



# EXECUTIVE DEVELOPMENT ROUNDTABLE EDRT

Boston University School of Management • 595 Commonwealth Avenue • Boston, MA 02215  
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## EDRT Fall 2012 Meeting *October 3-4, 2012* *Hotel Commonwealth, Kenmore Square* *Boston, MA*



### *“The Future of Leadership: Identity & Adaptability in Action”*

The Fall 2012 EDRT Meeting will be on October 3-4 at Hotel Commonwealth in Boston, MA. The meeting advances our Spring 2012 theme on the global future of leadership development and how individuals and organizations adapt to our changing landscape.

EDRT is delighted that **Marshall Goldsmith**, world renowned Executive Advisor & Author (including New York Times Best Seller, What Got You Here, Won't Get You There), as the meeting keynote speaker, where he will define and set the stage for delving deeper into the future of leadership development. Marshall Goldsmith's Ph.D. is from UCLA's Anderson School of Management where (in 2010) he was recognized as one of 100 distinguished graduates in the 75 year history of the School. He teaches executive education at Dartmouth's Tuck School and frequently speaks at leading business schools. He is one of a select few executive advisors who have been asked to work with over 120 major CEOs and their management teams. He served on the Board of the Peter Drucker Foundation for ten years. He has been a volunteer teacher for US Army Generals, Navy Admirals, Girl Scout executives, International and American Red Cross leaders, where he was a National Volunteer of the Year.

Marshall will also be the recipient of EDRT's prestigious 2012 Marion F. Gislason Award for Excellence in the Field of Leadership. The award presentation will take place at the EDRT meeting on October 3, 2012.

In addition, we are very pleased that **David Altman**, Ph.D., Executive Vice President at the Center for Creative Leadership, will also be speaking on the challenges of leadership development in our changing, dynamic world. David has extensive leadership experience in both the public and private sectors and deep expertise in developing effective leadership capabilities in complex organizations. We are also very excited that **Sean Corcoran**, SVP at Mullin, and **Mike Sheehan**, CEO of Hill Holliday, will be on our Application Panel to discuss their current and future leadership challenges.

Following are the agenda and speaker biographies.



**Boston University School of Management**  
**Executive Development Roundtable**  
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**Hotel Commonwealth, Boston, MA**  
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**AGENDA**

**Pre-meeting: Tuesday, Oct. 2, 2012**

6:00 pm – 8:00 pm **Informal Welcome/ Networking Gathering for EDRT Members and Guests - The Hawthorne - Appetizers & Cocktails**

**Day 1: Wednesday, Oct. 3, 2012**

7:30 am – 8:30 am **Breakfast - Foyer**

7:30 am – 8:15 am **New Member/Guest Orientation - Longwood Room**  
*Jack McCarthy, Director of EDRT, Associate Professor of Organizational Behavior, Boston University*

8:30 am – 9:15 am **Welcome, Introductions - Esplanade Ballroom**  
*Jack McCarthy, Director of EDRT, Associate Professor of Organizational Behavior, Boston University*

9:15 am – 10:30 am **EDRT Discovery Café**  
*Nancy Persson, Vice President, Executive & Organization Development, Staples, Inc.*  
*Lisa Prior, Principal, Prior Consulting LLC*

10:30 am – 10:45 am **Break - Foyer**

10:45 am – 11:00 am **EDRT Discovery Café (continued)**  
*Nancy Persson, Vice President, Executive & Organization Development, Staples, Inc.*  
*Lisa Prior, Principal, Prior Consulting LLC*

11:00 am – 12:30 pm **Future Leadership: Ideas in Action**  
*David Altman, Executive Vice President, Research, Innovation, and Product Development, Center for Creative Leadership (CCL®)*

12:30 pm – 1:15 pm **Lunch - Commonwealth Room**

1:15 pm – 1:45 pm **2012 Marion F. Gislason Award Ceremony - Commonwealth Room**  
*Recipient: Marshall Goldsmith, Executive Advisor and Author, Marshall Goldsmith Group*

1:45 pm – 3:00 pm **Helping Successful Leaders Get Even Better**  
*Marshall Goldsmith, Executive Advisor and Author, Marshall Goldsmith Group*

3:00 pm – 3:15 pm **Break**

3:15 pm – 5:00 pm **Helping Successful Leaders Get Even Better (Continued)**  
*Marshall Goldsmith, Executive Advisor and Author, Marshall Goldsmith Group*

