

CURRICULUM VITA

John Juzbasich D.Ed. ABD, MLD, PMP

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EDUCATION

The Pennsylvania State University

Doctorate of Adult Education, D.Ed. ABD

Completed all studies.

Master of Leadership Development, 2006

Temple University

Studies in Educational Psychology and Quantitative Research Design as components of the Penn State Doctorate of Adult Education degree program

Wharton School of Business, University of Pennsylvania

B.S. degree in Economics, Accounting Major, 1977

PROFESSIONAL EXPERIENCE

JANUARY 2020 TO PRESENT

Rutgers University

POSITION: Instructor

RESPONSIBILITIES: Teach in their Executive Education Program. Several project management topics including *Project Management Professional (PMP®) Exam Prep*: this online course provides a comprehensive review of project management concepts, terminology, tools and techniques necessary to pass the PMI® PMP examination.

JANUARY 2019 TO PRESENT

Data-Core Systems, Inc.

POSITION: Senior Advisor

RESPONSIBILITIES: Counsel executive leadership and management regarding the development of a data strategy and implementation of artificial intelligence and blockchain applications to solve a variety of business challenges.

JANUARY 2016 TO PRESENT

Lehigh University

POSITION: Instructor

RESPONSIBILITIES: Teach in their Vistex Institute for Executive Learning & Research. Project management and other topics.

JANUARY 2015 TO PRESENT

Infopro Learning, Inc.

POSITION: Senior Consultant

RESPONSIBILITIES: Counsel executive leadership and management regarding client development opportunities, course development and delivery. Lead course design teams and facilitate courses for clients.

SEPTEMBER 2001 TO PRESENT

Merit Systems LLC, DBA Merit Career Development

POSITION: Chief Executive Officer, Founding Partner of Merit Systems LLC and Principal of the Human Resources Development (HRD) business unit.

RESPONSIBILITIES: Executive leadership and management of the organization; provide strategic direction and guiding business principles; overall HRD program and curriculum development. Manage all education product development projects including instructor led training, web and computer based instruction, and video training. Responsible for quality control and incorporation of adult learning methods and techniques into the training interventions.

ACCOMPLISHMENTS:

- Established a new company during a difficult business climate and grew the firm to fifteen employees, with my business partner, James J. Wynne.
- Authored, co-authored and delivered many training programs (see Course Development).
- Executive producer of distance learning programs both DVD and web-based.
- Approved as a State of California Board of Registered Nursing *Certified education Provider*
- Awarded a US General Services Administration (GSA) federal contract
- Authorized as a *Registered Education Provider* for the Project Management Institute.
- Approved onto the *National Registry of Certified Professional Education Sponsors* by the National Association of State Boards of Accountancy (NASBA)
- Sanctioned as a *Certified Education Provider* for Hitachi Data Systems Corporation worldwide.
- Designed many custom interventions for clients, see Courses Developed below.
- See <http://www.meritcd.com> for more information.

JUNE 2012 TO PRESENT

The Pennsylvania State University. School of Graduate Professional Studies, Great Valley, PA

POSITION: Adjunct Professor

RESPONSIBILITIES: Teach in their Master of Leadership Development and MBA graduate programs.

Leadership course: *Strategy Focused Leadership*. This course provides an understanding of the requirements for effective strategic leadership in organizations operating in high-technology environments as assessed by the Balanced Scorecard. Topics include steering complex innovation, promoting collaboration within and between teams, and developing intellectual and social capital to support innovation to increase organization value.

NOVEMBER 2007 TO 2010

Eastern University. Campolo College of Graduate & Professional Studies

POSITION: Adjunct Professor

RESPONSIBILITIES: Teach courses for the university in their *Fast-Track* MBA program and *Organizational Leadership* program.

Organizational Leadership courses: *Strategic Leadership, Leading Change, Cross Cultural Studies*, topics include discovering one's leadership and character strengths, applying leadership concepts strategically in an organizational setting, integration of leadership knowledge and skills to set and achieve goals and objectives, organizational change theory and methods. *Quantitative Decision Making*, topics include linear and integer programming, time-series forecasting, project forecasting, and other quantitative decision making methods.

MAY 2005 TO 2010

West Africa American Trading Company, Inc.

POSITION: Chairman of the Board, President and CEO

RESPONSIBILITIES: Set overall strategic direction of the company and manage the executive team. Introduce investors and Liberian government officials to WAATCO products and services and our *Triple P (People, Planet, Profit)* bottom line concept of *Corporate Social Responsibility*, benefiting the **P**eople of Liberia, our **P**lanet through re-use of clothing, textbooks and personal computers from the USA in Liberia, and our business **P**rofit objectives.

