

SUSAN S. HARMELING, Ph.D.

USC Marshall School of Business, Equitas Advisory Group

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EDUCATION

UNIVERSITY OF VIRGINIA 2002-2006

Charlottesville, VA

Ph.D. 2006 in Business Ethics and Entrepreneurship, Darden School of Business. Focus on entrepreneurship education, effectuation and stakeholder theory. Highest distinction on comprehensive examinations. Dissertation on the National Foundation for Teaching Entrepreneurship: *Making Entrepreneurs and Worlds that Entrepreneurs Make*.

HARVARD BUSINESS SCHOOL 1989-1991

Boston, MA

M.B.A. 1991. Member, Public Service and Small Business Clubs. Manager, HBS Prospectus: co-directed "Prospectus 1992," a student business awarded by the HBS Concessions Committee. Sold advertising space to major corporate clients, designed book layout, managed publication and printing process, met university deadlines for incoming students' orientation.

HARVARD COLLEGE 1982-1987

Cambridge, MA

A.B. 1987. Magna cum laude in double concentration, English and Spanish Literature. Completed intensive semester abroad in program for Spanish language and Latin American poetry, Instituto Internacional, Middlebury College, Madrid, Spain, Fall 1986.

PROFESSIONAL EXPERIENCE

EQUITAS ADVISORY GROUP 2020-present

Washington, D.C.

Co-founder and Principal: As an extension of consulting work in business ethics, co-founded a research and advisory group for organizations that need to re-envision and achieve diversity, equity and inclusion goals. Conducted extensive qualitative field research in medium and Fortune 500 companies to develop a proprietary diversity training method grounded in scientific research and designed with decades of pedagogical expertise and performance feedback. Piloted at Harvard Business School in June 2020, this diversity training consists of integrated modules that can be mixed and customized for each organization's needs. Field-proven and evidence-based, this superior approach creates positive outcomes and measurable, lasting benefits.

U.S.C. MARSHALL SCHOOL OF BUSINESS 2017-present

Los Angeles, CA

Associate Professor of Clinical Entrepreneurship: Teaching entrepreneurship classes primarily to undergraduate students with an emphasis on business ethics. Continued case method work with the Lloyd Greif Center for Entrepreneurial Studies. Entrepreneurship Instructor in Custom Executive Education Program. Consistently among the highest-rated undergraduate instructors in the Marshall School of Business

HARVARD BUSINESS PUBLISHING
2013-2017

Boston, MA

Facilitator: Chosen as one of only three non-HBS faculty to lead seminars on the Harvard Business School case method. Seminars offered for both American and international faculty and taught exclusively by the case method cover all aspects of participant-centered learning. Author in online forum, *The Teaching Post*, a community of Educators interested in learning about the case method: <http://teachingpost.hbsp.harvard.edu/>

HOWARD UNIVERSITY SCHOOL OF BUSINESS
2006-2017

Washington, D.C.

Tenured Associate Professor: Professorship in entrepreneurship. Core course coordinator for entrepreneurship, responsible for designing course-wide learning goals and course-wide final project. Class based on Harvard Business School case method. Highest teaching evaluation ratings in the school, spring 2013: ranked #1 in a faculty of 57 full-time professors. Teaching evaluation ratings consistently in the top 10% of all faculty. Case instructor in MBA Orientation Program. Chosen to be a faculty mentor in the FRieND Program which pairs master teachers with faculty in need of assistance. Significant research and publishing record in both entrepreneurship and business ethics. Member of university-wide Council of Research Officers.

INTERNATIONAL CASE METHOD INSTITUTE
2006-present

Washington, D.C.