5:00 pm – 5:30 pm **Free Time**

5:30 pm – 8:30 pm **Dinner & Reception - The Gallery Room**  
*Entertainment: Lani Peterson, Professional Storyteller, ArnzenGroup*

8:30 pm **Networking Opportunity & Meeting Debrief - Cornwalls, Kenmore Square**



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**Day 2: Thursday, October 4, 2012**

7:30 am – 8:30 am	<b>Breakfast - Foyer</b>
7:30 am – 8:15 am	<b>Steering Committee Meeting – Olmstead Room</b> <i>Open to all EDRT Members</i>
8:30 am – 9:00 am	<b>Steering Committee Update &amp; After Action Review - Esplanade Ballroom</b> <i>COL (Ret) Charles D. Allen, Professor of Leadership &amp; Cultural Science, U.S. Army War College</i>
9:00 am – 10:00 am	<b>Company Application Panel</b> <i>Sean Corcoran, SVP Digital Media, Mullen</i>
10:00 am – 10:15 am	<b>Break - Foyer</b>
10:15 am – 11:00 am	<b>Company Application Panel (Continued)</b> <i>Mike Sheehan, Chief Executive Officer, Hill Holliday Kerry Benson, EVP Managing Director, Hill Holliday Mike Dyer, SVP Content Group, Hill Holliday</i>
11:00 am – 12:00 pm	<b>Applying the Learning: Roundtable Session on Identity &amp; Adaptability in Action</b> <i>Jack McCarthy, Director of EDRT, Associate Professor of Organizational Behavior, Boston University</i>
12:00 pm – 12:15 pm	<b>Wrap-up and Final Reflections</b> <i>Jack McCarthy, Director of EDRT, Associate Professor of Organizational Behavior, Boston University</i>
12:15 pm – 1:00 pm	<b>Informal Roundtable Luncheon Session - Commonwealth Room</b> <b>Lessons from the Corner Office on Leadership and Culture</b> <i>Adam Bryant, Senior Editor, New York Times</i>

**EXECUTIVE DEVELOPMENT ROUNDTABLE (EDRT)**

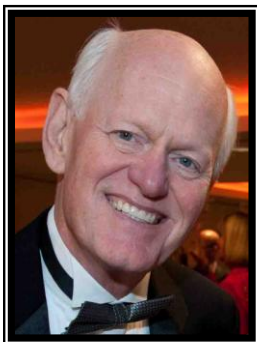
EDRT is a dynamic, peer-based learning consortium and research center open to all organizations that view leadership development as a critical strategic resource. The Creative Leadership Council is EDRT's forum for collaboration with the Center for Creative Leadership.





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**Marshall Goldsmith  
Executive Advisor & Author  
Marshall Goldsmith Group**

Marshall Goldsmith is the million-selling author or editor of 32 books, including the New York Times and Wall Street Journal bestsellers, *MOJO* and *What Got You Here Won't Get You There* – a WSJ #1 business book and winner of the Harold Longman Award for Business Book of the Year. His books have been translated into 28 languages and become bestsellers in ten countries.

Marshall's professional acknowledgments include: Institute for Management Studies – Lifetime Achievement Award (one of only two ever awarded), American Management Association - 50 great thinkers and leaders who have influenced the field of management over the past 80 years, BusinessWeek – 50 great leaders in America, Wall Street Journal – top ten executive educators, Forbes – five most-respected executive coaches, Leadership Excellence – top ten thinkers on leadership, Economic Times (India) – top CEO coaches of America, Economist (UK) – most credible executive advisors in the new era of business, National Academy of Human Resources – Fellow of the Academy (America's top HR award), World HRD Congress – 2011 global leader in HR thinking, 2011 - Tata Award (India) for Global HR Excellence, Fast Company – America's preeminent executive coach and Leader to Leader Institute – 2010 Leader of the Future Award. His work has been recognized by almost every professional organization in his field.

Dr. Goldsmith's Ph.D. is from UCLA's Anderson School of Management where (in 2012) he was recognized as the Distinguished Alumnus of the Year. He teaches executive education at Dartmouth's Tuck School and frequently speaks at leading business schools. He is one of a select few executive advisors who have been asked to work with over 150 major CEOs and their management teams. He served on the Board of the Peter Drucker Foundation for ten years. He has been a volunteer teacher for US Army Generals, Navy Admirals, Girl Scout executives, International and American Red Cross leaders – where he was a National Volunteer of the Year.

