISRAEL), May 1996.
- Address on Issues in Marketing Research for Legal Cases: Necessity of Using controls and the Propriety and Risk of Repetitive Probes,” Marketing and Public Policy Conference, Washington, D.C., May 1996.
- “Innovation and New Product and Business Development,” CEO Circle, May 10, 1996.
- “Segmentation in the Global Information Age: Accomplishments, Problems and Challenges,” The 1996 Converse Award Presentation, May 7, 1996.
- “Advances in Marketing,” Janssen Pharmaceutica, April 18, 1996.

- “Marketing in the Pharmaceutical Industry: Emerging Challenges and Opportunities,” Keynote Address, Healthcare Marketing and Communications Council and Wharton Executive Education, Wharton School, April 8, 1996.
- “The Stakeholder Challenge for Increased European Competitiveness,” Wharton European Forum, (London, England), March 29, 1996.
- “Product Launch,” Software Development and Marketing for Competitive Advantage, IC², The University of Texas Conference, March 20, 1996.
- “The Next Enterprise: Creating a Successful 21st Century Enterprise Today,” The Hong Kong Management Association, January 12, 1996.
- “Toward Virtual Management Education,” International Academy of Management (Boston, MA), December 8, 1995.
- “Business in the Global Information Age,” The Interdisciplinary Center of Business, Law and Technology, December 3, 1995.
- “Marketing Issue in the Global Economy,” Wharton Doctoral Consortium, August 11, 1995.
- “A View of Marketing Through the Prism of the 1977 and 1995 Doctoral Consortia,” Wharton School, Doctoral Consortium, August 8, 1995.
- “Toward a New Marketing Paradigm,” Ambrosetti Group’s A.F. Meeting (Rome, Italy), March 8, 1995.
- “Toward a New Marketing Paradigm: Lessons From and Implications to the Marketing of Services,” Ambrosetti Group’s Chief Executive Seminar (Milan, Italy), March 7, 1995.
- “The Value of Marketing Program,” Janssen Pharmaceutica, January 9, 1995.
- “The Virtual University: Research and Action Agenda,” The Virtual University Conference, SEI Center, January 12, 1995.
- “Marketing 2000,” AIMSE/Wharton Investment Institute, January 13, 1995.
- “Beyond Brand Management,” Wharton MBA Marketing Club, January 23, 1995.
- “A New Management Paradigm for the 21st Century Enterprise,” Conference of the International Academy of Management, December 9, 1994.
- “Research Priorities in Marketing as Derived From the SEI Center for Advanced Studies in Management Work on Creating Successful 21st Century Enterprises,” Doctoral Proseminar, November 16, 1994.
- “Creating a Successful 21st Century Enterprise: Implications for Business and Marketing Theory, Practice, Research and Education,” The University of Tokyo, November 4, 1994.
- “State of the World: Trades, Problems and Prospects,” YPO Philadelphia Chapter University, The Cloister, September 1994.
- “Is Your Marketing Obsolete? Implications of the New Marketing Paradigm for Business and Non-profit Organizations,” YPO Philadelphia Chapter University, The Cloister, September 1994.
- “The Value of Marketing: A Research Agenda,” Value of Marketing Conference, Stanford University, August 9, 1994.
- “Electronic Commerce: Progress and Prospects,” AMA Conference, San Francisco, August 8, 1994.
- “Determining the Value of Marketing: A New Challenge to the Discipline,” San Francisco AMA Conference, August 8, 1994.
- “*JMR* Special Issue on Innovation in New Product Development: Best Practice in Research, Modeling and Applications,” *JMR* Editorial Board Meeting, San Francisco, August 7, 1994.
- “Entering the U.S. Consumer Durable Markets,” Nijenrode Executive MBA Program, August 4, 1994.
- “A New Approach for Estimating the Demand for Interactive TV Products and Services, Interactive Industry 2000: Market Research for the Interactive Television Business,” July 28-29, 1994.
- “Creating a 21st Century Enterprise,” Poon Kam Kai Institute of Management, The University of Hong Kong, June 16, 1994.
- “Advances in U.S. Marketing and Their Implications to China,” Joint faculty seminar of the School of Economics and Management, Tsinghua University and the School of Management, Peking University, June 15, 1994.

- "Toward a New Marketing Paradigm," a faculty seminar at the Hong Kong University of Science and Technology, School of Business and Management, June 14, 1994.
- "Empirical Generalizations in Marketing: Opportunities for MSI Research Program," MSI Board of Trustees Meeting, April 29, 1994.
- "Textbook of the Future: A Perspective From the Virtual University Lab," April 8, 1994.
- "The Impact of Marketing Science on Industry and Academia," The Oscar W. Neuhaus Lecture, Rice University, March 23, 1994.
- "The Challenge of a New Marketing Paradigm," University of Texas at Austin, March 23, 1994.
- "Market Driven Quality," at the Beyond Quality: Organizational Transformation to the 21st Century Enterprise, March 17-18, 1994.
- "The Marketing Challenges for the Philadelphia Orchestra," Presentation to the Board of Trustees of the Philadelphia Orchestra, March 1, 1994.
- "Pharmaceutical Marketing: Emerging Challenges and Opportunities," Pharmaceutical Advertising Council and Wharton Executive Education Conference on Reengineering Pharmaceutical Marketing, February 25, 1994
- "Role of Marketing in the New MBA Curriculum: Lessons from the Wharton Experience," AMA Winter Conference, February 21, 1994.
- "Empirical Generalizations in Marketing: Some Observations," Wharton Conference on Empirical Generalizations in Marketing, February 16-18, 1994.
- "Increasing Marketing Effectiveness," Executive Conference of Schering-Plough Int., January 18, 1994.
- "The Value of Pharmaceutical Advertising and Promotion," Coalition of Healthcare Communication Conference, Marketing Conference in an Era of Change, New York October 27, 1993.
- "Advances in Marketing Strategies," Nijenrode University Executive Program, August 6, 1993.
- "Global Consumer Brand Strategies: Problems and Prospects," Seminar for the Business Partners of the Norwegian School of Management, June 11, 1993.
- "Determinants of New Product Success: Lessons from the U.S. and Japan," Faculty and Ph.D. students seminar at Erasmus University, June 10, 1993.
- "Getting the Most out of Benchmarking," Board of Directors of Wharton=s Alumni Association, May 14, 1993.
- "Marketing Opportunities in Japan and East Asia," with Hotaka Katahira and the International Forum Participants, April 18, 1993.
- "Toward a New Marketing Paradigm: Implications for Marketing Departments," Advisory Board Meeting of the Wharton's Marketing Department, April 8, 1993.
- "The New Wharton MBA Curriculum," Faculty seminar at Erasmus University, March 10 and June 10, 1993.
- "Marketing Science at a Crossroad," Inaugural Presentation as the first holder of the Unilever-Erasmus Marketing Professorship, Erasmus University, February 18, 1993.
- "The Strategic Impact of Market Driven Quality," with Paul R. Kleindorfer. ORSA/TIMS, San Francisco, Session on Customer Satisfaction and its Role in Global Competition. November 1992.
- "Issues and Advances in New Product Development and Management: A U.S. Perspective," Advanced Industrial Marketing Strategy Seminar, September 18, 1992.
- "The Market Driven 21st Century Enterprise: Implications for Law Departments," Presentation at the SmithKline Beecham U.S. Law Department Conference on Customer Focus Continuous Improvement, April 28, 1992.
- "New Product Development: Problems, Advances and Prospects," Wharton's Advanced Industrial Marketing Strategy, March 19, 1992.
- "Preparing for the 21st Century Today," Securities Industry Institute, 40th Anniversary Program, March 1992.
- "The Successful 21st Century Enterprise as Customer Driven: Implications for Marketing and Management Science," University of Texas at Austin, Faculty Colloquium, February 1992.

- "Time Based Competition: Implications for Marketing Science," INSEAD Faculty Presentation, January 1992.
- "A New Management Paradigm for Israel's Schools of Management: Lessons from the New Wharton MBA Curriculum," Conference on the Future of Management Education in Israel, Jerusalem, Israel, October 16, 1991.
- "Designing & Implementing an Innovative MBA Program: Lessons from the Wharton Experience," Conference on the Future of Management Education in Israel, Jerusalem, Israel, October 16, 1991.
- "How to Develop Products More Often and Get Them to Market Faster: Guidelines for Functional Management," Ambrosetti Group, Milan, Italy, May 9-10, 1991.
- "Management in the 21st Century: Implications to the Fragrance Industry," Summit 2000 Conference of the Fragrance Association, April 8, 1991.
- "Marketing Research and Modeling for the 21st Century Enterprise: The Emerging Crisis and its Challenges," Management Science Roundtable, February 17, 1991, Redington Beach, FL.
- "Inducing Creativity and Innovation in Large Bureaucracies: Lessons from Marketing," RGK 4th International Conference on Creativity and Innovative Management, August 8-10, 1991, Los Angeles, CA.
- "Concept Testing for Generating and Evaluating Positioning Strategies," PDMA Positioning Conference, March 6, 1990, New York, NY.
- "Research Priorities in the Information Technology Area," MSI, Information Technology Steering Group, January 18, 1990.
- "Building the 21st Century Corporation Today: A Marketing Perspective," MASTERSHIP, January 9, 1990, Los Angeles, CA.
- "Globalization: Opportunities for Innovative Research and Modeling," UCLA, January 9, 1990, Los Angeles, CA.
- "Marketing Skills and Strategies for the 1990's," Pfizer International Marketing Managers, December 1989, Lambertville, NJ.
- "Increasing the Effectiveness of Your New Product Development," Indian Institute of Technology, November 1989, Bombay, India.
- "Competitive Advantage Through Strategic Marketing," Contel Corporation, October 1989, Lake of the Ozarks, MO.
- "Management in the 21st Century," Wharton Advanced Management Program, September 1989, Philadelphia, PA.
- "The Contributions of Strategy and Other Business Functions to the Creation of Innovative Marketing Knowledge," AMA Marketing Educators Conference, Chicago, August 1989.
- "The Current and Potential Contributions of Strategy and the Other Business Functions to the Creation of Innovative Marketing Knowledge," AMA Summer Conference, August, 1989, Chicago, IL.
- "Selecting and Negotiating International Strategic Alliances: Applications of the AHP," TIMS Osaka, July 1989.
- "Improving the Effectiveness of the Industrial New Product Development Process: Lessons from Industry – The AS 400 Case," 16th International Research Seminar in Marketing, La Londe les Maures, France, May 19, 1989.
- "Strategic Marketing," Studio Ambrosetti AP Milan Group, May 17, 1989.
- "Developing and Launching New Products: Costs, Risks, and Conditions for Success," Studio Ambrosetti, AF Marketing Group, May 16, 1989.
- "The Marketing Challenge for Top Management: Promises and Pitfalls of Expert Systems," University of California, Irvine, April 27, 1989.
- "Management in the 21st Century: Implications for Management Research and Education," University of California, Irvine, April 27, 1989.
- "The Globalization of Management Education: Options, Trade-Offs, and an Agenda for Implementation," AACSB Annual Meeting, April 18, 1989, Montreal.
- "A Contrarian Approach to Effective Pricing," The Pricing Institute, March 7, 1989, New York.

- "Achieving Competitive Advantage in Marketing," Securities Industry Association, March 6, 1989, Philadelphia, PA.
- "Courtyard by Marriott: Designing a Hotel Facility with Consumer Based Marketing Models," presented to the TIMS/AMA seminar Marketing Science: A Developmental Tool for Management Scientists, New York, November 16, 1988.
- "Technology and Marketing-Driven Global Portfolio of R&D Projects," with Robert DeLuccia presented at the ORSA/TIMS Joint National Meeting in Denver, Co, October 26, 1988.
- "Pitfalls and Challenges of Global Marketing," Second International Conference on Marketing and Development, Karl Marx University, Budapest, Hungary, July 12, 1988.
- "Information Technology and Marketing Strategy," with Eric Clemons, presented at IS, TC and Strategy Plenary Meeting, January 1988.
- "A New Challenge for Human Resource Management: Incorporating a Marketing Perspective," The Lauder Institute: International Human Resource Conference, December 1987.
- "Advances in Marketing Strategy and Research," Wharton Alumni Club, Milan, October 1987.
- "Marketing and Corporate Strategy," Studio Ambrosetti, Milan, October 1987.
- "Marketing for Financial Institutions," Studio Ambrosetti, Milan, October 1987.
- "Proactive Marketing Research and Modeling: Pitfalls and Prospects," PMRG Fall 1987 meeting, Captiva Island, Florida, October 1987.
- "Turning Salespeople and Non-Marketing Executives into Marketing Strategists," AMA Marketing Educators' Conference, Toronto, August 1987.
- "International Marketing," Wharton Alumni Club, Toronto, August 1987.
- "Marketing and Technology: Progress, Problems, and Prospects," European-American Symposium, Enschede, The Netherlands, June 29-July 1, 1987.
- "Second Generation Expert Systems: Incorporating Enhanced Explanation and Learning," Marketing Science Conference, Jouy-en-Josas, France, June 24-26, 1987.
- "Market Segmentation: Shortcomings and Opportunities," 1987 Attitude Research Conference, West Palm Beach, Florida, May 1987.
- "Advances in Marketing Research and Modeling," Studio Ambrosetti, Milan, December 1986.
- "Advances in Management Strategy: A Marketing Perspective," The Institute of Management Consultants, March 1986.
- "The Marketplace of the Future: Global Consumers," Advertising Research Foundation 50th Anniversary Conference, March 1986.
- "A Marketing Perspective for Public Management: Research Implications," Wharton Department of Public Policy and Management Brown Bag Seminar, January 1986.
- "Advances in Global Marketing Strategy: Concepts, Methods, and Applications," International Symposium on Recent Developments in Management Research, Helsinki, Finland, 1986.
- "Expert Systems in Marketing," TIMS October 1986 Conference, Miami.
- "Advances in Portfolio Analysis and Strategy," Chinese Management Association, Taipei, July 1985.
- "New Development in Marketing and Planning," WEFA/Lauder Seminar, June 1985, Tokyo, Japan. Sessions on Advances in Market Segmentation, Product Positioning and Portfolio Analysis and Strategy.
- "Advances in Portfolio Analysis and Strategy," University of Illinois, Theories of Marketing Practice Conference, May 1985
- "Micro Computers in Marketing," Marketing Science Conference, March 1985.
- "Global Marketing Strategies," New York University, 1985.
- "Diffusion Models: The State of the Art," ASA conference, 1984.
- "Management Education in a Global Context," University of Pennsylvania Conference on Management Education and Foreign Languages, December 1984;
- "Generating and Evaluating Industrial Marketing Strategies Using the AHP," TIMS Conference, November 1984;
- "A Innovation Diffusion and New Product Forecasting," TIMS Conference, November 1984;
- "Foreign Market Entry and Import Protection Strategies," Israel Institute of Management, October 1984.

