

# Cox today

SMU • COX SCHOOL OF BUSINESS

SUMMER 2022



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ALUMNUS REFLECTS ON HIS EXPERIENCES

# Building business leaders

BREAKING GROUND  
ON THE FUTURE OF  
THE EDWIN L. COX  
SCHOOL OF BUSINESS

**SMU**  
*Ignited*

*Boldly Shaping Tomorrow*





## Dean's Letter

A Letter from Dean Myers

Since 2020, when the Cox School marked 100 years of business education at SMU, we've focused on the importance of the *Second Century* of developing business leaders at Cox. On May 6, the second century of business education at SMU Cox took a big step toward groundbreaking change. With the groundbreaking of our renovation and expansion project, our new and improved facilities will signal to the world that the Cox School of Business is committed to being a national leader in business education. To compete effectively with the world's most respected business schools, to recruit the best and brightest students and globally recognized faculty and to fully prepare tomorrow's leaders to be solution-oriented and nimble in an ever-changing world, our facilities must be up to the challenge.

New classroom configurations will feature a more seamless integration of technology and more collaborative workspaces. Our prime location in the heart of the SMU campus and our new building design will facilitate greater interaction between students and faculty within the Cox School and between colleagues across the University. For our Cox community to thrive, the new building design is driven by a major goal: to create a space that can incubate a "9 to 9" model of business education. The design will encourage students to spend their day at the Cox School – in class and after class – interacting with their peers and professors and sparking conversations out of which ideas flow and solutions take shape. The design will enhance the sense of community at SMU Cox that is a common denominator among some of our key business school

competitors. Completion of this important milestone in the Cox School's history is targeted for May 2024.

Speaking of history, just a few days before the groundbreaking, SMU Cox was the recipient of the largest gift ever made by a non-alumnus in the history of the University. Energy expert and philanthropist William S. Spears has asked that the amount of his gift remain undisclosed, but his generous commitment will establish the William S. Spears Institute for Entrepreneurial Leadership in the Cox School. His investment will encourage business creation, leadership development and economic growth, strengthening areas critical to the future of the Dallas business economy and beyond. Because of this gift, new leadership programs, scholarships and internships will be made possible for both undergraduates and graduates.

Through the Spears gift and the many gifts our loyal alumni and friends have given to support the renovation and expansion project, the Cox School will broaden its breadth and depth – our ability to shape tomorrow's world-changers. We thank you for your support and your belief in our vision for the second hundred years of business education at SMU.

**TO COMPETE  
EFFECTIVELY WITH  
THE WORLD'S  
MOST RESPECTED  
BUSINESS SCHOOLS,  
OUR FACILITIES  
MUST BE UP TO THE  
CHALLENGE.**

**Matthew B. Myers**

Dean & Tolleson Chair of Business Leadership  
David B. Miller Endowed Professor in Business



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William S. Spears strengthens entrepreneurial leadership in Dallas and beyond. A new renovation and expansion project will help build business leaders.



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### 46 | GROUNDBREAKING CHANGE

SMU breaks ground on extensive expansion and renovation of the Cox School of Business.



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**dcustom**

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Title IX of the Education Amendments of 1972, 20 U.S.C. §§ 1681-1688.

# PROGRAM NEWS

## SMU Cox BBA Student Wins Top Prize in The Data Open Championship

SMU Cox BBA student Julian LaNeve, a student in the Cox School's Alternative Assets Management Program, was the only undergraduate on a team with two PhD students from Duke University and a master of financial economics student from UC Berkeley. Together, the team members received \$100,000 for a report and presentation that recommended an introduction of trade restrictions based on specialization in different types of plastic waste treatments to counter the global pollution crisis.

In December, a Cox BBA student helped his team claim the top prize for The Data Open Championship, the world's leading global data science competition for university students. Cox BBA Julian LaNeve, a student in the Cox School's Alternative Assets Management Program, was the only undergraduate on a team with two PhD students from Duke University and a master of financial economics student from UC Berkeley. Together, the team members received \$100,000 for a report and presentation that recommended an introduction of trade restrictions based on specialization in different types of plastic waste treatments to counter the global pollution crisis.