Marshall's other books include: *Succession: Are You Ready?* – a WSJ bestseller, *The Leader of the Future* - a BusinessWeek bestseller. The AMA Handbook of Leadership, *The Organization of the Future 2* and *The Leadership Investment* – all three are American Library Association - Choice award winners for academic business books of the year. Over three hundred of his articles, interviews, columns and videos are available online at [www.MarshallGoldsmith.com](http://www.MarshallGoldsmith.com) for viewing and sharing. Visitors to this site have come from 197 countries and have viewed, read, listened to, downloaded or shared resources over 8 million times.



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**David Altman**  
**Executive Vice President, Research, Innovation, & Product Development**  
**Center for Creative Leadership (CCL®)**

David is Executive Vice President, Research, Innovation, and Product Development at the Center for Creative Leadership (CCL®), a not-for-profit research and educational institution with headquarters in Greensboro, NC. He is also an Adjunct Professor in the Department of Public Health Education at the University of North Carolina, Greensboro and Adjunct Professor in the Department of Social Sciences and Health Policy (SSHP) at the Wake Forest University School of Medicine. Before coming to CCL, he was a tenured Professor at Wake Forest in the Department of Public Health Sciences with a

joint appointment in the Department of Pediatrics.

David serves as director of the Robert Wood Johnson Foundation Substance Abuse Policy Research Program, a national initiative to stimulate research on issues related to drug, alcohol, and tobacco policy. This program will ultimately fund \$66 million in research grants. He is also co-director of the Robert Wood Johnson Foundation Ladders for Leadership: Building the Next Generation of Community Health Leaders Program, a \$4 million initiative to develop emerging leaders in health and health care.

David has long supplemented his work in the public health field with a keen interest in leadership, and in CCL. He attended the Leadership Development Program (LDP®) as a Fellow of the W.K. Kellogg Foundation National Leadership Program and, more recently, was a participant in Leading Creatively, Developing Leadership Talent, Assessment Certification Workshop, Coaching Certification Workshop, and Leadership at the Peak programs. He now trains the Leadership at the Peak program. He is active in a number of professional associations and is a Fellow of three divisions in the American Psychological Association and a Fellow in the Society of Behavioral Medicine. He is also a member of the American Public Health Association, Council on Epidemiology and Prevention of the American Heart Association, the Society of Public Health Education, and Academy of Behavioral Medicine Research. He serves on a variety of community taskforces and Boards.

Prior to joining Wake Forest, David was a Senior Research Scientist at Stanford Center for Research in Disease Prevention at Stanford University School of Medicine. He earned his Ph.D. in Social Ecology at the University of California, Irvine where he was selected as Alumni of the year in 2007, and was a Postdoctoral Fellow at the Stanford Center for Research in Disease Prevention.





**Boston University School of Management  
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EDRT Fall Meeting: October 3-4, 2012  
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**Nancy Persson  
Vice President, Executive & Organization Development  
Staples, Inc.**

Nancy Persson leads the Global Talent Management function at Staples, the world's largest office solutions company. With 2011 sales of \$25 billion and 91,000 associates worldwide, Staples operates in 27 countries throughout North and South America, Europe, Asia and Australia serving consumers and businesses of all sizes. Staples invented the office superstore concept in 1986 and today ranks second worldwide in e-commerce sales.

During her 19 years with the company, Nancy has built and still leads world-class executive and leadership development, OD and learning technology teams providing innovative solutions for 91,000 associates. She is an expert facilitator, communicator, and internal consultant widely recognized for her OD expertise and bottom line business focus. Staples University was founded under her leadership; recently globally rebranded as Staples LearningXchange, it offers a broad curriculum of leadership and management development, job-skills, and culture-building programs.

Ms. Persson brings more than 30 years of retail and Human Resources experience to her work; she earned her BA in Communications and Education from Boston College, holds a Masters in Organization Psychology from the Massachusetts School for Professional Psychology, and a Masters Certificate in Executive Coaching. She is a student of the Martial Arts, and recently earned her first degree black belt in Tai Kwan Do. Nancy is passionate about her work, karate, downhill skiing, and anything that allows her to spend time with her husband Mark, her sons, Douglas and Jackson, and her clinically insane dog Scarlet.