- "The Contribution of Consulting to the Consumer Research Discipline," ACR conference, October 1984.
- "The CEO and the Board," Strategic Management Conference, October 1984.

PROFESSIONAL AFFILIATIONS AND AWARDS

Professional Affiliations

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

Professional Awards

1. Honorary Degrees

M.A. Honors, University of Pennsylvania, 1971

2. Awards

- One of the 10 **Legends of Marketing, 2009**. An 8-volume set of anthologized work forthcoming from Sage, 2012.
- **Buck Weaver Award**, Massachusetts Institute of Technology, 2007.
- **Honorary Fellow of the Decade**, Interdisciplinary Center, Herzliya (Israel), May 2004.
- The 2003 **Elsevier Science Distinguished Scholar Award** of the Society for Marketing Advances
- One of the **10 Grand Auteurs** in Marketing. [Alain Jolbert, EMS Management and Societe, 2000]
- One of 18 *JAR* articles in the Special Classics Issue of **articles that have withstood the test of time**. Nov./Dec. 2000.
- **The Paul D. Converse Award, 1996**.
- **American Marketing Association/Irwin Distinguished Educator Award, 1993**.
- **First Faculty Impact Award**, Wharton Alumni Association, 1993.
- First Runner-Up in the 1988 **Franz Edelman Award for Management Science/Achievement**.
- **The 1985 Charles Coolidge Parlin Award**.
- Elected as the 1984 member of the **Attitude Research Hall of Fame**.
- Delivered the 13th (1981) **Albert Wesley Frey Lecture**, University of Pittsburgh.
- My *Product Policy* book won the **1979 Book of the Year Award** given by the editors of *Expansion* (Mexico).
- Winner of two **Alpha Kappa Psi Foundation Awards** for the best article published in the *Journal of Marketing* in 1973 and 1976.
- Runner up of the 1983 **William O'Dell Award** for "the article published 5 years earlier in *JMR* which stood the test of time and made the most significant long run contribution to Marketing Theory, methodology and practice".
- **Winning paper** (with Paul E. Green) of American Psychological Association Division of Consumer Psychology, 1972 Research Design Competition.
- A finalist (top 5) for the 1980 Wharton Award for teaching excellence.

3. Illustrative Citations

- Third highest ranked Marketing Scholar in the University of Maryland's Kirkpatrick and Locke Faculty Scholarship Study, 1985 (based on number of publications, citations, and peer ratings).

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

4. Illustrative Research Grants

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

5. Fellowships

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

6. Illustrative Recent Media Coverage

- Knowledge@Wharton:
 - Harnessing Networks to Create Value and Identify New Opportunities [interview, July 15, 2009] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=2289&specialid=88#>
 - What Does it Take to Compete in a Flat World? [October 31, 2007] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=1836>
 - Can't Run, Can't Hide: New Rules of Engagement for Crisis Management [September 19, 2007] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=1807>
 - Will a New Theory Help Firms to Manage in a 'Flat' World? [October 25, 2006] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=1588>
 - Business Books for the Beach, The Power of Impossible Thinking [March 22, 2006] http://knowledge.wharton.upenn.edu/special_section.cfm?specialID=22
 - Farewell, Peter Drucker: A Tribute to an Intellectual Giant [November 30, 2005] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=1326>
 - Should Your Next CEO Be a Philosopher? [interview, February 9, 2005] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=1125>
 - What's the Buzz About Buzz Marketing? [interview, January 12, 2005], reprinted in *Wharton Alumni Magazine*, Winter 2005 <http://knowledge.wharton.upenn.edu/article.cfm?articleid=1105>
 - Amazon's Multiple Personalities [interview, January 14, 2005] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=1088>
 - Back to the Drawing Board: Is the Traditional Theory of the Firm Obsolete? [interview, October 6, 2004] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=1047>
 - The Power of Impossible Thinking [book, August 25, 2004] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=1022>
 - What's Behind the 4-Minute Mile, Starbucks, and Moonlanding? The Power of Impossible Thinking [book, July 14, 2004] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=1007>

- A Lofty Take on Leadership: Mountain Climbing and Managing Companies [book, September 24, 2003] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=858>
- How Business Can Prepare for War [conference, February 9, 2003]
- Could a Cyber-Terrorist Take Down Your Company? Don't Wait to Find Out [conference, August 28, 2002] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=615>
- The New Business Reality [conference, January 30, 2002] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=509>
- What Webvan Could Have Learned from Tesco [interview, October 10, 2001] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=448>
- What's in Store for Capital Markets and the Economy? [interview, September 26, 2001] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=436>
- Did Terrorists Blow Up the Recovery? [interview, September 13, 2001] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=425>
- Dotcom Bomb Hits the Publications that Covered It [interview, August 29, 2001] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=418>
- Can Priceline Remain Profitable? [interview, August 15, 2001] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=412>
- Good vs. Great Leaders: The Difference is Humility, Doubt, and Drive [conference, June 20, 2001] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=377>
- It's Not Easy Being Paul Green [interview, November 8, 2000] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=262>
- Three Marketing Lessons from the Love Bug [interview, May 24, 2000] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=184>
- Just-in-Time Education: Learning in the Global Information Age [paper, August 30, 2000] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=236>
- New Rules of Digital Marketing [interview, October 13, 1999] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=79>
- Who's Buying on the Internet? [paper, September 1, 1999] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=63>
- Marketing Strategy in the Global Information Age [lecture, July 23, 1999] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=36>
- The Knowledge Edge [conference, June 23, 1999] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=34>
- Knowledge @ Wharton, High School Edition [glossary of various marketing terms]
- "6 Steps to Achieving Creativity in Business, Personal Life," US News and World Report, January 3, 2011. <http://health.usnews.com/health-news/family-health/brain-and-behavior/articles/2011/01/03/6-steps-to-achieving-creativity-in-business-personal-life.html>
- "Wharton's Jerry Wind Predicts the Future of Advertising," IESE Insight, May 19, 2010. <http://www.iese.edu/aplicaciones/news/view.asp?id=2333&lang=en>
- Interviewed in report on the *Future of Advertising Project*, VMarketing China Magazine, April 2010.
- Listing of *The Network Challenge: Strategy, Profit, and Risk in an Interlinked World* in "KYW News Radio 1060 AM's 10 Books to Read by Marc Kramer." November 1, 2009.
- "World Series a marketing windfall for Philadelphia," Philly.Com, October 27, 2009. <http://www.philly.com/philly/business/66284122.html>
- Media coverage of Fast.Forward (<http://www.youtube.com/user/FastForward>), the Marketing Channel on YouTube co-founded with Google:
 - "Truth in Advertising," Penn Gazette, September, 2009. <http://www.upenn.edu/gazette/0909/gaz07.html>
 - "YouTube's FastForward Biz Site Off to Slow Start," ReadWriteWeb Blog, September 23, 2009. http://www.readriteweb.com/archives/youtubes_fastforward_biz_site_off_to_slow_start.php
 - "Fast.Forward. Connecting marketers with innovative ideas (and other marketers)," YouTube Biz Blog, September 23, 2009. <http://ytbizblog.blogspot.com/2009/09/fastforward-connecting-marketers-with.html>
 - "Will the Future of Advertising Be a Blend of Old and New Media?" Knowledge@Wharton, September 30, 2009. <http://knowledge.wharton.upenn.edu/article.cfm?articleid=2344>

- “What’s the future of advertising?” InternetNews.com, October 2, 2009.
<http://blog.internetnews.com/dneedle/2009/10/whats-the-future-of-advertisin.html>
- “New Year, New Look for Google for Advertisers,” Google Agency Ad Solutions Blog, January 13, 2010. <http://adwordsagency.blogspot.com/2010/01/new-year-new-look-for-google-for.html>
- “Interview: Yoram (Jerry) Wind,” First Friday Book Synopsis, July 26, 2009.
<http://ffbsccn.wordpress.com/2009/07/26/interview-yoram-jerry-wind/>. Also published on Examiner.com, July 26, 2009. <http://www.examiner.com/x-14678-Dallas-Business-Commentary-Examiner~y2009m7d26-Interview-Yoram-Jerry-Wind>
- “Tips for Better Networking Skills,” FOX Business News, July 17, 2009.
<http://www.foxbusiness.com/search-results/m/25340846/tips-for-better-networking-skills.htm>
- Featured book in Wharton Alumni Newsletter: *The Network Challenge: Strategy, Profit, and Risk in an Interlinked World*, July 2009.
<http://www.wharton.upenn.edu/alumni/newsletter/2009/july/>
- “Future of Advertising? Print, TV, Online Ads,” Ad Age, June 1, 2009.
http://adage.com/article?article_id=136993
- “Wondering What to Do? We Asked the Experts,” Ad Age, April 6, 2009.
http://adage.com/article?article_id=135772.
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- Interview on “Managing Creative People,” Joel Kurtzman (ed), *Creating Value Through People*. Wiley 2008.
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- “The Power of Impossible Thinking,” Ocean City Public Library, BUSINESS BOOK CLUB, Book of the Week, October 07, 2007.
- Wharton media coverage of Competing in a Flat World:

○ Wharton Alumni Magazine	Winter	2008	Featured book
○ Wharton Alumni Magazine	December	2007	Featured article
○ Wharton Alumni Newsletter	August	2007	Featured book
○ Wharton Alumni Newsletter	December	2007	Featured book
○ Wharton Executive Education -- featured on home page	September	2007	Featured book
○ Wharton Faculty / Staff newsletter	September	2007	Featured book
○ Wharton Faculty / Staff newsletter	December	2007	Competing in a Flat World Competition Announcement
○ Knowledge at Wharton	October	2007	Interview with audio download
○ Competing in a Flat World website	October	2007	Website went live in October
- Goh, Dr. Sunny T.H. “How to Make the Impossible Possible.” *The Star Online*. July 10, 2006.
thestar.com.my/news/story.asp?file=/2006/7/10/business/14512212&sec=business.
- A link has been placed for the book *The Power of Impossible Thinking* on the website, www.worksavvy.ws/organization.htm#yourself as a recommendation to entrepreneurs and the diagram from page xxiv of the book is shown in the section of the website, “Organizing Yourself: Your Mind, Your Attitude, Time and Planning.”
- “How Business Ideas are Born,” MoneyControl.com, June 2, 2006.
- “Think You Know More Than Your Boss? You Just Might,” Beepcentral.com, April 24, 2006.

- “New Model: Divide and Govern.” *Directorship*. April 2006.
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- Thomas Group Review. *The Power of Impossible Thinking: A conversation with Yoram (Jerry) Wind and Jim Taylor*. Also appeared at Knowledge Leadership @ Thomas Group, Winter 2006.
- *The Power of Impossible Thinking* selected as one of the five outstanding books on “Thinking Outside the Box” by the Swiss Journal *CASH* on March 16, 2006.
- “Marketing Prof. Gives Crash Course in Brand Image,” *Daily Pennsylvanian*, February 9, 2006.
- “Churning Out Books for the Bigwigs,” *Daily Pennsylvanian*, November 10, 2005.
- Inaugural Thought Leader interview, *The Brand Strategy Roundtable Journal*, November 2005.
- A number of radio interviews re *The Power of Impossible Thinking*, including:
 - *Something You Should Know with Mike Carruthers*, March 2006.
 - Mix 92.9 Morning Show, Nashville, March 2006.
 - KRMB Radio, Strategies for Living, Shreveport, LA, August 11, 2004.
 - WKCT Radio, Drive Time, Bowling Green, KY, August 20, 2004.
 - WABJ Radio, John Sabastian Morning Show, Detroit, MI, August 18, 2004.
 - WKNO Radio, Smart Copy, Memphis, TN, August 17, 2004.
 - KIKK Radio, Salt Lake City, UT, November 6, 2004.
- “Winds of Change,” *The Economic Times, Brand Equity*, June 1, 2005, front page.
- “From Ink to Implementation: New Press Wharton School Publishing Co-Editors Say They Aim for Sound Management Titles that You Can Do Something With,” *BusinessWeek Online*, April 11, 2005.
- “Power of Mental Models,” *Asia Inc.* April 2005, pp. F14-15.
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- “Comment s’addresser au consommateur “Post-bull”? D’apres *Convergence Marketing Strategies for Reaching the Hybrid Consumer, Business Digest* 127 (February 2003), pp. 19-20.
- “Wealth is Created During Periods of Uncertainty,” *Fast Company*, April 2002, pp. 87-88.
- “Thought Leaders: Convergence Marketing: Preview an excerpt from the book by Wharton Professor Jerry Wind and Professor Vijay Mahajan of the University of Texas,” Wharton’s E-Buzz, October 2001; and Knowledge@Wharton, October 2001.
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- “Conversation with Jerry Wind,” Singapore, October 2000; abstract reproduced in http://can.mediacorpnews.com/analysis_prog/incon/incon_wind1.htm.
- “You Can’t Be An Extremist,” *Globs* March 8, 2001 (Hebrew).
- Wind, Yoram (Jerry). “Managing in the Year 2000” *Executive Issues*. August 1991.

PERSONAL DATA

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Philadelphia, PA 19104
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Fax: (215) 898-1703
E-mail: windj@wharton.upenn.edu

Marital Status: Married to Vardina Wind, Artist, (BA in Sociology, MA in Communications); Two children.

Illustrative Pro Bono Activities

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

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

The Interdisciplinary Center, Herzliya (Israel), all planning activities and other involvement (as outlined on p. 43), since 1994.

