

# Russell Walker, Ph.D.

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## CURRICULUM VITAE

### UNIVERSITY APPOINTMENT

<b>Clinical Associate Professor of Managerial Economics and Decision Sciences</b>	9/10 – Present
<b>Associate Director of the Zell Center for Risk Research</b>	9/10 – 11/13
<b>Assistant Director of the Zell Center for Risk Research &amp; Senior Lecturer</b>	6/07 – 9/10
<b>Kellogg School of Management, Northwestern University</b>	Evanston, IL
<ul style="list-style-type: none"><li>• <i>Author of Business Books in Risk, Big Data, and Analytics</i><ul style="list-style-type: none"><li>– <i>Winning with Risk Management</i>, World Scientific Publishing (2013).</li><li>– <i>Operational Risk in the Insurance Industry</i>, Lead Chapter in <i>Risk Management in Financial Institutions</i> Euromoney Publications (2013).</li><li>– <i>Success with Big Data: From Data and Analytics to Profits</i> (Oxford University Press, expected 2015).</li><li>– <i>Editor and Contributing Author of Book Series on “Opportunities in Big Data and Analytics.” Series Topics and Titles include: Advances and Opportunities in Health Care: The Importance of Cognitive Analytics, The Analytics of the Personalization of Media and Social Networks, Big Data Enabled by New Digital Platforms, Leading Analytical Teams, Latest Advances in Analytics</i> (World Scientific, Series begins Summer 2014)</li></ul></li><li>• <i>Experiential Learning Leadership in MBA Program</i> – Developed and direct the popular Analytical Consulting Lab, Digital Lab, and the Risk Lab courses. Taught Global Lab and Global Initiatives in Management. Individually sourced over 180 team projects with 90+ firms in the past 7 years. These experiential courses are in high demand among Kellogg MBA students, with classes being regularly highly oversubscribed.</li><li>• <i>Corporate and Executive Education</i> – Developed and lead new executive education programs in Global Leadership, Risk Management for Executives, Enterprise Risk Management, and Managing Regulation, Reputation, and Risk. Programs have been profitable and have attracted international attendees. Served as Academic Director and Relationship Manager for programs with the American Dental Association, the American Society of Transplant Surgeons, Professional Risk Managers’ International Association (PRMIA), Indian School of Business, and Sasin Graduate Institute of Business Administration. Developed and led executive education on Analytical Marketing and Big Data Strategies for Microsoft.</li><li>• <i>Business Case Development</i> – Authored 50+ business cases for Kellogg MBA and executive education classes.</li><li>• <i>Sponsored Research Leadership</i> – Led and cultivated multiple, sponsored-research efforts with leading firms. Projects have generated income to the university and produced employment opportunities for multiple students.</li><li>• <i>International Teaching and Executive Training</i> – Lead and develop successful executive education programs in India, Thailand, Austria, and Spain. Led and developed executive programs examining business opportunities in Turkey, United Arab Emirates, Qatar, Brazil, Argentina, Chile, Mexico, and Colombia.</li><li>• <i>Zell Center for Risk Research</i> – Developed executive-level curriculum in Enterprise Risk Management and Operational Risk Management. Managed Kellogg executive education partnership with PRMIA on Risk Management education for board members and senior executives. Served as external liaison to corporations, alumni, and executive education partners. Oversaw scholarship initiatives in risk and case competitions for MBA students. Led and founded the Zell Center Risk Summit Conference Series.</li><li>• <i>Faculty Advisor to the Hispanic Management Association</i> – Invited faculty advisor by the Kellogg Hispanic Management Association to advance causes of the organization including: 1) Increasing the number of Hispanic MBAs at Kellogg 2) Providing a support network for current Hispanic MBA students 3) Develop a Hispanic Leaders Speaker Series and 4) Leading an annual conference on the US Hispanic Consumer.</li></ul>	

### UNIVERSITY EDUCATION

<b>Executive MBA</b>	2004 – 2006
<b>Kellogg School of Management, Northwestern University</b>	Evanston, IL
<b>Ph.D. (1999) and M.S. (1997) in Engineering Systems</b>	1995 – 1999
<b>Cornell University</b>	Ithaca, NY
Academic and Research Strengths: Risk Analysis, Operations Research, Decision Analysis, & Applied Statistics	
National Science Foundation Minority (Hispanic) Graduate Fellow (1 of 1,000 issued nationally)	
Designed novel statistical methods to improve flood risk analysis, including catastrophic risk analysis.	
Developed an operational risk assessment for the New York City water supply, with recommendations for risk mitigation.	
Ph.D. and MS coursework, research, and writing completed in less than four years.	

**B.S. in Civil Engineering Systems**  
**University of South Florida**  
 University-Wide Honors Student, **Summa cum Laude Graduate**

1990 – 1995  
 Tampa, FL

## **KELLOGG TEACHING EXPERIENCE**

### **MBA COURSES DEVELOPED AND/OR TAUGHT**

#### ***The Analytical Consulting Lab***

- *Course Description:* The Analytical Consulting Lab is a practicum for students interested in developing deep skills in analytics. In this course, students apply classroom concepts and techniques to a real-world analytical task in which they use data to recommend a managerial decision. Students apply techniques and theories such as applied statistics, multivariate regression, optimization, stochastic simulation, decision tree analysis, time series analysis, forecasting, real options, risk analysis, data mining, and discrete event simulation. Students present their analytical findings through a consulting approach.
- *Pedagogical Basis:* Experiential learning course pairs Kellogg MBA project teams with analytical and strategy consulting projects, sponsored by firms. The lab provides students with experience in working in teams to develop consulting, strategy, analytical, and presentation skills.
- *Course Offerings:* Spring 2009, Winter 2010, Spring 2010, Winter 2011, Spring 2011, Winter 2012, Spring 2012, Winter 2013, Spring 2013, Winter 2014, Spring 2014. Scheduled for Fall 2014, Winter 2015, and Spring 2015.
- *Participating firms have included:* IBM, Microsoft, Northrop Grumman Aerospace, Deloitte, United Airlines, Groupon, Pfizer, Nielsen, Chicago Bears, Minnesota Vikings, Chicago Bulls, Chicago White Sox, Morton Salt, Hyatt Hotels, Carnival Cruise Lines, CDW, Turkish Airlines, William Blair and Co., the CME Group, Social Compact, ShopperTrak, Element Bars, IM Trust, Triad Broadcasting, Chateau Coutet (first growth Bordeaux), Northshore University Hospital, Dulce Vida Tequila, Interactive Health, Penn Gaming, US Army, Press Ganey, Few Spirits, Zest Health, Jacksonville Jaguars, and Soccerly.com, among others.
- I founded this course. This course is regularly over subscribed, resulting in multiple units per year. It is now the most popular lab class at Kellogg. I have been nominated for various teaching awards for this class. I have individually sourced 180+ projects with firms to provide the class the needed learning opportunities. McKinsey & Co. and Deloitte consistently recruit the graduates of this course for their proven analytical consulting skills.

#### ***The Risk Lab***

- *Course Description:* The Risk Lab is an experiential learning course, focused on evaluation of risks faced by a sponsoring company or business venture for the purpose of investment consideration. The goal of the class is to develop skills in identifying risks, evaluating the nature and impact of risks, and communicating the risk impact in the context of an investment decision. The course focuses on using analytical techniques (such as forecasting, regression analysis, simulation, sensitivity analysis, and scenario analysis) in the risk evaluation. Teams develop risk models in a spreadsheet environment and may also be required to research industry trends to provide measures of risk indicators.
- *Pedagogical Basis:* Experiential learning course focuses on risk in markets and within firms. This class pairs Kellogg MBA project teams with firms that are sponsoring risk-focused, consulting projects. Teaching includes developing a risk framework, performing risk measurement, and making risk-based decisions.
- *Course Offerings:* Fall 2012, Fall 2013. Scheduled for Fall 2014.
- *Participating firms have included:* Microsoft, IBM, Land O' Lakes, Levi Strauss, Menus of Change, MarkITX, CF Industries, the CME Group, Discover Financial, Edelman, Western Union, Gordon Rees, Mars Petcare, Review Trackers, Lockton, and Cuba Study Group.
- I founded this course. Our projects in agribusiness have helped the student-led agribusiness club and have led to my selection (by the MBA students) as the faculty advisor to the food industry and agribusiness club.