**Lisa Prior  
Principal  
Prior Consulting LLC**

Specializing in change management and leadership effectiveness, Lisa brings over twenty years of experience in working with corporate clients, helping them achieve goals and fulfill the promise of their potential through skilled consulting, coaching, and facilitation. Clients say they value Lisa for her energy and insight. She has worked with leaders at all levels in financial services, asset management, biopharma, healthcare, major universities, and other fields that rely on the skills of their people to differentiate them from the competition.

Lisa works with clients in three ways. She is a thought partner who collaborates in the design of approaches for developing future leaders and effective organizations. Lisa is a recognized expert who designs and facilitates strategically pivotal leadership programs and conversations. She is a trusted advisor who provides executive coaching, peer coaching, and team facilitation. As part of her consulting work, Lisa is a moderator for executive development programs at Harvard Business Publishing and a frequent conference presenter. Her most recent publication can be found in the volume, *Research in Management Consulting*. Lisa has been a supervisor in the MSPP's Executive Coaching certification program.

Lisa has a unique blend of line management and leadership development experience. She honed her leadership skills as Chief of Staff, Corporate and Community Affairs, at Bank Boston (now Bank of America), where she acted as the business officer for an 80-person, \$25 million division of the bank. The group's best practices won it the US Department of Commerce's *Ron Brown Award for Corporate Responsibility*. She also served in other roles at Bank



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EDRT Fall Meeting: October 3-4, 2012  
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***The Future of Leadership: Identity & Adaptability in Action***

Boston, including Human Resources Project leader for a major merger. She researched and summarized career development strategies that were later published by Boston University's Graduate School of Management. Previous to consulting, Lisa was responsible for leading research projects at Harvard University. Lisa served as a resident advisor to undergraduates at the Massachusetts Institute of Technology. She earned a Bachelor of Arts degree in Psychology from Fairfield University and Master's Degree in Organizational Development from Boston University. Lisa is currently a Steering Committee Member of the Executive Development Roundtable at Boston University and is writing a book with the working title, *Rubber Avenue: The Untold Story of a Company Family, A Factory Town, and the Truth About the Unsustainable Promise of Security and Loyalty*.



**Lani Peterson**  
**Psychologist, Coach, Public Speaker and Professional Storyteller**  
**ArnzenGroup**

Lani Peterson is a psychologist, coach, public speaker and professional storyteller. She has extensive experience working with individuals, groups and organizations in the areas of leadership, emotional intelligence, personal and team development. Drawing on her practice as a performing artist and public speaker, she teaches executives and managers the skill of personal presence, and the development and delivery of high impact communications. She specializes in the application of narrative as a leadership tool, and medium for personal growth, connection and change.

With a specialty in women's leadership development, Lani has worked with executives in both profit and non-profit organizations with a focus on medical and educational institutions. She specializes in helping executives on issues of executive presence, high impact communications, personal effectiveness, role transitions, influence, team development, conflict resolution and change management. Drawing from her twenty-five years' experience as both a psychologist and coach working with individuals and groups, Lani interweaves narrative training with systems thinking to guide and support change efforts. With a strong background in executive assessment, she works from a foundation of insight oriented feedback that can support an informed development and action plan.

Lani has a doctorate in psychology from the Massachusetts School of Professional Psychology, a Masters in Counseling Psychology from Lesley University with an undergraduate degree in literature from Smith College. She is a member of the National Speaker's Association and chaired the National Healing Story Alliance for five years.



**Charles D. Allen**  
**Professor of Leadership and Cultural Studies**  
**U.S. Army War College**

Colonel (retired) Charles D. Allen culminated a 30-year Army career as Director, Leader Development and is currently the Professor of Leadership and Cultural Studies in the Department of Command, Leadership, and Management at the United States Army War College, Carlisle Barracks, PA.

A 1978 graduate of the United States Military Academy at West Point, he had 11 years of overseas assignments in Germany, Honduras, and South Korea. Airborne and Ranger-qualified, his military education includes the U.S. Army Command and General Staff College, the School of Advanced Military Studies, and the United States Army War College. Prof Allen has served in leadership and staff positions from platoon through Corps (I and V Corps) in



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Executive Development Roundtable  
EDRT Fall Meeting: October 3-4, 2012  
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Army and Joint Commands. He also served as an instructor and assistant professor of Engineering Management at West Point.

