

Russell Walker, Ph.D.

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CURRICULUM VITAE

UNIVERSITY APPOINTMENT

- | | |
|---|---------------------------------|
| Director of Experiential Learning in Analytics and Senior Lecturer in Marketing
Department of Marketing and International Business
Foster School of Business, University of Washington | 9/19-Current

Seattle, WA |
| Clinical Professor of Managerial Economics and Decision Sciences | 9/16 – 9/19 |
| Clinical Associate Professor of Managerial Economics and Decision Sciences | 9/10 – 9/16 |
| Associate Director of the Zell Center for Risk Research | 9/10 – 11/13 |
| Assistant Director of the Zell Center for Risk Research & Senior Lecturer
Kellogg School of Management, Northwestern University | 6/07 – 9/10
Evanston, IL |
- *Specialties* – Leading and Mentoring Teams, Analytics, Big Data, Data Monetization, Data Science, Digital Strategy, Digital Platforms, Economics, Customer Analytics, Data-Driven Marketing, Analytical Organizational Design, Business Strategy, Risk Management, Enterprise Risk Management, Operational Risk Management, Time Series Analysis, Credit Risk Management, FinTech, Credit Cards, Payments, Global Trade and International Strategy, Public Speaking, Internet of Things.
 - *Author of Business Books on Big Data, Analytics, and Risk*
 - *From Big Data to Big Profits: Success with Data and Analytics*, Oxford University Press (2015). Named a top book in business technology and awarded silver medal by prestigious Axiom Awards (2015).
 - *Winning with Risk Management*, World Scientific Publishing (2013).
 - *Operational Risk in the Insurance Industry*, Lead Chapter in *Risk Management in Financial Institutions* Euromoney Publications (2013).
 - Editor and Contributing Author of Book Series on “*Opportunities in Big Data and Analytics.*” World Scientific. (Series began 2014)
 - *Experiential Learning Leadership in MBA Program* – Developed, lead and teach the popular Analytical Consulting Lab, Global Lab, and the Risk Lab courses. Individually sourced over 700 team projects with 250+ firms since 2008. These experiential courses are in high demand among Kellogg MBA students, with classes being regularly highly oversubscribed.
 - *Corporate and Executive Education* – Developed and lead new executive education programs in Global Leadership, Risk Management for Executives, Enterprise Risk Management, Operational Risk Management, and Managing Regulation, Reputation, and Risk. Served as Academic Director and Relationship Manager for programs with the American Dental Association, Professional Risk Managers’ International Association (PRMIA), Indian School of Business, and Sasin Graduate Institute of Business Administration. Developed and led executive education on Analytical Marketing and Big Data Strategies for Microsoft.
 - *Business Case Development* – Authored 90+ business cases for Kellogg MBA and executive education classes. Cases focus on analytics, strategy of technology, big data, risk management, Excel use, decision-making, and global business with many published at Harvard Business Publishing. My cases are amongst the most popular and used of all faculty at Kellogg and have been recognized by Harvard, Aspen Institute, Bank of England, Culinary Institute of America, Microsoft, and PRMIA for excellence in teaching analytics and risk management. My case series on decision-making is used in MBA classes at Kellogg, Booth, ISB, HKUST, and Sasin MBA and executive programs.
 - *Sponsored Research Leadership* – Led and cultivated multiple, sponsored-research efforts with leading firms. Projects have generated income to the university and produced employment opportunities for multiple students.
 - *International Teaching and Executive Training* – Lead and develop successful executive education programs in India, Thailand, Austria, and Spain. Led and developed executive programs examining business opportunities in Turkey, United Arab Emirates, Qatar, Brazil, Argentina, Chile, Mexico, and Colombia.
 - *Zell Center for Risk Research* – Managed Kellogg executive education on Risk Management education for board members and senior executives. Served as external liaison to corporations, alumni, and executive education partners. Oversaw scholarship initiatives in risk and case competitions for MBA students. Led and founded the Zell Center Risk Summit Conference Series.
 - *Faculty Advisor to the Hispanic Management Association* – Invited faculty advisor by the Kellogg Hispanic Management Association to advance causes of the organization including: 1) Increasing the number of Hispanic MBAs at Kellogg 2) Providing a support network for current Hispanic MBA students 3) Develop a Hispanic Leaders Speaker Series on the US Hispanic Consumer 4) Develop unique business cases on Latin America, especially on Cuba 5) Lead and undertake research on Cuban entrepreneurs.

UNIVERSITY EDUCATION

Executive MBA Kellogg School of Management, Northwestern University	2004 – 2006 Evanston, IL
Ph.D. (1999) and M.S. (1997) in Civil Engineering Systems Cornell University Academic and Research Strengths: Risk Analysis, Operations Research, Decision Analysis, & Applied Statistics National Science Foundation Minority (Hispanic) Graduate Fellow (1 of 1,000 issued nationally) Designed novel statistical methods to improve flood risk analysis, including catastrophic risk analysis. Developed an operational risk assessment for the New York City water supply, with recommendations for risk mitigation. Ph.D. and MS coursework, research, and writing completed in less than four years.	1995 – 1999 Ithaca, NY
B.S. in Civil Engineering Systems University of South Florida University-Wide Honors Student, Summa cum Laude Graduate	1990 – 1995 Tampa, FL

KELLOGG TEACHING EXPERIENCE

MBA COURSES DEVELOPED AND/OR TAUGHT

The Analytical Consulting Lab

- *Course Description:* The Analytical Consulting Lab is a practicum for students interested in developing deep skills in analytics. In this course, students apply classroom concepts and techniques to a real-world analytical task in which they use data to recommend a managerial decision. Students apply techniques and theories such as applied statistics, multivariate regression, optimization, stochastic simulation, decision tree analysis, time series analysis, forecasting, real options, risk analysis, data mining, and discrete event simulation. Students present their analytical findings through a consulting approach.
- *Pedagogical Basis:* Experiential learning course pairs Kellogg MBA project teams with analytical and strategy consulting projects, sponsored by firms. The lab provides students with experience in working in teams to develop consulting, strategy, analytical, and presentation skills.
- *Course Offerings:* Spring 2009, Winter 2010, Spring 2010, Winter 2011, Spring 2011, Winter 2012, Spring 2012, Winter 2013, Spring 2013, Winter 2014, Spring 2014, Fall 2014, Winter 2015, Spring 2015, Fall 2015, Winter 2016, Spring 2016, Fall 2016, Winter 2017, Spring 2017, Fall 2017, Winter 2018, Spring 2018, Winter 2019.
- *Participating firms have included:* IBM, Microsoft, Northrop Grumman Aerospace, Google, Deloitte, United Airlines, Groupon, Pfizer, Baxter, Memphis Grizzlies, American Airlines, Nielsen, Chicago Bears, Minnesota Vikings, Chicago Bulls, Chicago White Sox, Chicago Cubs, NFL, NFL Network, Cigna, Block 6 Analytics, 120 Sports, Morton Salt, Hyatt Hotels, Carnival Cruise Lines, CDW, Turkish Airlines, William Blair and Co., the CME Group, Social Compact, ShopperTrak, Element Bars, IM Trust, Triad Broadcasting, Chateau Coutet (first growth Bordeaux), Northshore University Hospital, Dulce Vida Tequila, Interactive Health, Penn Gaming, US Army, Press Ganey, Enso Winery, Few Spirits, Zest Health, Jacksonville Jaguars, Soccerly.com, Menus of Change, LinkedIn, Monterey Aquarium, Northwestern University Big Ten Sports, Qantas Airways, Zest Health, Paydunk, RxBar, Brideside, Western Union, Candid Wines, Yum Brands, Heinen's Fine Foods, and Wal-Mart among others.
- I founded this course. This course is regularly over subscribed, even with multiple units per year. It is now the most popular lab class at Kellogg by far. I have been nominated for various teaching awards for this class. I have individually sourced 400+ projects with firms to provide the class the needed learning opportunities. McKinsey & Co. and Deloitte consistently recruit the graduates of this course for their proven analytical consulting skills.

The Consulting Lab for Kellogg MSMS Program

- *Course Description:* The Consulting Lab is a practicum for students interested in developing deep skills in consulting. In this course, students apply classroom concepts and techniques to a real-world consulting task in which they use data to recommend a managerial decision. Students present their analytical findings through a consulting approach.
- *Pedagogical Basis:* Experiential learning course pairs Kellogg project teams with consulting projects, sponsored by firms. The lab provides students with experience in working in teams to develop consulting, strategy, analytical, and presentation skills.
- *Course Offerings* Winter 2018, Winter 2019.
- *Participating firms have included:* Heinen's Fine Foods, Northwestern Band, Northwestern Athletics, Asha Spa, Chicago Social and Sports Clubs, Thank God I'M Natural, Crockett Cookies, and Tier One Training.

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- I founded this course based on need in the program for experiential learning.