Founder and President: Founded boutique consulting firm whose mission is to develop and improve international business curricula based on the case study method of instruction. ICMI offers a wide range of educational services such as case research and development, faculty training, tailored case workshops and private instructional seminars. Clients include commercial firms, international organizations and institutions of higher learning. Recent engagements include facilitation of the AY4 Training Program at Deloitte Touch, an 8-case series on Lending and the Cost of Funding with seminars on case teaching for the International Finance Corporation, a 12-case series for the *Doing Business Project* of the International Finance Corporation, a training seminar for the Microinsurance Innovation Facility in Geneva and a Course on the case method for the World Bank in Kampala, Uganda. Other recent projects include: a two-day case method seminar with Booz-Allen Hamilton in Washington D.C., a joint case project with the University of Twente, the Netherlands and Harvard Business School and a keynote speech and case session for the Broad Integrative Fellows Program at Michigan State University. www.casemethodinstitute.com

INDEPENDENT CONSULTING
1997-2006

Washington, D.C.

International Finance Corporation/World Bank Case Development and Training, Washington D.C. - Wrote twelve cases for the *Doing Business* Report of the IFC, a project which provides information to investors on the ease of doing business in 160 countries. Also taught a series of case seminars to IFC staff on how to teach case studies 11/06-8/07. Wrote case study on "San Le", a Vietnamese furniture company, and accompanying technical note on the global furniture industry and market characteristics of the furniture industry in Vietnam, 6/05. Case and technical note used in a pilot one-week training course for IFC's field-based technical assistance staff, Ho Chi Minh City, 7/05. Developed and wrote case study on the *Azito Power Plant Project* in Cote d'Ivoire, presented in Beijing for IFC business development field officers, 1/06. Developed and wrote case study on the process of simplification in municipal business operations in "Molonia," a fictional composite of various IFC/World Bank simplification projects. Presented in Lima, Peru to IFC facility staff, 3/06. Wrote case study on the successful *Egypt Population Project* for a training seminar in the World Bank, summer 2006. Researched and wrote two

health care cases: *Managed Care for Developing Countries*, and *Reproductive Health Sector Reform, Egypt and Brazil*. Currently working on an 8-case series for the IFC's Treasury Department.

International Finance Corporation, Washington D.C. - Co-taught a week-long seminar to African Boards of Directors organized by the Center for Private Enterprise and the Global Corporate Governance Forum. Sessions include two case study discussions, a live case creation exercise and a guided role play, 7/06.

International Finance Corporation, Lagos, Nigeria - Taught original course on the case study method at the Lagos Business School (LBS), Lagos Nigeria, 11/04, 2/05. Worked with five core faculty members to develop their case research, development, writing and teaching skills. Gave presentation on innovation and opportunity to the Executive MBA group and co-produced a CD on interviewing and the case method featuring a Nigerian entrepreneur. On-going review of case studies and course development materials produced by LBS faculty.

Management Center Innsbruck, Austria - Visiting Lecturer, Consulting and Coaching course for students in the Graduate Health Management program, and course on Case Method of Instruction for faculty, 11/09. Guest Lecture on Merck and the Pharmaceutical Industry for Health Management Program, 2/09.

Microfinance Management Institute/CGAP/The World Bank - Conducted videoconference to Bangalore India, Manila, Philippines, and San Jose Costa Rica on the case study method and the development of quality teaching materials as part of a joint project on microfinance education, 10/04. On-going review of case studies and course development materials produced by member institutions. Short course on case development planned for MFMI Fellows, Johannesburg, South Africa, 9/05.

Batten Institute for Entrepreneurship, Darden School of Management - Researched and wrote case study on the Graduate Program for Entrepreneurship at the University of Osijek, developed two educational CD's for Batten's Perspectives on Entrepreneurship series, interviewed leading academics and practitioners in the field, 2003-2004.

Central European University, Budapest, Hungary - Taught course on the case study method to MBA students and faculty, presented 2003 working paper: *Ethical Innovation: An Instrumental Stakeholder Framework*, 10/03.

Andrija Stampar School of Public Health, Zagreb, Croatia - Designed and taught course on all aspects of the case study method for Graduate Program on Leadership and Health Management for public health professionals, 2/02.

Open Society Institute, Osijek, Croatia - Designed one-week case training course for the Graduate Program in Entrepreneurship at the University of Osijek, Croatia. Course, funded by OSI and taught in 9/01 and 3/02, focused on case research, writing and teaching for both graduate students and faculty.