His areas of interest are Strategic Leadership, Creativity and Innovation, and Organizational Change. In addition to authoring and co-authoring material for the USAWC curriculum for the core courses in Strategic Thinking and Strategic Leadership, he is the author and co-author of two chapters in Strategic Leadership: The General's Art (2008). His works are also published in Joint Force Quarterly, Parameters, Military Review, Armed Forces Journal, Army Professional Readings, Small Wars Journal, and Southern Business Review. Professor Allen is a member of the Board of the Directors for the Pennsylvania Education Policy Fellowship Program and a 2004-2005 Fellow of the program. He was a member of the Advisory Board for the Lumina Project for the Institute of Educational Leadership.

He is a contributor and member of the "On Leadership" panel of the Washington Post. Prof Allen is the Steering Committee Chairman for the Executive Development Roundtable hosted by Boston University. Professor Allen is a member of the community of practice for the Army Profession/Profession of Arms Campaign and has conducted studies of professional military education for the U.S. Army.



**Jack McCarthy**  
**Director of the Executive Development Roundtable**  
**Associate Professor of Organizational Behavior**  
**School of Management**  
**Boston University**

Jack McCarthy is an Associate Professor of Organizational Behavior in the School of Management at Boston University, where he also serves as the Director of the Executive Development Roundtable. He teaches courses on leadership and organizational behavior in the undergraduate, MBA, international and executive programs. Additionally, he designs and leads a year-long seminar series on leadership for the Hubert H. Humphrey Fellowship Program at Boston University, comprised of mid-career professionals and scholars from developing nations studying in the United States. He also serves as the Faculty Director for the university's core undergraduate Organizational Behavior course, where he and colleagues have received major grant funding from the university to help Redesign the Undergraduate Learning Experience, in recognition of their ongoing innovations in teaching and learning. Most recently, Jack was awarded the 2012 Broderick Prize for Excellence in Teaching by the School of Management at Boston University, the school's highest honor for teaching.

Jack was previously an Assistant Professor at the University of New Hampshire, where he launched and led the undergraduate business program at the university's urban campus in Manchester, NH and was the recipient of the college-wide 2005 Teaching Excellence Award. Having taught for three summers in residence in China, he received the 2009 Faculty of the Year Award from the International MBA Cohort at Boston University. Jack was selected to deliver the 2011 Faculty Address for the School of Management's Convocation Ceremony for its Bachelor's degree candidates as part of Boston University's 138<sup>th</sup> Commencement Exercises.

With research interests in leadership, executive development, strategic change, and global sustainability, Jack's work has been published in leading journals, and he is a frequent speaker at academic and professional conferences in the US and abroad on leadership and organizational change. Having served over fifteen years in corporate finance as a financial analyst, manager, and senior executive in operating divisions of the Raytheon Company, Schlumberger Ltd. and W.R. Grace & Co. prior to his career transition into academia, Jack draws heavily upon his real-world management and leadership experience in his teaching and research. He also serves as a leadership development consultant for executives and senior management teams in various industries, and has performed executive coaching





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Executive Development Roundtable  
EDRT Fall Meeting: October 3-4, 2012  
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***The Future of Leadership: Identity & Adaptability in Action***

meeting facilitation, and strategic planning sessions in the areas of leadership, team dynamics and organizational change.

In addition to a DBA in Organizational Behavior from the Graduate School of Management at Boston University, he received an MBA with a concentration in Finance from Babson College, and a BA in Economics from the University of Massachusetts at Amherst. A native Bostonian, and an alumnus of The Boston Latin School, Jack is an avid Boston sports fan and still plays competitive ice hockey, although at an increasingly less competitive pace.



**Sean Corcoran**  
**SVP, Digital Media**  
**Mullen**

Sean Corcoran has joined Mullen as SVP, Director of Digital Media and Social Influence, following three years of service as the Senior Analyst for Interactive Marketing at Forrester Research.

Corcoran is a leading authority on digital marketing, social media and agency structure, who has worked with marketing clients in a range of different industries and with a cross-section of digital pure play and integrated marketing agencies to understand and capitalize on the business effects of technology change.

Corcoran has recently worked with large-scale, innovative brands, including MasterCard, L’Oreal, Novartis, Johnson & Johnson, Crayola, MTVN and Mars to help shape digital (social, mobile, video) marketing strategies. He has also authored many forward- thinking reports, including: “*No Media Should Stand Alone* and *Embedding Social Media into the Marketing Mix*.”