The Risk Lab

- *Course Description:* The Risk Lab is an experiential learning course, focused on evaluation of risks faced by a sponsoring company or business venture for the purpose of investment consideration. The goal of the class is to develop skills in identifying risks, evaluating the nature and impact of risks, and communicating the risk impact in the context of an investment decision. The course focuses on using analytical techniques (such as forecasting, regression analysis, simulation, sensitivity analysis, and scenario analysis) in the risk evaluation. Teams develop risk models in a spreadsheet environment and may also be required to research industry trends to provide measures of risk indicators.
- *Pedagogical Basis:* Experiential learning course focuses on risk in markets and within firms. This class pairs Kellogg MBA project teams with firms that are sponsoring risk-focused, consulting projects. Teaching includes developing a risk framework, performing risk measurement, and making risk-based decisions.
- *Course Offerings:* Fall 2012, Fall 2013, Fall 2014, Fall 2015, Fall 2016, Fall 2017, Fall 2018.
- *Participating firms have included:* Microsoft, IBM, Land O' Lakes, Levi Strauss, Menus of Change, MarkITX, CF Industries, the CME Group, Discover Financial, Groupon, Edelman, Western Union, Northshore University Hospital, Gordon Rees, Mars Petcare, Review Trackers, Lockton, Culinary Institute of American, Harvard School of Public Health, and Cuba Study Group.
- I founded this course. Our projects in agribusiness have helped the student-led agribusiness club and have led to my selection (by the MBA students) as the faculty advisor to the food industry and agribusiness club.

Analyzing and Operating Digital Platforms (Digital Lab)

- *Course Description:* In this experiential learning course, we examine the operation of digital platforms made possible by mobile phones, Internet portals, and distributed sensor networks. The examination of these digital platforms focuses on how Big Data in these platforms can be analyzed and converted into meaningful data products for various constituents in order to monetize the data.
- *Pedagogical Basis:* Experiential learning course focuses on analyzing digital platforms. This class pairs Kellogg MBA project teams with firms that are sponsoring digital platform-focused, consulting projects. Teaching includes developing a data monetization framework, performing digital platform evaluations, and identifying analytically based recommendations.
- *Course Offerings:* Winter 2015.
- *Participating firms:* Google, Uber, Microsoft, IBM, LinkedIn, T-Mobile, Groupon, Review Trackers, eBay, PayPal, Skimble, Uptake Technologies, and multiple peer-lending and personal finance firms.
- I founded this course based on collaboration with leading and start-up digital platforms. Students on projects in this class report to me that this class experience has directly resulted in multiple job offers for Kellogg students with leading technology firms and has advanced the positioning of Kellogg students with leading technology firms.

Enterprise Risk Management

- *Course Description:* This course provides frameworks for identifying, quantifying, and managing risks to the overall enterprise and offers direction on the creation of a successful risk office and its integration with corporate strategy. Recognized forms of risk, such as Operational Risk, Credit Risk and Market Risk are explored in detail. The impact of shocks to enterprises, the role of liquidity risk, and the importance of protecting against these are reviewed. The course examines the measurement and consideration of political and global risk factors impacting a corporate strategy. The governance of risk management and the role of the board of directors in overseeing risk management are examined. Special sessions on managing risks to start-ups and risks in personal finance are very popular with the MBA students.
- *Pedagogical Basis:* This course examines risk holistically and provides students frameworks in ERM. Special emphasis is given to evaluating risk in financial services, international supply chains, and macro global trends. Students apply risk frameworks to company decisions and personal decisions.
- *Course Offerings:* Spring 2011, Winter 2012, Spring 2013, Spring 2014, Spring 2015, Spring 2016, Spring 2017, Spring 2018.
- Awarded 2011 Kellogg Teaching Impact Award, one of five issued at Kellogg for excellence and impact in teaching, as offered by the Kellogg Student Association.
- I founded this course, drawing on corporate experiences from my career in retail banking.

Operational Risk Management

- *Course Description:* This course explores the topic of operational risk as it is observed and manifested in various

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industries. A framework for identifying, assessing and managing operational risk is presented.

- *Pedagogical Basis:* This course focuses on risk in operations-focused firms. Emphasis is given to firms in B2C services and to those relying on international supply chains. The function of risk management in non-financial services firms is also examined. Students apply risk frameworks to companies.
- *Course Offerings:* Winter 2008, Winter 2009, Winter 2010.
- I founded this course. It is part of the Operations major at Kellogg.

Strategic Data-Driven Marketing

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

Enterprise Technology Management

- *Course Description:* This course is designed to give managers essential skills for executive oversight of enterprise technology. Topics covered include return on investment (ROI) for e-business projects, enterprise resource planning (ERP) deployment best practices, ERP ROI, strategic outsourcing, project management, and strategic alignment of technology. Class lectures are complemented by ‘real life’ case discussions of strategic and management issues for enterprise technology.
- *Pedagogical Basis:* Students examine critical technologies and how these technologies transform and enable new business models. Special emphasis is given to the deployment of analytics in the enterprise and how complexity in operations can be managed with technology. Students apply lessons to firms in project students and must build business cases for new technology adoption.
- *Course Offerings:* Winter 2010, Winter 2011.

Global Lab

- *Course Description:* This experiential learning course provides students with an opportunity to complete an international consulting project for a sponsoring firm during the winter quarter, and concludes with two weeks of in-country research and a presentation to the sponsoring firm’s senior management. The sponsoring firm and the student team work together to determine the project’s scope and parameters, under the guidance of a faculty adviser.
- *Pedagogical Basis:* Students develop skills and experience in consulting in an international setting. Special emphasis is given to dealing with project ambiguity and conducting measurement for strategy formation.
- *Course Offerings:* Winter 2009, Winter 2010, Winter 2011, Winter 2012, Winter 2013, Winter 2014, Winter 2015, Winter 2016, Winter 2017, Winter 2018, Winter 2019.
- *Participating firms have included:* HP, Northrop Grumman Aerospace, Turkish Airlines, Hyatt Hotels and Resorts International, Aspire Systems, Next Media, Promon, Refinancia, Astra International, The Mexican Secretary of Tourism, Pivot Point, Capital SAFI, Baxter, Kartuku, Canon Negro Lodge, Grupo Exito, Caresoft, and Citrofrut.
- *Countries Studied:* This class has featured projects in China, Cuba, Bolivia, Brazil, India, Colombia, Chile, Argentina, Mexico, Peru, Thailand, Indonesia, Kenya, South Korea, Taiwan, Hong Kong, Saudi Arabia, Kuwait, The United Arab Emirates, Qatar, Oman, and Turkey.
- This course is one of the most popular at Kellogg based on student bidding. It has also been nominated for the Kellogg Impact award in nearly every year it was offered. I have sourced over 50 projects for this class; all firms pay a fee and agree to host the students.

Global Initiatives in Management: Latin America

- *Course Description:* This course offers students an opportunity to learn about Latin American business opportunities within an innovative and flexible framework that combines traditional classroom-based learning with structured in-

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country field research.

- *Pedagogical Basis:* This class provides students an-depth examination of Latin America. Through an examination of the economy, history, culture, politics, and business climate of Latin America countries, students undertake research on industries and present their findings to leading international firms. This class has examined Brazil, Argentina, Chile, Colombia, and Mexico. As a special bonus, I provide the students an introduction to the business of wine in South America and an introduction to the appreciation of wine.
- *Course Offerings:* Winter 2010 (EMBA), Winter 2013, Summer 2013, Winter 2014.
- This class is consistently oversubscribed and is one of the most popular international courses at Kellogg.

Global Initiatives in Management: Gulf States and Middle East

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

Analytical Decision Modeling with Spreadsheets

- *Course Description:* This course teaches students how to structure, analyze, and solve business decision problems on Excel spreadsheets using tools such as simulation, sensitivity analysis, risk analysis, forecasting, and optimization. Underlying concepts, models, and methods are presented through Excel spreadsheets, using Excel functions and add-ins, etc. The course provides a disciplined approach to problem solving on spreadsheets, by building and analyzing models for a variety of problems in operations, finance, and marketing. In this sense, this course also serves to integrate various functional areas of management on a common spreadsheet platform.
- *Pedagogical Basis:* This class uses a “hands-on,” case-based approach to developing complex models in spreadsheets. In each class, three or four spreadsheet models are built from start to finish. Special emphasis is given to using simulation, optimization via Excel Solver (LP, IP, NLP), decision trees, and time series analysis. Attention is given to providing students confidence and skills in Excel, including short cuts, spreadsheet documentation, presentation, and overall model development best practices.
- *Course Offerings:* Fall 2008, Fall 2009, Winter 2011, Spring 2012.
- Authored and co-authored 30+ novel cases for the execution of this course, rejuvenating the course and resulting in increased enrollments. My sections have consistently been oversubscribed.