#### ***Analyzing and Operating Digital Platforms (Digital Lab)***

- *Course Description:* In this experiential learning course, we examine the operation of digital platforms made possible by mobile phones, Internet portals, and distributed sensor networks. The examination of these digital platforms focuses on how Big Data in these platforms can be analyzed and converted into meaningful data products for various constituents in order to monetize the data.
- *Pedagogical Basis:* Experiential learning course focuses on analyzing digital platforms. This class pairs Kellogg MBA project teams with firms that are sponsoring digital platform-focused, consulting projects. Teaching includes

developing a data monetization framework, performing digital platform evaluations, and identifying analytically based recommendations.

- *Course Offerings:* Scheduled for Winter 2015.
- *Participating firms:* Microsoft, IBM, T-Mobile, Groupon, Review Trackers, Lululemon, EBay, PayPal, Skimble, Zest Health, and multiple peer-lending and personal finance firms.
- I founded this course based on collaboration with leading and start-up digital platforms.

### ***Enterprise Risk Management***

- *Course Description:* This course provides frameworks for identifying, quantifying, and managing risks to the overall enterprise and offers direction on the creation of a successful risk office and its integration with corporate strategy. Recognized forms of risk, such as Operational Risk, Credit Risk and Market Risk are explored in detail. The impact of shocks to enterprises, the role of liquidity risk, and the importance of protecting against these are reviewed. The course examines the measurement and consideration of political and global risk factors impacting a corporate strategy. The governance of risk management and the role of the board of directors in overseeing risk management are examined.
- *Pedagogical Basis:* This course examines risk holistically and provides students frameworks in ERM. Special emphasis is given to evaluating risk in financial services, international supply chains, and macro global trends. Students apply risk frameworks to company decisions and personal decisions.
- *Course Offerings:* Spring 2011, Winter 2012, Spring 2013, Spring 2014. Scheduled for Spring 2015.
- Awarded 2011 Kellogg Teaching Impact Award, one of five issued at Kellogg for excellence and impact in teaching, as offered by the Kellogg Student Association.
- I founded this course, drawing on corporate experiences from my career in retail banking.

### ***Operational Risk Management***

- *Course Description:* This course explores the topic of operational risk as it is observed and manifested in various industries. A framework for identifying, assessing and managing operational risk is presented.
- *Pedagogical Basis:* This course focuses on risk in operations-focused firms. Emphasis is given to firms in B2C services and to those relying on international supply chains. The function of risk management in non-financial services firms is also examined. Students apply risk frameworks to companies.
- *Course Offerings:* Winter 2008, Winter 2009, Winter 2010.
- I founded this course. It is part of the Operations major at Kellogg.

### ***Strategic Data-Driven Marketing***

- *Course Description:* This course in the Executive MBA program (EMBA) is designed to help marketers quantify the strategic value of marketing initiatives and maximize marketing campaign performance by leveraging data to make more informed marketing decisions. The course covers marketing performance management, customer relationship management (CRM) strategy and execution, Internet search engine marketing, data mining segmentation, analytic marketing and value driven segmentation. Content covered is especially applicable to those managing broad customer connection initiatives and those leveraging the use of a CRM infrastructure and Recency, Frequency, and Monetary (RFM) measurements for firm action.
- *Pedagogical Basis:* The course provides students a hands-on approach to data-driven marketing. Data sets and case studies examine the role and value of customer measurement in marketing.
- *Course Offerings:* Fall 2007 (EMBA), Spring 2008 (EMBA), Fall 2008 (MBA), Spring 2009 (EMBA), Fall 2009 (MBA), Spring 2010 (EMBA).
- I launched this course in the Executive MBA program. It was ranked the top marketing class by EMBA students in 2009 and 2010 and was consistently oversubscribed.

### ***Enterprise Technology Management***

- *Course Description:* This course is designed to give managers essential skills for executive oversight of enterprise technology. Topics covered include return on investment (ROI) for e-business projects, enterprise resource planning (ERP) deployment best practices, ERP ROI, strategic outsourcing, project management, and strategic alignment of technology. Important technologies and trends are also discussed including Web 2.0, Web Services, Linux, Google, Oracle vs. Salesforce.com and e-business and enterprise architectures. Class lectures are complemented by 'real life' case discussions of strategic and management issues for enterprise technology.
- *Pedagogical Basis:* Students examine critical technologies and how these transform and enable new business models. Special emphasis is given to the deployment of analytics in the enterprise and how complexity in operations

can be managed with technology. Students apply lessons to firms in project students and must build business cases for new technology adoption.

- *Course Offerings:* Winter 2010, Winter 2011.

### ***Global Lab***

- *Course Description:* This experiential learning course provides students with an opportunity to complete an international consulting project for a sponsoring firm during the winter quarter, and concludes with two weeks of in-country research and a presentation to the sponsoring firm's senior management. The sponsoring firm and the student team work together to determine the project's scope and parameters, under the guidance of a faculty adviser.
- *Pedagogical Basis:* Students develop skills and experience in consulting in an international setting. Special emphasis is given to dealing with project ambiguity and conducting measurement for strategy formation.
- *Course Offerings:* Winter 2009, Winter 2010, Winter 2011, Winter 2012, Winter 2013, Winter 2014. Scheduled Winter 2015.
- *Participating firms have included:* HP, Northrop Grumman Aerospace, Turkish Airlines, Hyatt Hotels and Resorts International, Aspire Systems, Next Media, Promon, Refinancia, Astra International, The Mexican Secretary of Tourism, Pivot Point, and Citrofrut.
- *Countries Studied:* This class has featured projects in China, Brazil, India, Colombia, Chile, Argentina, Mexico, Peru, Thailand, Indonesia, South Korea, Taiwan, Hong Kong, Saudi Arabia, Kuwait, The United Arab Emirates, Qatar, Oman, and Turkey.
- This course is one of the most popular at Kellogg based on student bidding. It has also been nominated for the Kellogg Impact award in nearly every year it was offered. I have sourced over 40 projects for this class; all firms pay a fee and agree to host the students.

### ***Global Initiatives in Management: Latin America***

- *Course Description:* This course offers students an opportunity to learn about Latin American business opportunities within an innovative and flexible framework that combines traditional classroom-based learning with structured in-country field research.
- *Pedagogical Basis:* This class provides students an-depth examination of Latin America. Through an examination of the economy, history, culture, politics, and business climate of Latin America countries, students undertake research on industries and present their findings to leading international firms. This class has examined Brazil, Argentina, Chile, Colombia, and Mexico. As a special bonus, I provide the students an introduction to the business of wine in South America and an introduction to the appreciation of wine.
- *Course Offerings:* Winter 2010 (EMBA), Winter 2013, Summer 2013, Winter 2014. Scheduled Winter 2015.
- This class is consistently oversubscribed and is one of the most popular international courses at Kellogg.

### ***Global Initiatives in Management: Gulf States and Middle East***

- *Course Description:* This course offers students an opportunity to learn about Middle Eastern business within an innovative and flexible framework that combines traditional classroom-based learning with structured in-country field research.
- *Pedagogical Basis:* This class provides students an-depth examination of the Middle East, with emphasis on the Gulf States. Through an examination of the economy, history, culture, politics, and business climate of Middle Eastern countries, students undertake research on industries and present their findings to leading international firms. This class has examined The United Arab Emirates, Qatar, Oman, and Turkey.
- *Course Offerings:* Winter 2008 (EMBA), Winter 2009 (EMBA).
- I launched this course, which was our first examination of the Middle East for the Executive MBA (EMBA) program. In-country visits included meetings with governmental officials and sovereign-wealth funds.

### ***Analytical Decision Modeling with Spreadsheets***

- *Course Description:* This course teaches students how to structure, analyze, and solve business decision problems on Excel spreadsheets using tools such as simulation, sensitivity analysis, risk analysis, forecasting, and optimization. Underlying concepts, models, and methods are presented through Excel spreadsheets, using Excel functions and add-ins, etc. The course provides a disciplined approach to problem solving on spreadsheets, by building and analyzing models for a variety of problems in operations, finance, and marketing. In this sense, this course also serves to integrate various functional areas of management on a common spreadsheet platform.
- *Pedagogical Basis:* This class uses a "hands-on," case-based approach to developing complex models in spreadsheets. In each class, three or four spreadsheet models are built from start to finish. Special emphasis is given to using simulation, optimization via Excel Solver (LP, IP, NLP), decision trees, and time series analysis. Attention

is given to providing students confidence and skills in Excel, including short cuts, spreadsheet documentation, presentation, and overall model development best practices.

