

## Areas of Expertise

### Performance Measurement

#### Strategic Research: Customer, Employee, Alignment

#### Best Practices Research/ Assessments and Diagnostic Tools

### Industries

Pharmaceuticals, Medical Products, Banking, Insurance and other Financial Services, Retail, Industrial Equipment, Real Estate, Automotive, many others

### Positions Held

Independent Consultancy – Global Management and Research

Senior Vice President, Performance Measurement and Customer-focused Quality, The Forum Corporation

Vice President Consulting and President, Goodmeasure Survey Services, Goodmeasure, Inc.

Director of Public Affairs  
The Denver Regional Council of Governments

Senior Public Information Officer, Manager of Motion Picture and Television Production and Director, State Film Library, State of Illinois

President and Co-founder, Communicon, Inc.

### Education/Certifications/Citations

MBA, Yale School of Management, 1981

Doctoral studies in Philosophy, Northwestern U. 1963 - 65

AB in Humanities with Honors, Shimer College, 1963

Certified in Executive Programs and Processes : Voice of Customer, Quality Improvement, and Effective Meetings

Chairman's Award (4x) – Forum Worldwide

National CLIOs for Best Writing for Radio, Best Public Service Spot, and a special award for Merit in Marketing

Numerous civic and community awards including the SCLC Dr. Martin Luther King Award for Community Leadership

### Speaking Engagements/Books & Published Articles

Featured or Keynote Speaker for many organizations including Fortune Magazine, INC Magazine, Society for Human Resource Management, OD Network, American Society for Quality, International Customer Service Association, University of Illinois College of Medicine, International Association of Business Communicators, the Society of Consumer Affairs Professionals in Business.

Author: [From Manager to Innovator: Using Information to Become an Idea Entrepreneur](#), 1989, Administrative Management Society Foundation.

Author or co-author of more than two dozen published articles on business topics plus contributions to several books.

## Professional Experience and Cases

### Performance Measurement:

Globally recognized authority on performance measurement and business scorecards. Won widespread acclaim as the "father" of the Dynamic Scorecard, a popular alternative to the Balanced Business Scorecard.

- Global Fortune 100 Company - Chemical Industry. Facilitated teams at corporate and divisional levels in Latin American division of global company to build cross-linked dynamic scorecards. The scorecards clarified and rationalized corporate strategy and existing corporate initiatives and led to vastly improved alignment. As lead consultant, designed and delivered two days of performance measurement education to the 100 most senior executives followed by multiple sessions of team facilitation over three months.
- Major North American Energy Company. A merger provided the opportunity to replace the problematic balanced scorecard at one of the organizations with a better framework for aligning the two. Combining the Dynamic Scorecard with a performance management approach dubbed the "Integrated Performance Framework" provided a holistic model for integrated planning, goal setting, performance measurement, leadership, culture, performance management, and incentive compensation.

### Strategic Research:

Considered the foremost promoter and practitioner of Strategic Customer and Employee Research (SCR and SER), methodologies that measure and explore the gap between expectations and perceptions of performance. Expanded the work of the leading service quality theorists by integrating product quality and cost with service quality into a comprehensive and thoroughly tested model of customer expectations. Invented and popularized research methods such as Expectations Mapping and Virtual Group Technique that have been used by or on behalf of dozens of major organizations. Further developed Strategic Alignment Research (SAR) methodology which uncovers what an organization and its people "think" the strategy is, and determines the degree to which the organization, organizational units and individuals are committed to the various elements of the strategy.

- Canadian Division of Global Financial and Travel Services Company – Fortune 100 client. Two-pronged objectives were to identify a meaningful and useful segmentation scheme based on a combination of demographic, behavioral and value-based criteria, and to create highly targeted value propositions for each newly identified customer segment. Strategic Customer Research was conducted to understand customer expectations, segment the customer base and identify the drivers of customer behavior. New sales and marketing materials were developed and the organization was aligned to deliver to the new value propositions through employee education and work system enhancements. The client estimated that this work added approximately \$150 million to the top line in the first year of implementation.
- Financial Services Division of a Global Automotive Company. Given a corporate mandate to develop a balanced scorecard, the division was uncertain as to how to populate it with strategically relevant employee data. Data was compiled by business unit and supervisor that showed the gap between employee expectations and perceived performance. Managers and supervisors were trained to interpret their reports, provide feedback to their units, and develop and initiate improvement plans. All objectives were achieved.

### Best Practices Research:

Tools and assessments such as the Executive and Employee Assessments of Customer-Focused Quality and Top Team Alignment Diagnostic have been used by hundreds of companies and governmental organizations in more than fifty countries. Major studies of customer focus and the customer experience have been highlighted in executive conferences, quoted in publications such as *The Wall Street Journal* and *The Harvard Business Review* and featured in best-seller business books including [The Customer-Driven Company](#), [Customer-Centered Growth](#), [Managing the Customer Experience](#), [Strategic Performance Measurement](#), and [Uncommon Practice](#).

- Detailed research was conducted on behalf of a partnership of two global consultancies, one headquartered in the U.S. and focused on training and the customer experience, and the other based in the U.K. and focused on branding strategy. The goal of the research was to establish best practice with respect to the creation and maintenance of competitively superior customer experiences. The objectives were to develop models and case studies for inclusion in two books on "branded customer experiences," one for the U.S. market and one for the U.K. market, and in addition, to create a validated assessment tool that would document the extent to which subject companies employ best practice. The best practices were determined by an analysis of in-depth interviews with the senior executives of fourteen of these companies and were validated through a survey of employees of a half dozen companies in various industries. All objectives were met; the books have been published and have received wide recognition in the business book market, and a validated standardized survey was created.