Statistical Methods for Management Decisions

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

Introduction to the Quantitative Environment and Introduction to Excel

- *Course Description:* This specialized course was developed to provide first-year MBA students an introduction to quantitative concepts with special emphasis given to the use of Excel in MBA programs.
- *Pedagogical Basis:* Students review statistical concepts and mathematical concepts in preparation for MBA courses. Introductions to probability, statistics, finance, and economics are presented. Excel functions are presented.
- *Course Offerings:* Fall 2010, Fall 2011, Fall 2012, Fall 2013, Fall 2014, Fall 2015, Fall 2016, Fall 2017, Fall 2018.
- I founded this course. It is offered in the pre-term session. This optional class attracts 60% of the enrolled MBA class and has extremely high course ratings.

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Commerce and Trade: Lessons from the International Wine Industry

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

CORPORATE EXECUTIVE EDUCATION PROGRAMS LED AND TAUGHT

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

NEW EXECUTIVE EDUCATION PROGRAMS LED AND DEVELOPED

Operational Risk Management Master Class: Measurement, Management, Leadership
 Global Leadership: Managing Business Risks and Rewards
 Enterprise Risk Management
 Kellogg PRMIA Complete Course in Professional Risk Management
 Kellogg – Ernst & Young 360 Program for Chief Audit Executives
 Kellogg – Ernst & Young 360 Program for Chief Financial Officers

OPEN ENROLLMENT EXECUTIVE EDUCATION PROGRAMS TAUGHT

Strategic IT Portfolio Management
 Strategic Data-Driven Marketing
 Becoming a Data-Driven Manager: Program for the Principals of Inner-City Teaching Corps
 Marketing in Healthcare Executive Management Program
 US Olympic Committee Leadership Program
 Inner City Capital Connections Program
 Women's Food Service Forum
 Data-Driven Decision Making: Teachers in the National Foundation for Teaching Entrepreneurship
 Driving Strategic Value from IT
 Enterprise Risk Management Lecture Series: The role of the Chief Risk Officer and Board of Directors
 Managing Customer Relationships for Profit for Kellogg Executive Education
 Kellogg Post-MBA

INTERNATIONAL EXECUTIVE EDUCATION PROGRAMS AND PRESENTATIONS

Indian School of Business (ISB), Hyderabad, India
 Global Advanced Management Programme

Enterprise Risk Management for Global Leaders
 PGPMAX – Global and Strategic Risk Management
 National Institute of Bank Management
 Developing a Knowledge-centric Organization
 General Management Program: Managing Complexity, Integration, and Uncertainty
 Indian Bankers' Association

Sasin Graduate Institute of Business Administration of Chulalongkorn University, Bangkok, Thailand
 Leveraging Big Data and Analytics for Business Success, Sasin Executive Program
 Global Opportunities and Risks: Demography and the Emerging Middle Class, Sasin Alumni Presentation
 Enterprise Risk Management for the Global Executive, Sasin Executive Program
 Strategic IT Management and Leveraging Analytics, Sasin Executive Program
 Leveraging Analytics and Data Mining, Sasin Alumni Presentation
 Learning from Your Customer, Advanced Sasin Executive Program

Fundação Dom Cabral, Belo Horizonte, Brazil
 Global and Strategic Risk Management for Executives, FDC-Kellogg Executive Program

IESE Business School, Universidad de Navarra, Barcelona, Spain
 Guest Faculty for Quantitative Methods and Decision Analysis
 Guest Faculty for “From Big Data to Big Profits.”

NORTHWESTERN UNIVERSITY MASTERS OF SCIENCE IN ANALYTICS TEACHING

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

Analytics Leadership Practicum

- *Course Description:* In this course, I guide student teams on their capstone project in the Masters of Science in Analytics program. Projects have included SC Johnson, Walgreens, WE Energy, Transunion, Allstate, Chicago Park District, Chicago Bears, Chicago Bulls, Zurich North America, State Farm, Hilton Hotels and Resorts, Motorola, GE Transportation, and Accenture.
- *Pedagogical Basis:* I coach the students on applying analytical techniques on a real-world project, as well as on presenting and communicating their findings. The course focuses on applications of analytics, project management skills, presentation and communication of technical concepts in a business setting, and client-relationship management.
- *Course Offerings:* Winter 2013, Winter 2014, Winter 2015, Winter 2016, Winter 2017, Winter 2018, Winter 2019.
- I founded this course in conjunction with the MSiA program directors.

Business Analytics in the Digital Age

- *Course Description:* In this course, the students examine how the analytical function can best be deployed in a firm and industry. Special emphasis is given to the data collection and processing requirements. We examine the organizational design and human resource implications for deploying analytics.
- *Pedagogical Basis:* This is a case-based course where students must undertake an in-depth analysis of a firm or industry. In particular, the course focuses on strategies for the monetization of big data, the role of the Chief Data Officer, and the importance of presenting the value of data science and analytics in the enterprise.
- *Course Offerings:* Fall 2013, Fall 2014, Fall 2015, Fall 2016, Fall 2017, Fall 2018.
- I founded this course in conjunction with the MSiA program directors.

Capstone Project Advisor: Business Projects in Analytics

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

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SPONSORED RESEARCH LED AND CONDUCTED

“Opportunities to Advance Cuban Entrepreneurs” (2014-Current)

Research Sponsor: Cuba Study Group – an effort to examine the opportunities and challenges facing Cuban entrepreneurs in sourcing critical goods and services.

Research Accomplishments: Publication of white paper presented to US State Department, US Congressional officials and Cuban policy officials. Results were published in Fortune magazine article.

“Transparency and Resiliency in the Food Supply Chain” (2012 – Current)

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

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

“Identification of Economic Value Enabled by the Internet of Things on Consumers and Enterprises.” (2014-2019)

Research Sponsor: Microsoft.

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

“Examination of Opportunities for Autonomous Vehicles to Home Delivery Models.” (2014)

Research Sponsor: Microsoft

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

“Rationalizing New Delinquency Norms in the US Credit Card Industry” (2013)

Research Sponsor: Discover Financial Services.

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

“Economic Advantages and Perceptions of Cloud Computing” (2013)

Research Sponsor: Microsoft

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

“Commodity and Milk Price Risk Analysis for Producers” (2013)

Research Sponsor: Land O’ Lakes

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

“Autonomous Vehicles and Impact to Business Models” (2013)

Research Sponsor: Microsoft

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

“Operational Risk in the Insurance Industry” (2012 – 2013)

Research Sponsor: Ernst & Young and Euromoney Publications

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

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

Research Sponsor: The CME Group

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

“New Models for Foreign Currency Exchange” (2012)

Research Sponsor: Western Union and Microsoft

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

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

Research Sponsor: Zell Center for Risk Research

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

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

Research Sponsor: Northrop Grumman Aerospace

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

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crop surveillance.

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

Research Sponsor: Northrop Grumman Aerospace

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

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

Research Sponsor: Northrop Grumman Aerospace

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

“Price Optimization for Online Coupons” (2011)

Research Sponsor: Groupon

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

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

Research Sponsor: Secretary of Tourism of Mexico

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

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

Research Sponsor: Turkish Airlines

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

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

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

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

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

Research Sponsor: Fair Issac Company and PRMIA

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

“Measuring and Identifying Customer Behaviors in Online Coupons” (2010)

Research Sponsor: Groupon

Research Accomplishments: Customer behavior analysis measuring the impact of coupon type, day of week, price point, and time of day.

“Examination of the Interactive Marketing Opportunities for Embedded Retail within Mobile, Digital, and Media Channels: Project with Zazum, Inc.” (2010)

Research Sponsor: Zazum, Inc.

Research Accomplishments: Identification of market entry strategies and inter-channel strategies.

“Evaluation of Medical Healthcare Opportunities with the Republic of Turkey” (2010)

Research Sponsor: Consortium of Turkish Hospitals

Research Accomplishments: Established economic assessment of value for medical tourism between the US and the Republic of Turkey. Identified opportunities for US and Turkey to partner and mutually benefit. Recommended steps were provided for Turkish medical tourism hospitals to grow the US medical tourism market. Project employed multiple Kellogg MBA students in summer internships and over a 2-year period.

“Route Analysis in North America for Turkish Airlines” (2009)

Research Sponsor: Turkish Airlines

Research Accomplishments: Examination of existing routes from Istanbul to Chicago, New York, and Toronto. Specific recommendations made to add service to Washington DC, Houston, and Los Angeles, along with new connection timing to increase hub effectiveness. Recommendations made to the CEO, COO, and Board of Turkish Airlines.

“Development of a Hospital and Health Care Index for the United States” (2009)

Research Sponsor: Wellspring Partners and Huron Consulting Group in collaboration with Dean Dipak Jain

Research Accomplishments: Measured the impact of economic, policy, and operational improvements on the “financial health” of US Hospitals. Developed a novel index to score the “financial health” of hospitals on various metrics and how this metric could be use to score specific hospitals and the overall hospital industry.

“The Impact of Covenant-Lite Loans on Bond Risk and Post Bankruptcy Recovery” (2008)

Research Sponsor: Zell Center for Risk Research and Moody’s

Research Accomplishments: Examination of covenant-lite loans and impact on post-bankruptcy recovery.