- *Course Offerings:* Fall 2008, Fall 2009, Winter 2011, Spring 2012.
- Authored and co-authored 30+ novel cases for the execution of this course, rejuvenating the course and resulting in increased enrollments. My sections have consistently been oversubscribed.

#### ***Statistical Methods for Management Decisions***

- *Course Description:* This course explores the statistical relationships between variables and techniques for exploiting such relationships in business. Topics include one- and two-population hypothesis testing, correlation, simple and multiple regression analysis, and qualitative variables.
- *Pedagogical Basis:* This class provides students a case-based approach to examining the value and use of multivariate regression in various business settings. Each class includes three or four case presentations and development of analytical models for business interpretation.
- *Course Offerings:* Spring 2008, Summer 2008, Spring 2009.
- Recognized by Dean's Office for Excellence and Rigor in teaching this course.

#### ***Introduction to the Quantitative Environment and Introduction to Excel***

- *Course Description:* This specialized course was developed to provide first-year MBA students an introduction to quantitative concepts with special emphasis given to the use of Excel in MBA programs.
- *Pedagogical Basis:* Students review statistical concepts and mathematical concepts in preparation for MBA courses. Introductions to probability, statistics, finance, and economics are presented. Excel functions are presented.
- *Course Offerings:* Fall 2010, Fall 2011, Fall 2012, Fall 2013. Scheduled Fall 2014.
- I founded this course. It is offered in the pre-term session. This optional class attracts nearly 50% of the enrolled MBA class and has extremely high course ratings.

#### ***Commerce and Trade: Lessons from the International Wine Industry***

- *Course Description:* In this course, the wine industry is used as a microcosm to evaluate the impact of global trends, such as: the emerging middle class, demographic risks in the US and Europe, trade policy and disputes, the role of brands and pedigree in luxury items, and efficiencies and benefits in strategic alliances. Given the focus on wine, the course also serves to provide MBA students an intellectual introduction into wine appreciation, by examining commerce and wine in major wine producing regions of the world.
- *Pedagogical Basis:* Students examine the wine industry to understand international commerce and trade. Projects are assigned to look at lessons in international marketing, growing new demand in emerging markets, and overcoming trade barriers.
- I founded this novel course. It leverages my professional contacts in the wine industry and relationships with major wine and luxury good importers.

### **CORPORATE EXECUTIVE EDUCATION PROGRAMS LED AND TAUGHT**

US Securities and Exchange Commission – Operational Risk (2014)  
 World Bank and IFC – Operational Risk (2013)  
 Raytheon Missile Systems – Global Growth Leadership Forum (2013)  
 Raytheon Missile Systems – Developing a Global Strategy (2013)  
 Genworth Financial – Enterprise Risk Management and Risk Management in Auditing (2013)  
 American Association of Transplant Surgeons Leadership Program – ASTS Leadership Program Level I (2013)  
 American Association of Transplant Surgeons Leadership Program – ASTS Leadership Program Level II (2013)  
 Microsoft – Kellogg on Marketing –Analytical Marketing and Big Data (2008, 2009, 2010, 2011, 2012, 2013)  
 American Dental Association Kellogg Executive Management Program: ADA-KEMP (2012)  
 Pacific Gas & Electric – Operational Risk Management (2012)  
 Hyatt Hotels – Analytical Marketing (2010, 2011, 2012)  
 Discover Financial – Risk, Regulatory, and Economic Outlooks (2010, 2011, 2014)  
 Discover Financial – Credit Risk Management: Overview of Techniques and Trends (2009)  
 Deloitte, PRMIA, and Bank Austria – Enterprise Risk Management Post Crisis (2009)

## NEW EXECUTIVE EDUCATION PROGRAMS LED AND DEVELOPED

Operational Risk Management Master Class: Measurement, Management, Leadership (2014)  
 Global Leadership: Managing Risk and Rewards (2012, 2013)  
 Enterprise Risk Management (2009, 2010, 2011, 2012, 2013)  
 Kellogg PRMIA Complete Course in Professional Risk Management (2009, 2010, 2011, 2012, 2013)  
 Kellogg – Ernst & Young 360 Program for Chief Audit Executives (2010, 2011, 2012, 2013)  
 Kellogg – Ernst & Young 360 Program for Chief Financial Officers (2010)

## OPEN ENROLLMENT EXECUTIVE EDUCATION PROGRAMS TAUGHT

Marketing in Healthcare Executive Management Program (2010, 2011, 2012, 2013)  
 Strategic IT Portfolio Management (2010, 2011, 2012, 2013, 2014)  
 Strategic Data-Driven Marketing (2007, 2008, 2009, 2010, 2011, 2012, 2013, 2014)  
 Becoming a Data-Driven Manager: Program for the Principals of Inner-City Teaching Corps (2007, 2008, 2009, 2010, 2011, 2012)  
 Inner City Capital Connections Program (2013)  
 Women's Food Service Forum (2012)  
 Data-Driven Decision Making: Teachers in the National Foundation for Teaching Entrepreneurship (2007, 2008, 2009, 2010)  
 Driving Strategic Value from IT (2008, 2009, 2010)  
 Enterprise Risk Management Lecture Series: The role of the Chief Risk Officer and Board of Directors (2009)  
 Managing Customer Relationships for Profit for Kellogg Executive Education (2007, 2008, 2009)

## INTERNATIONAL EXECUTIVE EDUCATION PROGRAMS AND PRESENTATIONS

### **Indian School of Business (ISB), Hyderabad, India**

Global Advanced Management Programme (2009, 2010, 2011, 2012, 2013, 2014)  
 Enterprise Risk Management for Global Leaders (2010, 2011, 2012)  
 PGPMAX – Global and Strategic Risk Management (2011)  
 National Institute of Bank Management (2008, 2009, 2010, 2011, 2013)  
 Developing a Knowledge-centric Organization (2010)  
 General Management Program: Managing Complexity, Integration, and Uncertainty (2010)  
 Indian Bankers' Association (2008)

### **Sasin Graduate Institute of Business Administration of Chulalongkorn University, Bangkok, Thailand**

Leveraging Big Data and Analytics for Business Success, Sasin Executive Program (2012, 2013, 2014)  
 Global Opportunities and Risks: Demography and the Emerging Middle Class, Sasin Alumni Presentation (2012)  
 Enterprise Risk Management for the Global Executive, Sasin Executive Program (2011, 2012, 2013, 2014)  
 Strategic IT Management and Leveraging Analytics, Sasin Executive Program (2009, 2010)  
 Leveraging Analytics and Data Mining, Sasin Alumni Presentation (2010)  
 Learning from Your Customer, Advanced Sasin Executive Program (2008, 2009, 2010)

### **Fundação Dom Cabral, Belo Horizonte, Brazil**

Global and Strategic Risk Management for Executives, FDC-Kellogg Executive Program (2011, 2012)

### **IESE Business School, Universidad de Navarra, Barcelona, Spain**

Guest Faculty for Quantitative Methods and Decision Analysis (2006, 2007, 2008)

## NORTHWESTERN UNIVERSITY MASTERS OF SCIENCE IN ANALYTICS TEACHING

### **Masters of Science in Analytics Program (MSiA) – McCormick School of Engineering**

#### ***Analytics Leadership Practicum***

- *Course Description:* In this course, I guide student teams on their capstone project in the Masters of Science in Analytics program. Projects have included SC Johnson, Walgreens, WE Energy, Transunion, Allstate, Chicago Park

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District and Accenture.

- *Pedagogical Basis:* I coach the students on applying analytical techniques on a real-world project, as well as on presenting and communicating their findings. The course focuses on applications of analytics, project management skills, presentation and communication of technical concepts in a business setting, and client-relationship management.
- *Course Offerings:* Winter 2013, Winter 2014. Scheduled for Winter 2015.
- I founded this course in conjunction with the MSiA program directors.

### ***Business Applications of Analytics***

- *Course Description:* In this course, the students examine how the analytical function can best be deployed in a firm and industry. Special emphasis is given to the data collection and processing requirements. We examine the organizational design and human resource implications for deploying analytics.
- *Pedagogical Basis:* This is a case-based course where students must undertake an in-depth analysis of a firm or industry.
- *Course Offerings:* Fall 2013. Scheduled for Winter Fall 2014.
- I founded this course in conjunction with the MSiA program directors.

