Shaping Our Future as Leaders of Innovation

ASEAN GLOBAL LEADERSHIP PROGRAM
California, USA, 8th – 12th May 2017
SRW&Co.

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FROM THE DEAN OF
HAAS SCHOOL OF BUSINESS
UNIVERSITY OF CALIFORNIA BERKELEY

As part of our strong commitment to the SE Asia region, I am excited that we are once again partnering with SRW&Co. in offering this leadership program. From the mature economy like Singapore to the emerging markets of the CLMV, education plays a key role in shaping the business leaders of this region. With that in mind, I want to personally invite you to be a part of this experience that will change the way you look at your role within your organization.

This leadership program takes all the very best we have to offer from our esteemed faculty who design leadership programs for many of the most world renowned organizations and then customize the program with the ASEAN business leader in mind.

What you get with this program not only reflects the latest cutting-edge approaches to design thinking and innovation that our faculty are known for; it reflects our UC Berkeley Haas Defining Principles of "Questioning the Status Quo" and going "Beyond Yourself" I know that when you leave this program, you will feel re-charged and ready to engage leadership challenges on the global stage.

So join us on this incredible journey to become a truly innovative leader. We are looking forward to launching our relationship and to inspiring the leader you are becoming.

FROM THE CEO OF
UC BERKELEY EXECUTIVE EDUCATION

I look forward to personally welcoming you into the ASEAN Global Leadership Program, and into the Berkeley community, Silicon Valley and the San Francisco Bay Area. We are delighted to host senior ASEAN leaders.

Now in our 4th year conducting this program, Berkeley Executive Education is committed to developing executives in the region, and is excited to work with SRW&Co. to host the 2017 edition.

This program is custom-designed for ASEAN executives who want to learn and be inspired by the best that UC Berkeley and the Haas School of Business have to offer. With a focus on the cutting edge approaches to innovation and design thinking, this program has been developed to take you on an exciting journey to transform the way you think about global business and innovation.

See you in May 2017!
FROM THE CO-FACTORY DIRECTORS OF ASEAN GLOBAL LEADERSHIP PROGRAM

The world of business in 2017 is incredibly fast-paced, competitive, and global. On a daily basis leaders encounter disruptive innovations, new products and services, fresh business models, and rapidly shifting business landscapes. This is the reality we face – and create – every day in the San Francisco Bay Area and Silicon Valley. And increasingly in the ASEAN region as well, as I have witnessed in my visits to Singapore, Indonesia, and Malaysia.

To compete and lead effectively in this rapidly-changing global economy, senior executives and public sector officials need to constantly evolve and improve their portfolio of skills, with particular focus on driving innovation and leading with an entrepreneurial mindset. The ASEAN Global Leadership Program does just that: providing participants with an up-close view of Silicon Valley and the San Francisco Bay Area along with exposure to – and experience with – different models of innovation and entrepreneurial thinking in this world-renowned epicenter of business innovation and new business creation.

Over five days, distinguished faculty from UC Berkeley’s Haas School of Business will lead a deep dive into innovation’s key drivers, including: experimentation, customer insights, design thinking, collaboration, and culture. You’ll learn to identify emerging threats and opportunities, build rapid prototypes, pitch an idea, and address real challenges facing your organization. We will investigate the venture capital community and related sources of capital and innovations in fintech (financial technology). We will visit leading Silicon Valley companies to gain insights into their secrets for success, and also engage with business leaders who will share their perspectives on Silicon Valley, culture, and innovation.

This will be my fourth year faculty directing for this program, and I always look forward to it for the seniority and commitment of the attending executives, the quality of dialogue and engagement we have, and the wonderful relationships that emerge from this week together. We often hear from executives years later, recollecting how they are still using lessons learned during this rewarding week.

This program is sure to be a highly rewarding learning experience that will enhance your ability to lead – and especially lead change and innovation – in your organization.

Every company is in a grow or die situation. But the billion-dollar question is: “how do you grow, and how do you grow in a way that adds value?” In some circumstances, growth for growth’s sake doesn’t always lead to success; in fact, some growth might actually destroy value. The key to value-added growth is having an innovative business culture – a culture of full engagement and involvement from your people.

Every manager wants the elusive culture of innovation in the workplace, but consciously implementing one is where managers tend to struggle.