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PUBLICATIONS

BOOKS AND BOOK CHAPTERS

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

ARTICLES & JOURNAL PUBLICATIONS

1. Walker, Russell – Contributing Member to *Menus of Change Annual Report*. An Initiative of the Harvard School of Public Health and the Culinary Institute of America, June, 2018.
2. Walker, Russell, Arlin Wasserman, and Neel Inamdar. “Activating the West Coast Groundfishery for Sustainable Economic Growth.” Paper to Packard Foundation, October, 2018.
3. Walker, Russell and Arlin Wasserman. “Analysis of Seafood Consumption Trends in the US with a Perspective on Encouraging Sustainable Practices.” Monterey Bay Aquarium, Seafood Watch, 2017.
4. Walker, Russell – Contributing Member to *Menus of Change Annual Report*. An Initiative of the Harvard School of Public Health and the Culinary Institute of America, June, 2017.
5. Walker, Russell – Contributing Member to *Menus of Change Annual Report*. An Initiative of the Harvard School of Public Health and the Culinary Institute of America, June, 2016.
6. Walker, Russell, et al. – Faculty Director of Research on the Study. “Exporting Opportunities and Challenges for Cuban Entrepreneurs.” Research Paper with the Cuba Study Group, presented to US Congressional and Governmental Officials on Cuba Policy, February, 2016.
7. Walker, Russell and Kyle Bell. “What Cuba’s New Wave of Entrepreneurs Need to Know.” *Fortune*. September 19, 2015.
8. Walker, Russell. “Monetizing Big Data For Big Profits: It Takes More Than Algorithms.” *Forbes*. September 9, 2015.
9. Walker, Russell and Thomas Davenport. “LinkingIN to Data Products.” *The Wall Street Journal*. July 22, 2015.
10. Walker, Russell, et al. – Faculty Director of Research on the Study. “*Supplying Growth: Purchasing Challenges and Opportunities for Cuban Entrepreneurs*.” Research Paper with the Cuba Study Group, presented to US Congressional and Governmental Officials on Cuba Policy, July 28, 2015.
11. Walker, Russell – Contributing Member to *Menus of Change Annual Report*. An Initiative of the Harvard School of Public Health and the Culinary Institute of America, June, 2015.
12. Walker, Russell. “The Increasing Importance of Operational Risk in Enterprise Risk Management.” *The Journal of Enterprise Risk Management*, Volume 1, Number 1, February 2015.
13. Walker, Russell – Contributing Member to *Menus of Change Annual Report*. An Initiative of the Harvard School of Public Health and the Culinary Institute of America, April 2014.
14. Walker, Russell. “Four Tips for Mitigating Risk of Cyber Crime.” *SAS Knowledge Exchange*, November 26, 2013.
15. Walker, Russell. “Winning with Risk Management: Focus on Operational Risk.” *The European Financial Review*, October 2013.
16. Walker, Russell – Contributing Member to *Menus of Change Annual Report*. An Initiative of the Harvard School of Public Health and the Culinary Institute of America, April 2013.
17. Walker, Russell. “*Role of Credit Rating Agencies as Risk Information Brokers*.” Prepared for the Anthony T. Cluff Fund and the Financial Services Roundtable, Presented to the US SEC and US Congress, September 2010.
18. Walker, Russell and Dipak Jain. “*Republic of Turkey: A Medical Tourism Destination for the United States*.” An International White Paper for Turkey Medical Tourism Federation, 2010.
19. Walker, Russell. “Fortune Favours the Well-Prepared.” *Financial Times*. Managing in a Downturn: Risk. January 29, 2009.
20. Merrick, Jason, Jill Hardin and Russell Walker. “Partnerships in Training.” *Interfaces* 36(4), pp. 359–370, INFORMS Publications, July – August 2006.
21. Walker, Jr., F. Russell and J. R. Stedinger. “Long-term Variability in the Arrival Rate of Flood Events as Evidenced

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- by Flood Clustering.” *EOS Transactions, American Geophysical Union* 2000 Spring Meeting, 81(19), S200, May 9, 2000.
22. Walker, Russell. “Risk and Statistical Analysis of Hydrologic and Environmental Data.” Ph.D. Dissertation, Cornell University Library, August 1999.
 23. Walker, Russell and J. R. Stedinger. “A Fate and Transport Model for *Cryptosporidium*.” *Journal of Environmental Engineering of the American Society of Civil Engineers*, vol. 125, no. 4, p 325-333, April, 1999.
 24. Walker, Russell. “A Fate and Transport Model for *Cryptosporidium* in the New York City Water Supply Watersheds,” Master of Science Thesis, Cornell University Library, August 1997.

PUBLISHED BUSINESS CASES

1. Walker, Russell. “Alexa: A Pandora’s Box of Risks.” Case: KE1143, May, 2019.
2. Walker, Russell. Motorola India: On Razr Thin Ice. Case KE1140, May, 2019.
3. Walker, Russell and Andrew Dilts. “Polaris Battery: Managing Risks in a Start-up.” Case: KE1072. August, 2018.
4. Walker, Russell. “Measuring and Managing Risk in Commodities: Corn and the Golden Kernel.” Case: 5-317-502. June, 2018
5. Walker, Russell. “Excel(lence) with Interest.” Case 5-217-256. February, 2018.
6. Walker, Russell and Joanna Green. Neighborhood Watch: The Rise of Zillow. Case 5-117-006, 2017.
7. Walker, Russell, Israel Feuerberg, Lorena Sanchez Garcia and Santiago Trevino Villasenor. CEMEX: Information Technology, an Enabler for Building the Future. Case 5-315-502 (KEL992), 2017.
8. Walker, Russell and Greg Merkley. “Chipotle Mexican Grill: Food with Integrity?” Case 5-316-501, January 2017.
9. Walker, Russell. “Bank of America: Consumers Fight Back. Case 5-116-001.” Case KEL947, June 2016.
10. Walker, Russell and Joanna Wilson. “Horse Trading: Food Sourcing in the Twenty-First Century.” Case KEL945, April 2016.
11. Walker, Russell and Kyle Bell. “Nestlé Ice Cream in Cuba.” Case 5-315-504, September 2015.
12. Walker, Russell and Rafique Jiwani. “Reinventing E-Commerce: Amazon’s Bet on Unmanned Vehicle Delivery. Case 5-315-501, August 2015.
13. Walker, Russell. “Conseco: Market Assumptions and Risk.” Case 5-311-509, June 2014.
14. Walker, Russell. “Scandal at Société Générale: Rogue Trader or Willing Accomplice?” Case 5-313-505. 2013.
15. Walker, Russell. “Maxxed Out: TJX Companies and the Largest-Ever Consumer Data Breach.” Case 5-313-507. 2013.
16. Walker, Russell and Wilson Joanna. “Nokia’s Supply Chain Management.” Case 5-111-007 (KEL673). 2012.
17. Walker, Russell, Mark Jeffery, Linus So, Sripad Sriram, Jon Nathanson, Joao Ferreira and Julia Feldmeier. “Netflix Leading with Data: The Emergence of Data-Driven Video.” Case 5-110-006 (KEL473). 2010.
18. Schmedders, Karl, Russell Walker and Michael Stritch. “Arbor City Community Foundation (A): The Foundation.” Case 5-310-502(A) (KEL585). 2010.
19. Schmedders, Karl, Russell Walker and Michael Stritch. “Arbor City Community Foundation (B): Managing Good Fortune.” Case 5-310-502(B) (KEL586). 2010.
20. Schmedders, Karl, Russell Walker and Michael Stritch. “Arbor City Community Foundation Executive Education Version” (KEL588). 2011.

ADDITIONAL DEVELOPED BUSINESS CASES USED IN MBA PROGRAMS

21. Walker, Russell and Joanna Wilson. “Foursquare and Rise of Location Based Services.” January 2013.
22. Walker, Russell and Joanna Wilson. “Australia’s Decade in the Sun: Trade and Marketing Lessons from the Wine Industry in Australia.” February 2012.
23. Walker, Russell and Joanna Wilson. “The Bordeaux Wine Market: Lessons on Futures and Regulation from the Wine Industry in Bordeaux, France.” February 2012.
24. Walker, Russell, Aline Baly, and Joanna Wilson. “Transforming Sauternes-Barsac: Marketing and Product Lessons from Innovation in Sauternes.” January 2012.
25. Walker, Russell and Joanna Wilson. “The Grand Dom of Champagne: Lessons in Marketing Luxury Brands from the Champagne Industry.” January 2012.
26. Walker, Russell and Joanna Wilson. “Chile vs. Argentina: Marketing and Innovation Lessons from the Wine Industry in South America.” January 2012.
27. Walker, Russell. “BP’s Risky Business.” June 2011.
28. Walker, Russell. “Toyota: A Crisis in America.” June 2011.