ACCOMPLISHMENTS:

- Recruited investors and an executive team.
- Set up operations in Wayne, PA, and in Monrovia, Liberia.
- Visited Liberia and hired a team in Monrovia, Liberia to conduct operations.
- Delivered over 40,000 elementary and secondary education textbooks to schools in Liberia.
- Distributed over 100 large bags of children's clothing to orphanages in Liberia.
- Shipped several hundred personal computers to Liberia.
- Bestowed the title of *Honourary Paramount Chief of Lofa Gola Chiefdom, Klay District, Bomi County*, by the mayor and citizens of Tubmanburg, Liberia
- Present the WAATCO *CSR/PPP* business model at universities to business students

JANUARY 2001 TO AUGUST 2001

NIIT (USA) Inc.

POSITION: Business Development Manager

RESPONSIBILITIES: Sold custom off-shore software development services in India, including e-Transformations, legacy application migrations/re-engineering, data consolidations and conversions to clients in the Mid-Atlantic Region (PA through VA). Worked with WebSphere, WebMethods, Ariba, and other e-Business software environments.

ACCOMPLISHMENTS:

- Advised and trained new sales representatives.
- Presented NIIT skills and services to prospective clients.
- Worked with clients to create offshore development centers in India.

MAY 2000 TO DECEMBER 2000

Level 8 Systems, Inc.

POSITION: Large Account Sales Representative

- RESPONSIBILITIES: Sold object oriented (OO) Enterprise Application Integration, EAI, software and an OO application development environment. Work with CIO's and their software architects on complex e-Business environments requiring rapid request/response from legacy applications, bridging to the new web and client/server worlds. Work at business shows and industry events.

ACCOMPLISHMENTS:

- Advised and trained new sales representatives.
- Performed marketplace analysis and recommended products enhancements to upper management.

JANUARY 1999 TO APRIL 2000

Unisys Corporation

POSITION: National Sales Director, Thin Client Computing

RESPONSIBILITIES: Responsible for Thin Client sales and marketing programs for the US.

Determined and recommended resource and product requirements. Worked with field sales personnel on large complex customer situations. Assessed and monitored corporate thin client plans and programs and made appropriate changes.

ACCOMPLISHMENTS:

- Designed and implemented a Thin Client business plan.
- Built a Thin Client business partner program.
- Attained 118% of revenue objective.

OCTOBER 1998 TO SEPTEMBER 1999

Micro Focus, Inc.

POSITION: Large Account Sales Executive

RESPONSIBILITIES: Responsible for a sales territory generating over \$5M in software revenues, handling large accounts in the DC-VA-Carolinas geography; specializing in Year 2000 software re-engineering and programmer productivity tools.

ACCOMPLISHMENTS:

- Average monthly attainment of 150% of sales quota.
- Micro Focus Quarterly Sales Leader Award, June 1999

JUNE 1995 TO SEPTEMBER 1998

Centron DPL, Inc.

POSITION: Regional Sales Representative

RESPONSIBILITIES: Rejuvenated a sales territory and expanded it to a district office for

Centron—a large distributor of computer WAN and LAN networking equipment. Initiated marketing and sales strategies and programs to established long term client relationships with very large firms in the Philadelphia-Baltimore-Washington corridor, with a focus on the telecommunications and finance industries. Lead teams that designed and implemented complex nationwide and worldwide networks. Provided turnkey solutions of networking hardware and software to solve complex client requirements.

ACCOMPLISHMENTS:

- Built a district office in Philadelphia for Centron: interviewed candidates, advised and managed sales and administrative personnel.
- Grew revenues from \$2M to \$10M and then to \$15M annually.
- Exceeded all sales objectives three consecutive years.
- Ranked among the top three producers in the firm.
- Received the 1996 Million Dollar Club Eagle Award

AUGUST 1991 TO MAY 1995

Merit Systems

POSITION: President and Independent Information Technology Financial Consultant

RESPONSIBILITIES: Consulted on lease design, residual forecasting, financial analysis, and contract negotiation for both lessee and lessor clients. Guest lecturer at lease training courses. Led a sales force automation project, focusing on productivity. Advised client executive management on competitive strategies. Created sales productivity tools: brochures, newsletters, marketing materials, and executive presentations. Developed product strategies, wrote business plans, created sales commission compensation plans for various companies.