The path to an innovative culture begins with leadership. It’s ultimately the leader’s job to advance the innovation agenda within the company.

With that in mind, we’ve designed this program for leaders like you, who want to learn how to motivate and inspire their global teams by fostering an innovative culture. This program will provide you with insights and tools that you can put to work as soon as you return to your organization. In just 5 days, you’ll develop a road-map for innovation that you can use within your organization and to help guide your team.

We’ve enjoyed working with executives like you from the SE Asia region over the past 4 years in this program – and we’ve heard from them what a difference it’s meant in their ability to add that value to their organization’s growth. We look forward to meeting the 2017 leaders attending this program!
FROM THE CHAIRMAN & PARTNER OF SRW&Co.

We launched our first ASEAN Global Leadership Program (AGLP) in 2009 with the noble mission of collaborating with the world class business schools to design a premier leadership development program for the ASEAN leaders from both the corporate and public sectors. The backdrop is that of the ASEAN Economic Community (AEC) and the challenges and opportunities that will confront the leaders in the region. A key challenge (and opportunity) is how to build, grow and sustain the ASEAN organizations by unleashing the potentials of the organizations and the people within, both at a country and regional level. The 4 global themes for our AGLP are Globalization, Innovation, Entrepreneurship and Leadership and we believe these 4 key themes address the strategic challenges faced by any leaders in any organization in the region.

We had been privileged to forge a strategic partnership with some of the top ranked global business schools to help us with the design and delivery of a world class bespoke leadership development program. Our AGLP alumni now number some 250 senior executives from the corporate and public sector in the region.

Many of our AGLP alumni are C-suite and Board members of large corporations and business owners of small medium enterprises, including top policy makers and regulators in their respective countries. To ensure we have an ASEAN composition of the participants, we had forged a strategic partnership with the ASEAN Business Advisory Council to enroll participants from the ASEAN countries.

The AGLP with the UC Berkeley Haas School of Business is our 4th run since 2014. The program had consistently scored high ratings by the participants in terms of the quality and value of the Berkeley-Haas learning experience. It also draws on the feedback and suggestions from the participants and the program faculty in raising the bar for the annual run of the program both in terms of content design and delivery. The commitment from the leaders of Berkeley-Haas and the faculty team involved in our AGLP are commendable. The reciprocated exchange of learning insights and knowledge between the faculty and the participants and among the participants are the fundamental learning spirit of the program.

We look forward to working closely with our Berkeley-Haas partner to deliver another successful run of our AGLP in May 2017. We will strive to enroll more participants from across the ASEAN region, and look forward to welcoming another cohort of senior ASEAN leaders to our 2017 program.
ABOUT UC BERKELEY EXECUTIVE EDUCATION

The University of California's flagship campus at Berkeley is one of the preeminent universities in the world. A catalyst of economic growth and social innovation, the world-class institution is home to distinguished faculty (with 22 Nobel laureates to date), a stellar research library, a national laboratory and more than 350 academic programs. UC Berkeley ranks fifth among the world's top universities in the Times Higher Education magazine of Great Britain's “World Reputation Rankings.”

As the second-oldest business school in the United States, the Haas School of Business at the University of California, Berkeley is one of the world's leading producers of new ideas and knowledge in all areas of business — which includes the distinction of having two of its faculty members receive the Nobel Prize in Economics over the past 20 years. The school offers outstanding management education to 2,200 undergraduate and graduate students each year who come from around the world to study in one of its six degree-granting programs. The school's mission is “to develop leaders who redefine how we do business.”

The UC Berkeley Executive Education offers a portfolio of programs developed by the most forward-thinking minds in academia and industry. We leverage resources all over campus, the Bay Area, and the Silicon Valley to provide the most engaging educational experiences available to business executives. Our programs help professionals develop the skills and knowledge to embrace change and catalyze success in their industries.
ABOUT SRW&Co.

SRW&Co. is a regional management consulting firm providing specialist services in designing and implementing a full range of integrated people management and development solutions. Our focus and goal is clear—to help our clients to improve their organizational performance through innovative and effective people management and development practices, which are customized to meet their specific needs and requirements.

Our consulting teams have extensive hands-on experiences working for many leading corporations ranging from global consulting firms, multinational companies, to large local conglomerates. Combining global best practices with local experiences and cultural understanding, we help many leading global and local companies in the Asia-Pacific region to develop and implement a full spectrum of integrated people management and development solutions. We bring with us best practices and research in the field of people management and development to support our custom designed work with clients in the region.