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## Former President George W. Bush Paid a Surprise Visit to Scott Hensley's Business Leadership Institute Class

Former President George W. Bush paid a surprise visit to Scott Hensley's Business Leadership Institute class midway through the spring 2022 semester. The BBA students in Business Communication 1210 enthusiastically participated in experiential learning with practical applications from President Bush's communication and leadership experiences. President Bush's visits to SMU classes remain confidential prior to his arrival.

SMU Cox provided the second-highest number of active volunteers to help Dallas County residents with their taxes and secured substantial refunds for many of them in the tax season that ended in April. Their student volunteer efforts were made with the Dallas Community Tax Centers/Foundation Communities' Volunteer Income Tax Assistance Program (VITA). According to the program's volunteer coordinator, Cox students provided 523.5 hours of support, saving tax payers an estimated \$13.611 in preparation costs and assisted in securing a total of \$11.7 million in refunds to the community.

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To participate, students receive tax training, must pass a proficiency exam and are directed to volunteer 25+ hours as a tax preparer in Dallas area locations. Accounting Professor Wendy Wilson offers extra credit for her Federal Income Tax students who complete the volunteer commitment. All of the students who participate in VITA report that the experience is quite meaningful and important to them, Wilson says. The volunteers are BBAs enrolled in Wilson's ACCT 4315 class as well as MS Accounting students. The majority of undergraduate participants are accounting majors.



BBA students welcome 43rd U.S. President George W. Bush, who paid a surprise visit to Scott Hensley's Business Leadership Institute class midway through the spring 2022 semester.

**Best & Brightest Business Majors of 2022**

Two SMU Cox undergraduate students, Petar Bozhilov and Greta Felten, were included in the Best & Brightest Business Majors of 2022 feature published by Poets and Quants for Undergrads. Entering its seventh year, the article highlights graduating seniors who embody the best in business education. The publication asked the nation's top 50 business schools to submit two students each using their own selection criteria and process based on factors such as academic performance, extracurricular leadership and innate potential. Overall, the list includes 58 women and 42 men. The feature has included Cox students since its inception.



Petar Bozhilov (left) and Greta Felten (right) are among the Best & Brightest BBAs of 2022.

Originally from Sofia, Bulgaria, Bozhilov came to the United States in 2018. He majored in finance with a specialization in alternative asset management. Bozhilov says he left his family and friends in Bulgaria to grow as a person. He had no relatives or close friends in this country and describes building his own future from scratch. During his summer 2021 internship, he served as an investment banking analyst at Cowen Inc.'s Dallas office. After graduation, he joined the multinational investment bank and financial services company as a full-time analyst.

Felten also majored in finance with a specialization in alternative asset management and a minor in Spanish. She was a Don Jackson Fellow and Teaching Associate in the Encap & LCM Alternative Asset Management Center. As a fellow and TA, she coached students through behavioral and technical interview preparation and mentored students as they ran the gauntlet of professional recruitment. She says this experience provided her with an opportunity to teach, mentor and cheer on students over the course of their academic careers. After graduation, Felten began working as an investment banking analyst for Moelis and Company in New York.



At center back (left to right): Associate Dean Jim Bryan, Assistant Dean Kevin Knox and Dean Matt Myers visited with BBA students during the annual BBA picnic.

**Dean's Annual BBA Picnic**

The Dean's Annual BBA Picnic gave students, faculty and staff the opportunity to relax and enjoy a meal of hot dogs and hamburgers before the onslaught of exams and final papers. The informal lunch was held in the EY Gallery in early April.