ACCOMPLISHMENTS:

- Elected to the Board of Directors of a client.
- Work has been published in Computerworld and Bank Automation News.
- Developed training programs.
- Guest motivational speaker.

JANUARY 1989 TO JULY 1991

IBM Credit Corporation

POSITION: Financial Marketing Advisor and Leasing Representative, West Orange, NJ

RESPONSIBILITIES: Consulted and advised over 200 IBM field sales personnel and 1,000 customers in northern New Jersey, on information technology financial acquisition strategies and promoted leasing from IBM Credit Corporation. Negotiated lease rates and contractual terms and conditions and worked with customers' accountants and attorneys on complex leasing transactions. Explained and resolved accounting, tax, and legal issues.

ACCOMPLISHMENTS:

- Designed customized leases for specific customer requirements. Wrote computer models to build step leases, perform IRS compliance tests, FASB 13 analysis, and produce the desired ROE for IBM Credit Corporation.
- Advised ICC executives as to market and product requirements.
- Piloted several new offerings for ICC.
- Grew revenues from \$42 M to \$88 M and \$119 M in 1989 and 1990, respectively; first half 1991 revenues exceeded \$90 M.
- Achieved two 100% clubs, averaging over 120% attainment above objectives.
- Ranked among the top ten financial advisors in the USA.

JANUARY 1987 TO DECEMBER 1988

IBM Corporation

POSITION: Manager of Business Planning, Mid-Atlantic Area headquarters, Philadelphia, PA

RESPONSIBILITIES: Developed strategic plans and sales programs, utilizing advanced statistical models, to align IBM with current market demands. Researched, surveyed and analyzed market conditions, as well as regional field personnel and IBM organization structure. Identified requirements, developed forecasting methods, recommended and presented plans and programs to address business needs.

ACCOMPLISHMENTS:

- Designed and implemented a business plan and methodology for reporting and tracking of revenue projections, expense and personnel resource requirements for \$1.6 billion area organization.
- Member of Advisory Committee for Revenue Forecasting and Tracking Methodology used across the country.
- Conducted quantitative statistical and financial analysis of major business problems including: competitive strategies, product line positioning, and sales productivity improvements.
- Developed marketplace organization plan and advised executives on geographic area reorganization of branch offices to improve sales coverage of current client base, focusing on manpower planning and productivity.
- Promoted to IBM Credit Corporation.

AUGUST 1984 TO DECEMBER 1986

IBM Corporation

POSITION: Sales Manager, Finance and Insurance Branch Office, West Orange, NJ

RESPONSIBILITIES: Managed a sales team of six direct reports supporting a large multi-national insurance company generating in excess of \$40 million annually. Directed sales efforts of a 50 man national marketing team throughout the US, generating sales of over \$150 M. Interfaced with client executive management and IBM executives to design, develop and implement tactical and long range plans for the clients information technology requirements.

ACCOMPLISHMENTS:

- Achieved three 100% Clubs.
- Grew revenues 20% annually in a declining business environment.
- Sold IBM's first \$100 M mainframe volume purchase contract.
- Generated five Regional Manager Awards for team, rewarding competitive, financial, and long range planning accomplishments.
- Promoted to Manager of Business Planning.

JANUARY 1983 TO JULY 1984

IBM Corporation

POSITION: Regional Advisory Sales Representative, Mid-Atlantic Region headquarters, Philadelphia, PA

- RESPONSIBILITIES: Promoted to develop marketing programs for large mainframe and mid-range systems. Specialized in financial and competitive marketing strategies

and became the leader of the competitive swat team. Advised over 200 IBM salespersons on financial and competitive strategies to win complex sales situations.

ACCOMPLISHMENTS:

- Received a Regional Manager's Award for competitive achievements.
- Selected to attend the IBM President's Class.
- Promoted to Large Account Sales Manager

JANUARY 1981 TO DECEMBER 1982

IBM Corporation

POSITION: Large Account Sales Representative

RESPONSIBILITIES: Sold intermediate and large computer systems to established large IBM customers in the greater Philadelphia area and worked with several multi-national accounts.

ACCOMPLISHMENTS:

- Attained annual sales quotas of \$5 M to \$10 M.
- Achieved two consecutive IBM 100% Clubs, averaging over 125% attainment of objectives each year.
- Received a Regional Manager Award and a Branch Manager Award.
- Promote to regional sales advisory staff.