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

Government of Catalonia, International Advisory Board (2007-)

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

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

Lauder Institute Alumni Association, Advisory Board (2005-present)

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

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

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

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

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

Affiliations:

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

APPENDIX B

DOCUMENTS REVIEWED AND/OR RELIED UPON

Bates Range	
APL794000082356	– APL794000082378
APL7940000102312	– APL7940000102332
APL-ITC796-0000508285	– APL-ITC796-0000508544
APLNDC0000036172	– APLNDC0000036265
APLNDC0000036266	– APLNDC0000036348
APLNDC0000036349	– APLNDC0000036570
APLNDC00004618	– APLNDC00004736
APLNDC0001867475	– APLNDC0001867477
APLNDC0002007608	– APLNDC0002007704
APLNDC0002831037	– APLNDC0002831088
APLNDC-X0000006548	– APLNDC-X0000006647
APLNDC-Y0000023361	– APLNDC-Y0000023907
APLNDC-Y0000024130	– APLNDC-Y0000024333
APLNDC-Y0000025460	– APLNDC-Y0000025574
APLNDC-Y0000026687	– APLNDC-Y0000026807
APLNDC-Y0000027136	– APLNDC-Y0000027422
SAMNDCA00190144	– SAMNDCA00190243
SAMNDCA00237743	– SAMNDCA00237772
SAMNDCA00237973	
SAMNDCA00250503	– SAMNDCA00250557
SAMNDCA00250682	– SAMNDCA00250709
SAMNDCA00252685	– SAMNDCA00252775
SAMNDCA11039743	– SAMNDCA11039807
SAMNDCA11053867	– SAMNDCA11053901

Legal Documents:

Apple Inc., v. Samsung Electronics Co., Ltd., et al., No. 12-CV-0630, Judgment, October 11, 2012.

Apple's Motion for a Permanent Injunction and for Damages Enhancements, September 21, 2012.

Declaration Of Andries Van Dam, Ph.D. In Support Of Samsung's Opposition To Apple's Motion For A Permanent Injunction And For Damages Enhancements Regarding U.S. Patent No. 7,469,381, October 18, 2012.

Declaration of Marylee Robinson in Support of Apple's Motions for a Permanent Injunction, for Damages Enhancement, for Supplemental Damages and Prejudgment Interest with Exhibits 9, 29, and 31, September 21, 2012.

Declaration Of Stephen Gray In Support Of Samsung's Opposition To Apple's Motion For A Permanent Injunction And Damages Enhancement, October 18, 2012.

Declaration of Terry Musika in Support of Apple's Motion for Permanent Injunction with Exhibit 51, 53, 54, 56, 58- 61, and 66-68, August 29, 2012.

Defendant Exhibits 30, 48, 49, 52, 62, and 63.

Joint Pretrial Statement and Proposed Order, July 24, 2012.

Trial Tr. vol. 6, 1638-1988, Aug. 10, 2012.

Depositions:

Deposition of John Hauser, April 27, 2012.

Deposition of Ramamirtham Sukumar, Ph.D., April 24, 2012.

Expert Reports:

Corrected Expert Report of Michael J. Wagner, April 20, 2012.

Expert Report of John R. Hauser with Supporting Documents, March 22, 2012.

Expert Report of R. Sukumar Regarding the Amount Samsung Customers Would Be Willing to Pay for the Features Associated with Patent Nos. U.S. 7,844,915, U.S. 7,469,381, U.S. 7,864,163, and U.S. 7,663,607, April 16, 2012.

Patents:

U.S. Patent No. 7,469,381 B2.

U.S. Patent No. 7,844,915 B2.

U.S. Patent No. 7,864,163 B2.

APPENDIX B

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- Harrison, Glenn W. and Elisabet E. Ruström. 2008. "Experimental Evidence on the Existence of Hypothetical Bias in Value Elicitation Methods." In Charles R. Plott and Vernon L. Smith (eds.), *Handbook of Experimental Economics Results*. New York: Elsevier B.V.
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APPENDIX B

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Websites:

“How to Buy a Cell Phone,” *PC World*, November 29, 2011, available at http://www.pcworld.com/article/125653/cell_phone_guide.html (viewed October 16, 2012).

“Motorola Droid Razr Maxx review (Verizon Wireless).” *CNET*, October 17, 2012, available at http://reviews.cnet.com/smartphones/motorola-droid-razr-maxx/4505-6452_7-35128051-2.html (viewed October 17, 2012).

“Tablet Buying Guide,” *Consumer Reports*, May 2012, available at <http://www.consumerreports.org/cro/tablets/buying-guide.htm> (viewed October 16, 2012).

<http://cell-phones.toptenreviews.com/smartphones/> (viewed October 12, 2012).

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http://shop.sprint.com/mysprint/shop/phone_wall.jsp?filterString=smartphone&isDeeplinked=true&INTNAV=ATG:HE:Smartphones (viewed October 18, 2012).

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http://www.amazon.com/SanDisk-SDSDU-064G-A11-Ultra-UHS-I-Class/dp/B007B5RJA6/ref=sr_1_94?s=pc&ie=UTF8&qid=1350430546&sr=1-94&keywords=sandisk+64 (viewed October 10, 2012).

<http://www.apple.com/iphone/from-the-app-store/>, accessed October 18, 2012.

<http://www.samsung.com/us/mobile/cell-phones/SGH-I777ZKAATT-features> (viewed on October 17, 2012).

<http://www.samsung.com/us/mobile/cell-phones-accessories#container> (viewed October 8, 2012).

Tablet Computer Definition, *PC Magazine*, available at http://www.pcmag.com/encyclopedia_term/0,2542,t=tablet+computer&i=52520,00.asp (viewed October 16, 2012).

Other:

Exh. 32 - Time to Tab - Samsung Galaxy Tab 10.1 Global TV Commercial - YouTube.mp4

EXHIBIT 1

SAMSUNG GALAXY S II (AT&T) FEATURES AND SPECIFICATIONS

Home > Cell Phones > Features >

Samsung Galaxy S™ II, available at AT&T

SGH-I777 ★★★★★ 706 REVIEWS

[Tweet](#) 178 | [Print](#) 25 | [Pin it](#) 4 | [BUY NOW](#)


[OVERVIEW](#) | [FEATURES](#) | [SPECS](#) | [GALLERY](#) | [REVIEWS](#) | [ACCESSORIES](#) | [SUPPORT](#)

Features

The brightest, most colorful screen

The Galaxy S™ II has an amazing 4.27" Super AMOLED™ Plus screen. This superb display has razor sharp clarity and breathtaking color. See every detail of videos and pictures. See the full range of hues in all their subtlety and brilliance. And with its superior wide viewing angle, you don't have to be directly in front of the screen to see a perfect image. Truth is, you really have to see it to believe it.


[Watch Video >>](#)



Entertaining with movies and TV shows


Choose from thousands of premium movies and TV shows on [Media Hub](#), and begin watching them in seconds thanks to progressive download optimized for mobile phones.

The Galaxy S™ II utilizes Adobe® Flash® Technology with ease, so you'll have better access to millions more web pages and videos.



Green guides show you the way

In an effort to provide our customers with the latest in technology and the best user-experience, we've provided a new environmental-friendly alternative to a printed paper guide. Virtual Guides provide a "one-stop" support experience with everything from User Guides, Support Videos, Commercials, and Simulations. Take the our next step in going green.



[SGH-I777 Galaxy S II Virtual User Guide - ENGLISH](#)


Shoot super sharp photos and videos

Sure, the Galaxy S™ II has a huge screen, but it's a mere 8.89 mm at its thinnest from front to back. That's only .35 of an inch. For such a large phone, you'll be amazed how easily it slips in and out of your pocket.

When you want to shoot your own videos and photos, you'll have an 8MP 1080p camera at your fingertips. You can even output videos from your phone to watch on an HDTV with an optional [Samsung HDTV Smart Adapter](#).

For video chat, there's a 2 MP front facing camera. With Google Talk, you can video chat with all of your Google Talk contacts, whether they are on a mobile phone or a computer.

Check out our [camera tips and tricks](#) and start enjoying dazzling, detail-rich photos in a snap.



Specifications

Carrier

- AT&T

Form Factor

- Touchscreen

Size

- Product Dimensions: 4.96" (L) x 2.60" (W) x .35" (D)
- Weight: 4.3 oz.

Color

- Black

Battery

- Standby Time: Up to 400 Hrs*
- Continuous Usage Time: Up to 8 Hrs Talk*

Network

- Frequencies and Data Type: GSM Quadband:850/900/1800/1900MHz UMTS Triband:850/1900/2100MHz
- Data Speed: GPRS/EDGE/HSPA+
- SAR Value: Head 0.36 W/kg
- SAR Value: Body 0.90 W/kg

Platform

- Android™ 4.0, Ice Cream Sandwich

CPU / Processor

- Processor Speed, Type: 1.2 GHz, Dual Core (Samsung Exynos C210)

Display

- Display Resolution: 480x800 Pixel
- Display Size: 4.3"
- Display Technology: Super AMOLED Plus
- Has Touchscreen

User Interface

- User Interface Features: Widgets; TouchWiz; Social Hub; Smart Unlock; Accelerometer

Camera

- Rear-facing Camera Resolution: 8.0 MP
- Front-facing Camera Resolution: 2.0 MP
- Digital Optical Zoom: 4x
- Camera Features: Auto Focus; Shot Modes, ISO, Shooting Mode, SceneMode, White Balance; Smile Shot; Camcorder; DivX®; HD Recording; HD Playback; TVOut; Online Image Uploading

EXHIBIT 1

SAMSUNG GALAXY S II (AT&T) FEATURES AND SPECIFICATIONS

A faster phone for speedier web browsing

Inside the Galaxy S™ II, there's a dual core processor tirelessly keeping things moving. You'll have a full 1.2 GHz of computing power. The Galaxy S™ II keeps your movies moving. Games and apps run smoothly. Websites load almost instantly. And jaws drop even faster. As for network capability, it's specifically engineered to run on AT&T's state-of-the-art 4G network.

Sync and share digital content with AllShare™

Transform your digital living experience by enjoying your content on multiple screens, anytime, anywhere. You can wirelessly stream your movies, music and photos from your smartphone, or tablet to your Smart TV, PC and to other DLNA Certified® devices. Samsung AllShare™ seamlessly puts your music, memories and videos in harmony.

[Watch Video >>](#)

Optimized for business

Galaxy S II supports Exchange ActiveSync® for push email, contacts, and calendars, along with features like global address lookup (GAL), and the ability to create and respond to meeting requests. And if you need to send or request documents while you're out of the office, Galaxy S II lets you view, edit, and create Microsoft®-compatible documents, spreadsheets, and presentations. This device also offers Security and IT departmental control via device management, on-device encryption and remote lock and wipe.

Learn more about [The S.A.F.E.™ Solution](#): Samsung Approved For Enterprise™.

*Battery power consumption depends on factors such as network configuration, signal strength, operating temperature, features selected, vibrate mode, backlight settings, browser use, frequency of calls and voice, data and other application usage patterns.

BRIGHTEST, MOST COLORFUL screen based on a blind test administered by Strategy Analytics.

Playback on the Galaxy S II in HD-like quality.

Screen images simulated. Appearance of device may vary. Some features may not be available in all areas. *4G* used in conjunction with a

Samsung product refers to it operating with the identified carrier's applicable 4G network. Android and Android Market are trademarks of Google.

Inc. Adobe and Flash are either registered trademarks or trademarks of Adobe Systems Incorporated in the United States and/or other countries.

Other company and product names mentioned herein may be trademarks of their respective owners.

Features and specifications are subject to change without prior notification

Notes & Sources:

Highlights represent specifications that may be related to the patented features.

From <http://www.samsung.com/us/mobile/cell-phones/SGH-I777ZKAATT-features> (viewed on October 17, 2012).

Audio

* Audio Features: Music Player; Compatible Music Files, 3GP, AAC, MP4, M4A, MP3, OGG, WAV, WMA; Audio, Streaming; Ringtones, Polyphonic 40levels; MP3/Music Tones

Video

* Video Features: Video Player; Compatible Video Files, 3GP, AAC, AAC+, AMRNB,AVI,eAAC+,H.263, H.264, MP4,MPEG4, QCIF, WMV; Video, Streaming

Fun and Entertainment

* Fun and Entertainment Features: Downloadable Content; Wallpapers, Animated; Samsung Widget Gallery; Samsung Media Hub

Business & Office

* Business & Office Features: Microsoft® OfficeCompatible; vCard/vCalendar; Voice Memo

Messaging Options

* Messaging Options: Email; Corporate Email; Picture Messaging; Text Messaging; Instant Messaging; Threaded/ChatStyle; Video Messaging; Swype™; Predictive Text (XT9®)

Connectivity

* Connectivity: Bluetooth®, Bluetooth® Profiles, A2DP, AVRCP, HFP, OPP, PBAP; WiFi; WiFi-Hotspot; HTML Browser; Flash®; Java™; GPS

Memory

* Internal Memory: 16GB/1024MB RAM (4GLPDDR*2)
* External Memory: Supports up to 32GB microSD™ card

Calling Functions

* Calling Functions: Speakerphone; Voice Recognition; Voicemail; Speech-to-text; Text-to-speech; Etiquette/Gesture Mode; Picture Caller ID; Multitasking; Hearing Aid Compatible (HAC); TTY; Airline Mode

EXHIBIT 2

HOVER-OVER DESCRIPTIONS FOR SPECIFICATIONS LISTED ON SAMSUNG GALAXY S II FEATURE PAGE

Category	Specification	Hover-Over Description
Carrier	AT&T	Provides who the cell phone carrier is for this model of phone.
Size	Product Dimensions: 4.96" (L) x 2.60" (W) x .35" (D) Weight: 4.3 oz.	Height, width and depth of the phone, measured in inches (in.). Weight of the phone, measured in ounces (oz.).
Color	Black	Choice of colors (exterior design) that a cellphone model is currently available in.
Battery	Standby Time: Up to 400 Hrs* Continuous Usage Time: Up to 8 Hrs Talk*	Amount of time available in Sleep mode in which a phone's display is inactive to save power, but not totally shut down. Battery power consumption depends on factors such as network configuration, signal strength, operating temperature, features selected, vibrate mode, backlight settings, browser use, frequency of calls and voice, data and other application usage patterns.
Network	SAR Value: Head 0.36 W/kg SAR Value: Body 0.90 W/kg	SAR stands for Specific Absorption Rate which is the unit of measurement for the amount of RF energy absorbed by the head when using a mobile phone. SAR stands for Specific Absorption Rate which is the unit of measurement for the amount of RF energy absorbed by the body when using a mobile phone.
Display	Has Touchscreen	Technology that enables users to interact with a phone by touching images, words, or icons on the display.
Camera	Rear-facing Camera Resolution: 8.0 MP	Number of pixels across and down that are used to capture an image. More pixels, the sharper the photo.
Memory	External Memory: Supports up to 32GB microSD™ card	Hardware device or memory card that connects to a phone for the purpose of receiving and storing data.

Notes & Sources:

From <http://www.samsung.com/us/mobile/cell-phones/SGH-I777ZKAATT-features> (viewed on October 17, 2012).

Descriptions shown for specifications for which detailed descriptions pop-up when the cursor hovers over them.