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29. Walker, Russell. "Motorola, On Razr Thin Ice." June 2011.
30. Walker, Russell. "Starbucks: Latin American Strategy." January 2011.
31. Walker, Russell. "Starbucks: China and Asia Strategy." January 2011.
32. Walker, Russell. "JPMorgan Chase – The Diamond Standard." January 2011.
33. Walker, Russell. "Mastering the Mortgage." September 2010.
34. Walker, Russell. "Mastering Real Estate Investing." September 2010.
35. Walker, Russell and Christian Zaum. "Customer Portfolio Analysis at Credit Suisse Private Wealth Management." July 2010.
36. Walker, Russell and Louis Merlini. "Green Real Estate: Hedging Risk of Sustainable Buildings." May 2010.
37. Walker, Russell and Michael Stienstra. "Measuring Risk in Commodities: Corn, the Golden Kernel." March 2010.
38. Walker, Russell and S. D. "Yield Management Spreadsheet Case." August 2009.
39. Walker, Russell and S. D. "Workforce Planning Spreadsheet Case." August 2009.
40. Walker, Russell and S. D. "Waiting for the Best Offer Spreadsheet Case." August 2009.
41. Walker, Russell and S. D. "The Best Brew Spreadsheet Case." August 2009.
42. Walker, Russell, Robert Korajczyk, and S. D. "Savings for the Future Spreadsheet Case." August 2009.
43. Walker, Russell and S. D. "Project Valuation Spreadsheet Case." August 2009.
44. Walker, Russell and S. D. "Project Selection Spreadsheet Case." August 2009.
45. Walker, Russell and S. D. "Production Planning Spreadsheet Case." August 2009.
46. Walker, Russell and S. D. "Producing for Profits Spreadsheet Case." July 2009.
47. Walker, Russell and S. D. "Price is Right Spreadsheet Case." July 2009.
48. Walker, Russell and S. D. "Picking a Portfolio Spreadsheet Case." July 2009.
49. Walker, Russell and S. D. "HR Performance Evaluation Spreadsheet Case." July 2009.
50. Walker, Russell and S. D. "Optimal Job Searching Spreadsheet Case." July 2009.
51. Walker, Russell and S. D. "New Product Development Spreadsheet Case." July 2009.
52. Walker, Russell and S. D. "Managing a Marketing Budget Spreadsheet Case." July 2009.
53. Walker, Russell and S. D. "Make Me Wine (and Profit Too) Spreadsheet Case." July 2009.
54. Walker, Russell and S. D. "Bidding to Win Spreadsheet Case." July 2009.
55. Walker, Russell and S. D. "Let's Make a Deal Spreadsheet Case." June 2009.
56. Walker, Russell and S. D. "Inventory Planning Spreadsheet Case." June 2009.
57. Walker, Russell and S. D. "Modeling Uncertain Class Flows Spreadsheet Case." June 2009.
58. Walker, Russell and S. D. "Modeling Stocks, Bonds and Options Spreadsheet Case." June 2009.
59. Walker, Russell and S. D. "Optimal Decisions with Incremental Information Spreadsheet Case." June 2009.
60. Walker, Russell and S. D. "Buy Now, Pay Later Spreadsheet Case." June 2009.
61. Walker, Russell and S. D. "Asset Liability Matching Spreadsheet Case." May 2009.
62. Walker, Russell. "USA Financial One Bank Case Spreadsheet Case." May 2008.
63. Walker, Russell and Mark Jeffrey. "First Bank USA One." Kellogg Case, 2008.
64. Walker, Russell and Mark Jeffrey. "U.S. Bank: An Analytical View of Market Segmentation." December 2008.
65. Walker, Russell. "Forecasting Remittance Mail Volumes." Developed for Capital One University for Executive Education, 2002.
66. Walker, Russell. "Call Center Selection: Real-world Application of Optimization. Parts I-IV." Developed for Capital One University for Executive Education, September 2003.
67. Walker, Russell. "Outsourcing in the Global Economy: Using Decision Science Models to Manage Outsourcers." Developed for a guest lecture at Universidad de Navarra, IESE Business School, Barcelona, Spain. 2006.
68. Walker, Russell. "The Credit Card Industry: How does it work?" Developed for a guest lecture at Universidad de Navarra, IESE Business School, Barcelona, Spain, 2006.

BLOGS AND DIGITAL PUBLICATIONS

- Author of BigDatatoBigProfits.com "*Big Data to Big Profits: Creating Value as a Data Creator.*" This blog examines topics in Big Data, Analytics, Digital Strategies, and Data Science. This blog was named the #9 most influential blog internationally in Big Data and Analytics.
- Author of "*Winning with Risk Management*". This blog focuses on contemporary cases and issues in Risk Management. It includes a very popular Risk Predictions and Outlooks for the New Year, where I blog on risks facing prominent firms

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and overall risks to the global economy.

- Author of a very popular LinkedIn posts series. These posts regularly generate in excess of 2500 views and the series has some 35,000 followers. Top articles have attracted over 115,000 views.
- Author of Twitter handle @RussWalker1492. I share my interest in discovery and thoughts on Big Data, Analytics, Digital, Economics, Business Leadership, Food Sourcing, MBAs, and Hispanic Culture.

INVITED PRESENTATIONS

Big Data & Analytics

1. **Data Monetization Strategies: Earning from Your Data.** BI Worldwide Analytics Forum. Chicago, Illinois, November 16, 2018.
2. **Big Data and Business Disruption.** Farmers Insurance Conference on Digital Business and Analytics. Keynote Presentation. Los Angeles, California. November 8, 2018.
3. **Learning from Your Customer Data, The 3Ds of Marketing: Digital, Data, and Disruption.** Foster School of Business, University of Washington, Seattle, Washington, October 25, 2018.
4. **Learning from Your Customer Data, The 3Ds of Marketing: Digital, Data, and Disruption.** Foster School of Business, University of Washington, Seattle, Washington, August 11, 2018.
5. **Digital Opportunities in Sports and Media.** INFORMS Chicago Conference. Notre Dame University, Chicago Campus, Chicago, IL, September 14, 2017.
6. **From Big Data to Big Profits.** IESE Executive Program. Barcelona, Spain, July 6-7, 2017.
7. **Data Monetization: Leveraging Big Data for More.** Keynote Speaker at FICO Conference. Napa, CA, December 16, 2016.
8. **From Big Data to Big Profits: Success with Digital, Social, and Mobile Through Data Science.** San Francisco, CA, August 25-26, 2016.
9. **Big Data Monetization.** Keynote Speaker on Supply Chain Conference. Rosemont, IL, June 8, 2016.
10. **Leveraging Big Data for Enterprise Insights.** Keynote Speaker to Discover Financial, Riverwoods, IL, May 13, 2016.
11. **Leveraging Digital Strategies and Analytics in Media and Sports.** Featured Competitive Advantage Talk, 2016 MIT Sloan Sports Analytics Conference, Boston, MA, March 11, 2016.
12. **From Big Data to Big Profits.** Harvard Business Review Webinar, Boston, MA, March 3, 2016.
13. **Strategies for Monetizing Big Data.** Keynote speaker at Deloitte University, Dallas, TX. November 20, 2015.
14. **Monetizing Big Data via Digital Platforms: Apps, Mobile, and Internet of Things.** Keynote speaker to Kellogg Alumni Club of San Francisco and Silicon Valley and SAP, Palo Alto, CA, November 10, 2015.
15. **The Money Ball-ization of Our Lives.** Renaissance Weekend. Tarrytown, NY, October 16, 2015.
16. **Big Data Monetization Strategies.** Keynote speaker. Kellogg Alumni Club of New York, New York, NY. October 15, 2015.
17. **The Growing Power of Big Data.** K-TED Talk at the Kellogg School of Management, Evanston, IL. October 12, 2015.
18. **The Money Ball-ization of Business.** Renaissance Weekend. Monterey, CA, September 6, 2015.
19. **Strategies for Creating Big Data via Digital Platforms: Apps, Mobile, and Internet of Things.** Renaissance Weekend. Jackson, WY, July 6, 2015.
20. **Strategies for Monetizing Big Data.** Predictive Analytics World Business Conference. Chicago, IL, June 9, 2015.
21. **Monetizing Big Data: Focus on Data Products and Asset Surveillance.** Featured Expert Speaker at Partners, Teradata Conference, Nashville, TN, October 20, 2014.
22. **Leveraging Big Data for Big Profits.** Keynote Speaker. Big Data and Analytics: Opportunities and Challenges. University of Ottawa, Ottawa, Canada, September 30, 2014.
23. **Monetization of Big Data with Digital Platforms.** “Monetizing Big Data Panel Series.” Keynote speaker to eBay and PayPal event on Big Data. Hosted in conjunction with the Kellogg San Francisco Alumni Club and Teradata, Palo Alto, CA, May 15, 2014.
24. **Challenges and Opportunities with Big Data.** Keynote speaker at AON-Hewitt Executive Series. Libertyville, IL, April 11, 2011.
25. **Novel Approaches for Leveraging Analytics in Marketing.** Keynote speaker to IBM CMO Series. Glenview, IL, June 29, 2010.
26. **Predictive Analytics at Work.** Teradata Conference. New Orleans, LA, June 29, 2009.
27. **Analytical Marketing as a Strategic Function.** Sasin Graduate Institute of Business Administration of Chulalongkorn University. Invited Speaker. Hua Hin, Thailand, August 22-31, 2008.
28. **Opportunities for Using Data in Retail Banking, Case Studies and Trends.** Cornell University S.C. Johnson

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- School of Management. Ithaca, NY, February 28, 2007.
29. **The Credit Card Industry and Opportunities for Use of Decision Models.** New York University, Leonard Stern School of Business. Invited Speaker New York, NY, April 10, 2006.
 30. **The Power of Analytics in the Credit Card Industry.** Cornell University S.C. Johnson School of Management. Ithaca, NY, February 15, 2006.
 31. **Analytics for Improved Decision Making in the Retail Banking Industry.** Cornell University S.C. Johnson School of Management. Ithaca, NY, February 16, 2005.
 32. **Leveraging Novel Data for Modeling Fraud Cases and Agent Staffing.** INFORMS 2004. Denver, CO, October 25, 2004.
 33. **Data Mining: Techniques and Impacts on IT and Management.** University of Virginia, Darden Graduate School of Business Administration Rationality Seminar. Charlottesville, VA, November 18, 2003.