JULY 1977 TO DECEMBER 1980

IBM Corporation

POSITION: Field New Account Sales Representative, Philadelphia, PA

RESPONSIBILITIES: Sold computer systems to new accounts in the greater Philadelphia area to first time IBM customers. Established client relationships, analyzed their information technology needs and proposed appropriate hardware and software solutions. Worked with small manufacturing firms and distribution companies.

ACCOMPLISHMENTS:

- Attained annual sales quotas of \$1.5 M to \$5 M.
- Achieved three consecutive IBM 100% Clubs, averaging over 110% attainment of objectives each year.
- Received two Regional Manager Awards and two Branch Manager Awards.
- Promoted to large account sales representative.

PROFESSIONAL EDUCATION

The Pennsylvania State University: Lean Six Sigma Certification

IBM: President's Class

IBM: Manager Training

IBM: Sales Training

Situational Leadership® Certified Instructor

PAR Leadership and Teamwork, Certified Instructor

Amembal and Isom: Advanced Leasing

Communispond: Speaking on Paper

Karrass Organization: Effective Negotiating

Learning International: Conducting Professional Sales Negotiations
Holden Corporation: Power Based Selling
OnTarget, Inc.: Target Account Selling
StatGraphics, Inc.: Statistical Analysis of Data
Temple University: Statistical Methods of Stochastic Modeling
Montgomery County Community College: Italian language courses
Villanova University: Federal Income Taxation
H & R Block: Income Tax Preparation Course

SOFTWARE SKILLS

Adobe Acrobat Pro
Adobe Captivate
Adobe Connect
Adobe InDesign
Adobe Photoshop
Adobe Premier
Articulate 360
Canvas
Microsoft Excel
Microsoft Outlook
Microsoft PowerPoint
Microsoft Project
Microsoft Word
Moodle
Steinberg WaveLab

PUBLICATIONS

Books

- Juzbasich, J. (2019). Risk Identification Using the Premortem Technique. In D. Barrett & K. Soniat (Eds.), *The Keys to Our Success: A collection of tools, techniques, templates and concepts from 25 of our Best Project Managers*, 2nd Edition.
- Potosky, D. & Juzbasich, J. (2019). Chapter 24. Creating a measure of managerial mindsets to support research: An occupational culture perspective. In F. Chevalier, L. M. Cloutier, & N. Mitev (Eds.), *Research Methods for the DBA*. Caen, France: SARL In Quarto - Editions Management et Société (EMS).
- Juzbasich, J. (2015). Sowing the seeds of hope. In J. J. Sosik (Ed.), *Leading with character: Stories of valor and virtue and the principles they teach*, 2nd Ed. (pp. 264-265). Greenwich, CT: Information Age Publishing Inc.

- Potosky, D., Spaulding, J., & Juzbasich, J. (2013). Experiential learning as an outcome of meaning-making processes. In O. Kovbasyuk & P. Blessinger (Eds.), *Meaning-Centered Education: Perspectives and Explorations, Vol. 1*. New York: Routledge Publishing.
- Juzbasich, J. (2009). Applying full range leadership development in organizational and social development. In J. J. Sosik & Dongil (don) Jung, *Full Range Leadership Development: Pathways for People, Profit, and Planet* (pp. 69-70). New York: Taylor & Francis Group.
- Juzbasich, J. (2009). Environmental, health, and safety application of full range leadership development. In J. J. Sosik & Dongil (don) Jung, *Full Range Leadership Development: Pathways for People, Profit, and Planet* (pp. 340-341). New York: Taylor & Francis Group.
- Juzbasich, J. (2006). Sowing the seeds of hope. In J. J. Sosik (Ed.), *Leading with character: Stories of valor and virtue and the principles they teach* (pp. 217-218). Greenwich, CT: Information Age Publishing Inc.
- Juzbasich, J. (1994). *Special report: Analysis of the IBM customer agreement* (1994). (Available from International Computer Negotiations, Inc., Drawer 2970, Winter Park, FL 32790-2970)

Refereed Journal Articles, Conference Proceedings and Presentations

- Potosky, D. & Juzbasich, J. (2015). Meaning-Centered Communication Orientation in Interpersonal Skills Training. Proceedings of the European Academy of Management, 2015 conference, Warsaw, Poland.
- Sosik, J. J, Juzbasich, J., & Chun, J. U. (2011). Effects of moral reasoning and management level on ratings of charismatic leadership, in-role and extra-role performance of managers: A multi-source examination. *The Leadership Quarterly* 32, pp.434-450.
- Juzbasich, J. & Sosik, J. J. (2008). Effects of gender composition of leader-follower dyads and leaders' level of moral development on charismatic leadership ratings. Proceedings of the Institute of Behavioral and Applied Management, 2008 conference, Orlando, FL. (BEST PAPER AWARD).