### ***Capstone Project Advisor: Business Projects in Analytics***

- *Course Description:* In this course, I advise students on the development of business recommendations from the Capstone projects. I coach and advise the teams on project presentations, including graphical representation of findings, document content, communications to executives, and in-person presentations.
- The student body of the MSiA program chose me to serve in this advisory role.

## **SPONSORED RESEARCH LED AND CONDUCTED**

### **"Transparency and Resiliency in the Food Supply Chain" (2012 – Current)**

*Research Sponsor:* Menus of Change – a joint venture between the Harvard School of Public Health and the Culinary Institute of America. Additional sponsors include Forager and Microsoft.

*Research Accomplishments:* Publication of white paper on the importance of increased transparency and measurement in global food sourcing.

### **"Examination of Opportunities for Autonomous Vehicles to Home Delivery Models." (2014-Current)**

*Research Sponsor:* Microsoft.

*Research Accomplishments:* Examination of how autonomous vehicles and integration with various digital platforms can disrupt retail and home delivery services.

### **"Identification of Economic Value Enabled by the Internet of Things on Consumers and Enterprises." (2014-Current)**

*Research Sponsor:* Microsoft.

*Research Accomplishments:* Examination of how digital processes are creating economic value in our daily lives, with emphasis on who and how the value can be claim by technology providers.

### **"Rationalizing New Delinquency Norms in the US Credit Card Industry" (2013)**

*Research Sponsor:* Discover Financial Services.

*Research Accomplishments:* Examined the impact of the financial crisis, credit card act, mortgage lending, debit card usage, and consumer confidence on the inexplicably low delinquency levels in the US credit card industry.

### **"Economic Advantages and Perceptions of Cloud Computing " (2013)**

*Research Sponsor:* Microsoft

*Research Accomplishments:* Examination of perceptions of cloud computing and its appropriateness for small and medium sized enterprises.

### **"Commodity and Milk Price Risk Analysis for Producers" (2013)**

*Research Sponsor:* Land O' Lakes

*Research Accomplishments:* Development of a spreadsheet Monte Carlo simulation that allows milk producers a tool for determining the attractiveness of milk price insurance, based on commodity and milk price conditions.

### **"Autonomous Vehicles and Impact to Business Models " (2013)**

*Research Sponsor:* Microsoft

*Research Accomplishments:* Examination of the use of autonomous vehicles and how these can transform specific business models. Recommendations to sponsor on software and distributed computing efforts that can be made to capture value.

### **"Operational Risk in the Insurance Industry" (2012 – 2013)**

*Research Sponsor:* Ernst & Young and Euromoney Publications

*Research Accomplishments:* Surveyed executives and industry research on operational risk in the insurance industry. The work is presented in a book chapter entitled *Operational Risk in the Insurance Industry*, as part of the book *Risk Management in Financial Institutions*, to be published by Euromoney Publications in Summer 2013.

**“Rationalizing and Modeling Response Times at the CME” (2012)**

*Research Sponsor:* The CME Group

*Research Accomplishments:* Identification of customer behavior critical in high-speed trading, which assisted the CME in making specific hardware improvements and service level agreements adjustments.

**“New Models for Foreign Currency Exchange” (2012)**

*Research Sponsor:* Western Union and Microsoft

*Research Accomplishments:* Provided an examination of new low-cost models to fund foreign exchange platforms, such as a currency cloud and service exchanges across borders, with a presentation to senior management of Western Union.

**“Embedding Hedging Products into Green Construction Projects: Controlling Costs and Pollution” (2012)**

*Research Sponsor:* Zell Center for Risk Research

*Research Accomplishments:* Provided a model to determine the optimal risk-based approach to seeking LEED certification in building construction, based on energy price movements.

**“Forecasting Hard to Borrow Securities for the Prime Brokerage Business” (2012)**

*Research Sponsor:* BNP Paribas Prime Brokerage Unit

*Research Accomplishments:* Project suspended due to client reorganization, awaiting project re-initiation.

**“The Confluence of Marketing and Risk Management in Private Wealth Management” (2011)**

*Research Sponsor:* Otto Beisheim School of Management and Credit Suisse

*Research Accomplishments:* Examination of the interconnected nature of marketing and risk management in private wealth management, with specific recommendations to Credit Suisse. Work was part of Ph.D. study for Christian Zaum.

**“Using Remote Sensing Data to Create Economically Valuable Measures for Agricultural Markets” (2011)**

*Research Sponsor:* Northrop Grumman Aerospace

*Research Accomplishments:* Provided economic analysis on the value and opportunity to conduct broad-scale and localized crop surveillance.

**“Surveillance for Retail and Economic Activity Using Remote Sensing and Site-Specific Measures” (2011)**

*Research Sponsor:* Northrop Grumman Aerospace

*Research Accomplishments:* Provided recommendations on use of remote sensing to conduct urban activity measurement, particularly in the context of measuring usage of real estate.

**“Opportunities for Remote Surveillance in Property Insurance and Business Insurance Industries” (2011)**

*Research Sponsor:* Northrop Grumman Aerospace

*Research Accomplishments:* Identification of insurance surveillance needs that can be transformed with remote sensing.

**“Price Optimization for Online Coupons” (2011)**

*Research Sponsor:* Groupon

*Research Accomplishments:* Analysis of pricing models for various coupon types. Opportunities to raise margin were identified based on market data analysis.

**“Attracting a New Traveler: Authenticity and Travel Trends in Mexico” (2011)**

*Research Sponsor:* Secretary of Tourism of Mexico

*Research Accomplishments:* Provided an examination of strategies to make Mexico a top 5 international travel destination.

**“Cargo Business in North America for Turkish Airlines” (2010)**

*Research Sponsor:* Turkish Airlines

*Research Accomplishments:* Examination of cargo clients for Turkish Airlines and the potential to increase cargo traffic from North America to Turkey and India. The project identified specific industries to target and points of differentiation for air cargo suppliers. Recommendations made to the CEO, COO, and Board of Turkish Airlines.

**“Credit Rating Agencies as Risk Information Brokers.” (2010)**

*Research Sponsor:* Anthony Cluff Fund of the Financial Services Round Table

*Research Accomplishments:* Provided a study of Credit Rating Agencies to the US Securities and Exchange Commissions, US Congress, and US Senate in the wake of the Dodd-Frank Act.

**“Credit Condition Survey with PRMIA and FICO” (2010)**

*Research Sponsor:* Fair Issac Company and PRMIA

*Research Accomplishments:* Publication of 2010 quarterly credit risk surveys, tracking banking trends in lending and the general health of the loan market. Recognized as a leading industry survey.



**“Measuring and Identifying Customer Behaviors in Online Coupons” (2010)***Research Sponsor:* Groupon*Research Accomplishments:* Customer behavior analysis measuring the impact of coupon type, day of week, price point, and time of day.**“Examination of the Interactive Marketing Opportunities for Embedded Retail within Mobile, Digital, and Media Channels: Project with Zazum, Inc.” (2010)***Research Sponsor:* Zazum, Inc.*Research Accomplishments:* Identification of market entry strategies and inter-channel strategies.**“Evaluation of Medical Healthcare Opportunities with the Republic of Turkey” (2010)***Research Sponsor:* Consortium of Turkish Hospitals*Research Accomplishments:* Established economic assessment of value for medical tourism between the US and the Republic of Turkey. Identified opportunities for US and Turkey to partner and mutually benefit. Recommended steps were provided for Turkish medical tourism hospitals to grow the US medical tourism market. Project employed multiple Kellogg MBA students in summer internships and over a 2-year period.**“Route Analysis in North America for Turkish Airlines” (2009)***Research Sponsor:* Turkish Airlines*Research Accomplishments:* Examination of existing routes from Istanbul to Chicago, New York, and Toronto. Specific recommendations made to add service to Washington DC, Houston, and Los Angeles, along with new connection timing to increase hub effectiveness. Recommendations made to the CEO, COO, and Board of Turkish Airlines.**“Development of a Hospital and Health Care Index for the United States” (2009)***Research Sponsor:* Wellspring Partners and Huron Consulting Group in collaboration with Dean Dipak Jain*Research Accomplishments:* Measured the impact of economic, policy, and operational improvements on the “financial health” of US Hospitals. Developed a novel index to score the “financial health” of hospitals on various metrics and how this metric could be used to score specific hospitals and the overall hospital industry.**“The Impact of Covenant-Lite Loans on Bond Risk and Post Bankruptcy Recovery” (2008)***Research Sponsor:* Zell Center for Risk Research and Moody’s*Research Accomplishments:* Examination of covenant-lite loans and impact on post-bankruptcy recovery.