Our technical advisors are industry and business experts who have specialized knowledge and expertise in specific business functions and industries. We also collaborate with our strategic partners comprising leading consulting firms, world class universities and business schools and reputed local boutique consulting firms on a project basis. In fact, even some of our clients become our strategic partners which speak volumes of our partnership approach in working with our clients.

We believe, ultimately, it is the people who will make or break the company. Hence we adopt a balanced and holistic approach in our consulting framework and methodology by combining our technical strength in the custom design of the systems, methodologies and tools, and working on change management and communication to win over the hearts and minds of our clients in the effective implementation of the systems to deliver tangible results and value as expected. We believe the acid test of our deliverables in any consulting assignment lies in the effective implementation of the systems we designed. Hence our design has the built-in implementation module as an integral part of the solution we offer to our clients which is a hallmark of our bench-strength.

Finally, we measure our success as a consulting firm in alignment with the successes of our clients and strategic partners, and the successes of our own people in becoming dedicated professionals who passionately live our values and walk the talk.
TEACHING VENUE

The course will take place at the Haas School of Business, University of California Berkeley. Each day, breakfast, lunch and afternoon refreshments will be offered. The Haas School building is designed by the renowned architect Charles Moore and built in 1995. It is a mini-campus of four connected buildings set around a central courtyard. The buildings were designed to create a sense of community by fostering business and educational interactions among students, faculty, staff, and visitors.

GRADUATION DINNER

Graduation dinner will take place at the Women's Faculty Club. Built by John Galen Howard in 1923 as a haven for women excluded from the Men's Faculty Club (now the Faculty Club), the Women's Faculty Club is a genteel oasis in a busy, crowded campus.

CAMPUS TOUR

Led by expert student guides who know the university and the nuances of student life, a campus tour is ideal for anyone wishing to learn more about the university. Tour will include visits to the iconic Campanile Esplanade, Sproul Plaza, and Free Speech Movement Café. The tour will end with a visit to the Energy Biosciences Institute—the largest public-private partnership of its kind in the world, created to apply advanced biological knowledge to the area of bioenergy development.
LOCATION

UC Berkeley Executive Education
Haas School of Business
University of California, Berkeley
2220 Piedmont Ave.
Berkeley, California

REGISTRATION

Applications are accepted on a first-come, first-served basis. Early registration is recommended.

TRAVEL & ACCOMMODATION

The cost of travel, accommodation and visa will be borne by the participants.

We will recommend the hotel within walking distance to the campus. We suggest all participants make hotel reservations as early as possible to secure rooms during summer peak season.
MONDAY, 8th MAY 2017

Welcome & Program Overview, Review Issues & Objectives
Mark Coopersmith and John Danner

History of Silicon Valley & Entrepreneurial Mindset
How and why did Silicon Valley attain its position as a global leader in entrepreneurship, innovation, and value creation? In this session we delve into the fascinating history of Silicon Valley, including the development of the rich, diverse, and highly supportive ecosystem that helps launch and grow so many high-value organizations. We also investigate the mindset of the entrepreneurs and innovators that lead these high-growth companies: how they think, how they operate, and how they create the unique cultures that drive these ventures.
Mark Coopersmith

Innovation: Getting to I-land
The innovation imperative for organizations, developing a working definition of innovation, targets for innovation in your business.
John Danner

Global Trends (including Asia/ASEAN)
Global economic trends and outlook; Asia/ASEAN: major challenges and prospects; US-ASEAN INSPIRE program; US political and economic policies and their impact on Asia/ASEAN.
Mark Coopersmith and John Danner

Campus Tour

TUESDAY, 9th MAY 2017

Integrating Design Thinking & Customer Needs into Great Products
We will introduce you to the four core elements of “design thinking” -- observe and notice, frame and reframe, imagine and design; make and experiment and develop these capabilities at the individual, team and corporate level. We would also explore what it looks like to put the customer at the center of business strategy and product development and the relationship between “design thinking” and “lean start-up.”
Sara Beckman

Design Thinking In Action (exercise & case studies)
In this session, we will apply the “design thinking” principles to participant problems or organizations, visualize customer interactions and develop a customer-focused story.
Sara Beckman