Conference Papers and Presentations

- Spaulding, J. & Juzbasich, J. (2012). *The emerging synthesis of dialogical pedagogy and cyberspace*. Meaning centered education panel discussion as a part of the Mini-Bakhtinian Conference in Education. Newark, DE, March 2012.
- Juzbasich, J. (2011). *Simulation: A learning tool for today's project manager*. Poster board presentation as part of the 6th annual Biopharmaceutical Project Management Conference. (Finalist). Durham, North Carolina, March, 2011.

Juzbasich, J. (2006). *Inspirational moments in leadership development*. White board paper as a part of the Gallup Leadership Summit. Washington, DC, October 2006.

Juzbasich, J. & Saunders, D. M. (1995). *Dr. Demming's Theory of Profound Knowledge applied to the voice of the customer*. White board presentation as part of the annual American Society for Quality National Conference. (Blue Ribbon Award). San Antonio, Texas, Spring 1995.

Non-Refereed Journal Articles

Juzbasich, J. (1994). Forgo fixed-term leases. Computerworld, July 11, 1994.

Juzbasich, J. (1994). Cost containment: How to negotiate with IBM on no-list mainframe pricing. Bank Automation News, February 23, 1994.

Video Productions

Juzbasich, J. (Executive Producer and Director), & Wynne, P. D. (Producer and Writer). (2013). *HIPAA and HITECH: Pathway to compliance, a four part series* [Motion pictures]. (Available from Merit Systems LLC, 125 Strafford Avenue, Suite 222, Wayne, PA 19087.)

Juzbasich, J. (Executive Producer), & Mennies, M. (Producer, Director). (2011). *Hitachi Data Systems: Virtual storage platform installation training* [Motion picture]. (Available from Hitachi Data Systems Corporation, 750 Central Expressway, Santa Clara, CA 95050.)

Juzbasich, J. (Executive Producer), & Mennies, M. (Producer, Director). (2010). *HIPAA and HITECH for business associates* [Motion picture]. (Available from Merit Systems LLC, 125 Strafford Avenue, Suite 222, Wayne, PA 19087.)

Juzbasich, J. (Executive Producer), & Wentz, W. (Producer, Writer, Director). (2009). *Hitachi Data Systems: Universal storage platform VM DKC6151 installation training* [Motion picture]. (Available from Hitachi Data Systems Corporation, 750 Central Expressway, Santa Clara, CA 95050.)

Juzbasich, J. (Executive Producer), & Wentz, W. (Producer, Writer, Director). (2008). *Hitachi Data Systems: Universal storage platform V multi cabinet installation and upgrade training* [Motion picture]. (Available from Hitachi Data Systems Corporation, 750 Central Expressway, Santa Clara, CA 95050.)

Juzbasich, J. (Executive Producer), & Wentz, W. (Producer, Writer, Director). (2008). *Recognizing and reporting child abuse and child sexual abuse* [Motion picture]. (Available online from Merit Systems LLC, 125 Strafford Avenue, Suite 222, Wayne, PA 19087.)

MEDIA CITATIONS AND CONTACTS

Story spotlighting John Juzbasich's leadership experiences. In J. J. Sosik & Dongil (don) Jung, *Full Range Leadership Development: Pathways for People, Profit, and Planet* (pp.1-2). New York: Taylor & Francis Group.

Column highlighting small business entrepreneurship and exporting, the 7th Congressional District Business Procurement Summit sponsored by Congressman Joe Sestak of Pennsylvania. *Small business can benefit from government resources*, www.NewsofDelawareCounty.com (March 27, 2009) Media, PA.

Story spotlighting John Juzbasich's leadership to help rebuild war-torn Liberia. *Leadership development*, [Penn State Outreach](#) (Spring, 2006).

Article on John Juzbasich's leadership and work in Liberia, Africa. *College student helps Liberia*, [The Daily Local News](#) (November 22, 2005) West Chester, PA.

Interviewed and quoted in *The question of price advantage*, [Bank Automation News](#) (April 20, 1994).