## PUBLICATIONS

### BOOKS AND BOOK CHAPTERS

1. Walker, Russell. *Winning with Risk Management*. World Scientific Publishing, 2013.
2. Walker, Russell. *Operational Risk in the Insurance Industry*. Book Chapter in *Risk Management in Financial Services*. Euromoney Publications, July, 2013.
3. Walker, Russell. *Success with Big Data: From Data and Analytics to Profits* (Oxford University Press, under contract and expected 2015).
4. Walker, Jr. F. Russell and Ellen Douglas. “Identifying Hydrologic Variability and Change for Strategic Water System Planning and Design.” Chapter 12 of Monograph by the American Geophysical Union, Information Requirements for Water System Design. AGU Publications, March, 2003.

### OTHER PUBLICATIONS

5. Walker, Russell. “Four Tips for Mitigating Risk of Cyber Crime.” *SAS Knowledge Exchange*, November 26, 2013.
6. Walker, Russell. “Winning with Risk Management: Focus on Operational Risk.” *The European Financial Review*, October 2013.
7. Walker, Russell. “Role of Credit Rating Agencies as Risk Information Brokers.” Prepared for the Anthony T. Cluff Fund and the Financial Services Roundtable, Presented to the US SEC and US Congress, September 2010.
8. Walker, Russell. “Fortune Favours the Well-Prepared.” *Financial Times*. Managing in a Downturn: Risk. Jan. 29, 2009.
9. Merrick, Jason, Jill Hardin and Russell Walker. “Partnerships in Training.” *Interfaces* 36(4), pp. 359–370, INFORMS Publications, July – August 2006.
10. Walker, Jr., F. Russell and J. R. Stedinger. “Long-term Variability in the Arrival Rate of Flood Events as Evidenced by Flood Clustering.” *EOS, Transactions*, American Geophysical Union 2000 Spring Meeting, 81(19), S200, May 9, 2000.

11. Walker, Russell. "Risk and Statistical Analysis of Hydrologic and Environmental Data." Ph.D. Dissertation, Cornell University Library, August 1999.
12. Walker, Jr., F. Russell and J. R. Stedinger. "A Fate and Transport Model for *Cryptosporidium*." Journal of Environmental Engineering of the American Society of Civil Engineers, vol. 125, no. 4, p 325-333, April, 1999.
13. Walker, Jr. F. "A Fate and Transport Model for *Cryptosporidium* in the New York City Water Supply Watersheds," Master of Science Thesis, Cornell University Library, August 1997.

## PUBLISHED BUSINESS CASES

14. Walker, Russell. "Conseco: Market Assumptions and Risk." Case 5-311-509, June 2014.
15. Walker, Russell. Scandal at Société Générale: Rogue Trader or Willing Accomplice? Case 5-313-505. 2013.
16. Walker, Russell. Maxxed Out: TJX Companies and the Largest-Ever Consumer Data Breach. Case 5-313-507. 2013.
17. Walker, Russell and Wilson Joanna. Nokia's Supply Chain Management. Case 5-111-007 (KEL673). 2012.
18. Walker, Russell, Mark Jeffery, Linus So, Sripad Sriram, Jon Nathanson, Joao Ferreira and Julia Feldmeier. Netflix Leading with Data: The Emergence of Data-Driven Video. Case 5-110-006 (KEL473). 2010.
19. Schmedders, Karl, Russell Walker and Michael Stritch. Arbor City Community Foundation (A): The Foundation. Case 5-310-502(A) (KEL585). 2010.
20. Schmedders, Karl, Russell Walker and Michael Stritch. Arbor City Community Foundation (B): Managing Good Fortune. Case 5-310-502(B) (KEL586). 2010.
21. Schmedders, Karl, Russell Walker and Michael Stritch. Arbor City Community Foundation Executive Education Version (KEL588-PDF-ENG). 2011.

## DEVELOPED BUSINESS CASES

1. Walker, Russell and Joanna Wilson. "Foursquare and Rise of Location Based Services." January 2013.
2. Walker, Russell and Thomas Blank. "Bank of America: Consumers Fight Back." May 2012.
3. Walker, Russell and Joanna Wilson. "Australia's Decade in the Sun: Trade and Marketing Lessons from the Wine Industry in Australia." February 2012.
4. Walker, Russell and Joanna Wilson. "The Bordeaux Wine Market: Lessons on Futures and Regulation from the Wine Industry in Bordeaux, France." February 2012.
5. Walker, Russell, Aline Baly, and Joanna Wilson. "Transforming Sauternes-Barsac: Marketing and Product Lessons from Innovation in Sauternes." January 2012.
6. Walker, Russell and Joanna Wilson. "The Grand Dom of Champagne: Lessons in Marketing Luxury Brands from the Champagne Industry." January 2012.
7. Walker, Russell and Joanna Wilson. "Chile vs. Argentina: Marketing and Innovation Lessons from the Wine Industry in South America." January 2012.
8. Walker, Russell. "BP's Risky Business." June 2011.
9. Walker, Russell. "Toyota: A Crisis in America." June 2011.
10. Walker, Russell. "Motorola, On Razr Thin Ice." June 2011.
11. Walker, Russell, Israel Feuerberg, Lorena Sanchez Garcia, and Santiago Treviño Villaseñor. "Cemex IT Integration: Enabling International Growth." March 2011.
12. Walker, Russell. "Starbucks: Latin American Strategy." January 2011.
13. Walker, Russell. "Starbucks: China and Asia Strategy." January 2011.
14. Walker, Russell. "JPMorgan Chase – The Diamond Standard." January 2011.
15. Walker, Russell. "Excel(lence) with Interest." September 2010.
16. Walker, Russell. "Mastering the Mortgage." September 2010.
17. Walker, Russell. "Mastering Real Estate Investing." September 2010.
18. Walker, Russell and Christian Zaum. "Customer Portfolio Analysis at Credit Suisse Private Wealth Management." July 2010.
19. Walker, Russell and Louis Merlini. "Green Real Estate: Hedging Risk of Sustainable Building Improvements." May 2010.
20. Walker, Russell and Michael Stienstra. "Measuring Risk in Commodities: Corn, the Golden Kernel." March 2010.
21. Walker, Russell and Sudhakar Deshmukh. "Yield Management Spreadsheet Case." August 2009.
22. Walker, Russell and Sudhakar Deshmukh. "Workforce Planning Spreadsheet Case." August 2009.
23. Walker, Russell and Sudhakar Deshmukh. "Waiting for the Best Offer Spreadsheet Case." August 2009.