*H*Works, Advisory Board Company* - Developed practices, case studies and research materials for the Health Care Advisory Board and H*Works, the Company's new hospital consulting division.

McKinsey and Company - Researched and wrote a four-case series on three managers at the Bank of Montreal for McKinsey's corporate training program.

George Washington University School of Public Health - Visiting Lecturer, Business Ethics and the Pharmaceutical Industry: Merck and River Blindness, 10/04.

HARVARD BUSINESS SCHOOL
1987- 2000

Boston, MA

Lead Case Writer, Committee of 200 Project: Served as main case writer for the Committee of 200 Project at Harvard Business School. The Project's focus was on developing cases with female protagonists for the HBS curriculum. Wrote 14 cases and 5 teaching notes on businesses owned and/or managed by women, including E*Trade and Weight Watchers.

Case Writer: Developed, researched and wrote over 20 case studies for MBA courses in International Management, Entrepreneurial Management and Accounting, and Executive Programs, including Managing Global Opportunities (MGO), Mexico City, 1993. Case subjects included Eli Lilly, Mexico, SC Johnson Europe and search firm Egon Zehnder International.

THE ADVISORY BOARD COMPANY
1993-1997

Washington, D.C.

Senior Consultant: Managed, researched and co-wrote 1995 and 1996 presentation studies on U.S. health care. *Emerging from Shadow* addressed renewed strength of the health care provider relative to HMO's; *Medicare Strategy* covered the retail nature of senior care.

CULTURAL SURVIVAL ENTERPRISES
1991-1993

Cambridge, MA

Native American Program Director: Initiated and developed production and marketing program for Native American tribes in the U.S. and Canada. Developed business plans, marketing materials and financial statements for tribal enterprises. Marketed products to corporations and alternative trade organizations (ATO's) including The Nature Company and The Body Shop.

PROFESSIONAL PUBLICATIONS

Olive, Tomas Antoni and Harmeling, Susan S. (2019) "*The Effectual Creation of Cubism by Picasso and Braque (1908-1914)*" Journal of Small Business Economics, Special Issue on Effectuation, 54:3, 819-842.

Harmeling, Susan S. and Sarasvathy, S.D. (2013) "*When Contingency is a Resource: Educating Entrepreneurs in the Balkans, the Bronx and Beyond*" Entrepreneurship Theory and Practice, 37:4.

Harmeling, Susan S. (2011) "*Re-Storying an Entrepreneurial Identity: Education, Experience and Self-Narrative*" Education and Training, 8/9: 53.

Meyers, Yuvay J. and Harmeling, Susan S. (2011) "*Best Address: The Use of Innovative Marketing in the Real Estate Industry*" Journal of Research in Marketing and Entrepreneurship, 31:1, 74-84.

Harmeling, Susan S. (2011) "*Contingency as an Entrepreneurial Resource: How Private Obsession Fulfills Public Need*" Journal of Business Venturing, 26:3, 293-305.

Harmeling, Susan S. (2010) "*Entrepreneurship and Human Progress: Contingency as a Resource*" International Journal of Entrepreneurship and Innovation, 11: 3, 181–188.

Harmeling, S., Sarasvathy, S. D., and Freeman, R. E. (2009) "*Related Debates in Ethics and Entrepreneurship: Values, Opportunities and Contingency*" Journal of Business Ethics, 84:3, 341-365.

Harmeling, Susan S. (2008) "*That My Neighbor's Cow Might Live: Effectuation and Entrepreneurship Education in Croatia*" International Journal of Entrepreneurship Education. Vol. 6.

Harting, Troy, Harmeling, Susan and Venkataraman, S. (2006) "*Innovative Stakeholder Relations: When Ethics Pays (and when it Doesn't)*" Co-authored with Dr. Troy Harting and Prof. S. Venkataraman. Business Ethics Quarterly, 16:1, January, 2006.