Panel Discussion: Innovation & Disruption in FinTech
It's one thing to talk about bringing new innovations to market. It's another to actually do it. In this highly interactive panel discussion we will be joined by business executives who are actively driving innovation and disruption in their companies and in their market sectors. These executives will share stories of "how it is done," discuss challenges and successes, and provide insights based on what they have learned along the way. There will be time for questions from program participants.
Mark Coopersmith

The Evolving Venture Capital Landscape
Venture capital is a key driver in the global innovation economy. New factors, participants and techniques have accelerated pace of change in this dynamic and important industry. Global investors with strategic and financial objectives have entered the marketplace at scale. Interaction between these new participants and traditional stakeholders has created a new level of complexity and opportunity. Our session will review the basic industry framework as well these emerging trends. We will identify opportunities for participation and value creation.
Jerome Engel

Photo session
WEDNESDAY, 10th MAY 2017

Site Visits
Google
Autodesk Workshop & Gallery

THURSDAY, 11th MAY 2017

The Silicon Valley Model of Entrepreneurship
The San Francisco Bay Area/Silicon Valley is considered by many to be the birthplace of modern entrepreneurial startup formation, producing new forms of financing such as venture capital, creative approaches to investigating product/market fit and business model innovation, and the development of the most robust and evolved entrepreneurial ecosystem globally. In this session we will investigate and explore a number of the tools, techniques, processes, frameworks and participants that contribute to this particular model and approach.
Mark Coopersmith

Innovation in Customer Experience
Today's digitally-enabled customers are more demanding than ever, with their expectations for experience being set by the best includes leaders like Amazon and Apple. In the session we will investigate how organizations can (and do) leverage the forces of digital disruption along with more traditional methods to better serve customers while upending existing markets, creating new ones, and radically altering the ways products and services are marketed, sold and delivered.
Michael Hinshaw

Panel Discussion from ASEAN Business Award Winners
This is a moderated panel discussion with three highly accomplished ASEAN Business Award Winners who are leaving their mark as entrepreneurs and innovators in their countries and the region. They will discuss their journeys to success (and failures) and offer their insights on how to address challenges and move forward with initiatives to grow their business. Our discussion will also explore the regional outlook for entrepreneurial success in global competitive markets.
Mark Coopersmith and John Danner

"The Other F Word" – Leveraging Failure to Drive Success
Most leaders overlook a significant resource that most of us generate in our organizations every day: Failure. Drawing from the upcoming book by John Danner & Mark Coopersmith, this session investigates how leaders can effectively leverage failure to drive innovation, growth and overall organization resilience. We will review a seven-point roadmap to help ensure that failure converts to a strategic resource, along with sharing road-tested practices that will help develop a failure-savvy organization.
Mark Coopersmith and John Danner

Closing Dinner

FRIDAY, 12th MAY 2017

Built for Growth: The Natural Leadership Styles of Growth-Oriented Leaders
Every organization faces the imperative to grow - or risk stagnation. There are any courses and books on the mechanics of addressing that challenge; but they miss a central issue: who should build that growth? Based on Built For Growth, the Harvard Business School Press 2017 lead title, this session will explore the personality characteristics of highly successful entre- and intrapreneurs. You will learn about how these growth leaders make decisions, manage and lead; and have the opportunity to discover which of the four Builder Personalities you most closely resemble.
John Danner

Presenting YOUR Innovation Initiatives
As we commence the final afternoon of our week together, participants will share key innovation concepts presented and discussed during the program that they find particularly interesting and relevant to challenges faced by their organizations. They will also discuss how they might present these concepts in their organizations and introduce the into their markets, building upon the content we have covered and activities we have undertaken together during this weeklong program.
Mark Coopersmith & John Danner

Synthesis & Review
Final thoughts on the themes of the week and ideas for what the participants might do differently when they get back to work.
Mark Coopersmith & John Danner

--- "The Agenda may be subject to change and those who have registered will be notified accordingly." ---
John Danner teaches courses on entrepreneurship, innovation and strategy at UC Berkeley's Schools of Business and Information, as well as the Berkeley Executive MBA program. He is also an annual Visiting Professor at Princeton University, teaching a campus wide course on entrepreneurship to address global challenges, in addition to having launched an "Ideas Factory" program for student entrepreneurs and a discussion series on failure as the frequent companion of innovation.