24. Walker, Russell and Sudhakar Deshmukh. "The Best Brew Spreadsheet Case." August 2009.
25. Walker, Russell, Robert Korajczyk, and Sudhakar Deshmukh. "Savings for the Future Spreadsheet Case." August 2009.
26. Walker, Russell and Sudhakar Deshmukh. "Project Valuation Spreadsheet Case." August 2009.
27. Walker, Russell and Sudhakar Deshmukh. "Project Selection Spreadsheet Case." August 2009.
28. Walker, Russell and Sudhakar Deshmukh. "Production Planning Spreadsheet Case." August 2009.
29. Walker, Russell and Sudhakar Deshmukh. "Producing for Profits Spreadsheet Case." July 2009.
30. Walker, Russell and Sudhakar Deshmukh. "Price is Right Spreadsheet Case." July 2009.
31. Walker, Russell and Sudhakar Deshmukh. "Picking a Portfolio Spreadsheet Case." July 2009.
32. Walker, Russell and Sudhakar Deshmukh. "HR Performance Evaluation Spreadsheet Case." July 2009.
33. Walker, Russell and Sudhakar Deshmukh. "Optimal Job Searching Spreadsheet Case." July 2009.
34. Walker, Russell and Sudhakar Deshmukh. "New Product Development Spreadsheet Case." July 2009.
35. Walker, Russell and Sudhakar Deshmukh. "Managing a Marketing Budget Spreadsheet Case." July 2009.
36. Walker, Russell and Sudhakar Deshmukh. "Make Me Wine (and Profit Too) Spreadsheet Case." July 2009.
37. Walker, Russell and Sudhakar Deshmukh. "Bidding to Win Spreadsheet Case." July 2009.
38. Walker, Russell and Sudhakar Deshmukh. "Let's Make a Deal Spreadsheet Case." June 2009.
39. Walker, Russell and Sudhakar Deshmukh. "Inventory Planning Spreadsheet Case." June 2009.
40. Walker, Russell and Sudhakar Deshmukh. "Modeling Uncertain Cash Flows Spreadsheet Case." June 2009.
41. Walker, Russell and Sudhakar Deshmukh. "Modeling Stocks, Bonds and Options Spreadsheet Case." June 2009.
42. Walker, Russell and Sudhakar Deshmukh. "Optimal Decision Making with Incremental Information Availability Spreadsheet Case." June 2009.
43. Walker, Russell and Sudhakar Deshmukh. "Buy Now, Pay Later Spreadsheet Case." June 2009.
44. Walker, Russell and Sudhakar Deshmukh. "Asset Liability Matching Spreadsheet Case." May 2009.
45. Walker, Russell. "USA Financial One Bank Case." May 2008.
46. Walker, Russell and Mark Jeffrey. "First Bank USA One." Kellogg Case, 2008.
47. Walker, Russell and Mark Jeffrey, "U.S. Bank: An Analytical View of Market Segmentation." December 2008.
48. Walker, Russell. "Forecasting Remittance Mail Volumes." Developed for Capital One University for Executive Education, 2002.
49. Walker, Russell. "Call Center Selection: Real-world Application of Optimization. Parts I-IV." Developed for Capital One University for Executive Education, September 2003.
50. Walker, Russell. "Outsourcing in the Global Economy: Using Decision Science Models to Manage Outsourcers." Developed for a guest lecture at Universidad de Navarra, IESE Business School, Barcelona, Spain. 2006.
51. Walker, Russell. "The Credit Card Industry: How does it work?" Developed for a guest lecture at Universidad de Navarra, IESE Business School, Barcelona, Spain, 2006.

## EDITORIAL POSITION

*Journal of Enterprise Risk Management* (JERM). Inaugural Editorial Advisory Board

2013-Current

## ADVISORY POSITIONS

### NOT FOR PROFIT ADVISORY ROLES

#### **Menus of Change Scientific Technical Council**

8/12 – Current

- Serving on the Scientific Council, providing direction on economic models for more sustainable food supply models.
- Joint venture between the Harvard School of Public Health and Culinary Institute of America.

#### **Morton Arboretum, Lisle, IL**

5/11 – Current

- Serving on the Science and Technology Council.
- Providing direction on technology adoption and deployment.

#### **Enterprise Risk Management Symposium**

12/13-Current

- Serving on the Advisory Board for PRMIA.
- Provide leadership on programs and educational seminars.

**Russell Walker, Ph.D. 2023 Linden Avenue, Highland Park, IL 60035 · (224) 515-6485**  
**www.russellwalkerphd.com · russell-walker@kellogg.northwestern.edu**

**Virginia Hispanic Chamber of Commerce**

5/06 – 12/07

- Served on Legislative Committee, advising US senators, Virginia's congressmen and governor on Latino matters, providing perspective from the Hispanic Chamber.
- Served on Corporate Relations Committee, working with leading companies in Virginia on participation with the Virginia Hispanic Chamber of Commerce and on general Latino matters.
- Finance Committee Chairman, recommending policies to the board of directors.

**West Grace Street Association (Advisor to the City Council of Richmond, VA)**

1/05 – 12/07

- Advised City Council on matters related to public infrastructure and drainage systems.
- Worked with City Council on developing a new neighborhood policing and safety system.

**UNIVERSITY ADVISORY ROLES**

Executive MBA Advisory Board, Kellogg School of Management  
 Cornell University Alumni Association

06/07 – 12/10  
 03/00 – 03/03

**CORPORATE ADVISORY ROLES**

Corporate Advisor on Analytics to Predilytics 8/10 – Current  
 Chief Analytics Officer for Calexus Solutions 5/07 – Current  
 Corporate Advisor to Leo Tilman and Co. 1/10 – Current  
 Executive Advisor to JMP Software 12/03 – 12/05  
 Corporate Advisor to Microsoft Research on High Performance Computing 11/03 – 9/05  
 Corporate Advisor to Intel Research on Distributed Computing 11/03 – 9/05

**ADDITIONAL UNIVERSITY ADVISORY ROLES**

Advisor to Department of Statistical Sciences & Operations Research, Virginia Commonwealth University 2/02 – 5/07  
 Advisor to Cornell University Theory Center, Cornell University 11/03 – 1/06  
 Advisor to Virginia Commonwealth University regarding humanitarian trips to Cuba 2/02 – 5/05

**GOVERNMENTAL ADVISORY ROLES**

Invited Expert on Risk in Emerging Markets to US State Department and US Embassy in Morocco 11/13  
 Advisor to US senators, Virginia governor, and Virginia congressmen on Hispanic leadership 5/06 – 12/07  
 Advisor to Richmond City Council on infrastructural and public safety matters 1/05 – 12/07  
 Invited Expert on Risk to Infrastructural Systems, US Department of Energy on Homeland Security 10/01

**CORPORATE EXPERIENCE****Corporate Strategist, Strategic Technology Group**

8/00 – 12/06

**Capital One Financial, Inc. (NYSE: COF)**

Richmond, VA

*Corporate Research Leadership*

- Leader and founder of the New Decision Paradigms enterprise-wide research program. Researched and enabled new quantitative techniques and technologies that enabled novel credit risk modeling, rules engines, and data mining.
- Co-leader of High Performance Computing research program. Evaluated and deployed grid computing and distributed storage techniques to reduce IT expenses and enable increased analytics.
- Led the creation of the first-ever Analytics Testing Lab at Capital One and development of a next generation analytics environment. Projects slated to save \$60M in improved credit risk decisions in all lines of business. Project earned corporate award for excellence from the CEO, awarded to top 1% of projects.
- Founder of enterprise-wide Center of Excellence for Simulation and Modeling. Projects enable over \$40M in improved operations, reduce operational risks, and involve many cross-functional teams. Projects earned corporate award for excellence from the CEO, awarded to top 1% of projects.

*Partnership Development and External Relationship Leadership*

- Led the execution and planning of annual innovation summits and innovation exchanges between C-level executives at IBM, Yahoo!, Hewlett Packard, Oracle, Microsoft, eBay, Boeing, Northrop Grumman, SAS, SPSS, and Google.
- Regularly interacted with and presented recommendations to C-level executives.
- Cultivated relations with external academic, business, and VC partners at executive levels, internationally.

*Corporate and IT Strategy*

- Strategist on team that researched and enabled many key IT projects. IT innovations recognized as part of *InformationWeek* 500 #1 ranking for Capital One (September, 2005).
- Key contributor to the emerging technology component of US Card Competitive Intelligence survey, providing information on credit card industry to senior leadership team.
- Developed IT strategy and data flow processes for entry to the Mexican credit card industry.

#### *Business Development*

- Researched market potential for financial products and services aimed at US Hispanic and Latin American markets.
- Researched technologies and intellectual property impacting deposits, auto finance, Internet banking, and payments.
- Designed operations and analytics platforms for entry into the Mexican credit card industry.

#### *Risk Management*

- Lead technology strategist on efforts to redesign risk-model scoring for the US and UK businesses. Total enterprise value expected at over \$50M.
- Re-engineered internal processes for collections, risk, and fraud mitigation. Provided recommendations that yielded over \$14M in savings and income and reduced operational risks.
- Evaluated enterprise-core systems such as system of account record, credit risk modeling algorithms, fraud, customer retention, and collection decision engines and provided recommendations to senior executives.
- Developed new business process mapping standards for IT and business projects in order to mitigate operational risks.

#### *Analytics, Business Intelligence, and Technology Evaluation*

- Lead strategist on evaluating, selecting, and piloting new business intelligence tools and related IT platforms, including evaluation of SAS, SPSS, R, Teradata, DB2, Oracle, TreeNet, text mining tools, and grid computing systems and database environments.
- Served as chief evaluator of new analytic tools to the enterprise, recommending enterprise-wide tool standards for simulation and statistical analysis.
- Led evaluation of text mining, voice mining, and advanced data mining technology across the enterprise.
- Established corporate standards for business process mapping.