Stevenson, H.S. and S. Harmeling. (1989) "*Entrepreneurial Management's Need for a More Chaotic Theory*" The Journal of New Business Venturing, Vol.1.

SELECTED CASE STUDIES

Harmeling, Susan S. Melvin Hines and Upswing, *Harvard Business Publishing*, Forthcoming 2022.

Harmeling, Susan S. *Swoop Group Transportation*, Harvard Business Publishing, SCG-579. October, 2020.

Harmeling, Susan S. *Randy Hetrick and TRX: Protecting Intellectual Property Rights (A) and (B)* SCG549-PDF-ENG. January, 2019.

Harmeling, Susan S. *ChekAbuse (A) and (B)* SCG559-PDF-ENG. Harvard Business Publishing, February, 2020.

Henry, Patrick and Harmeling, Susan S. *Wolo (A) and (B)* SCG529-PDF-ENG. Lloyd Greif Center, Harvard Business Publishing, November, 2017.

Grossman, Elissa and Harmeling, Susan S. *Getting Somewhere by Going Nowhere: Full Psyche (A) and (B)*. Lloyd Greif Center, Harvard Business Publishing, Fall, 2016.

Harmeling, Susan S. *IFC Treasury Case: Cost of Funding Increase*. International Finance Corporation Treasury Department, Washington D.C., August, 2016.

Hamermesh, Richard, van der Steen, Marianne and Harmeling, Susan S. *Building an Integrated Biopharma Company: Crucell. (A) 815-085 and (B) 815-086*. Harvard Business Publishing, February 13, 2015.

Leonard, Dorothy and Harmeling, Susan S. *Assistant Professor Gyan Gupta and the Wet Noodle Class (A): 912-405 and (B) 912-406*. Harvard Business Publishing, July 13, 2011, revised December 2015.

Harmeling, Susan S. *CO2 Abatement Strategies in Poland*. KicInnoenergy SE, Eindhoven, Netherlands, October 2015.

PROCEEDINGS AND OTHER PUBLICATIONS

"*Entrepreneurship and the Human Enterprise: Where Private Obsession Meets Public Need*" Frontiers of Entrepreneurship Research, Vol. 27: Iss. 4, Article 5, 2007. Co-Authored with Troy R. Harting.

"*That My Neighbor's Cow Might Live: Effectuation, Entrepreneurship Education and Regional Development in Croatia*" Published in Kyrö, P. and C. Carrier (eds.) 2005.

"*The Dynamics of Learning Entrepreneurship in Cross-Cultural University Context*" University of Tampere, Research Center for Vocational Education, Entrepreneurship Series 2/2005, University of Tampere, Finland. Full paper published in the Babson College Entrepreneurship Journal, 2004.

"*Fostering Entrepreneurship in Croatia.*" Batten Briefing, vol. 2, No. 3, Summer 2003.

"*Reflections from an Entrepreneurial Pioneer*", an Interview with Howard Stevenson of Harvard Business School. Batten Briefing, vol. 2, No. 2, Spring 2003.

Authored dozens of case studies and teaching notes, both for Harvard Business School and for various clients of the International Case Method Institute, a private consulting business (see *Professional Experience* section above).

SELECTED PRESENTATIONS AND ACADEMIC PANELS

"*Kidpreneur Day*" Co-organizer with Wagilabs and VentureLab. Coached USC entrepreneurship students who moderated and coached young entrepreneurs from around the world, November 11, 2021.

"*Community Conversation: Exploring DEI Around the Globe*" Moderator of panel sponsored by the USC Marshall Office of Diversity Equity and Inclusion. October 12, 2021

"*Business Leadership as a Tool for Social Justice*", Panelist at this event sponsored by the Harvard Business School African-American Alumni Association. October 7, 2021.

"*From Heroin to Harvard: Lessons on Authentic Leadership: A Conversation with Charles Henderson*", Moderator/Interviewer at the Greif Center-sponsored event, April 15, 2021.

Young Presidents Organization Roundtable for the MBA Entrepreneur and Venture Management Club of USC, March 25, 2021, Emcee of the Event with prominent entrepreneurs and businesspeople from the Orange County Region of YPO.