A senior moderator of leadership seminars for both the Aspen Institute and Federal Executive Institute, he speaks, consults and conducts executive education courses on innovation, strategy and leadership around the world. He is the co-author of The Other "I" word: How Smart Leaders, Teams, and Entrepreneurs Put Failure to Work (John Wiley & Sons, 2015); and is currently writing a book with a Princeton colleague on the intersection of the personalities of successful business founders and four key challenges they face in building enterprises.

Mr. Danner has extensive experience directing major consulting, management and policy projects for organizations ranging from Fortune 500 companies and major government agencies to large nonprofit institutions and emerging ventures. Among his engagements are strategic analysis and advice to several major players in the restructuring global energy and utility markets (including the organization that manages California's electricity grid), business process innovation for two significant regulated infrastructure companies, acquisition integration and strategy for a major food products and service company, and work with a broad range of new ventures on multiple issues regarding their business launches.

As a management consultant, attorney, entrepreneur and executive, he has helped organizations develop and successfully execute strategic initiatives in rapidly changing environments - including energy, telecommunications, consumer products, high tech, health care, education and information industries.

His career has been interspersed with both senior-level public service positions at the state and federal government levels, and startup entrepreneurial ventures in the business publishing and philanthropic fields. TED University, which has become a popular part of the global TED conferences, is also his brainchild. In addition to serving on several advisory boards, he is also a judge for the international Spark Design Awards. Mr. Danner holds the JD, MPH and MAEd degrees from UC Berkeley and a BA from Harvard College.
Mark Coopersmith is an educator, Fortune 500 executive, entrepreneur, and author. A Senior Fellow at UC Berkeley's Haas School of Business, he teaches and speaks on entrepreneurship, innovation, and leading change to students and executives around the world. He has launched and led global businesses at the intersection of technology, media and brands for companies such as Sony and Newell Rubbermaid, has built successful Silicon Valley startups (one of his companies is now owned by Google, another addresses global water scarcity), advises leadership teams at companies such as Intel and DirecTV, and sits on several boards. He has spoken to leadership teams at Daimler Benz, Google, IDEO, Salesforce, Wells Fargo Bank, and many others.

Mark's entrepreneurship students have launched ventures in sectors as varied as web services, medical devices, consumer electronics, business services, cancer research, education, online retail, and fashion. Many of these ventures were created and accelerated while the founders were enrolled in Mark's popular Workshop for Startups and Learn2Launch courses and programs. He also mentors many entrepreneurs and teams including those at UC Berkeley's SkyDeck accelerator.

Mark's insights have been featured in The Economist, The New York Times, USA Today, The Financial Times, Fast Company, and Entrepreneur; and on CNN, Fox News, NPR and The Huffington Post. He is the inaugural Author in Residence at NASDAQ's Entrepreneurial Center in SF, where shares insights from his 2015 Wiley book “The Other “F” Word,” co-authored with John Danner.

Mark earned his BA and MBA degrees at UC Berkeley.

Michael Hinshaw is Managing Director of customer experience services and technology firm Mcorp, where he helps companies integrate creativity and business strategy to improve business performance by transforming how they interact with customers.

Co-author of the best-selling book Smart Customers, Stupid Companies: Why Only Intelligent Companies Will Thrive, and How to Be One of Them, Michael focuses on the market, social and technological forces driving disruptive innovation, and what it takes for companies to embrace and profit from this change - rather than getting crushed by it.

Recognized as a customer experience, marketing and innovation leader by Forrester Research, DMA, the American Bankers Association and others, he regularly speaks on these topics and has been published and quoted in dozens of publications ranging from Harvard Business Review and Fast Company to American Executive and Time.

Previously, Michael was founder and CEO of Verida, which he grew from initial funding to a $300 million public company, becoming the largest independent grain trader in Canada. Earlier in his career, he led the turnaround and sale of brand consultancy Triad, Inc., and worked as a marketing consultant with Investment Banks and Venture Capital firms positioning their portfolio companies for market entry.

As a consultant to senior management, some of the global organizations he has advised include AT&T, Danone, Lululemon, Microsoft, T. Rowe Price and the United Methodist Church.

Michael is also a Teaching Fellow at UC Berkeley's Lester Center for Entrepreneurship and Innovation at The Haas School of Business, and has held board seats at publicly traded, private and non-profit firms.