HONORS, AWARDS, AND ACHIEVEMENTS

Golden Key International Honour Society
Pi Lambda Theta International Honor Society
Beta Gamma Sigma International Honor Society
Honourary Paramount Chief of Lofa Gola Chiefdom, Klay District, Bomi County, Liberia
Ten consecutive IBM 100% Clubs [annual sales achievement award]
Micro Focus Quarterly Sales Leader Award, June 1999
Centron Million Dollar Club Eagle Award for sales leadership

PROFESSIONAL LICENSES AND CERTIFICATIONS

Certified Lean Six Sigma Practitioner by The Pennsylvania State University
Certified Project Management Professional, PMP, by the Project Management Institute
Certified Situational Leadership® Trainer
Certified PAR Leadership and Teamwork Trainer
United States Coast Guard U.S. Merchant Marine Officer License
Federal Communication Commission Amateur Radio License, K3JUZ
Chester County Pennsylvania ServSafe Certification
Pennsylvania Insurance Agent License (expired)
Pennsylvania Real Estate Agent License (expired)

CURRENT AND FUTURE RESEARCH INTERESTS

Artificial Intelligence as applied to business applications
Cultural History Activity Theory (CHAT)
Meaning Centered Communication
Adult Leadership Education
eLearning
Multi-National and Cross-cultural Instruction

PROFESSIONAL ASSOCIATIONS

Currently

Society for Advancement of Management (SAM) Editorial Review Board member
University of Scranton Industrial Advisory Board member
European Institute for Advanced Studies in Management
Golden Key International Honour Society (Academic Excellence)
Pi Lambda Theta International Honor Society and Professional Association in Education
Beta Gamma Sigma International Honor Society (Business Excellence)
Project Management Institute Keystone Chapter
The Wharton Club of Philadelphia
Penn State Alumni Association

Previously

American Association for Adult and Continuing Education (AAACE)
International Leadership Association (ILA)
Society for Industrial and Organizational Psychology (SIOP)
American Society for Training and Development (ASTD)
Institute of Behavioral and Applied Management (IBAM)
International Society for Performance Improvement (ISPI)
Project Management Institute (PMI)
American Society for Quality (ASQ)
Amateur Radio Relay League (ARRL)

SEMINARS, COURSES AND WORKSHOPS TAUGHT

PMP Exam Prep
Financial Planning for Projects
Advanced Project Management
Leading Organizational Change
Project Planning Foundations
Project Management Leadership
Transformational Leadership

Full Range Leadership Development
Project Management Foundations
Innovation Fundamentals
Leading Change and Innovation
Make Better Decisions
Emotional Intelligence
Strategic Leadership
Cross Cultural Studies
Quantitative Decision Making
Interpersonal Skills
Customer Conversations
Leadership and Management for Non-Supervisors
Introduction to Leadership and Team Building
Building High Performance Teams
Situational Leadership®
Leadership and Management
Quantitative Decision Making
Sailing (for Main Line Sail & Power Squadron)
Hitachi Cloud Architectural Design for Pre-Sales Professionals
Powerful Workplace Writing
First Class Facilitation
Storage Economics: Determining the Value of Hitachi Data Systems Storage Solutions
Storage Economics Blue Belt Master Class
PAR Leadership and Teamwork
Randori Negotiating: Winning Methods and Techniques
Communication for Consultants
Project Management Fundamentals
Persuasive Presentations
Advanced High-Tech Sales Training
High Tech Procurement
High Tech Leasing

Course Development

PMP Exam Prep
Leading Organizational Change
Project Planning Foundations
Advanced Project Management
Project Management Leadership
Critical Thinking and Decision Making
Transformational Leadership
Introduction to Leadership and Team Building
Leadership for Non-Supervisors
Interpersonal Communications
Emotional Intelligence

Customer Conversations
Powerful Workplace Writing
Storage Economics: Determining the Value of Hitachi Data Systems Storage Solutions
Storage Economics Blue Belt Master Class
Discovering the Economic Value of Hitachi Data System Products and Solutions
First Class Facilitation
Project Management Best Practices
Project Management Fundamentals
Communication for Consultants
Persuasive Presentations
High Tech Procurement
High Tech Leasing

Speaking Engagements and Seminars Presented to Professional Groups:

“Artificial Intelligence”, The Philadelphia Contributionship 2019-2020 Corporate Conference, Philadelphia, PA, January 10, 2020, (Invited Keynote Speaker).

“Data Strategy Makes Way for Artificial Intelligence”, The Philadelphia Contributionship, Philadelphia, PA, November 20, 2019, (Invited Speaker).