36 BBA and 98 Graduate Students Inducted into Beta Gamma Sigma

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The Cox School's top 2022 academic achievers were inducted into Beta Gamma Sigma (BGS) during an induction ceremony in April. Founded in 1913, BGS is the international business honor society for AACSB-accredited schools in the top 5% of business school programs around the world. Inducted as students, BGS members go on to serve in critical leadership roles in corporate, entrepreneurial, government, non-profit and academic sectors. The Cox School welcomed 36 BBA students and 98 graduate students (across all the Cox graduate degree programs) into Beta Gamma Sigma about a month before graduation. As part of the induction ceremony, students received yellow and blue cords they wore over their commencement robes.



The Cox School's newest Beta Gamma Sigma inductees.

Marketing Honors Research Project Presented



Senior Hallie Jo Schroeder presents her team's project results.

Graduating seniors enrolled in the Marketing Honors Research Project presented their capstone projects in May. Over the course of the spring semester, the students performed market research to identify relevant research questions, designed and conducted surveys

and presented their findings. Under the guidance of Assistant Professor of Marketing Mili Mormann, the class explored a diverse range of topics, including the popularity of VRBO and AirBNB compared to hotels, digital streaming strategies, influencer marketing, social media effectiveness, investor decision making and university branding.

Marketing Department Presents Awards to Outstanding Students

The Cox School's outstanding 2021-22 undergraduate marketing students received recognition in a special ceremony in April. Marketing department faculty members presented six students with awards. Faculty members nominated students based on their grades, in-class participation and project performance. Parents were invited to watch their students receive their honors.



(Left to right) Nora Helena Hoey, C Penney Retailing Award winner; Hannah Nicole Webb, Outstanding Marketing Major Award winner; Carolina Sanchez, Delfina Witis Hughes, Alexander Scott Gillespie and Megan Marie Burnside, Distinguished Marketing Major Award winners.



**SMU Veterans Garden**

**SMU Veterans Garden**

Vice Chair of Investment Banking at Cowen and Company Frank Dunlevy '68 hosted a reception in January for military veterans in the Cox School's



Cox Executive Board Member Frank Dunlevy, second row, fourth from left, hosted Cox veterans in the Dean's Suite.

graduate programs. Active duty and veteran students gathered in the Dean's Suite as Dunlevy, a Vietnam War-era veteran, thanked them for their service. Dunlevy, who is a member of the Cox School's Executive Board, encouraged them to make good use of the SMU Cox network and the connections they make through their graduate studies to pursue their post-military careers.



New plaque sits at the entrance to the SMU Veterans Garden, previously called the Rock Garden.

**Annabel Reeves**



Annabel Reeves, MBA '22, represents the Cox School of Business in Poets and Quants' annual list of the 100 Best and Brightest MBA inductees.

Poets and Quants selected Annabel Reeves, MBA '22, to represent the Cox School of Business in its annual list of 100 Best and Brightest MBAs from the nation's leading business schools. After commencement, Reeves joined Goldman Sachs as a private wealth management advisor.

During her two years at Cox, she served as treasurer of the Student Advisory Board and as a teaching assistant for Financial Accounting I with Clinical Professor of Accounting Susan Riffe and Applied Corporate Finance with Associate Professor of Finance Amar Gandelas, as well as the VP of fundraising and sponsorship

development for the Graduate Entrepreneurship Club. In that role, she designed and launched SMU's first Business Accelerator Program for student entrepreneurs.

It required a lot of work around the clock, but it was so rewarding to bring curriculum, networking opportunities and over \$500,000 in cash and in-kind prizes to a handful of incredibly talented and driven student entrepreneurs at SMU and SMU Cox, Reeves says.

**SMU Veterans Garden**

A specially commissioned plaque honoring SMU students, faculty and staff who served in the Global War on Terrorism now has a permanent place of honor in the SMU Veterans Garden, between the Cox School and the Hughes Rigg Student Center. The plaque was made possible through the sponsorship of 7-Eleven and company President and CEO Joe DePinto, who is also a military veteran. The prototype for the brass engraved plaque was unveiled by the Cox School's Veterans in Business Club and the U.S. Veterans of SMU Club on Veterans Day 2021. The permanent plaque was installed in the spring.