Risk Management

34. **Enterprise Risk Management: Outlook for Financial Services.** Presentation to Risk Committee at William Blair and Co. Chicago, Illinois, September 28, 2018.
35. **Operational Risk in Payments: Privacy, Cyber Risks, Data Breaches, and FinTech.** Keynote Speaker to Discover Financial. February 21, 2018.
36. **Operational Risk for Banking Leaders: Measurement to Management.** Keynote Speaker to Discover Financial. October 17, 2017.
37. **Examining Disposable Income and Food Price Trends: Implication on Healthy Eating in the US.** Menus of Change Annual Conference – Culinary Institute of America and the Harvard School of Public Health. Hyde Park, NY, June 23, 2017.
38. **Operational Risk Management: Impacts to Brand and the Customer.** Keynote Speaker to USAA, February 17, 2017.
39. **Complete Course in Risk Management.** Amsterdam Institute of Finance. Amsterdam, The Netherlands, June, 2016.
40. **Operational Risk Management in Financial Service Firms.** Presentation to the IFC and the World Bank, Washington, DC, March 4, 2016.
41. **Risk Management: An Executive Perspective.** State Farm Risk Management Executive Series. Bloomington, IL, December 17, 2015.
42. **Operational Risk: From Measurement to Leadership.** PRMIA Risk Management Industry Presentation. New York, NY, December 7, 2015.
43. **Managing Risks in the Global Food Supply Chain.** Menus of Change Annual Conference – Culinary Institute of America and the Harvard School of Public Health. Hyde Park, NY, June 19, 2015.
44. **Enterprise Risk Management: Basel III and Implications of Regulatory Reform.** Capital One Speaker Series. Glen Allen, VA, May 29, 2015.
45. **Operational Risk Management: From Measurement to Management and Leadership.** PRMIA Series. Chicago, IL, April 23, 2015.
46. **Managing Supply Chain Risks through Analytics.** Keynote speaker at Lean Logistics Conference. Chicago, IL, April 21, 2015.
47. **Enterprise Risk Management.** Amsterdam Institute of Finance. Amsterdam, The Netherlands, March 24, 2015.
48. **Developing Operational Risk Metrics.** Keynote speaker at Federal Home Loan Bank Operations Annual Conference. Chicago, IL, March 11, 2015.
49. **Operational Risk Management: Moving from Measurement to Management.** Federal Home Loan Bank of Chicago, IL, January 8, 2015.
50. **Operational Risk Management: Focus on Customer Experience in Financial Services.** PRMIA Speaker Series. New York, NY, December 8, 2014.
51. **Operational Risk in Practice.** Keynote speaker to US Securities and Exchange Commission University, Washington, DC, July 9, 2014.
52. **Operational Risk for Executives.** Discover Financial Services, March 14, 2014.
53. **Enterprise Risk Management for the Audit Function.** Chief Audit Executive Corporate Conference. Richmond, VA, September 16-17, 2013.
54. **Risk Management for the Global Leader.** Sasin Graduate Institute of Business Administration of Chulalongkorn University. Invited Speaker. Hua Hin, Thailand, August 15-17, 2013.
55. **Risk Management: Opportunities for the Banking Leader.** Executive Case and Guest Speaker. The Bank of England, Prudential Risk Authority Conference, Oxford England, July 7-9, 2013.
56. **Enterprise Risk Management for Financial Services.** Executive Presentation at the Indian School of Business..

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- Hyderabad, India, July 31, 2012.
57. **Supply and Price Risks in Agricultural Markets.** Kellogg Risk Summit. Chicago, IL, February 21, 2012.
 58. **New Risks in Mortgages.** FICO World. New York, New York, November 3, 2011.
 59. **Enterprise Risk Management for Financial Services.** Executive Presentation at the Indian School of Business. Hyderabad, India, August 29, 2011.
 60. **Managing Global Risk Post Financial Crisis.** Kellogg Risk Summit. Evanston, IL, February 23, 2011.
 61. **Basel III, the Card Act and Dodd-Frank Regulation.** Invited Speaker to the Discover Financial Risk Speaker Series. Riverwoods, IL, November 5, 2010.
 62. **The US Consumer: New Risks on the Horizon.** Kellogg Risk Summit. Evanston, IL, October 28, 2010.
 63. **Enterprise Risk Management.** Executive Series at the Indian School of Business. Hyderabad, India, July 27, 2010.
 64. **The Future of Enterprise Risk Management.** GARP Chicago Chapter Presentation. Chicago, IL, June 16, 2010.
 65. **Risk in the Economy.** Northwestern Alumni Association, Taste of Kellogg. Evanston, IL, March 30, 2010.
 66. **Enterprise Risk Post Crisis.** DePaul University Risk Management Series. Chicago, IL, December 4, 2009.
 67. **Credit Risk Management Post Crisis.** Discover Financial Risk Speaker Series. Riverwoods, IL, September 10, 2009.
 68. **The Future of Derivatives.** PRMIA Chicago Meeting at CME. Chicago, IL, July 29, 2009.
 69. **Operational Risk and Enterprise Risk Management.** PRMIA International Speaker Series. Invited Speaker. Vienna, Austria, February 17-18, 2009
 70. **Perspective from the Inside on the Financial Crisis.** Kellogg Risk Summit. Panel Moderator and Organizer. Evanston, IL, November 20, 2008.
 71. **Improving Credit Risk and Customer-Centric Models Using Genetic Algorithms.** INFORMS 2008. Financial Services Series. Washington, DC, October 12, 2008.
 72. **Operational Risk Management and Basel II.** Indian Banks' Association. Keynote Speaker, Mumbai, India, September 16-18, 2008
 73. **Operational Risk Management and the Subprime Crisis.** PRMIA International Speaker Series. Keynote Speaker. Hyderabad, India, September 15, 2008.
 74. **Credit Score-carding: Industry Best Practices.** SAS Business Executive Series. Invited Speaker. Chicago, IL, June 9-10, 2008.
 75. **Trends in the US Credit Card Industry: Impacts of the Credit Crisis.** HSBC Executive Finance Forum. Invited Speaker. Libertyville, IL, May 22, 2008.
 76. **Fraud Detection in Electronic Money Transfers.** INFORMS International 2007 Puerto Rico. San Juan, Puerto Rico, July 11, 2007.
 77. **Risks to the New York City Water Supply and Management Options for Homeland Security.** Sandia National Laboratories Panel on Homeland Security. Albuquerque, NM, November 24, 2001.
 78. **Hydrologic Risk: Long-Term Variability in the Arrival Rate of Flood Events as Evidenced by Flood Clustering.** American Geophysical Union 2000 Spring Conference. Washington, D.C., May 31, 2000.
 79. **Risk Analysis of the New York City Water Supply.** United States Military Academy at West Point. West Point, NY, June 7, 1999.
 80. **Management of the New York City Water Supply.** Syracuse University. Syracuse, NY, November 9, 1998.