EXHIBIT 3**SUMMARY OF FEATURES AND OPTIONS
CONSIDERED BY PROFESSOR HAUSER IN HIS SMARTPHONE CONJOINT ANALYSIS**

<u>Feature</u>	Level			
	1	2	3	4
Touchscreen	Reliable Touch	Reliable Touch, Rubberband, Tap to Re-center after Zoom	Less Reliable Touch, Autoswitch (1 to 2 Fingers), Rubberband, Tap to Re-center after Zoom	Reliable Touch, Autoswitch (1 to 2 Fingers), Rubberband, Tap to Re-center after Zoom
Connectivity	Cellular, WiFi	Cellular, WiFi, Tethering	Cellular, WiFi, Tethering, MicroUSB	Cellular, WiFi, Tethering, MicroUSB, HDMI
Camera	3 MP Rear Camera, Standard Video Recording, Autofocus	8 MP Rear Camera, HD Video Recording, Autofocus	8 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom
Storage/Memory	8 GB (2,000 songs or 3,000 photos)	16 GB (4,000 songs or 6,000 photos)	32 GB (8,000 songs or 12,000 photos)	64 GB (16,000 songs or 23,000 photos)
Apps Available	150,000	300,000	450,000	600,000
Size and Weight	3.5 inches, 4 oz.	4 inches, 5 oz.	4.3 inches, 5.3 oz.	4.5 inches, 6 oz.
Price (with Contract)	Free (\$0)	\$99	\$199	\$299

Notes & Sources:

From Hauser Report, Exhibit D, pp. 15-16. Level orders may not be equal to the system used in Professor Hauser's survey.

EXHIBIT 4**SUMMARY OF FEATURES AND OPTIONS
CONSIDERED BY PROFESSOR HAUSER IN HIS TABLET CONJOINT ANALYSIS**

<u>Feature</u>	Level			
	1	2	3	4
Touchscreen	Full Multi-Touch	Full Multi-Touch, Rubberband, Tap to Recenter after Zoom	Very Limited Multi-Touch, Autoswitch (1 to 2 Fingers), Rubberband, Tap to Re- center after Zoom	Full Multi-Touch, Autoswitch (1 to 2 Fingers), Rubberband, Tap to Re- center after Zoom
Connectivity	WiFi	WiFi, Bluetooth	WiFi, Bluetooth, MicroUSB	WiFi, Bluetooth, MicroUSB, HDMI
Camera	3 MP Rear Camera, Standard Video Recording, Autofocus	8 MP Rear Camera, HD Video Recording, Autofocus	8 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom
Storage/Memory	8 GB (2,000 songs or 3,000 photos)	16 GB (4,000 songs or 6,000 photos)	32 GB (8,000 songs or 12,000 photos)	64 GB (16,000 songs or 23,000 photos)
Apps Available	150,000	300,000	450,000	600,000
Size and Weight	7 inches, 1 lb.	8.5 inches, 1.5 lbs.	9 inches, 1.75 lbs.	10 inches, 2 lbs.
Price (with Contract)	\$199	\$359	\$499	\$659

Notes & Sources:

From Hauser Report, Exhibit E, pp. 14-15. Level orders may not be equal to the system used in Professor Hauser's survey.

EXHIBIT 5

**SMARTPHONE CALCULATION OF ESTIMATED WILLINGNESS-TO-PAY PRICE PREMIUM
FOR THE AUTOSWITCH FEATURE ('915 PATENT)
BASED ON RFC SIMULATION EMPLOYED BY PROFESSOR HAUSER**

Step 1 Compare a smartphone with the feature to one without the feature (all else equal)

Choose level at which the other features are set - in this case at their "best"

Choose level for price - in this case "\$199"

Calculating the WTP for Autoswitch

Features	Phone A - with the feature	Phone B - without the feature
Touchscreen	Reliable Touch, Autoswitch , Rubberband, Tap to Re-center after Zoom	Reliable Touch, Rubberband, Tap to Re-center after Zoom
Connectivity	Cellular, WiFi, Tethering, MicroUSB, HDMI	Cellular, WiFi, Tethering, MicroUSB, HDMI
Camera	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom
Storage/Memory	64 GB	64 GB
Apps Available	600,000	600,000
Size and Weight	4.5 inches, 6 oz.	4.5 inches, 6 oz.
Price (with Contract)	\$199	\$199

**RFC Simulated
Choice Share**

67%

33%

Step 2 Modify the price and reestimate market share iteratively until market shares are equal for both products

Price (with Contract)	\$219	\$199
RFC Simulated Choice Share	58%	42%
⋮	⋮	⋮
Price (with Contract)	\$238	\$199
RFC Simulated Choice Share	50%	50%

Step 3 The difference between the two prices is the implied WTP for the feature (in this case Autoswitch):

\$39

Notes & Sources:

Simulated choice shares were calculated following Professor Hauser's methodology using Sawtooth SMRT and his accompanying simulation files (avss_final.srt, avss_final.hbu, avss_final.ucs, avss_final.att, avss_final.dat).

EXHIBIT 6

SMARTPHONE CALCULATION OF ESTIMATED WILLINGNESS-TO-PAY PRICE PREMIUM FOR THE AUTOSWITCH, RUBBERBAND, AND TAP TO RE-CENTER FEATURES ('915, '381 AND '163 PATENTS) BASED ON RFC SIMULATION EMPLOYED BY PROFESSOR HAUSER

Step 1 Compare a smartphone with the feature to one without the feature (all else equal)

Choose level at which the other features are set - in this case at their "best"
 Choose level for price - in this case "\$199"

Calculating the WTP for Autoswitch, Rubberband, and Tap to Re-center after Zoom

Features	Phone A - with the features	Phone B - without the features
Touchscreen	Reliable Touch, Autoswitch, Rubberband, Tap to Re-center after Zoom	Reliable Touch
Connectivity	Cellular, WiFi, Tethering, MicroUSB, HDMI	Cellular, WiFi, Tethering, MicroUSB, HDMI
Camera	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom
Storage/Memory	64 GB	64 GB
Apps Available	600,000	600,000
Size and Weight	4.5 inches, 6 oz.	4.5 inches, 6 oz.
Price (with Contract)	\$199	\$199

**RFC Simulated
Choice Share**

84%

16%

Step 2 Modify the price and reestimate market share iteratively until market shares are equal for both products

Price (with Contract)	\$219	\$199
RFC Simulated Choice Share	80%	20%
⋮	⋮	⋮
Price (with Contract)	\$299	\$199
RFC Simulated Choice Share	54%	46%

Step 3

Even with a price difference of \$100, the smartphone with the three patented features is still associated with a slightly larger market share, meaning that the implied WTP for the three features is at least \$100. ¹

Notes & Sources:

Simulated choice shares were calculated following Professor Hauser's methodology using Sawtooth SMRT and his accompanying simulation files (avss_final.srt, avss_final.hbu, avss_final.ucs, avss_final.att, avss_final.dat).

¹ The RFC Simulation tool is constrained to considering only prices within the range considered by Professor Hauser (i.e., between \$0 and \$299).

EXHIBIT 7

TABLET CALCULATION OF ESTIMATED WILLINGNESS-TO-PAY PRICE PREMIUM FOR THE AUTOSWITCH FEATURE ('915 PATENT) BASED ON RFC SIMULATION EMPLOYED BY PROFESSOR HAUSER

Step 1 Compare a tablet with the feature to one without the feature (all else equal)

Choose level at which the other features are set - in this case at their "best"

Choose level for price - in this case "\$499"

Calculating the WTP for Autoswitch

Features	Tablet A - with the feature	Tablet B - without the feature
Touchscreen	Full Multi-Touch, Autoswitch (1 to 2 Fingers) , Rubberband, Tap to Re-center after Zoom	Full Multi-Touch, Rubberband, Tap to Re-center after Zoom
Connectivity	WiFi, Bluetooth, MicroUSB, HDMI	WiFi, Bluetooth, MicroUSB, HDMI
Camera	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom
Storage/Memory	64 GB	64 GB
Apps Available	600,000	600,000
Size and Weight	10 inches, 2 lbs.	10 inches, 2 lbs.
Price	\$499	\$499

**RFC Simulated
Choice Share**

65%

35%

Step 2 Modify the price and reestimate market share iteratively until market shares are equal for both products

Price	\$531	\$499
RFC Simulated Choice Share	54%	46%
⋮	⋮	⋮
Price	\$544	\$499
RFC Simulated Choice Share	50%	50%

Step 3 The difference between the two prices is the implied WTP for the feature (in this case Autoswitch):

\$45

Notes & Sources:

Simulated choice shares were calculated following Professor Hauser's methodology using Sawtooth SMRT and his accompanying simulation files (avss_final.srt, avss_final.hbu, avss_final.ucs, avss_final.att, avss_final.dat).

EXHIBIT 8

TABLET CALCULATION OF ESTIMATED WILLINGNESS-TO-PAY PRICE PREMIUM FOR THE AUTOSWITCH, RUBBERBAND, AND TAP TO RE-CENTER FEATURES ('915, '381 AND '163 PATENTS) BASED ON RFC SIMULATION EMPLOYED BY PROFESSOR HAUSER

Step 1 Compare a tablet with the feature to one without the feature (all else equal)
 Choose level at which the other features are set - in this case at their "best"
 Choose level for price - in this case "\$499"

Calculating the WTP for Autoswitch, Rubberband, and Tap to Re-center after Zoom

Features	Tablet A - with the features	Tablet B - without the features
Touchscreen	Full Multi-Touch, Autoswitch (1 to 2 Fingers), Rubberband, Tap to Re-center after Zoom	Full Multi-Touch
Connectivity	WiFi, Bluetooth, MicroUSB, HDMI	WiFi, Bluetooth, MicroUSB, HDMI
Camera	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom
Storage/Memory	64 GB	64 GB
Apps Available	600,000	600,000
Size and Weight	10 inches, 2 lbs.	10 inches, 2 lbs.
Price	\$499	\$499

RFC Simulated Choice Share	76%	24%
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Step 2 Modify the price and reestimate market share iteratively until market shares are equal for both products

Price	\$531	\$499
RFC Simulated Choice Share	67%	33%
⋮	⋮	⋮
Price	\$589	\$499
RFC Simulated Choice Share	50%	50%

Step 3 The difference between the two prices is the implied WTP for the features:

\$90

Notes & Sources:

Simulated choice shares were calculated following Professor Hauser's methodology using Sawtooth SMRT and his accompanying simulation files (avss_final.srt, avss_final.hbu, avss_final.ucs, avss_final.att, avss_final.dat).

EXHIBIT 9

**RESPONDENT CHOICE PREDICTIONS FOR DIFFERENTLY PRICED "BENCHMARK" SMARTPHONES
BASED ON RFC SIMULATION EMPLOYED BY PROFESSOR HAUSER**

Comparing two identical smartphones with different prices

Choose level at which the other features are set - in this case at their "best"

Choose level for price - in this case "\$0"

Calculating Market Shares for Identical Smartphones with Different Prices

Features	Phone A - more expensive	Phone B - less expensive
Touchscreen	Reliable Touch, Autoswitch, Rubberband, Tap to Re-center after Zoom	Reliable Touch, Autoswitch, Rubberband, Tap to Re-center after Zoom
Connectivity	Cellular, WiFi, Tethering, MicroUSB, HDMI	Cellular, WiFi, Tethering, MicroUSB, HDMI
Camera	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom
Storage/Memory	64 GB	64 GB
Apps Available	600,000	600,000
Size and Weight	4.5 inches, 6 oz.	4.5 inches, 6 oz.
Price (with Contract)	\$99	\$0
RFC Simulated Choice Share	43%	57%

When two identical smartphones are offered, one for free and the other for \$99, 43% of respondents choose the more expensive (\$99) smartphone

The starting level for the price affects the results but the conclusion holds that too high a percentage choose the more expensive smartphone

Price (with Contract)	\$199	\$0
RFC Simulated Choice Share	31%	69%
Price (with Contract)	\$299	\$0
RFC Simulated Choice Share	16%	84%
Price (with Contract)	\$199	\$99
RFC Simulated Choice Share	32%	68%
Price (with Contract)	\$299	\$99
RFC Simulated Choice Share	16%	84%
Price (with Contract)	\$299	\$199
RFC Simulated Choice Share	19%	81%

Notes & Sources:

Simulated choice shares were calculated following Professor Hauser's methodology using Sawtooth SMRT and his accompanying simulation files (avss_final.srt, avss_final.hbu, avss_final.ucs, avss_final.att, avss_final.dat). Except for price, the features' levels were set the same as those for the benchmark smartphone employed to create Table 4 of the Hauser Report. The price levels (\$0, \$99, \$199, and \$299) are the four price levels that appear in Professor Hauser's survey.

EXHIBIT 10

**RESPONDENT CHOICE PREDICTIONS FOR DIFFERENTLY PRICED "BENCHMARK" TABLETS
BASED ON RFC SIMULATION EMPLOYED BY PROFESSOR HAUSER**

Comparing two identical tablets with different prices

Choose level at which the other features are set - in this case at their "best"

Choose level for price - in this case "\$199"

Calculating Market Shares for Identical Tablets with Different Prices

Features	Tablet A - more expensive	Tablet B - less expensive
Touchscreen	Full Multi-Touch, Autoswitch (1 to 2 Fingers), Rubberband, Tap to Re-center after Zoom	Full Multi-Touch, Autoswitch (1 to 2 Fingers), Rubberband, Tap to Re-center after Zoom
Connectivity	WiFi, Bluetooth, MicroUSB, HDMI	WiFi, Bluetooth, MicroUSB, HDMI
Camera	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom
Storage/Memory	64 GB	64 GB
Apps Available	600,000	600,000
Size and Weight	10 inches, 2 lbs.	10 inches, 2 lbs.
Price	\$359	\$199

**RFC Simulated
Choice Share**

41%

59%

When two identical tablets are offered, one for \$199 and the other for \$359, 41% of respondents choose the more expensive (\$359) tablet

The starting level for the price affects the results but the conclusion holds that too high a percentage choose the more expensive tablet

Price	\$499	\$199
RFC Simulated Choice Share	32%	68%
Price	\$659	\$199
RFC Simulated Choice Share	15%	85%
Price	\$499	\$359
RFC Simulated Choice Share	35%	65%
Price	\$659	\$359
RFC Simulated Choice Share	15%	85%
Price	\$659	\$499
RFC Simulated Choice Share	17%	83%

Notes & Sources:

Simulated choice shares were calculated following Professor Hauser's methodology using Sawtooth SMRT and his accompanying simulation files (avss_final.srt, avss_final.hbu, avss_final.ucs, avss_final.att, avss_final.dat). Except for price, the features' levels were set the same as those for the benchmark tablet employed to create Table 4 of the Hauser Report. The price levels (\$199, \$359, \$499, and \$659) are the four price levels that appear in Professor Hauser's survey.