## OMBA STUDENTS CELEBRATE IMMERSION EXPERIENCE

# OMBA STUDENTS CELEBRATE IMMERSION EXPERIENCE



Pony ears prevailed as OMBA students showed their Mustang pride.



The immersion gave students who might not otherwise meet the chance to get to know their fellowOMBAs.



OMBAs pose with Cox Professor of Practice in Strategy and Entrepreneurship Helmuth Ludwig (center).

In January, the Cox School welcomed more than 100 SMU Cox Online MBA (OMBA) students to Dallas to take part in a variety of in-person business experiences and networking events over four days. While Cox OMBA students take all of their coursework online, they participate in at least two in-person immersion experiences hosted in cities around the world or within the United States. Several OMBA students traveled to Dubai for an immersion experience in the fall. Each immersion gives OMBA students the opportunity to network with one another, meet with faculty and staff and put their coursework into practice through experiential learning.

The Dallas immersion focused on building new skillsets and introduced new business practices. Students heard from the president and COO of Jacobs Engineering, Jacob Pragada, and entrepreneur Nina Vaccaro, chair and CEO of the Pinnacle Group. Students participated in corporate visits to host companies such as 7-Eleven, Mary Kay, AT&T Performing Arts Center, Cox Oil and Gas and Hotels.com. They also created personalized schedules based on a selection of on-campus master classes, which included skill-building sessions in Tableau, Entrepreneurship, Energy Strategy, Risk Management, Challenging Assumptions and Game Theory. The immersion also allowed students to explore the SMU campus, with lunch at the Meadows Museum of Art and private tours of the museum's collections. One of the week's highlights was a networking reception at the Park City Club. See photos from the reception above.

## EQUAL PAY FOR EQUAL WORK DISCUSSION AND WORKSHOP

The Cox School's Office of Graduate Admissions and the Office of Diversity sponsored an Equal Pay for Equal Work Discussion and workshop in April. Students from all programs were invited to attend both in-person and virtually as Dedman School of Law Professor Joanna Grossman and Cox School Professor of Management Robin Pinkley presented two angles to the pay gap that persists between men's and women's salaries. Grossman explained that March 18, 2022, symbolizes how far into this year women worked to earn what men earned solely in the 2021 calendar year. Grossman explained that the wage gap is even greater among women of color. Pinkley's presentation dealt with actions women can take to close the gap, including self-advocating and negotiating the very first job salary. Not doing so, Pinkley warned, can have detrimental salary effects over the course of a career, in turn keeping the pay gap alive and well.



(Left to right) Robin Pinkley, the Cox School's Janet and Craig Duchossois Endowed Professor of Management and Organizations, with Joanna L. Grossman, the Ellen K. Solender Endowed Chair in Women and the Law and Professor of Law, Dedman School of Law.

**EMBA '22 Students Travel to UAE**

Executive MBA students traveled to Dubai and Abu Dhabi, United Arab Emirates (UAE) in fall 2021 to leverage their coursework and consultative skills with area businesses. Students gained hands-on experience working with organizations on projects that focused on inclusion for all people, climate resilient strategies that utilize environmental finance, the development of enhanced female talent pipelines to support the United Nation's Sustainable Goal of Gender Equality, UAE market entry strategies and environmental sustainability. EMBA students and accompanying faculty members immersed themselves in the local culture by touring Dubai. They visited the famed Dubai skyscraper Burj Khalifa and journeyed on a Desert Safari. In Abu Dhabi, students visited the Grand Mosque and the Emirates Palace.



EMBA students conducted projects for their Global Consulting course and a trophy was awarded to the group that faculty deemed to have produced the Best Project. (Left to right) Adjunct Professor Arjun Singh with EMBA '22 students Kyle Huston, Cole Morrison, Matt Stankey and Gus Scherer.



(Left to right) EMBA '22 students Pamela Nuñez, Erika Liles and Yormanda Montiel Payares amid the skyscrapers of Dubai.



The entire EMBA Class of 2022 cohort traveled to the UAE. Some of the women opted for a sunset photo during their Desert Safari.