Leadership

81. **Leadership for the College New Hire: Negotiating Job Offers and Preparing for Your First Job.** Presentation to the McCormick School of Engineering Students, Evanston, IL, November 13, 2018.
82. **Leadership for the College New Hire: Navigating Your First Job.** Presentation to McCormick School of Engineering Graduate Students, Evanston, IL, October 16, 2017.
83. **Food Traceability in the US: Food Fraud and Understanding Our Food.** Menus of Change Annual Conference – Culinary Institute of America and the Harvard School of Public Health. Hyde Park, NY, June 23, 2017.
84. **Leadership for the College New Hire: Navigating Your First Job.** Presentation to McCormick School of Engineering Graduate Students, Evanston, IL, October 7, 2016.
85. **Leading the Enterprise Through a Data Breach: Preparation, Reaction, and Recovery.** Keynote presentation to NY Banking Executives. New York, NY, October 15, 2015.
86. **Leading the Enterprise into the Future: Preparing for The World in 2050 and Opportunities for Advancement.** Renaissance Weekend. Tarrytown, NY October 16, 2015.
87. **Leading the Enterprise: Digital, Data, and Avoiding Danger.** Keynote Presentation to the College of American Pathologists. Chicago, IL, July 10, 2015.
88. **Leading Enterprise Risk Management in Practice.** Special Case Presentation. ERM Symposium. October 1, 2014.
89. **Leadership in Risk Management.** Leading Author Series, US Securities and Exchange Commission University,

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- Washington, DC, July 9, 2014.
90. **Kellogg and Ernest & Young Chief Audit Executive 360 Program.** Keynote Presentation. “Enterprise Risk Management for Chief Audit Executives.” Evanston, IL, September 10, 2012.
 91. **Leading a Complex Food Supply Chain: Menus of Change Scientific Technical Council.** A Joint Venture of the Harvard University School of Public Health and the Culinary Institute of America, Cambridge, MA, September 11-12, 2012.
 92. **Risk Management for the Global Leader.** Sasin Graduate Institute of Business Administration of Chulalongkorn University. Invited Speaker. Hua Hin, Thailand, August 23-25, 2012.
 93. **Leading a Global Enterprise.** Sasin Graduate Institute of Business Administration of Chulalongkorn University. Invited Speaker. Hua Hin, Thailand, August 18-20, 2011.
 94. **From CFO to CEO.** Kellogg and Ernest and Young CFO 360 Program. Rosemont, IL, March 16, 2010.
 95. **Decision Analysis for the Executive: Case Studies on Analytics and Leading an Analytical Enterprise.** Universidad de Navarra, IESE Business School. Invited Speaker. Barcelona, Spain, February 4-6, 2008.
 96. **Decision Analysis for the Executive: Case Studies on Financial the Services Industry and Future Trends.** Universidad de Navarra, IESE Business School. Invited Speaker. Barcelona, Spain, May 7-9, 2007.
 97. **Decision Analysis for the Executive: Case Studies on Financial the Services Industry and Challenges of Outsourcing.** Universidad de Navarra, IESE Business School. Invited Speaker. Barcelona, Spain, May 27-June 1, 2006.
 98. **Leadership Lessons in Financial Services: Risk Management and Understanding the Customer.** Cornell University S.C. Johnson School of Management. Ithaca, NY, February 23, 2004.

Innovation, Growth, and Entrepreneurship

99. **Digital Disruption in Insurance: Opportunities and Challenges.** Presentation to Gallagher Executive Forum. Rolling Meadows, IL, September 18, 2018.
100. **Digital Disruption through Analytics.** BI Worldwide Digital Forum. Plano, TX, September 20, 2018.
101. **Digital Platforms, New Payments, Cryptocurrencies, and Demographic Shifts: Opportunities to Innovate in Financial Services.** Presentation to Credit Union Alliance, Nashville, TN, June 13, 2017.
102. **Growing Your Business with Data.** ICIC Presentation, Milwaukee, WI, September 12, 2016.
103. **Growing Your Business with Data.** ICIC Presentation, Chicago, IL, July 28, 2016.
104. **Growth from Digital and Big Data Assets.** NUVention Program on Innovation, Evanston, IL, May 20, 2016.
105. **Innovation from Digital Platforms.** Renaissance Weekend at Aspen Institute, Aspen, CO, August 28, 2014
106. **Enabling Innovation and Overcoming Risks to Your Start-Up.** Keynote speaker to the Kellogg San Francisco and Silicon Valley Alumni Club, Palo Alto, CA, February 29, 2014.
107. **Best Practices in Risk Management, FDI, and Stimulating GDP Growth in Emerging Economies. Forum on Risk Management Best Practices.** US Embassy, US State Department, and US Economic Office. Rabat, Casablanca, November 22, 2013.
108. **Managing Risks in to Entrepreneurs in Small and Medium Enterprises.** Confédération Générale des Entreprises du Maroc and US State Department, Economic Office. Casablanca, Morocco, November 21, 2013.
109. **Changing Demography of the World: Opportunities for Innovators.** Entrepreneurship Workshop by US State Department for Moroccan Firms. Technopark, Casablanca, Morocco. November 21, 2013.
110. **Global Growth Leadership.** Raytheon Leadership Series. Tucson, AZ. November 7-8, 2013.
111. **Leveraging Data Assets for Transformation.** Inner City Capital Connections Program, Chicago, IL June 6, 2013.
112. **Financial Services and the Digital Consumer: Frontiers of Innovation.** Conference on the Digital Customer, hosted by the Financial Times and Accenture, Chicago, IL, May 16, 2013.
113. **Integrated Marketing Communications for Innovation and Growth.** Microsoft Marketing Series. Presentation to Microsoft Executives, Redmond, WA, April 18, 2013.
114. **IT Management for Innovation and Growth.** Sasin Graduate Institute of Business Administration of Chulalongkorn University. Invited Speaker. Hua Hin, Thailand, August 24-28, 2010.
115. **Strategic IT Management- Fostering Innovation and Growth.** Sasin Graduate Institute of Business Administration of Chulalongkorn University. Invited Speaker. Hua Hin, Thailand, August 20-24, 2009.
116. **Innovative Approaches in Marketing: Learning from Your Customer via Analytics.** Kellogg Marketing Conference. Chicago, IL, January 23, 2009.
117. **Innovation and Start-Up Growth.** Cornell University S.C. Johnson School of Management. Invited Speaker at Symposium on Innovation. Ithaca, NY, September 24, 2005.
118. **Innovative Model for Managing IT Resources: Improving Time to Market.** INFORMS 2004. Denver, CO, October 25, 2004.
119. **Competitive Advantages in Retail Banking: Enabling Growth and Innovation.** Microsoft Research and Intel

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Research Retail Banking Seminar. Keynote Speaker. New York, NY, November 5, 2003.

Global Strategy

120. **The World in 2050: Preparing for Changes to the Customer Base and Workforce.** Executive Presentation to William Blair and Co. Chicago, IL, September 28, 2018.
121. **The World in 2050: Asia, Africa, and Opportunities for Advancement.** Renaissance Weekend-Monterey, CA, September 5, 2015.
122. **The World in 2050: Opportunities for Growth & Prosperity.** Renaissance Weekend-Jackson, WY, July 6, 2015.
123. **The World in 2050: Risks, Rewards, and Growth.** PRMIA and Amsterdam Institute of Finance. Keynote Speaker. Amsterdam, The Netherlands, March 23, 2015.
124. **The World in 2050: Changes in Demographic, Trade, and Economic Norms.** Renaissance Weekend. Tarrytown, NY, October 18, 2014.
125. **Preparing for the World in 2050: The Changing World Demographics.** Keynote speaker to the Kellogg Boston Alumni Club, Boston, MA, September 11, 2014.
126. **Strategic Risk Management for the Global Leader.** Sasin Graduate Institute of Business Administration of Chulalongkorn University. Invited Speaker. Hua Hin, Thailand, August 17-18, 2014.
127. **The Changing World Demographics.** Keynote speaker to the Kellogg Washington D.C. Alumni Club, Washington, DC, March 20, 2014.
128. **Implications of the Changing World Demographics.** Keynote speaker at the Lockton Mining Conference, Saint Louis, MO, March 18, 2014.
129. **Developing a Global Strategy in a Changing World.** Presentation to High Performers of Raytheon Missile Systems. Tucson, AZ, August 26, 2013.
130. **Global Opportunities and Risk: Demography and Emerging Middle Class.** Sasin Graduate Institute of Business Administration of Chulalongkorn University. Sasin Executive Program, Hua Hin, Thailand, August 16, 2013.
131. **Managing Global Risks.** Global Risk Management and Foreign Direct Investment - Partners in Growth. Bloomberg, BusinessWeek and Zurich Series, Chicago, IL, July 16, 2013.
132. **Global Opportunities and Risk: Demography and Emerging Middle Class.** Sasin Graduate Institute of Business Administration of Chulalongkorn University. Alumni Presentation. Hua Hin, Thailand, August 31, 2012.
133. **Opportunities for Growth in Latin America.** Finance Panel at Kellogg Latin American Business Conference, Evanston, IL, May 7, 2010.
134. **A Model for Medical Tourism Partnership.** Medical Tourism Conference. Chicago, IL, March 12, 2010.