EXHIBIT 11

RESPONDENT CHOICE PREDICTIONS FOR IDENTICALLY PRICED "BENCHMARK" SMARTPHONES THAT DIFFER ONLY IN STORAGE/MEMORY CAPACITY

Comparing a smartphone with maximum memory (64 GB) to one with minimum memory (8 GB) all else equal

Choose level at which the other features are set - in this case at their "best"

Choose level for price - in this case "\$199"

Calculating the RFC Simulated Choice Share for an Additional 56 GB of Memory

Features	Phone A - with the feature	Phone B - without the feature
Touchscreen	Reliable Touch, Autoswitch, Rubberband, Tap to Re-center after Zoom	Reliable Touch, Autoswitch, Rubberband, Tap to Re-center after Zoom
Connectivity	Cellular, WiFi, Tethering, MicroUSB, HDMI	Cellular, WiFi, Tethering, MicroUSB, HDMI
Camera	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom
Storage/Memory	64 GB	8 GB
Apps Available	600,000	600,000
Size and Weight	4.5 inches, 6 oz.	4.5 inches, 6 oz.
Price (with Contract)	\$199	\$199
RFC Simulated Choice Share	65%	35%

When all other features (including price) are held constant, the smartphone with more storage clearly dominates the smartphone with lower storage. Still, according to the results, 35% of respondents would prefer the smartphone with lower storage.

Notes & Sources:

Simulated choice shares were calculated following Professor Hauser's methodology using Sawtooth SMRT and his accompanying simulation files (avss_final.srt, avss_final.hbu, avss_final.ucs, avss_final.att, avss_final.dat). Except for storage/memory, the features' levels were set the same as those for the benchmark smartphone employed to create Table 4 of the Hauser Report. Choice shares were then calculated.

EXHIBIT 12

RESPONDENT CHOICE PREDICTIONS FOR IDENTICALLY PRICED "BENCHMARK" TABLETS THAT DIFFER ONLY IN STORAGE/MEMORY CAPACITY

Comparing a tablet with maximum memory (64 GB) to one with minimum memory (8 GB) all else equal

Choose level at which the other features are set - in this case at their "best"

Choose level for price - in this case "\$499"

Calculating the RFC Simulated Choice Share for an Additional 56 GB of Memory

Features	Tablet A - with the feature	Tablet B - without the feature
Touchscreen	Full Multi-Touch, Autoswitch (1 to 2 Fingers), Rubberband, Tap to Re-center after Zoom	Full Multi-Touch, Autoswitch (1 to 2 Fingers), Rubberband, Tap to Re-center after Zoom
Connectivity	WiFi, Bluetooth, MicroUSB, HDMI	WiFi, Bluetooth, MicroUSB, HDMI
Camera	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom
Storage/Memory	64 GB	8 GB
Apps Available	600,000	600,000
Size and Weight	10 inches, 2 lbs.	10 inches, 2 lbs.
Price	\$499	\$499

**RFC Simulated
Choice Share**

69%

31%

When all other features (including price) are held constant, the tablet with more storage clearly dominates the tablet with lower storage. Still, according to the results, 31% of respondents would prefer the tablet with lower storage.

Notes & Sources:

Simulated choice shares were calculated following Professor Hauser's methodology using Sawtooth SMRT and his accompanying simulation files (avss_final.srt, avss_final.hbu, avss_final.ucs, avss_final.att, avss_final.dat). Except for storage/memory, the features' levels were set the same as those for the benchmark tablet employed to create Table 4 of the Hauser Report. Choice shares were then calculated.

EXHIBIT 13

RESPONDENT CHOICE PREDICTIONS FOR IDENTICALLY PRICED "BENCHMARK" SMARTPHONES THAT DIFFER ONLY IN CONNECTIVITY OPTIONS

Comparing a smartphone with maximum connectivity options to one with minimum connectivity options all else equal

Choose level at which the other features are set - in this case at their "best"

Choose level for price - in this case "\$199"

Calculating the RFC Simulated Choice Share for Tethering, MicroUSB and HDMI

Features	Phone A - with the features	Phone B - without the features
Touchscreen	Reliable Touch, Autoswitch, Rubberband, Tap to Re-center after Zoom	Reliable Touch, Autoswitch, Rubberband, Tap to Re-center after Zoom
Connectivity	Cellular, WiFi, Tethering, MicroUSB, HDMI	Cellular, WiFi
Camera	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom
Storage/Memory	64 GB	64 GB
Apps Available	600,000	600,000
Size and Weight	4.5 inches, 6 oz.	4.5 inches, 6 oz.
Price (with Contract)	\$199	\$199
RFC Simulated Choice Share	75%	25%

When all other features (including price) are held constant, the smartphone with more connectivity options clearly dominates the phone with less connectivity options. Still, according to the results, 25% of respondents would prefer the smartphone with less connectivity options.

Notes & Sources:

Simulated choice shares were calculated following Professor Hauser's methodology using Sawtooth SMRT and his accompanying simulation files (avss_final.srt, avss_final.hbu, avss_final.ucs, avss_final.att, avss_final.dat). Except for connectivity, the features' levels were set the same as those for the benchmark smartphone employed to create Table 4 of the Hauser Report. Choice shares were then calculated.

EXHIBIT 14

**RESPONDENT CHOICE PREDICTIONS FOR IDENTICALLY PRICED "BENCHMARK" TABLETS
THAT DIFFER ONLY IN CONNECTIVITY OPTIONS**

Comparing a tablet with maximum connectivity options to one with minimum connectivity options all else equal

Choose level at which the other features are set - in this case at their "best"

Choose level for price - in this case "\$199"

Calculating the RFC Simulated Choice Share for Bluetooth, MicroUSB, HDMI

Features	Tablet A - with the features	Tablet B - without the features
Touchscreen	Full Multi-Touch, Autoswitch (1 to 2 Fingers), Rubberband, Tap to Re-center after Zoom	Full Multi-Touch, Autoswitch (1 to 2 Fingers), Rubberband, Tap to Re-center after Zoom
Connectivity	WiFi, Bluetooth, MicroUSB, HDMI	WiFi
Camera	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom
Storage/Memory	64 GB	64 GB
Apps Available	600,000	600,000
Size and Weight	10 inches, 2 lbs.	10 inches, 2 lbs.
Price	\$199	\$199

**RFC Simulated
Choice Share**

76%

24%

When all other features (including price) are held constant, the tablet with more connectivity options clearly dominates the tablet with less connectivity options. Still, according to the results, 24% of respondents would prefer the tablet with less connectivity options.

Notes & Sources:

Simulated choice shares were calculated following Professor Hauser's methodology using Sawtooth SMRT and his accompanying simulation files (avss_final.srt, avss_final.hbu, avss_final.ucs, avss_final.att, avss_final.dat). Except for connectivity, the features' levels were set the same as those for the benchmark tablet employed to create Table 4 of the Hauser Report. Choice shares were then calculated.

EXHIBIT 15

**RESPONDENT CHOICE PREDICTIONS FOR IDENTICALLY PRICED "BENCHMARK" SMARTPHONES
THAT DIFFER ONLY IN THE NUMBER OF APPS AVAILABLE**

Comparing a smartphone with 150,000 apps to one with 600,000 apps all else equal

Choose level at which the other features are set - in this case at their "best"

Choose level for price - in this case "\$199"

Calculating the RFC Simulated Choice Share for an Additional 450,000 Apps

Features	Phone A - with the feature	Phone B - without the feature
Touchscreen	Reliable Touch, Autoswitch, Rubberband, Tap to Re-center after Zoom	Reliable Touch, Autoswitch, Rubberband, Tap to Re-center after Zoom
Connectivity	Cellular, WiFi, Tethering, MicroUSB, HDMI	Cellular, WiFi, Tethering, MicroUSB, HDMI
Camera	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom
Storage/Memory	64 GB	64 GB
Apps Available	600,000	150,000
Size and Weight	4.5 inches, 6 oz.	4.5 inches, 6 oz.
Price (with Contract)	\$199	\$199
RFC Simulated Choice Share	57%	43%

When all other features (including price) are held constant, the smartphone with more apps clearly dominates the smartphone with less apps. Still, according to the results, 43% of respondents would prefer the smartphone with less apps.

Notes & Sources:

Simulated choice shares were calculated following Professor Hauser's methodology using Sawtooth SMRT and his accompanying simulation files (avss_final.srt, avss_final.hbu, avss_final.ucs, avss_final.att, avss_final.dat). Except for number of apps available, the features' levels were set the same as those for the benchmark smartphone employed to create Table 4 of the Hauser Report. Choice shares were then calculated.

EXHIBIT 16

RESPONDENT CHOICE PREDICTIONS FOR IDENTICALLY PRICED "BENCHMARK" TABLETS THAT DIFFER ONLY IN NUMBER OF APPS AVAILABLE

Comparing a tablet with maximum number of apps (650,000) to one with the minimum number of apps (150,000) all else equal

Choose level at which the other features are set - in this case at their "best"

Choose level for price - in this case "\$199"

Calculating the RFC Simulated Choice Share for an Additional 450,000 apps

Features	Tablet A - with the feature	Tablet B - without the feature
Touchscreen	Full Multi-Touch, Autoswitch (1 to 2 Fingers), Rubberband, Tap to Re-center after Zoom	Full Multi-Touch, Autoswitch (1 to 2 Fingers), Rubberband, Tap to Re-center after Zoom
Connectivity	WiFi, Bluetooth, MicroUSB, HDMI	WiFi, Bluetooth, MicroUSB, HDMI
Camera	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom
Storage/Memory	64 GB	64 GB
Apps Available	600,000	150,000
Size and Weight	10 inches, 2 lbs.	10 inches, 2 lbs.
Price	\$199	\$199

**RFC Simulated
Choice Share**

56%

44%

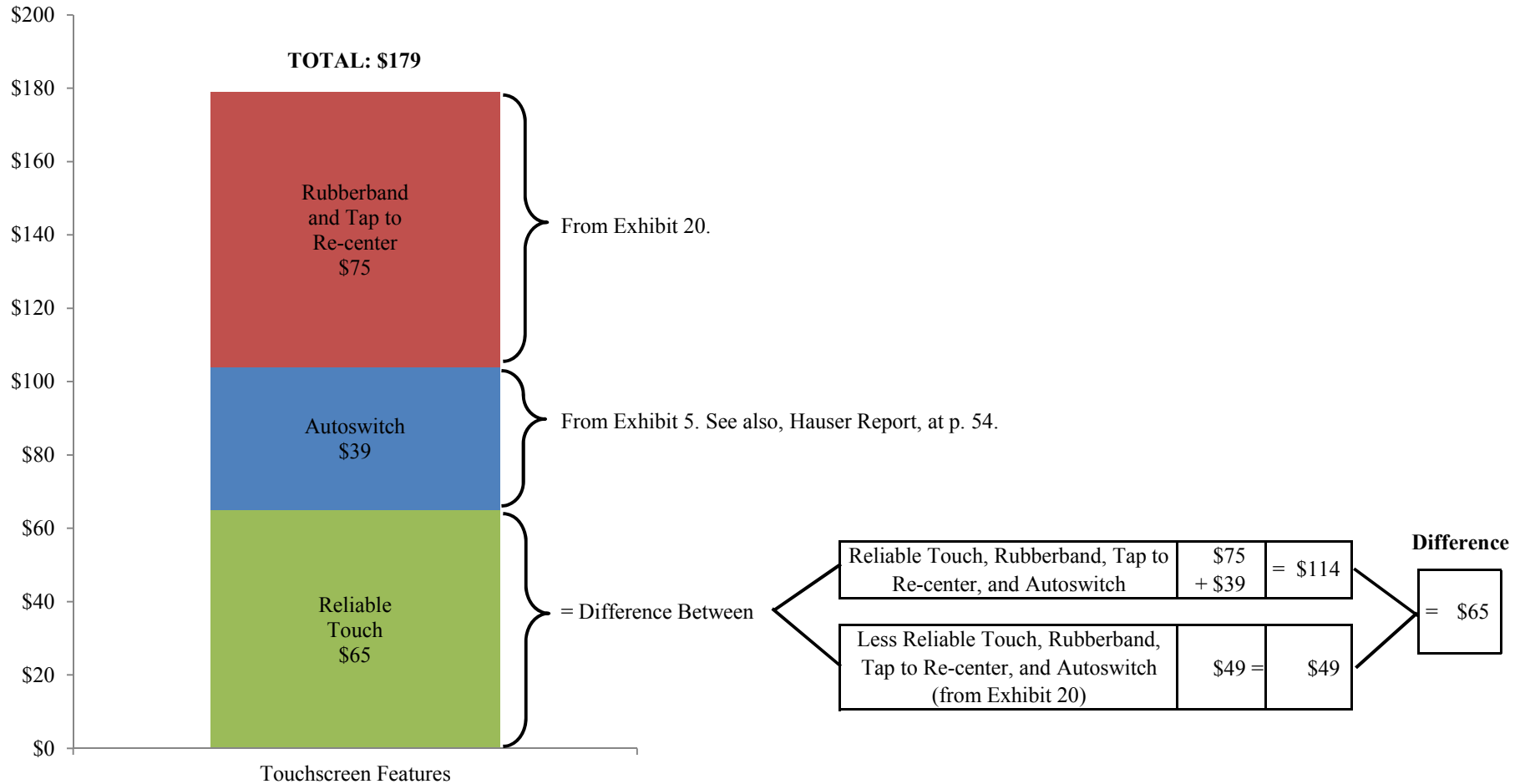
When all other features (including price) are held constant, the tablet with more apps clearly dominates the tablet with less apps. Still, according to the results, 44% of respondents would prefer the tablet with less apps.

Notes & Sources:

Simulated choice shares were calculated following Professor Hauser's methodology using Sawtooth SMRT and his accompanying simulation files (avss_final.srt, avss_final.hbu, avss_final.ucs, avss_final.att, avss_final.dat). Except for number of apps available, the features' levels were set the same as those for the benchmark tablet employed to create Table 4 of the Hauser Report. Choice shares were then calculated.

EXHIBIT 17

**TOTAL WILLINGNESS-TO-PAY ESTIMATES FOR INDIVIDUAL TOUCHSCREEN FEATURES
BASED ON PROFESSOR HAUSER'S RFC SIMULATIONS**



Notes:

Calculation based on premise that willingness-to-pay estimates are additive due to the additive nature of the underlying utility function. See Hauser Report, pp. 21-22, 36.