#### *University – Corporate Relationship Leadership*

- Forged relationship between Capital One and the Cornell University Theory Center.
- Contributed to building a first-ever internship program between Cornell University, Department of Operations Research and Capital One, specifically for students interested in credit risk and careers in Financial Engineering. Students at Cornell complete a class project based on Capital One business opportunities.
- Led relationship between Capital One and Virginia Commonwealth University, organizing specialized Executive Education, research and consultation on simulation projects.

#### *Talent Development*

- Led and developed an internship program for graduate students in Operations Research, with students from the University of Virginia and Virginia Commonwealth University participating.
- Served as Capital One's Diversity recruiter to Cornell University, recruited at National Society of Hispanic MBAs.

#### *Community Relationship Leadership*

- Served as Capital One's representative to the Virginia Hispanic Chamber of Commerce.
- Initiated and led a program that paired Capital One executives with local, Hispanic small-business owners. Program drew corporate and local media attention for the value added back to the community.
- Founding member of the Capital One Hispanic Associate Network.

## **INVITED PRESENTATIONS**

1. **Sasin Graduate Institute of Business Administration of Chulalongkorn University.** "Global Opportunities and Risk: Demography and Emerging Middle Class." Sasin Executive Program, Hua Hin, Thailand, August 16, 2014.
2. **Sasin Graduate Institute of Business Administration of Chulalongkorn University.** "Strategic Risk Management for the Global Leader." Invited Speaker. Hua Hin, Thailand, August 17-18, 2014.
3. **Operational Risk Executive Seminar.** US Securities and Exchange Commission University, Washington, DC, July 9, 2014.
4. **Leadership in Risk Management.** Leading Author Series, US Securities and Exchange Commission University, Washington, DC, July 9, 2014.
5. **Monetization of Big Data with Digital Platforms.** "Monetizing Big Data Panel Series." Keynote speaker to EBay

- and PayPal event on Big Data. Hosted in conjunction with the Kellogg San Francisco Alumni Club and Teradata, May 15, 2014.
6. **The Changing World Demographics.** Keynote speaker to the Kellogg Washington D.C. Alumni Club, March 20, 2014.
  7. **Implications of the Changing World Demographics.** Keynote speaker at the Lockton Mining Conference, Saint Louis, Missouri, March 18, 2014.
  8. **Operational Risk Seminar.** Discover Financial Services, March 14, 2014.
  9. **Overcoming Risks to Your Start-Up.** "Winning with Risk Management." Keynote speaker to the Kellogg San Francisco Alumni Club, February 29, 2014.
  10. **Forum on Risk Management Best Practices.** "Best Practices in Risk Management, FDI, and Stimulating GDP Growth in Emerging Economies." US Embassy, US State Department, and US Economic Office. Rabat, Casablanca, November 22, 2013.
  11. **Managing Risks in Small and Medium Enterprises Conference.** Confédération Générale des Entreprises du Maroc and US State Department, Economic Office. "Financing Small and Medium Enterprises: An International Perspective." Casablanca, Morocco, November 21, 2013.
  12. **Entrepreneurship Workshop by US State Department for Moroccan Firms** "Changing Demography of the World: Opportunities for Innovators." Technopark, Casablanca, Morocco. November 21, 2013.
  13. **Raytheon Leadership Series.** "Global Growth Leadership Forum." Tucson, Arizona. November 7-8, 2013.
  14. **Raytheon Leadership Series.** "World Demographics: Adapting the Organization for a New Marketplace." Tucson, Arizona. October 16, 2013.
  15. **Chief Audit Executive Corporate Conference.** "Enterprise Risk Management for the Audit Function." Richmond, Virginia, September 16-17, 2013.
  16. **Presentation to High Performers of Raytheon Missile Systems.** "Developing a Global Strategy," Tucson, Arizona, August 26, 2013.
  17. **Sasin Graduate Institute of Business Administration of Chulalongkorn University.** "Risk Management for the Global Leader." Invited Speaker. Hua Hin, Thailand, August 15-17, 2013.
  18. **Global Risk Management and Foreign Direct Investment - Partners in Growth.** "Managing Global Risk." Bloomberg, BusinessWeek and Zurich Series, Chicago, IL, July 16, 2013.
  19. **Risk Management in Practice,** Executive Case and Guest Speaker. The Bank of England, Prudential Risk Authority Conference, Oxford England, July 7-9, 2013.
  20. **Inner City Capital Connections Program,** "Leveraging Data Assets." Chicago, IL June 6, 2013.
  21. **Financial Services and the Digital Consumer,** Hosted by Financial Times and Accenture, Chicago, May 16, 2013.
  22. **Microsoft Marketing Series.** "Integrated Marketing Communications." Presentation to Microsoft Executives, Redmond, WA, April 18, 2013.
  23. **Menus of Change Scientific Technical Council.** A Joint Venture of the Harvard University School of Public Health and the Culinary Institute of America, Cambridge, MA, September 11-12, 2012.
  24. **Kellogg and Ernest & Young Chief Audit Executive 360 Program,** "Enterprise Risk Management for Chief Audit Executives." Evanston, IL, September 10, 2012.
  25. **Sasin Graduate Institute of Business Administration of Chulalongkorn University.** "Global Opportunities and Risk: Demography and Emerging Middle Class." Alumni Presentation. Hua Hin, Thailand, August 31, 2012.
  26. **Sasin Graduate Institute of Business Administration of Chulalongkorn University.** "Risk Management for the Global Leader." Invited Speaker. Hua Hin, Thailand, August 23-25, 2012.
  27. **Executive Presentation at the Indian School of Business.** "Enterprise Risk Management for Financial Services." Hyderabad, India, July 31, 2012.
  28. **Kellogg Risk Summit** on "Supply and Price Risks in Agricultural Markets." Panel Moderator and Organizer. Chicago, IL, February 21, 2012.
  29. **FICO World.** "New Risks in Mortgages." New York, New York, November 3, 2011.
  30. **Executive Presentation at the Indian School of Business.** "Enterprise Risk Management for Financial Services." Hyderabad, India, August 29, 2011.
  31. **Sasin Graduate Institute of Business Administration of Chulalongkorn University.** "Risk Management for the Global Leader." Invited Speaker. Hua Hin, Thailand, August 18-20, 2011.
  32. **AON-Hewitt Executive Series.** "Challenges and Opportunities with Big Data." Libertyville, IL, April 11, 2011.
  33. **Kellogg Risk Summit** on "Managing Global Risk." Panel Moderator and Organizer. Evanston, IL, February 23, 2011.
  34. **Guest Speaker to the Discover Financial Risk Speaker Series.** "Basel III, the Card Act and Dodd-Frank Regulation." Riverwoods, IL, November 5, 2010.
  35. **Kellogg Risk Summit** on "The US Consumer." Panel Moderator and Organizer. Evanston, IL, October 28, 2010.