Generational and Demographic Shifts and The Future of the Workplace

135. **Success with Millennials and the Intergenerational Workforce: Implications for Financial Services.** Keynote Presentation to the Credit Union Alliance. Nashville, TN, June 14, 2017.
136. **Success with Millennials and the Intergenerational Workforce:** Implications for a Customer Service Business. Keynote Presentation to the Texas Dental Association. Austin, TX, June 26, 2015.
137. **Strategies for Preparing for Demographic Changes and for Leveraging the Intergenerational Workforce.** ADA Membership Conference. Keynote Presentation. Chicago, IL, April 17, 2015.
138. **Success with Millennials, Baby Boomers and Gen X:** Implications for a Customer Service Business. Keynote Presentation to the Chicago Dental Practitioners. Chicago, IL, March 10, 2015.
139. **Preparing for Demographic Changes and the Intergenerational Workforce.** ADA President's Elect Conference. Keynote Presentation. Chicago, IL, January 12, 2015.
140. **Winning in Business – Preparing for Demographic Shifts Globally.** Renaissance Weekend at Aspen Institute, Aspen, CO, August 28, 2014.
141. **Global Opportunities and Risk: Demography and Emerging Global Middle Class.** Sasin Graduate Institute of Business Administration of Chulalongkorn University, Hua Hin, Thailand, August 16, 2014.
142. **World Demographics: Adapting the Organization for a New Marketplace.** Raytheon Leadership Series. Keynote Speaker. Tucson, AZ, October 16, 2013.

EDITORIAL POSITION

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

2013-2018

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ADVISORY POSITIONS

NOT FOR PROFIT ADVISORY ROLES

- | | |
|--|----------------|
| Northwestern University NUvention Analytics Advisory Board | 10/15-Current |
| <ul style="list-style-type: none"> • Serving as an advisor on the selection of innovation targets leveraging analytics. • Serve as an advocate for analytics across university programs. | |
| Northwestern University Masters of Science in Analytics Faculty Board | 01/13-Current |
| <ul style="list-style-type: none"> • Serving as an advisor to students on job placement. • Serve as an advocate analytics programs and the data science profession. | |
| Northwestern University Sustainability: Tree USA Program | 10/14-Current |
| <ul style="list-style-type: none"> • Serving as an advisor on the care and support for the campus forest. • Serve as an advocate for tree planting initiatives on campus and for the growth and care of the campus forest. | |
| American Institute of Big Data Professionals | 9/14-Current |
| <ul style="list-style-type: none"> • Serving as an advisor on Big Data and Analytics. • Advocating for Big Data and Analytical professionals. | |
| Menus of Change Scientific Technical Council | 8/12 – Current |
| <ul style="list-style-type: none"> • Serving on the Scientific Council, providing direction on economic models for more sustainable food supply models. • Joint venture between the Harvard School of Public Health and Culinary Institute of America. | |
| Enterprise Risk Management Symposium | 12/13-12/15 |
| <ul style="list-style-type: none"> • Serving on the Advisory Board for PRMIA. • Provide leadership on programs and educational seminars. | |
| Morton Arboretum, Lisle, IL | 5/11 – 5/15 |
| <ul style="list-style-type: none"> • Serving on the Science and Technology Council. • Providing direction on technology adoption and deployment. | |
| Virginia Hispanic Chamber of Commerce | 5/06 – 12/07 |
| <ul style="list-style-type: none"> • Served on Legislative Committee, advising US senators, Virginia’s congressmen and governor on Latino matters, providing perspective from the Hispanic Chamber. • Served on Corporate Relations Committee, working with leading companies in Virginia on participation with the Virginia Hispanic Chamber of Commerce and on general Latino matters. • Finance Committee Chairman, recommending policies to the board of directors. | |
| West Grace Street Association (Advisor to the City Council of Richmond, VA) | 1/05 – 12/07 |
| <ul style="list-style-type: none"> • Advised City Council on matters related to public infrastructure and drainage systems. • Worked with City Council on developing a new neighborhood policing and safety system. | |

PAST UNIVERSITY ADVISORY ROLES

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|---|---------------|
| Executive MBA Advisory Board, Kellogg School of Management | 06/07 – 12/10 |
| Cornell University Alumni Association | 03/00 – 03/03 |
| Advisor to Department of Statistical Sciences & Operations Research, Virginia Commonwealth University | 2/02 – 5/07 |
| Advisor to Cornell University Theory Center, Cornell University | 11/03 – 1/06 |
| Advisor to Virginia Commonwealth University regarding humanitarian trips to Cuba | 2/02 – 5/05 |

CORPORATE ADVISORY ROLES

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|---|----------------|
| Chief Analytics Officer for Calexus Solutions | 5/07 – Current |
| Corporate Advisor to Leo Tilman and Co. | 1/10 – 12/14 |
| Executive Advisor to JMP Software | 12/03 – 12/05 |
| Corporate Advisor to Microsoft Research on High Performance Computing | 11/03 – 9/05 |
| Corporate Advisor to Intel Research on Distributed Computing | 11/03 – 9/05 |

GOVERNMENTAL ADVISORY ROLES

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

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CORPORATE EXPERIENCE

Corporate Strategist, Strategic Technology Group Capital One Financial, Inc. (NYSE: COF)

8/00 – 12/06
Richmond, VA

Corporate Research Leadership

- Leader and founder of the New Decision Paradigms enterprise-wide research program. Researched and enabled new quantitative techniques and technologies that enabled novel credit risk modeling, rules engines, and data mining.
- Leader of High Performance Computing research program. Evaluated and deployed grid computing and distributed storage techniques to reduce IT expenses and enable increased analytics.
- Led and founded the first-ever Analytics Testing Lab at Capital One and development of a next generation analytics environment. Project earned corporate award for excellence from the CEO, awarded to top 1% of projects.
- Founder of enterprise-wide Center of Excellence for Simulation and Modeling. Projects earned corporate award for excellence from the CEO, awarded to top 1% of projects.

Partnership Development and External Relationship Leadership

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

Corporate and IT Strategy

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

Business Development

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

Risk Management

- Lead technology strategist on efforts to redesign risk-model scoring for the US and UK businesses.
- Re-engineered internal processes for collections, risk, and fraud mitigation.
- Evaluated enterprise-core systems such as system of account record, credit risk modeling algorithms, fraud, customer retention, and collection decision engines and provided recommendations to senior executives.
- Developed new business process mapping standards for IT in order to mitigate operational risks.

Analytics, Business Intelligence, and Technology Evaluation

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

University – Corporate Relationship Leadership

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

Talent Development

- Led and developed an internship program for graduate students in Operations Research, with students from the University of Virginia and Virginia Commonwealth University participating.

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- Served as Capital One's Diversity recruiter to Cornell University, recruited at National Society of Hispanic MBAs. *Community Relationship Leadership*
- Served as Capital One's representative to the Virginia Hispanic Chamber of Commerce.
- Initiated and led a program that paired Capital One executives with local, Hispanic small-business owners. Program drew corporate and local media attention for the value added back to the community.
- Founding member of the Capital One Hispanic Associate Network.

PREVIOUS TEACHING EXPERIENCE

- | | |
|---|--|
| <p>Adjunct Professor
 Virginia Commonwealth University
 Department of Statistical Sciences & Operations Research</p> <ul style="list-style-type: none"> • Instructed graduate and undergraduate courses in operations research including stochastic processes, operations research, and multi-objective decision analysis with emphasis on software use and application to business problems. • Managed and developed professional internship program for students, advised students on career development. | <p>1/02 – 12/04
 Richmond, VA</p> |
| <p>Executive Instructor and Training Consultant
 Virginia Commonwealth University
 Department of Statistical Sciences & Operations Research in partnership with Capital One University, Capital One Financial, Inc.</p> <ul style="list-style-type: none"> • Taught eight courses on time series analysis, forecasting, and optimization. Over 150 Capital One associates were trained, yielding improved analysis and operations worth \$5M+ in annual savings and increased earnings. Training resulted in national award for the highest return on investment for training. Courses led to improved collection strategies and outsourcing options. • All course work was based on case studies, taken from real-world situations. • Course ratings for instructor was at 98% responding as "Exceeds Expectations." | <p>10/02 – 11/04
 Richmond, VA</p> |
| <p>Instructor for Engineering Economics
 Cornell University, College of Engineering</p> <ul style="list-style-type: none"> • Taught financial concepts, bond pricing, tax and investment strategies, and replacement analysis. Cash-flow analysis, tax implications, and concepts of interest, shorting, arbitrage, and role of financial markets. | <p>5/98 – 8/99
 Ithaca, NY</p> |
| <p>Teaching Assistant for Introduction to Wines
 Cornell University, School of Hotel Administration</p> <ul style="list-style-type: none"> • Prepared wine, sampling notes, class materials and equipment for over 900 students weekly. Administered exams. | <p>8/97 – 6/99
 Ithaca, NY</p> |

RECENT AWARDS, HONORS, & RECOGNITION

- Named a top influential blogger in Big Data and Analytics globally.
- Awarded silver medal and named a top book author in business technology by the prestigious Axiom Awards (2015) for book, *From Big Data to Big Profits: Success with Data and Analytics* (2015).
- Recognized for excellence in risk management business cases by Harvard Business School Publishing, Kellogg School of Management, the Aspen Institute, the World Bank, Bank of England, and PRMIA.
- Awarded Kellogg Impact Teaching Award for Enterprise Risk Management by MBA students in 2011.

OTHER DETAILS

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

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