EXHIBIT 18

**SMARTPHONE CALCULATION OF ESTIMATED WILLINGNESS-TO-PAY PRICE PREMIUM
FOR THE AUTOSWITCH FEATURE ('915 PATENT)
BASED ON RFC SIMULATION EMPLOYED BY PROFESSOR HAUSER
WHEN BASELINE PRICE IS \$0**

Step 1 Compare a smartphone with the feature to one without the feature (all else equal)

Choose level at which the other features are set - in this case at their "best"
Choose level for price - in this case "\$0"

Calculating the WTP for Autoswitch

Features	Phone A - with the feature	Phone B - without the feature
Touchscreen	Reliable Touch, Autoswitch , Rubberband, Tap to Re-center after Zoom	Reliable Touch, Rubberband, Tap to Re-center after Zoom
Connectivity	Cellular, WiFi, Tethering, MicroUSB, HDMI	Cellular, WiFi, Tethering, MicroUSB, HDMI
Camera	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom
Storage/Memory	64 GB	64 GB
Apps Available	600,000	600,000
Size and Weight	4.5 inches, 6 oz.	4.5 inches, 6 oz.
Price (with Contract)	\$0	\$0
RFC Simulated Choice Share	67%	33%

Step 2 Modify the price and reestimate market share iteratively until market shares are equal for both products

Price (with Contract)	\$99	\$0
RFC Simulated Choice Share	61%	39%
⋮	⋮	⋮
Price (with Contract)	\$164	\$0
RFC Simulated Choice Share	50%	50%

Step 3 The difference between the two prices is the implied WTP for the feature (in this case Autoswitch):

\$164

Notes & Sources:

Simulated choice shares were calculated following Professor Hauser's methodology using Sawtooth SMRT and his accompanying simulation files (avss_final.srt, avss_final.hbu, avss_final.ucs, avss_final.att, avss_final.dat). Employed procedure identical to that used to derive figures in Table 4 of Hauser Report but started with a baseline price of \$0 (with a two-year contract).

EXHIBIT 19

SMARTPHONE CALCULATION OF ESTIMATED WILLINGNESS-TO-PAY PRICE PREMIUM FOR THE AUTOSWITCH, RUBBERBAND, AND TAP TO RE-CENTER FEATURES ('915, '381 AND '163 PATENTS) BASED ON RFC SIMULATION EMPLOYED BY PROFESSOR HAUSER WHEN BASELINE PRICE IS \$0

Step 1 Compare a smartphone with the feature to one without the feature (all else equal)
 Choose level at which the other features are set - in this case at their "best"
 Choose level for price - in this case "\$0"

Calculating the WTP for Autoswitch, Rubberband, and Tap to Re-center after Zoom

Features	Phone A - with the features	Phone B - without the features
Touchscreen	Reliable Touch, Autoswitch, Rubberband, Tap to Re-center after Zoom	Reliable Touch
Connectivity	Cellular, WiFi, Tethering, MicroUSB, HDMI	Cellular, WiFi, Tethering, MicroUSB, HDMI
Camera	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom
Storage/Memory	64 GB	64 GB
Apps Available	600,000	600,000
Size and Weight	4.5 inches, 6 oz.	4.5 inches, 6 oz.
Price (with Contract)	\$0	\$0

RFC Simulated Choice Share	84%	16%
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Step 2 Modify the price and reestimate market share iteratively until market shares are equal for both products

Price (with Contract)	\$99	\$0
RFC Simulated Choice Share	78%	22%
⋮	⋮	⋮
Price (with Contract)	\$266	\$0
RFC Simulated Choice Share	50%	50%

Step 3 The difference between the two prices is the implied WTP for the features (in this case Autoswitch, Rubberband, and Tap to Re-center after Zoom):

\$266

Notes & Sources:

Simulated choice shares were calculated following Professor Hauser's methodology using Sawtooth SMRT and his accompanying simulation files (avss_final.srt, avss_final.hbu, avss_final.ucs, avss_final.att, avss_final.dat). Employed procedure identical to that used to derive figures in Table 4 of Hauser Report but started with a baseline price of \$0 (with a two-year contract).

EXHIBIT 20

**SMARTPHONE CALCULATION OF ESTIMATED WILLINGNESS-TO-PAY PRICE PREMIUM
FOR FEATURES NOT REPORTED BY PROFESSOR HAUSER
BASED ON RFC SIMULATION EMPLOYED BY PROFESSOR HAUSER**

Level	Touchscreen	Connectivity	Camera
1	Reliable Touch -	Cellular, WiFi -	3 MP Rear Camera, Standard Video Recording, Autofocus -
2	Reliable Touch, Rubberband, Tap to Re-center after Zoom \$75	Cellular, WiFi, Tethering \$33	8 MP Rear Camera, HD Video Recording, Autofocus \$79
3	Less Reliable Touch, Autoswitch, Rubberband, Tap to Re-center after Zoom \$49	Cellular, WiFi, Tethering, MicroUSB \$61	8 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera >\$100
4	Reliable Touch, Autoswitch, Rubberband, Tap to Re-center after Zoom >\$100	Cellular, WiFi, Tethering, MicroUSB, HDMI \$68	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom >\$100

Level	Storage/Memory	Number of Apps Available	Size and Weight
1	8 GB -	150,000 -	3.5 inches, 4 oz. -
2	16 GB \$19	300,000 \$11	4 inches, 5 oz. \$28
3	32 GB \$27	450,000 \$12	4.3 inches, 5.3 oz. \$26
4	64 GB \$31	600,000 \$13	4.5 inches, 6 oz. \$31

Notes & Sources:

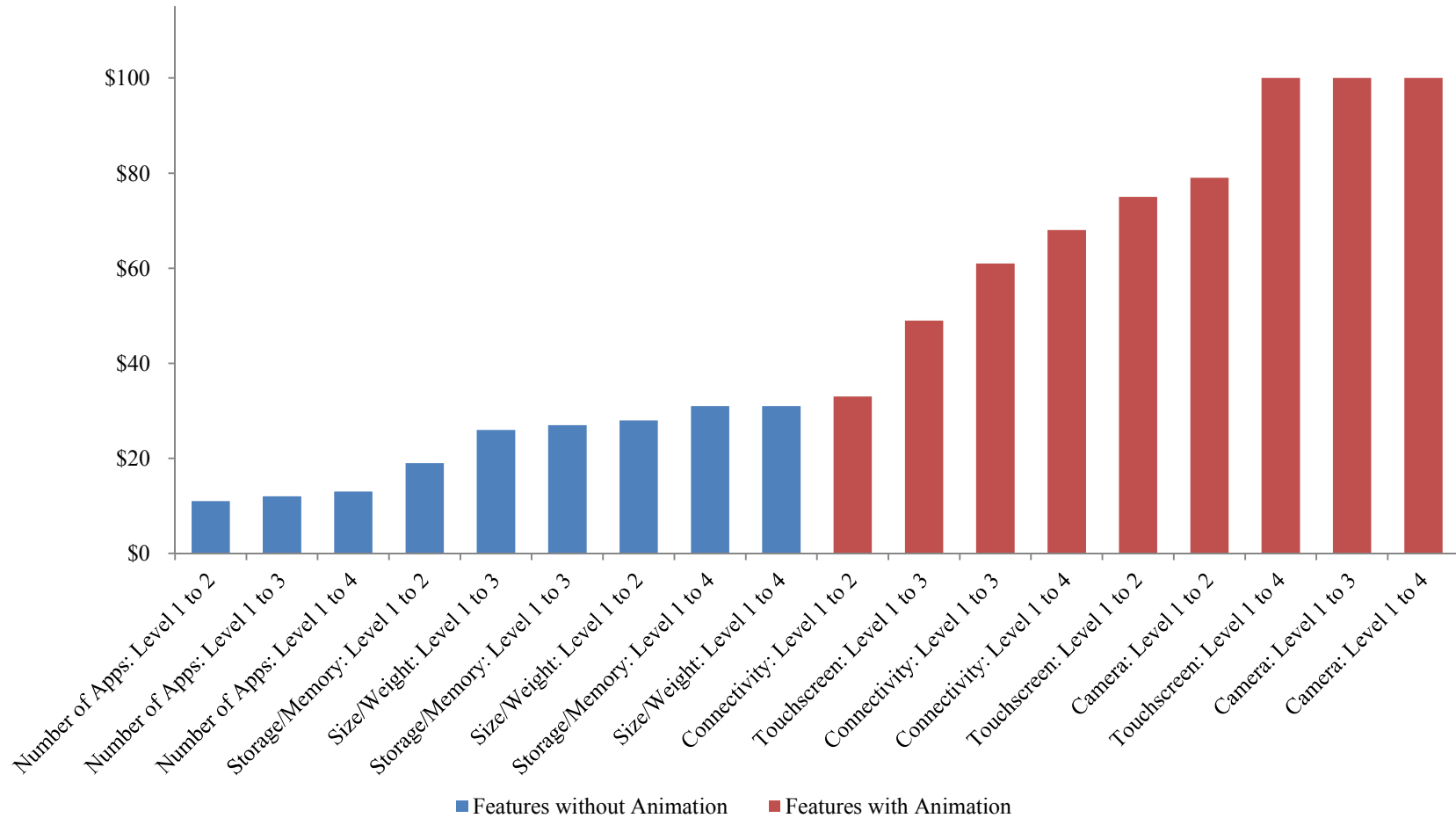
As in Professor Hauser's analysis, WTP is derived by calculating the price for which simulated market shares are 50%-50% between two products for which the attribute of interest differs while all other attributes are kept constant at their "best" levels. For size and weight, the largest size is assumed to be "best." In this exhibit, WTP is calculated for each given attribute relative to the lowest level of that attribute (for a smartphone in which the other attributes are at the "best" levels). Blue color coding represents features that are added or improved compared to the reference level. Orange color coding represents features that are less attractive compared to the reference level.

The price for which the shares are equal (WTP) is obtained through a manual grid search, as in Professor Hauser's report, by starting with both products having prices set at \$199 and increasing the price of the "better" alternative until the simulated shares are the same for both products. Because the maximum price considered in the survey is \$299, the WTP is capped at \$100.

Highlighted features are those in which animated descriptions were used. Level orders may not be equal to the system used in Professor Hauser's survey.

EXHIBIT 21

**CALCULATION OF ESTIMATED WILLINGNESS-TO-PAY PRICE PREMIUM FOR SMARTPHONE FEATURES
 BASED ON RFC SIMULATION EMPLOYED BY PROFESSOR HAUSER
 COMPARING FEATURES WITH AND WITHOUT ANIMATED DESCRIPTIONS
 (ALL FEATURES AND ALL LEVELS)**

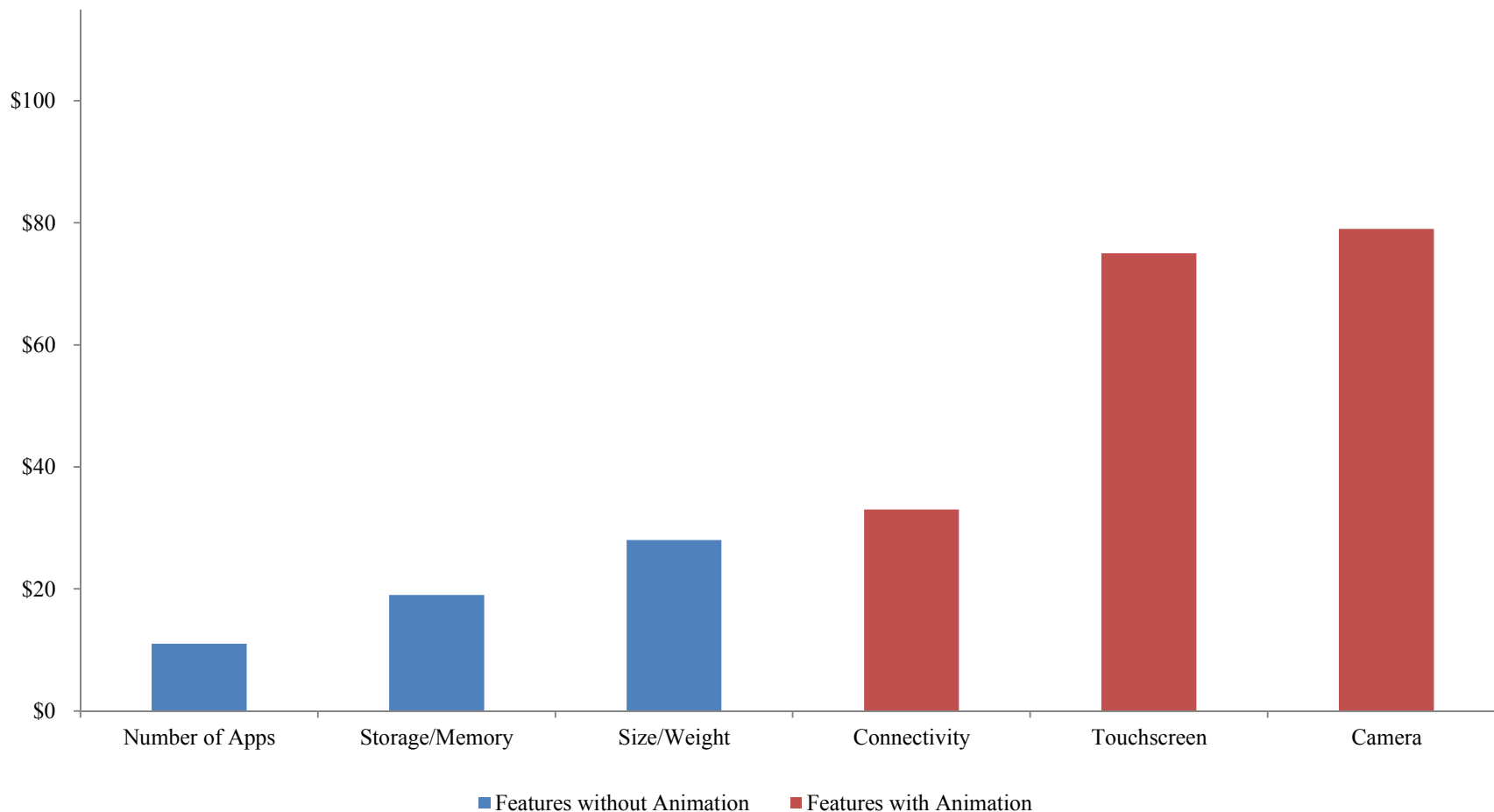


Notes & Sources:

WTP is capped at \$100. See Exhibit 20. Features displayed in red are those in which animated descriptions were used.