"Do You Have to Choose? Ethics with Success on the Job" Panelist (business ethics expert) along with Ron Sugar, former CEO of Northrup Grumman and Chair of the Board of Uber, and Jerry Neely, Entrepreneur and Founder of USC's Neely Center for Ethical Leadership and Decision Making, February 10, 2021.

"Entrepreneurship Across the Curriculum". Seminar on Teaching Entrepreneurship, University of Baltimore School of Business, June 2013.

"Ethics and Social Entrepreneurship: Using Contingency as a Resource". Presented at the Donchian Ethics Symposium, University of Richmond, September 20, 2010.

"Re-Storying an Entrepreneurial Identity: Education, Experience and Self-Narrative". Presented at the Babson College Entrepreneurship Conference, IMD/EPFL, Lausanne Switzerland, June, 2010.

"The Entrepreneurial Mindset: New Ends, New Means, New Selves". Presented at the Babson College Entrepreneurship Conference, Babson College, Wellesley MA, June 5, 2009.

"Nyenrode University Health Management Program". Participant in Academic Roundtable with Michael Porter, Harvard Business School, May 13, 2009.

"(Some Preliminary Thoughts) on Deeds, Goldfarb, and Minniti's 'Entrepreneurship and Growth, Wealth Creation and Regional Development'". Presented at the Carey-Darden Entrepreneurship Retreat, Johns Hopkins University, May, 2009.

"When Contingency is a Resource: Educating Entrepreneurs in the Balkans, the Bronx and Beyond". Presented in the peer review section of the ISBE Conference, Belfast, Northern Ireland, November 6-8, 2008. Best Paper Award in the Education Track.

"Entrepreneurship and the Case Study Method". ELI Institute Conference on Entrepreneurship, Howard University, funded by the Kauffman Foundation for Entrepreneurship, June 2008.

"Entrepreneurship as a Mindset". Presented to the ELI Entrepreneurship Institute at Howard University, funded by the Kauffman Foundation for Entrepreneurship, May 2008.

"Entrepreneurship and the Human Enterprise". Presented at the Babson Entrepreneurship Conference, Instituto de Empresa, Madrid, Spain, June 2007. Presented at the Howard University Research Series, April 2007.

"That My Neighbor's Cow Might Live: Effectuation and Entrepreneurship Education in Croatia". Presented at the Allied Academies Conference, Reno, Nevada, October 2007. Presented at the Babson Conference for Entrepreneurship, Glasgow, Ireland, June 2004.

"The Entrepreneur as Strong Poet". Presented at the Society of Business Ethics Conference at the Academy of Management meetings, New Orleans, Louisiana, August 2004.

"The Strong Poet in Ethics and Entrepreneurship: A Look at the Role of Contingency". Co-authored with Prof. Saras Sarasvathy and Prof. R. Edward Freeman. Presented at IESE Conference on Entrepreneurship, Barcelona, Spain, September 2005.

"Ethical Innovation: an Instrumental Stakeholder Framework". Presented at the Society of Business Ethics Conference at the Academy of Management meeting, Seattle, Washington, August 2003.

"*Making Entrepreneurs and What Entrepreneurs Make*". Presented at the IESE Conference on Entrepreneurship, Barcelona, Spain, September 2005.

FELLOWSHIPS AND AWARDS

Best Paper Award: ISBE Conference Belfast Ireland (November 2008) Shared the award with co-author Saras Sarasvathy for the paper, "When Contingency is a Resource: Educating Entrepreneurs in the Balkans, the Bronx and Beyond."

Faculty Fellowship, The George Washington University Executive Development Program (2007) Member of GWU School of Business EDP Faculty, responsible for entrepreneurship, business ethics and the case study method.

FRieND Program, Howard University (2009-present) Chosen to be member of faculty mentorship program whereby faculty with outstanding teaching records mentor other faculty needing assistance with some aspect of pedagogy from classroom style to syllabus development to materials selection.