**Forty-five Students Graduated from One-Year Full-Time MBA Program**



Forty-five students graduated in May from the One-Year Full-Time MBA program. A few posed in caps and gowns the day before commencement.



Ninety-eight students, not all shown here, graduated in May from the Two-Year Full-Time MBA program.

## COMMENCEMENT

### COMMENCEMENT



The Black Graduate Student Association represents students across all graduate programs. (Left to right) Gigi Kanyana MS Finance, John Stark PMBA, Robyne Jones OMB, K. Okafor OMB, Albert Ouyang PMBA, Kara Frison One Year FTBA, and Shuaib Akiyode Two Year FTBA.



In the third OMB cohort to graduate since the online degree program began, 18 students received their degrees in May and 36 who will complete the program in August also participated in the May ceremony.

See more Commencement Day photos on pages 58-60.

## COMMERCIAL DIPLOMACY

### COMMERCIAL DIPLOMACY



In April, SMU Cox hosted U.S. Representative Mike McCaul, ranking member of the House Foreign Affairs Committee, and retired Ambassador David C. Miller Jr., President of the U.S.

(Left to right) U.S. Rep. Michael McCaul, Texas 10th District, and Retired U.S. Ambassador David C. Miller Jr. discuss how fostering strong relationships and honest dialogue between leaders in American business and the U.S. government can enable a U.S. economic advantage and preserve American principles and values.

Diplomatic Studies Foundation for a discussion about how the U.S. government should better help U.S. businesses compete overseas and about the progress toward establishing the national home for the Center for Commercial & Corporate Diplomacy at SMU Cox. Rep. McCaul explained the role of commercial diplomacy and the importance of bridging gaps between Washington, D.C., and the Dallas business community.

The idea has developed over several years, sparked by a group of retired national security professionals and their concern that the Department of State needed to improve its performance and regain its leadership role in the development and execution of U.S. foreign policy. Among other things, the report identified a need for continuing education and training. As a result, the nonprofit U.S. Diplomatic Studies Foundation (DSF) was founded to assist in expanding the Department of State's training and education capabilities. For the past three years, DSF has been collaborating with SMU Cox Executive Education to develop a program that will combine seminar experiences and case studies on topics such as commercial diplomacy, international corporate strategy and economic statecraft.

A major aspect of the program will include meetings with private sector leaders in the Dallas business community in order to enhance understanding of how the U.S. does business globally. The program has evolved from its initial concept and now will empower leaders not just from the Department of State, but also from the departments of Commerce, Defense and the Treasury, the U.S. Agency for International Development, the Export-Import Bank of the United States and other U.S. government departments and agencies to become more effective advocates for U.S. economic and commercial interests. This program seeds the vision for the permanent Center for Commercial & Corporate Diplomacy that Representative McCaul and Ambassador Miller discussed.

This is an excellent opportunity to help our country maintain economic advantages globally, which in turn will contribute to national security and American prosperity, says Associate Dean for Executive Education and Graduate Programs Shane Goodwin. SMU Cox is perfectly positioned to become home for the Center for Commercial & Corporate Diplomacy because of our unique relationships with Dallas business leaders and our strong partnership with DSF.

## CENTRAL TEXAS ECONOMIC FORUM

### THE BRIDWELL INSTITUTE FOR ECONOMIC FREEDOM

Plans are underway to offer an Executive Education edition of Strategic Leadership in Exponential Times in 2023. The course presents a new methodology to address the challenges of exponential change driven by digital innovations (4th Industrial Revolution). Offered initially only as a fall 2021 MBA course, it will also be offered again in the Fall Mod B 2022 semester for MBAs. Applications for this limited enrollment course were opened at the beginning of Fall Mod A 2022.

Helmuth Ludwig, professor of practice in strategy and entrepreneurship, co-teaches the course with Jim Snabe, co-author of Dreams and Details, chairman at Siemens AG, former co-CEO at SAP AG and a member of the World Economic Forum board of trustees. He is also joined in person and via Zoom by other executives from C3 AI, Energen, Systemair and Idonea. The executives address the opportunities and challenges of a season change from a position of strength.