EXHIBIT 22

**CALCULATION OF ESTIMATED WILLINGNESS-TO-PAY PRICE PREMIUM FOR SMARTPHONE FEATURES
BASED ON RFC SIMULATION EMPLOYED BY PROFESSOR HAUSER
COMPARING FEATURES WITH AND WITHOUT ANIMATED DESCRIPTIONS
(ALL FEATURES FOR LEVEL 1 TO 2)**

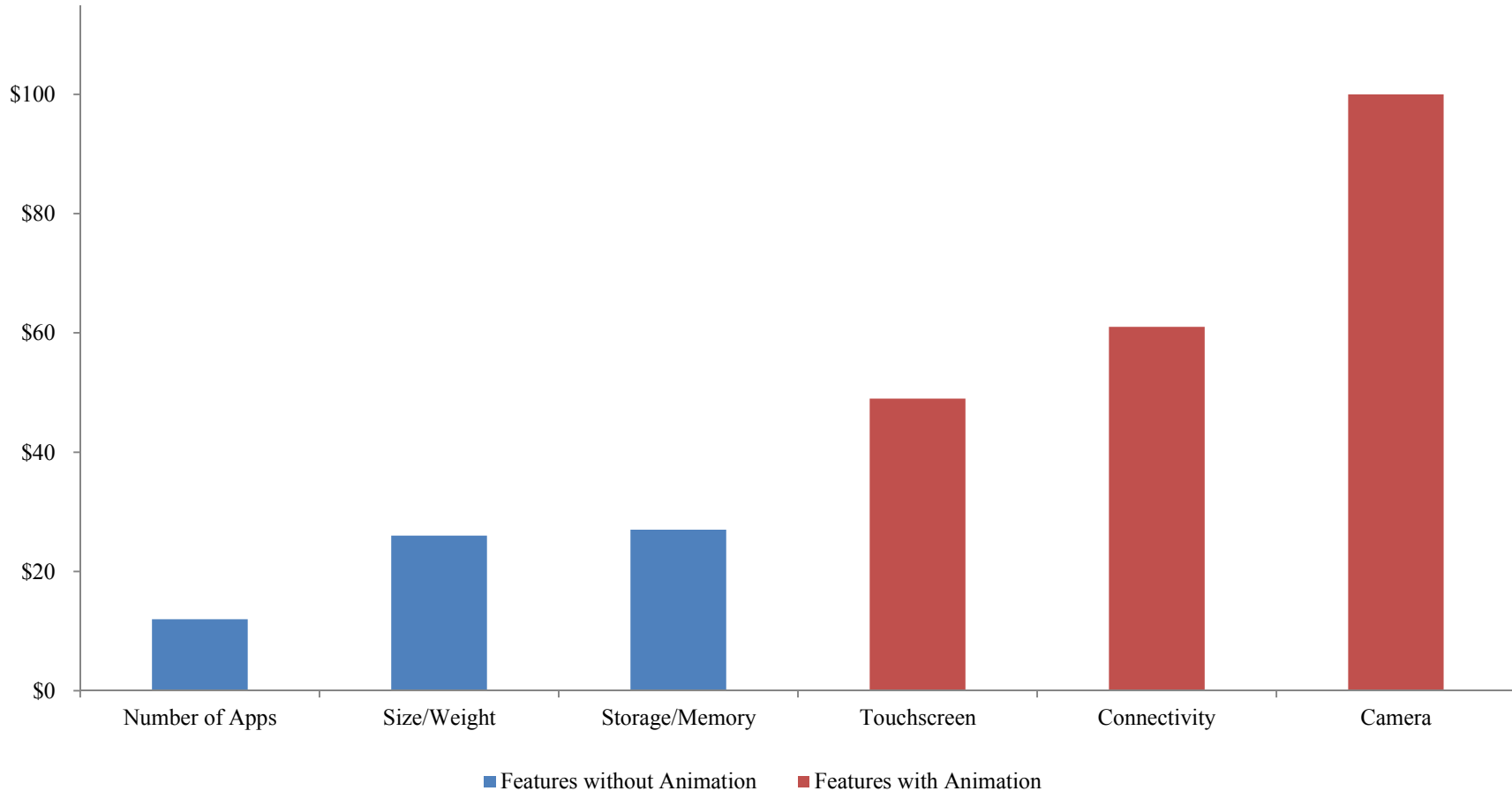


Notes & Sources:

From Exhibit 20. Features displayed in red are those in which animated descriptions were used.

EXHIBIT 23

**CALCULATION OF ESTIMATED WILLINGNESS-TO-PAY PRICE PREMIUM FOR SMARTPHONE FEATURES
BASED ON RFC SIMULATION EMPLOYED BY PROFESSOR HAUSER
COMPARING FEATURES WITH AND WITHOUT ANIMATED DESCRIPTIONS
(ALL FEATURES FOR LEVEL 1 TO 3)**

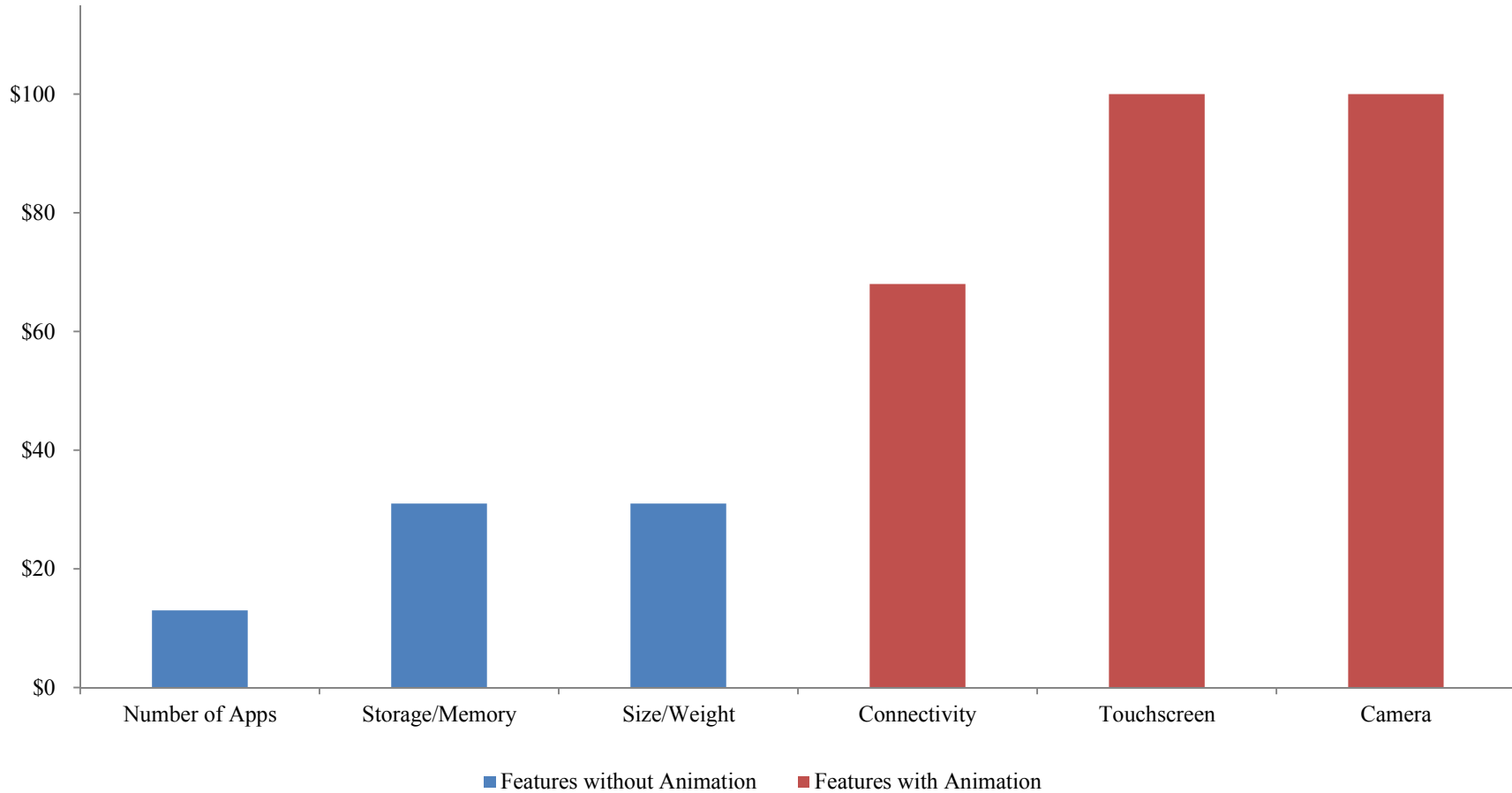


Notes & Sources:

WTP is capped at \$100. See Exhibit 20. Features displayed in red are those in which animated descriptions were used.

EXHIBIT 24

**CALCULATION OF ESTIMATED WILLINGNESS-TO-PAY PRICE PREMIUM FOR SMARTPHONE FEATURES
BASED ON RFC SIMULATION EMPLOYED BY PROFESSOR HAUSER
COMPARING FEATURES WITH AND WITHOUT ANIMATED DESCRIPTIONS
(ALL FEATURES FOR LEVEL 1 TO 4)**



Notes & Sources:

WTP is capped at \$100. See Exhibit 20. Features displayed in red are those in which animated descriptions were used.

EXHIBIT 25

**TABLET CALCULATION OF ESTIMATED WILLINGNESS-TO-PAY PRICE PREMIUM
FOR FEATURES NOT REPORTED BY PROFESSOR HAUSER
BASED ON RFC SIMULATION EMPLOYED BY PROFESSOR HAUSER**

Level	Touchscreen	Connectivity	Camera
1	Full Multi-Touch -	WiFi -	3 MP Rear Camera, Standard Video Recording, Autofocus -
2	Full Multi-Touch, Rubberband, Tap to Recenter after Zoom \$46	WiFi, Bluetooth \$37	8 MP Rear Camera, HD Video Recording, Autofocus \$59
3	Very Limited Multi-Touch, Autoswitch (1 to 2 Fingers), Rubberband, Tap to Re-center after Zoom \$32	WiFi, Bluetooth, MicroUSB \$80	8 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera \$98
4	Full Multi-Touch, Autoswitch (1 to 2 Fingers), Rubberband, Tap to Re-center after Zoom \$90	WiFi, Bluetooth, MicroUSB, HDMI \$94	12 MP Rear Camera, HD Video Recording, Autofocus, 2 MP Front Camera, Zoom \$122

Level	Storage/Memory	Number of Apps Available	Size and Weight
1	8 GB -	150,000 -	7 inches, 1 lb. -
2	16 GB \$32	300,000 \$10	8.5 inches, 1.5 lbs. \$21
3	32 GB \$51	450,000 \$13	9 inches, 1.75 lbs. \$35
4	64 GB \$56	600,000 \$16	10 inches, 2 lbs. \$46

Notes & Sources:

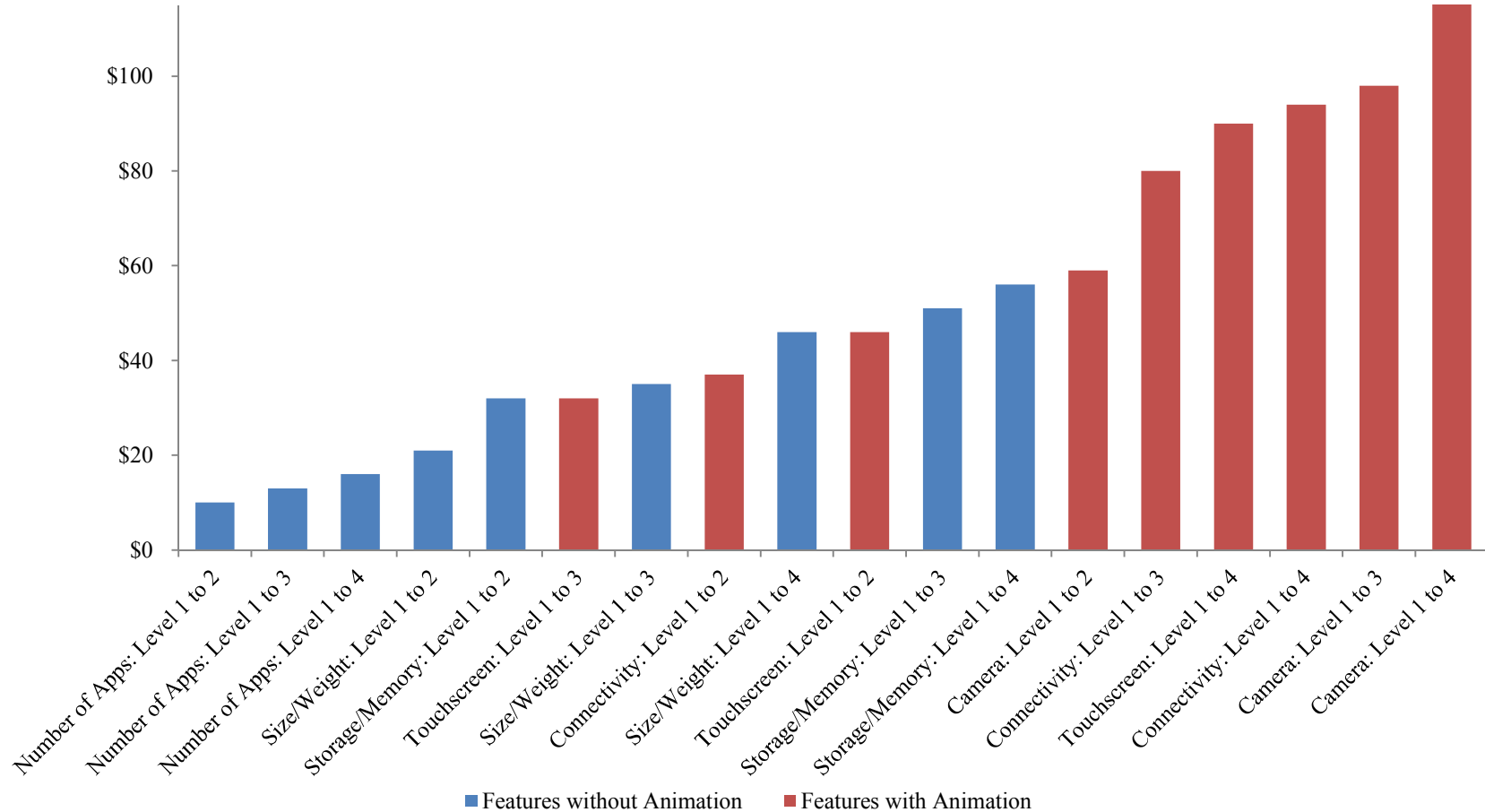
As in Professor Hauser's analysis, WTP is derived by calculating the price for which simulated market shares are 50%-50% between two products for which the feature of interest differs while all other features are kept constant at their "best" levels. For size and weight, the largest size is assumed to be "best." In this exhibit, WTP is calculated for each given feature relative to the lowest level of that feature (for a tablet in which the other features are at the "best" levels). Blue color coding represents features that are added or improved compared to the reference level. Orange color coding represents features that are less attractive compared to the reference level.