“Global Intercultural Management”, The Pennsylvania State University, School of Graduate and Professional Studies, Malvern, PA, April 10, 2019, (Invited Speaker).

“Strategic Portfolio Planning”, Project Management Institute, Keystone Chapter, Northeast Branch, February 2019 Meeting, Moosic, PA, February 21, 2019, (Invited Speaker).

“Risk Management: The Pre-Mortem Technique”, Project Management Institute, Massachusetts Bay Chapter, Fall 2017 PMI MassBay Professional Development Day, Norwood, MA, September 23, 2017, (Invited Speaker).

“Mastering Critical Thinking for Effective Leadership”, International Institute of Business Analysis, NJ Chapter Meeting, Iselin, NJ, March 10, 2016, (Invited Speaker).

“Simulation as a Project Management Teaching Tool”, University of Scranton, Industrial Advisory Board Annual Meeting, Scranton, PA, October 30, 2015, (Invited Speaker).

“Make Better Decisions”, Project Management Institute, Keystone Chapter, Spring 2015 Lehigh Valley Spring Professional Development Day, Breinigsville, PA, March 28, 2015, (Invited Speaker).

“Making Project Management Training Memorable”, 2014 Project Management Institute Washington, DC Chapter Project Management Symposium, Washington, DC, September 26, 2014, (Invited Speaker).

- “Your Brain on Training”, Devereux Foundation 2014 Learning Leaders Conference, Villanova, PA, September 24, 2014, (Invited Speaker).
- “Leading in the Digital Age: Are You Connected for Success?”, The Pennsylvania State University Great Valley Campus, Malvern, PA, March 26, 2014, (Invited Panelist).
- “Make Training Stick”, American Society for Training and Development Philadelphia Chapter Meeting, King of Prussia, PA, March 12, 2014, (Invited Speaker).
- “Make Better Decisions”, Project Management Institute New York City Chapter Symposium, New York, NY, October 19, 2013, (Invited Speaker).
- “Cross Cultural Communication”, The Pennsylvania State University, School of Graduate and Professional Studies, Malvern, PA, October 7, 2013, (Invited Speaker).
- “Flex Your Leadership Style”, Project Management Institute Washington, D.C. Chapter meeting, Tysons Corner, MD, September 17, 2013, (Invited Speaker).
- “Simulation as an Adult Learning Tool”, Angry birds, happy employees: Using games in the workplace to cultivate collaboration and innovation, Igniting Innovation forum sponsored by the Chester County Economic Development Council, Malvern, PA, October 26, 2012, (Invited Speaker).
- “Cross Cultural Communication” International Institute of Business Analysis New Jersey Chapter meeting, Iselin, NJ, March 24, 2011, (Invited Speaker).
- “Team Building” U.S. Office of Personnel Management—Federal Investigative Services Division conference, Pittsburgh, PA, April 7, 2009, (Invited Speaker).
- “Transformational Leadership: Building High Performance Teams”, Project Summit Business Analyst World conference sponsored by the Project Management Institute and the International Institute of Business Analysis, Valley Forge, PA, April 27, 2009 (Invited Speaker).
- “Effects of Gender Composition of Leader-Follower Dyads and Leaders’ Level of Moral Development on Charismatic Leadership Ratings” Institute of Behavioral and Applied Management conference, Orlando, FL, October 3, 2008, (Invited Speaker).
- “Transformational Leadership: Constructing a Participative HSE Culture” St. Gobain International Executive Management conference sponsored by Saint-Gobain Corporation, Boston, MA, June 11, 2008, (Invited Speaker).
- “Constructing a Participative EHS Management System Through Transformational Leadership” Risk Management conference sponsored by Saint-Gobain Corporation, Indianapolis, IN, May 7, 2008, (Invited Speaker).

“Transformational Leadership”, Project Summit Business Analyst World conference sponsored by the Project Management Institute and the International Institute of Business Analysis, Philadelphia, PA, April 29, 2008 (Invited Speaker).

“Leadership In Action: From Malvern to Monrovia to Kuwait”, Leadership In Action showcase sponsored by The Pennsylvania State University Great Valley Campus, Malvern, PA, April 16, 2008 (Invited Speaker).

“Success Story: Corporate Social Responsibility in Action”, Post-Conflict Africa: Open for Responsible Business conference sponsored by Students for Responsible Business, International Business Association, Francophone Student Professional Organization, & Division of Student Affairs, Temple University Main Campus, Philadelphia, PA, February 21, 2008 (Invited speaker).