37. **Sasin Graduate Institute of Business Administration of Chulalongkorn University.** "IT Management." Invited Speaker. Hua Hin, Thailand, August 24-28, 2010.
38. **Executive Series at the Indian School of Business.** "Enterprise Risk Management." Hyderabad, India, July 27, 2010.
39. **Keynote speaker to IBM CMO Series** "Leveraging Analytics in Marketing." Glenview, IL, June 29, 2010.
40. **GARP Chicago Chapter Presentation.** "The Future of Enterprise Risk Management." Chicago, IL, June 16, 2010.
41. **Finance Panel at Kellogg Latin American Business Conference,** May 7, 2010.
42. **Northwestern Alumni Association, Taste of Kellogg.** "Risk and the Economy." Evanston, IL, March 30, 2010.
43. **Kellogg and Ernest and Young CFO 360 Program.** "From CFO to CEO." Rosemont, IL, March 16, 2010.
44. **Turkish Medical Tourism Conference.** "A Model for Medical Tourism Partnership." Chicago, IL, March 12, 2010.
45. **DePaul University Risk Management Series.** "Enterprise Risk Post Crisis." Chicago, IL, December 4, 2009.
46. **Discover Financial Risk Speaker Series.** "Credit Risk Management Post Crisis." Riverwoods, IL, September 10, 2009.
47. **Sasin Graduate Institute of Business Administration of Chulalongkorn University.** "Strategic IT Management." Invited Speaker. Hua Hin, Thailand, August 20-24, 2009.
48. **PRMIA Chicago Meeting at CME.** "The Future of Derivatives." Chicago, IL, July 29, 2009.
49. **Teradata Conference.** "Predictive Analytics." New Orleans, LA, June 29, 2009.
50. **PRMIA International Speaker Series.** "Operational Risk and Enterprise Risk Management." Invited Speaker. Vienna, Austria, February 17-18, 2009
51. **Kellogg Marketing Conference.** "Learning from Your Customer." Chicago, IL, January 23, 2009.
52. **Kellogg Risk Summit.** "Perspective from the Inside on the Financial Crisis." Panel Moderator and Organizer. Evanston, IL, November 20, 2008.
53. **INFORMS 2008.** "Improving Credit Risk and Customer-Centric Models Using Genetic Algorithms." Financial Services Series. Washington, DC, October 12, 2008.
54. **Indian Banks' Association.** "Operational Risk Management and Basel II Seminar." Invited and Keynote, Mumbai, India, September 16-18, 2008
55. **PRMIA International Speaker Series.** "Operational Risk Management and the Subprime Crisis." Invited and Keynote. Hyderabad, India, September 15, 2008.
56. **Sasin Graduate Institute of Business Administration of Chulalongkorn University.** "Analytical Marketing." Invited Speaker. Hua Hin, Thailand, August 22-31, 2008.
57. **SAS Business Executive Series.** "Credit Scorecarding: Industry Best Practices." Invited Speaker. Chicago, IL, June 9-10, 2008.
58. **HSBC Executive Finance Forum.** "Trends in the US Credit Card Industry: Impacts of the Credit Crisis." Invited Speaker. Libertyville, IL, May 22, 2008.
59. **Universidad de Navarra, IESE Business School.** "Decision Analysis for the Executive: Case Studies on the Financial Services Industry and Future Trends." Invited Speaker. Barcelona, Spain, February 4-6, 2008.
60. **INFORMS International 2007 Puerto Rico.** "Fraud Detection in Electronic Money Transfers." San Juan, Puerto Rico, July 11, 2007.
61. **Universidad de Navarra, IESE Business School.** "Decision Analysis for the Executive: Case Studies on Financial the Services Industry and Future Trends." Invited Speaker. Barcelona, Spain, May 7-9, 2007.
62. **Cornell University S.C. Johnson School of Management.** "Opportunities for Using Data in Retail Banking, Case Studies and Trends." Ithaca, NY, February 28, 2007.
63. **Universidad de Navarra, IESE Business School.** "Decision Analysis for the Executive: Case Studies on Financial the Services Industry and Challenges of Outsourcing." Invited Speaker. Barcelona, Spain, May 27-June 1, 2006.
64. **New York University, Leonard Stern School of Business.** "The Credit Card Industry and Opportunities for Use of Decision Models." Invited Speaker New York, NY, April 10, 2006.
65. **Cornell University S.C. Johnson School of Management.** "The Power of Analytics in the Credit Card Industry." Ithaca, NY, February 15, 2006.
66. **Cornell University S.C. Johnson School of Management.** Invited Speaker at Symposium on "Innovation and Start-Up Growth." Ithaca, NY, September 24, 2005.
67. **Cornell University S.C. Johnson School of Management.** "Analytics for Improved Decision Making in the Retail Banking Industry." Ithaca, NY, February 16, 2005.
68. **INFORMS 2004.** "Managing IT Resources for Improving Time to Market." Denver, CO, October 25, 2004.
69. **INFORMS 2004.** "Modeling Fraud Cases and Agent Staffing." Denver, CO, October 25, 2004.
70. **Cornell University S.C. Johnson School of Management.** "Strategies for Risk Management and Understanding the Customer." Ithaca, NY, February 23, 2004.

71. **University of Virginia, Darden Graduate School of Business Administration Rationality Seminar.** “Data Mining: Techniques and Impacts on IT and Management.” Charlottesville, VA, November 18, 2003.
72. **Microsoft Research and Intel Research Retail Banking Seminar.** “Competitive Advantages in Retail Banking.” Keynote Speaker. New York, NY, November 5, 2003.
73. **Sandia National Laboratories Panel on Homeland Security.** “Risks to the New York City Water Supply and Management Options.” Albuquerque, NM, November 24, 2001.
74. **American Geophysical Union 2000 Spring Conference.** “Long-Term Variability in the Arrival Rate of Flood Events as Evidenced by Flood Clustering.” Washington, D.C., May 31, 2000.
75. **United States Military Academy at West Point.** “Risk Analysis of the New York City Water Supply.” West Point, NY, June 7, 1999.
76. **Syracuse University.** “Management of the New York City Water Supply.” Syracuse, New York, November 9, 1998.

## PREVIOUS TEACHING EXPERIENCE

### Adjunct Professor

**Virginia Commonwealth University**

1/02 – 12/04

Richmond, VA

#### Department of Statistical Sciences & Operations Research

- Instructed graduate and undergraduate courses in operations research including stochastic processes, operations research, and multi-objective decision analysis with emphasis on software use and application to business problems.
- Managed and developed professional internship program for students, advised students on career development.

### Executive Instructor and Training Consultant

**Virginia Commonwealth University**

10/02 – 11/04

Richmond, VA

#### Department of Statistical Sciences & Operations Research in partnership with Capital One University, Capital One Financial, Inc.

- Taught eight courses on time series analysis, forecasting, and optimization. Over 150 Capital One associates were trained, yielding improved analysis and operations worth \$5M+ in annual savings and increased earnings. Training resulted in national award for the highest return on investment for training. Courses led to improved collection strategies and outsourcing options.
- All course work was based on case studies, taken from real-world situations.
- Course ratings for instructor was at 98% responding as “Exceeds Expectations.”

### Instructor for Engineering Economics

**Cornell University, College of Engineering**

5/98 – 8/99

Ithaca, NY

- Taught financial concepts, bond pricing, tax and investment strategies, and replacement analysis. Cash-flow analysis, tax implications, and concepts of interest, shorting, arbitrage, and role of financial markets. Introduced students to daily reports in financial publications, such as the Wall Street Journal.
- Instructed on statistical and probability theory, statistical test formulation, and statistical software.

### Teaching Assistant for Introduction to Wines

**Cornell University, School of Hotel Administration**

8/97 – 6/99

Ithaca, NY

- Prepared wine, sampling notes, class materials and equipment for over 900 students weekly. Administered exams.

## OTHER DETAILS

- Fluent in Spanish.
- Citizenship: USA
- Avid traveler and photographer. History and wine enthusiast.
- Supporter of multiple botanical gardens and arboretums. Horticulture enthusiast.
- Former freelance author and photographer for food, wine, and travel articles.
- Honorary Societies: Tau Beta Pi • Sigma Xi • Phi Kappa Phi • Chi Epsilon • Golden Key • Themis



## OUTSIDE ACTIVITIES

The Kellogg School of Management encourages its faculty to disclose any activities that might present a real or apparent conflict of interest. I advise firms on analytics, risk management, and international strategy. The following is a list of organizations for which I have provided professional services or advice in these areas since joining Kellogg in 2007. I confirm that none of these have created a conflict of interest with my duties to the Kellogg School of Management or Northwestern University.

Accenture, AON, Bank of England, CoBank, CME Group, Discover Financial Services, Genworth Financial, Hyatt Hotels and Resorts, IBM, Indian School of Business, International Finance Corporation, John Deere, Leo Tilman and Co., Lockton, Microsoft, Northrop Grumman, Oracle, Oxford University Press, Pacific Gas and Electric Company, Pepsico, Professional Risk Managers' International Association, PNC Financial Services, Puget Sound Energy, Raytheon, Sasin Graduate School of Management, Teradata, The Financial Services Roundtable, The SAS Institute, The US Securities and Exchange Commission, The US State Department, The US Embassy in Morocco, The World Bank.

I am the founder and managing partner of Walker Bernardo, LLC, a minority-owned firm focused on risk and analytics.

I have served on various civic boards and have provided pro-bono services to various organizations including:

Cornell University Alumni Association, Chicago Botanic Garden, City of Richmond Virginia, Enterprise Risk Management Symposium, Kellogg Alumni Network, Kellogg Hispanic Management Association, Kellogg Agribusiness and Food Club, Menus of Change, Mexican Secretary of Tourism, Morton Arboretum, Northwestern Alumni Association, Northwestern University, Professional Risk Managers' International Association, Turkish Consulate and Commercial Attaché of Chicago, Virginia Hispanic Chamber of Commerce, Virginia Commonwealth University, The Office of the Governor of the Commonwealth of Virginia, US Department of Energy, and US Department of Homeland Security.