The price for which the shares are equal (WTP) is obtained through a manual grid search, as in Professor Hauser's report, by starting with both products having prices set at \$499 and increasing the price of the "better" alternative until the simulated shares are the same for both products. Because the maximum price considered in the survey is \$659, the WTP is capped at \$160.

Highlighted features are those in which animated descriptions were used. Level orders may not be equal to the system used in Professor Hauser's survey.

EXHIBIT 26

**CALCULATION OF ESTIMATED WILLINGNESS-TO-PAY PRICE PREMIUM FOR TABLET FEATURES
 BASED ON RFC SIMULATION EMPLOYED BY PROFESSOR HAUSER
 COMPARING FEATURES WITH AND WITHOUT ANIMATED DESCRIPTIONS
 (ALL FEATURES AND ALL LEVELS)**

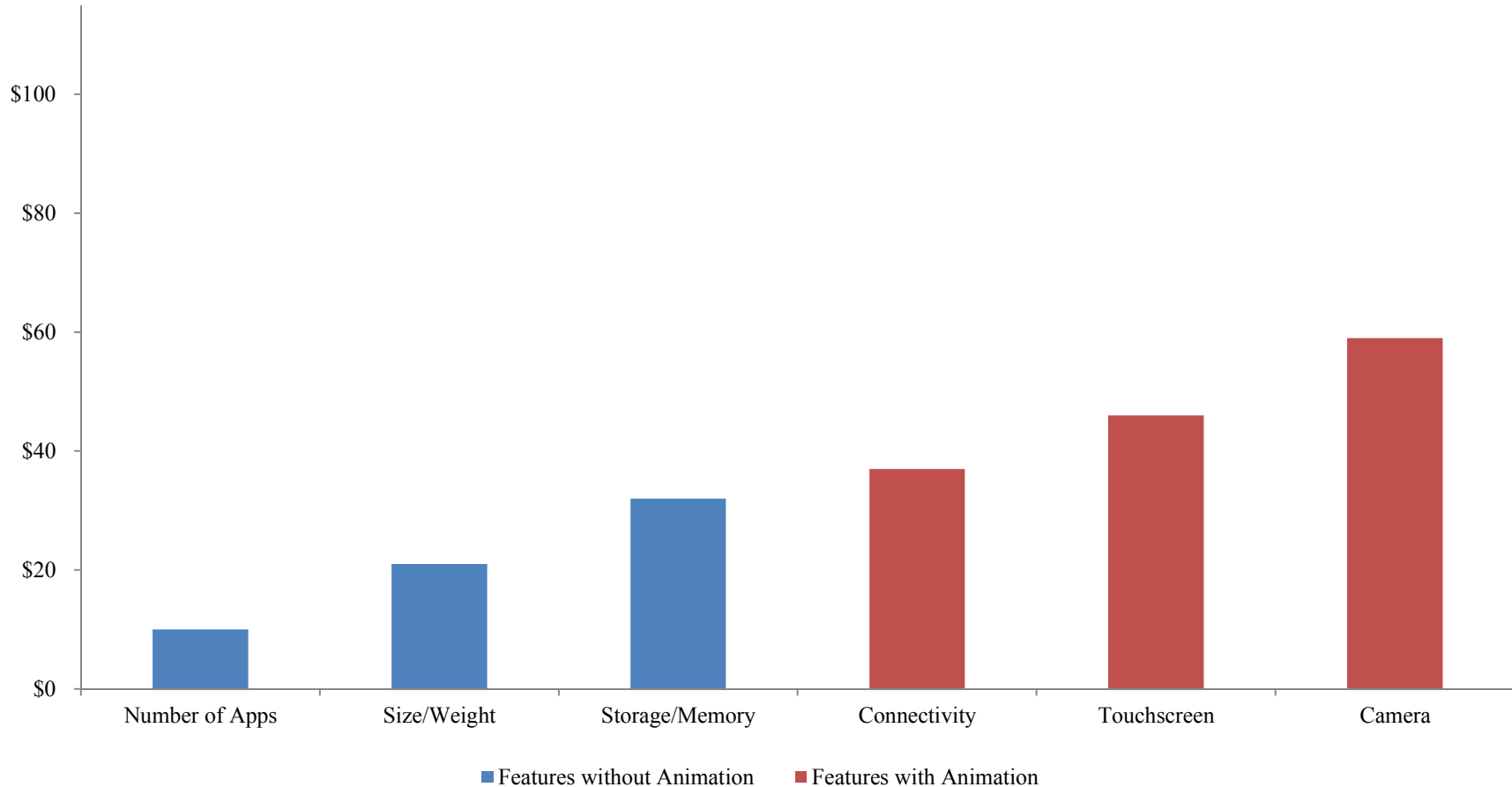


Notes & Sources:

From Exhibit 25. Features displayed in red are those in which animated descriptions were used.

EXHIBIT 27

**CALCULATION OF ESTIMATED WILLINGNESS-TO-PAY PRICE PREMIUM FOR TABLET FEATURES
BASED ON RFC SIMULATION EMPLOYED BY PROFESSOR HAUSER
COMPARING FEATURES WITH AND WITHOUT ANIMATED DESCRIPTIONS
(ALL FEATURES FOR LEVEL 1 TO 2)**

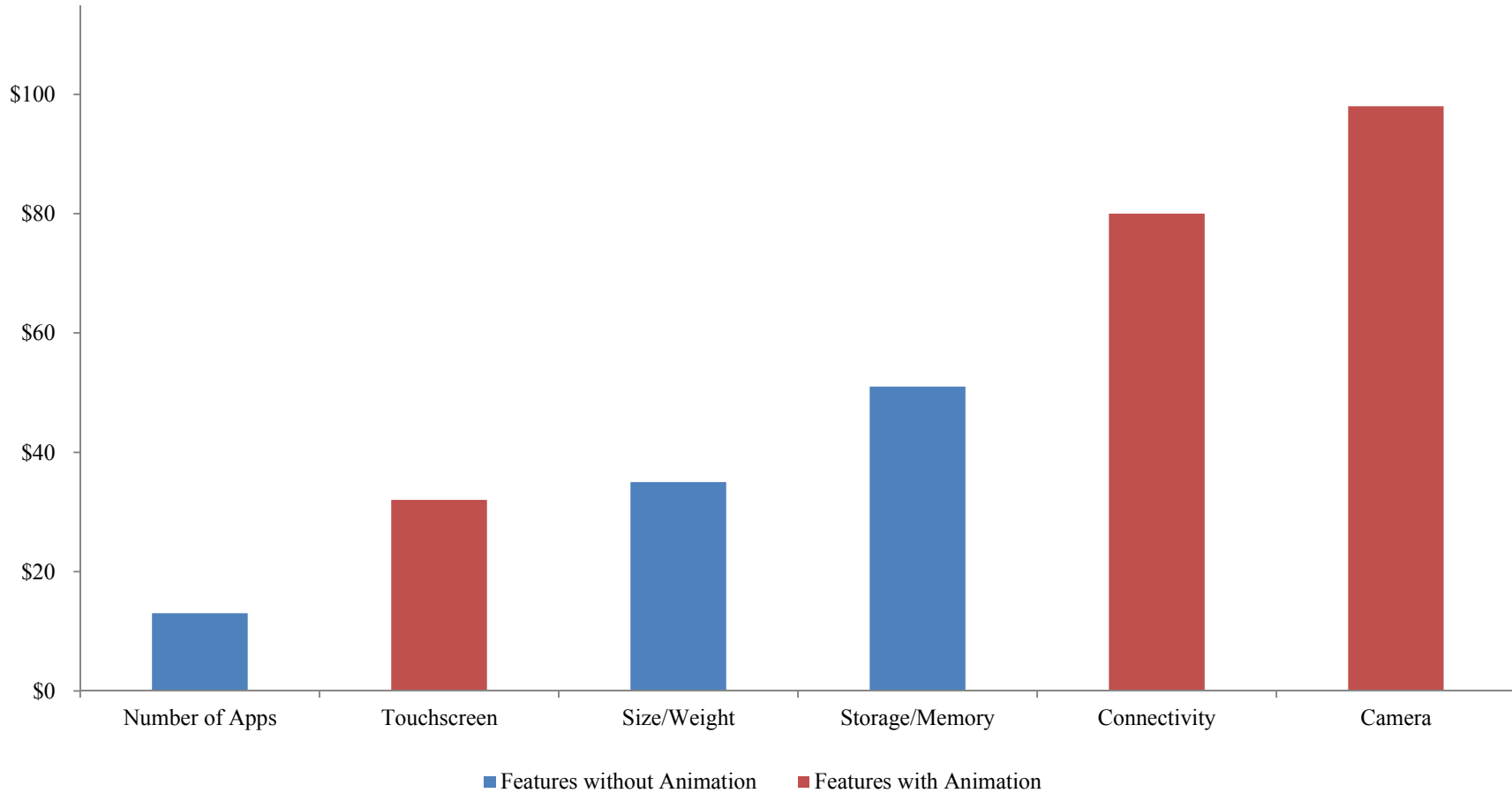


Notes & Sources:

From Exhibit 25. Features displayed in red are those in which animated descriptions were used.

EXHIBIT 28

**CALCULATION OF ESTIMATED WILLINGNESS-TO-PAY PRICE PREMIUM FOR TABLET FEATURES
BASED ON RFC SIMULATION EMPLOYED BY PROFESSOR HAUSER
COMPARING FEATURES WITH AND WITHOUT ANIMATED DESCRIPTIONS
(ALL FEATURES FOR LEVEL 1 TO 3)**

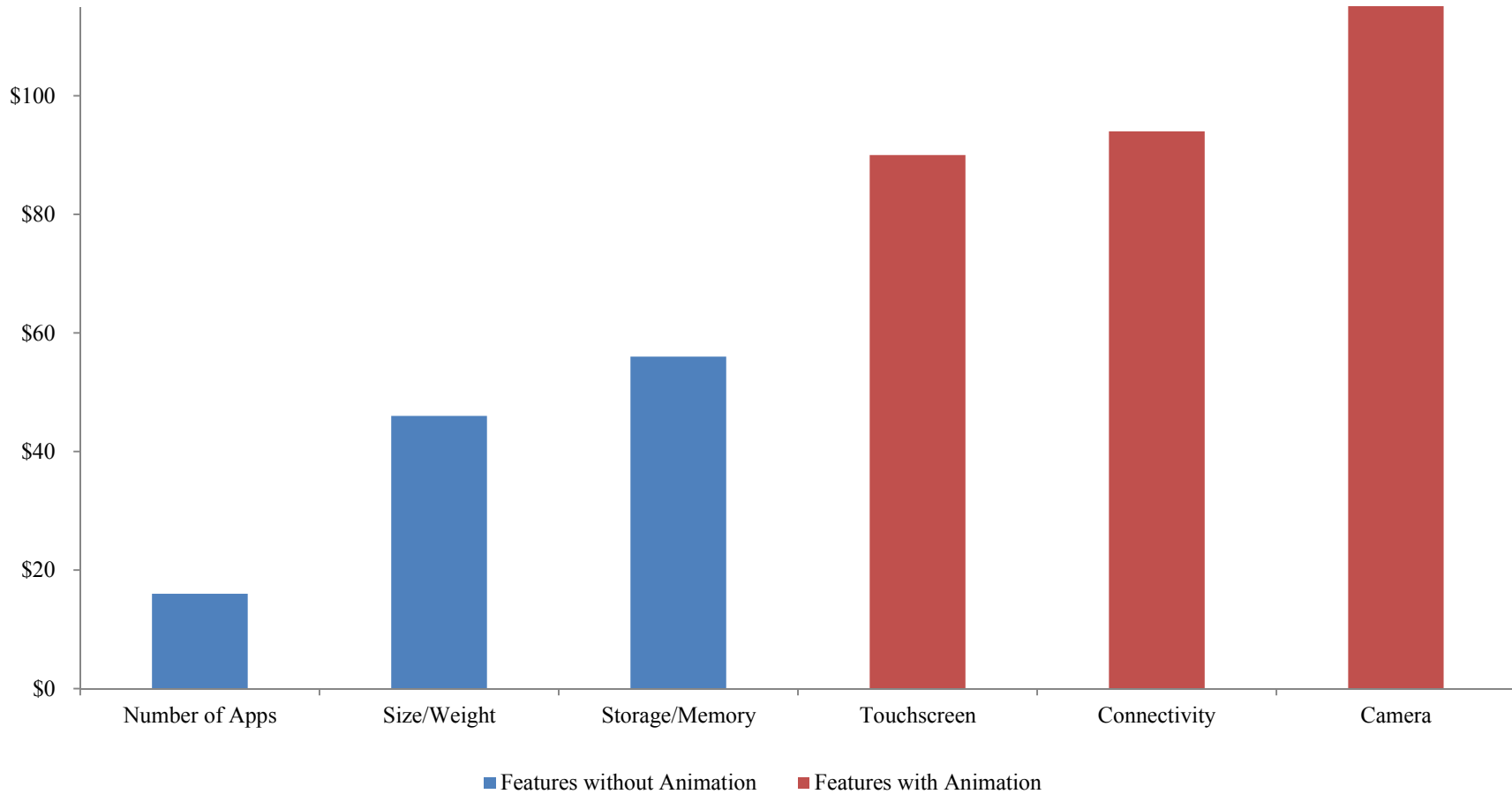


Notes & Sources:

From Exhibit 25. Features displayed in red are those in which animated descriptions were used.

EXHIBIT 29

**CALCULATION OF ESTIMATED WILLINGNESS-TO-PAY PRICE PREMIUM FOR TABLET FEATURES
BASED ON RFC SIMULATION EMPLOYED BY PROFESSOR HAUSER
COMPARING FEATURES WITH AND WITHOUT ANIMATED DESCRIPTIONS
(ALL FEATURES FOR LEVEL 1 TO 4)**



Notes & Sources:

From Exhibit 25. Features displayed in red are those in which animated descriptions were used.