Harvard Business School Public Service Fellowship (1991-1992) Awarded one-year stipend for HBS graduates pursuing careers in public service.

Harvard Business School Scholarship (1989-1990) Awarded first-year full scholarship for outstanding research contribution to HBS in Entrepreneurship.

Rotary International Scholarship (1989) Awarded full scholarship for Grand Diplome course at La Varenne *Ecole de Cuisine* in Paris.

PROFESSIONAL AFFILIATIONS AND ACTIVITIES

Member, Teaching Post Forum for Educators, Harvard Business School Publishing

Member, Executive Committee for the Graduate Certificate for Entrepreneurship, Howard University School of Business

Member, Case Competition Faculty Committee, Howard University School of Business

Member, Academy of Management

Member, Society for Business Ethics

Reviewer, Journal of Business Venturing

Reviewer, Entrepreneurship Theory and Practice

Reviewer, Strategic Entrepreneurship Journal

Judge, George Washington School of Business Case Competition, 2007.

Adjunct Faculty Member, Management Center Innsbruck, University of Innsbruck, Austria

Guest Lecturer, School of Business, University of Bern, Switzerland

LANGUAGE SKILLS

English (native). German (fluent). Spanish (fluent). French (proficient).

PRINT MEDIA

Forbes Magazine, Regular contributor on Diversity, Equity and Inclusion beginning August, 2021.
<https://www.forbes.com/sites/susanharmeling/?sh=782ea1fd181c>

Business Insider, "Rihanna's Unbridled Success is a Testament to Unbridled Inclusivity-and a Case Study for CEO's (September 13, 2021)

Harvard Business School Alumni Bulletin, "Real Talk" Profile on Equitas Advisory Group Founders Susan S. Harmeling and Charles M. Henderson, Profile, April 8, 2021
<https://www.alumni.hbs.edu/stories/Pages/story-bulletin.aspx?num=8149>

Government Executive, "Viewpoint: How Biden can Foster a More Inclusive America." (February 2, 2021)

Business Insider, "7 months after George Floyd's death, Corporations are still 'Diversity Washing' Instead of Making Actual Changes." (January 9, 2021)

Government Executive, "Don't Cancel Federal Diversity Training, Fix It". (October 15, 2020)

Atlantic Magazine, "The Fight Against Words That Sound Like, but Are Not, Slurs". (September 28, 2020)

Los Angeles Times, "Netflix's class warfare movie 'The Platform' has struck a chord. Two economists explain why." (April 15, 2020)

Bloomberg News, "Starbucks Employees Challenged to Serve Even Those Who Aren't Buying". (January 25, (1st Quarter/Winter) 2019).

Bloomberg News, "McKinsey Is 'Horrorified' That Saudi Arabia Report May Have Been Misused". (October (4th Quarter/Autumn) 21, 2018).

Los Angeles Business Journal, "Women-Owned Firms Reach \$18.9B". (June 29, 2018).

Los Angeles Business Journal, "L.A.'s wealthiest Women Include Business Leaders, Investors, Heirs". (May 18, 2018).

New York Times, "Yellow Fever Restaurant at California Whole Foods Sets Off a Debate". (April 30, 2018).

RADIO

Arizona Public Radio, "Insys Facing String Of Lawsuits, Many Ethical Questions" (January 3, 2018)
<https://theshow.kjzz.org/content/587729/insys-facing-string-lawsuits-many-ethical-questions>

VISUAL MEDIA

Interview on the One-Year Anniversary of the Murder of George Floyd, NBC TV Los Angeles with Ted Chen. May 24, 2021

USC Marshall School of Business, Tommy Talks, "The Ethics of the Coronavirus Crisis" (April 2020)
<https://www.youtube.com/watch?v=L354kp0C4y4>

Harvard Business School, Alumni Profile, "Making a Difference" (June 2018)
https://www.alumni.hbs.edu/video.aspx?v=1_fmzumeyp

Harvard Business Publishing, "Primer on Case Solutions: Mini-Guide and Video" (March 2016).