He pursued his education at the University of San Francisco and the Academy of Art University, receiving his BFA and MFA degrees in design from the Academy.
Sara Beckman is Earl F. Cheit Faculty Fellow at the Haas School of Business where she designs and delivers courses on design, innovation and product management and a Teaching Professor in the Mechanical Engineering Department in the College of Engineering. Her 25 years of experience teaching design and innovation-related topics at the Haas School of Business culminated in creating a course, Problem Finding, Problem Solving, which draws from design thinking, critical thinking and systems thinking literature. That course is now offered to all business students at Haas, and prepares them both for their Applied Innovation projects as well as for their work in their own jobs.

Her recent research focuses on the role of learning style diversity on design teams, and on the pedagogy of teaching design. For the past two years, she leveraged her teaching and research experience in serving as the Chief Learning Officer of the recently founded Jacobs Institute of Design Innovation within University of California, Berkeley's College of Engineering. Sara directs the Product Management Program for the Berkeley Center for Executive Education, serving 350 product managers from around the world each year. Before joining Berkeley-Haas, Sara worked in the Operations Management Services group at Booz, Allen & Hamilton and ran the Change Management Team at Hewlett-Packard. Sara received her BS, MS and PhD degrees from Stanford University in Industrial Engineering and Engineering Management.

Jerome S. Engel is an internationally recognized expert in innovation, entrepreneurship, and venture capital, lecturing and advising business and government leaders around the world. After a successful business career, he joined the faculty of the University of California at Berkeley in 1991 to found the Lester Center for Entrepreneurship and Innovation, where he currently serves as Senior Fellow and Founding Executive Director Emeritus. At Berkeley he has fostered the creation of an internationally distinguished program that provides entrepreneurship education across the University and its constituent community. Mr. Engel is an Adjunct Professor at the Haas School of Business and instructs in both the School's MBA and Executive Education programs, specializing in Entrepreneurship, Corporate Innovation, New Venture Finance, Venture Capital and Private Equity.

He serves on the Advisory Boards of several universities and innovation centers around the world. An author and frequent speaker, he has been cited in the Wall Street Journal, National Public Radio and other global media.

Mr. Engel is active in the private sector. He is a General Partner of Monitor Ventures, LLC, a venture capital firm organized in collaboration with the Monitor Group, a global strategic consulting and private equity management firm. Over his career Mr. Engel has served on the Boards of a number of emerging companies and non-profit organizations. Current Board positions include Adaptive Planning, Jupiter Systems, MedAmerica, and the National Collegiate Inventors and Innovators Alliance. He advises major corporations, emerging companies and private equity investors on strategy, innovation, technology commercialization, and capital formation.

From 1979 through 1990, Mr. Engel was San Francisco Bay Area Director of Entrepreneurial Services, a practice group he founded at Ernst & Young, that is globally recognized for the creation of the Entrepreneur of the Year Award. Promoted to Partner in 1982, Mr. Engel specialized in consulting on capital formation, corporate strategy and management organization of entrepreneurial ventures, with an emphasis in software and biotechnology. In 1990, Mr. Engel was appointed Ernst & Young's National Director of Capital Resources, where he directed the firm's capital formation services for its emerging business clients nationwide. During his career, Mr. Engel helped a number of entrepreneurial firms go public, including Brøderbund, Maxis, Autodesk and Fair Isaac Companies.

From 1992-1995, Mr. Engel served as a member of the Board of Directors of Maxis Corporation, and oversaw the company's financing activities, which included venture capital and a successful initial public offering. In 1995, Mr. Engel was a founding General Partner of Kline Hawkes Capital, a venture capital firm based in Los Angeles that was cited by CalPERS as providing top decile performance. In 1998, Mr. Engel co-founded AllBusiness.com, which he grew to over 150 employees and sold to NBC in March 2000 providing outstanding returns for its investors.

Professor Engel's awards and recognitions include the National Collegiate Inventors and Innovators Alliance Lifetime Educational Achievement Award, the Global Consortium of Entrepreneurship Centers Award for Outstanding Contributions to Advance the Discipline of Entrepreneurship among others. His most recent research and publications focus on the nature in innovation processes in firms, communities and global networks. He is a CPA and received his undergraduate degree at Penn State University and his master's degree at the University of Pennsylvania, Wharton School.