“I’m tremendously excited about Sean coming on board to run digital media and social influence,” said John Moore, Chief Media Officer at Mullen. “His Forrester background makes him a unique asset and embeds in Mullen one of the preeminent thinkers in a space that is keeping CMOs up at night. We look forward to Sean creating a new vision and helping our clients navigate critically important channels like social, mobile and gaming, to name just a few.”

“Integrating different media silos is an imperative for marketers to succeed in the digital era,” said Corcoran. “And to do this at Mullen – with its hyperbundled approach to integrating creative, media, and technology, along with its stellar portfolio of clients such as Google, Zappos, and JetBlue – makes the opportunity even that much more exciting.”



**Mike Sheehan**  
**Chief Executive Officer**  
**Hill Holliday**

As the CEO of Boston's largest advertising agency, Mike Sheehan has been a leader in Boston's Business Community for several years. He fosters a culture not only of professional excellence and client dedication but also of personal integrity and responsibility at Hill Holliday. Under his leadership, Hill Holliday has grown 70%, and now employs close to 900 people in Boston, New York, and Greenville, S.C. This growth has not come at the expense of the agency’s unique and highly respected culture – Hill Holliday has been recognized by the Boston



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Executive Development Roundtable  
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***The Future of Leadership: Identity & Adaptability in Action***

Globe, the Boston Business Journal and Advertising Age as a "Best Places to Work."

*An advertising copywriter and creative director by trade, Mike has been awarded virtually every national and international award for excellence: The Grand Clio, One Show Gold, Cannes Lion, and Communication Arts.*

Mike joined Hill Holliday as a group creative director in 1994, and was named executive creative director of Hill Holliday in 1996. In 1999, he joined DDB Chicago as executive creative director. A year later, he rejoined Hill Holliday as president. He was named CEO in 2003, the only non-founder to hold that title. The list of clients for whom Mike has worked includes virtually every Hill Holliday client, such as John Hancock, Dunkin' Donuts, Bank of America, Covidien, and Liberty Mutual, as well as other prominent national brands like McDonald's, Maytag, and Gatorade.

Mike Sheehan's out-of-office accomplishments are equally impressive, including a Father of the Year Award from the American Diabetes Association and the Father's Day Council. He serves on a number of boards of directors, including Catholic Charities of the Archdiocese of Boston, Thayer Academy, the American Ireland Fund, The Inly School, the Center of Excellence for Patient Safety at Brigham and Women's Hospital, and the Board of Overseers for Boston Children's Hospital. Former Board positions include BJ's Wholesale Club where he chaired the Executive Compensation and ERISA committees, Cardinal Cushing School & Training Center, and Chairman of the Board of Saint Anselm College.

Mike attended the United States Naval Academy and received his B.A. in English from Saint Anselm College. Saint Anselm awarded him an Honorary Doctor of Laws degree in 2011.



**Adam Bryant**  
**Senior Editor, New York Times**

Adam Bryant is senior editor for features at *The New York Times*. He also conducts interviews with CEOs for *Corner Office*, a weekly feature he started in March 2009 in the Sunday *New York Times* Business Section. (Also on nytimes.com.) Adam recently authored the *New York Times* best-seller, *The Corner Office; Indispensable and Unexpected Lessons from CEOs on How to Lead and Succeed*, which draws broader lessons from his over 150 CEO interviews.

Adam was lead editor of a series on dangers of distracted driving that won a Pulitzer Prize for National Reporting. Prior to his current role he was business reporter, deputy business editor, and deputy national editor. He was also former senior writer/business editor at *Newsweek*.

**Please Note:** EDRT is hosting a special informal luncheon event as an extension of our two day meeting. We hope you can arrange your return travel plans to join us for this truly unique opportunity for an interactive dialogue on leadership....

***"Lessons from the Corner Office on Leadership and Culture" ...with Adam Bryant***

Adam's EDRT session is scheduled for **12:15-1:00pm, Thurs. Oct 4<sup>th</sup>**. More detail to follow.

Adam Bryant will be on campus that afternoon and evening for a series of interactive sessions with students and faculty, primarily of BU's Graduate School of Management's new Leadership and Organizational Transformation concentration.