“Full Range Leadership Development: Transformational Leadership In Action”, The Pennsylvania State University Great Valley Campus, Malvern, PA, November 26, 2007 (Invited Speaker).

“International Corporate Social Responsibility in Action”, Fox School of Business, Temple University Main Campus, Philadelphia, PA, October 11, 2007 (Invited speaker).

“Transformational Leadership”, Leadership Forum management meeting sponsored by Northwestern Human Services, Inc., Harrisburg, PA, May 18, 2007 (Invited Speaker).

“Leadership in Action: From Malvern to Monrovia”, Leadership In Action showcase sponsored by The Pennsylvania State University Great Valley Campus, Malvern, PA, April 24, 2007 (Invited Speaker).

“Meet the Exporter”, Fox School of Business, Temple University Main Campus, Philadelphia, PA, February 16, 2007 and November 10, 2006 (Invited speaker).

“Idea to International Business”, Breaking into the International Trade Game seminar sponsored by the US Dept. of Commerce Small Business Development Center, Temple University, Fort Washington Campus, Fort Washington, PA, October 24, 2006 (Invited speaker).

“International Business in Liberia, Africa”, Fox School of Business, Temple University Main Campus, Philadelphia, PA, April 7, 2006 (Invited speaker).

“My Path to Liberia, Africa” Ubuntu and the Spirit of Leadership forum sponsored by Penn State University, Great Valley Campus, Malvern, PA, November 21, 2005 (Invited speaker).

“Doing Business in Liberia” US Dept. of Commerce Small Business Development Center, Temple University Main Campus, Philadelphia, PA, October 18, 2005 (Invited speaker).

“Vehicle Financing: To Lease or Not to Lease?” Lions Club of Lansdale, PA, January 5, 1995
(Invited speaker).

“Sales Leadership” Storage Tech Corporation annual sales meeting, Boulder, CO, March, 1993
(Invited motivational speaker).

INTERNATIONAL EXPERIENCE

Taught courses for Hitachi Data Systems Corporation (HDS) worldwide including: India, Russia, South Korea, Sweden, Switzerland, Denmark, France, Austria, Germany, Italy, Netherlands, United Kingdom, and Australia

Lead a project management competition at the Singapore University of Technology and Design, in Singapore

Established and managed West Africa American Trading Company, Inc. in Liberia, Africa.

Speak, read and write Serbo-Croatian, Latin and Cyrillic alphabets; visited the area several times. Working knowledge of French.

Hosted an *AFS* exchange student from Italy, 1/1998 through 7/1998.

Hosted an *AFS* exchange student from Ecuador, 8/1996 through 7/1997.

Hosted two Russian adults from *American-Soviet Home Stays* for one week in March, 1994.

Traveled throughout Europe and North America.

Toured Japan, China, Hawaii, Jamaica, Cayman Islands, Canada, Australia, and New Zealand.

COMMUNITY SERVICE AND ORGANIZATIONS

Currently

Easttown Township, Chester County, Pennsylvania; 2020 Election Clerk

S. D. S. Q. (Socially Distanced Saxophone Quartet) musician and composer

America’s Boating Club Valley Forge, formerly the Main Line Sail and Power Squadron, Past Commander

National Multiple Sclerosis Society 100 mile bicycle tour participant (four times)

Merion Concert Band (musician)

Chesapeake Bay Tartan Sailing Club

Chesapeake Bay Maritime Museum

Previously

Chesapeake Bay Yacht Racing Association

Lower Merion Symphony (musician)

Maryland Yacht Club

Easttown Municipal Advisory Committee, Easttown Township, PA

The Union League of Philadelphia

Easttown Township Election Precinct Minority Inspector

Racial Justice Committee Co-Chair

A Better Chance: ABC House Board of Directors Member
Scoutmaster BSA Radnor, PA Troop 284
Church Music Committee Chair
BSA Sea Scout Master Ship 502
Leadership Development Committee
United States Coast Guard Auxiliary
State Street Orchestra
Chester County Concert Band
The Upper Darby Sousa Band
Easttown Municipal Waste Advisory Committee, Easttown Township, PA
Leader of BSA Venture Crew 500
Church Youth Group Advisor
Conestoga High School Band Chaperone
Georgetown Racing Fleet Sailing Club
Bodkin Yacht Club

HOBBIES AND INTERESTS

Music performance, composition, and recording
Photography
Boating and other outdoor activities

REFERENCES

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