### THE BRIDWELL INSTITUTE FOR ECONOMIC FREEDOM

#### THE TEXAS ECONOMIC FORUM

#### THE TEXAS MODEL AND PEOPLE OF COLOR

#### EXECUTIVE RESIDENCE

### CENTRAL TEXAS ECONOMIC FORUM

The Bridwell Institute for Economic Freedom hosted the Texas Economic Forum which explored The Texas Model and People of Color and featured Executive in Residence Michael Cox, Peter Lewin from The University of Texas at Dallas and Frank Martin from Southern University of New Orleans.

The Bridwell Institute also co-hosted the annual Economic Freedom of North America Network Conference with the Canadian Fraser Institute. More than 30 scholars from university research centers and state public policy institutes across the U.S., Mexico and Canada attended. This conference created a unique opportunity for academics and policy researchers to explore collaboration opportunities and share best practices for using the Economic Freedom of North America index, whose lead author is Bridwell's Dean Stansel, research associate professor.

### THE BRIDWELL INSTITUTE FOR ECONOMIC FREEDOM

North Korean defector Yeonmi Park came to SMU to discuss her bestselling book In Order to Live: A North Korean Girl's Journey to Freedom. Park described the deprivation and deception she endured and that millions of North Korean people continue to endure to this day. She told the story of how she and her mother were betrayed and sold into sexual slavery in China and forced to suffer terrible psychological and physical hardship before they finally made their way to Seoul, South Korea and to freedom.

### THE BRIDWELL INSTITUTE FOR ECONOMIC FREEDOM

The Bridwell Institute for Economic Freedom welcomed Matt Ridley, columnist for The Telegraph and The Times and member of the Science and Technology Select Committee for the House of Lords, Great Britain. Ridley discussed his book How Innovation Works and Why It Flourishes in Freedom.

### THE BRIDWELL INSTITUTE FOR ECONOMIC FREEDOM

#### THE BRIDWELL INSTITUTE FOR ECONOMIC FREEDOM

In the fall, the Bridwell Institute hosted 80 students from SMU, Baylor University, Texas Tech University, the University of Central Arkansas and Angelo State University for a daylong reading group summit. The spring summit featured James Otteson of the University of Notre Dame discussing his most recent book, Seven Deadly Economic Sins: Obstacles to Prosperity and Happiness Every Citizen Should Know, and his forthcoming book, The Ethics of Wealth Redistribution. Throughout the semester, students from all five schools participated in concurrent reading groups on the theme of Freedom and Human Flourishing: Poverty, Prosperity & Quality of Life around the World.

In the spring, 60 students from SMU and the University of Central Arkansas united for a reading group summit featuring the Bridwell Institute's Director Bob Lawson discussing his book, Socialism Sucks. The joint reading list for this semester centered around the theme of Capitalism, Socialism and Human Flourishing.

# COMMUNITY ENGAGEMENT



(Left to right) Former Brierley Institute for Customer Engagement Director Marci Armstrong, Executive in Residence Hal Brierley, AT&T Consumer CEO and Cox Executive Board member Thaddeus Arroyo '89, Topgolf CMO Geoff Cottrill and former American Airlines Senior VP of Marketing, Sales & Loyalty Kurt Stache.

## MARKETING AND CUSTOMER ENGAGEMENT DURING A PANDEMIC

The Brierley Institute for Customer Engagement hosted a panel discussion on "Customer Engagement Post-Pandemic" featuring Thaddeus Arroyo, CEO of AT&T Consumer, Geoff Cottrill, CMO of Topgolf, Kurt Stache, former Senior Vice President of Marketing, Sales & Loyalty at American Airlines, and Hal Brierley, Executive in Residence, SMU Cox Brierley Institute. Students, faculty, staff and alumni attended the panel discussion and reception. The panelists discussed the challenges and opportunities of marketing and customer engagement during a pandemic. The discussion was moderated by Marci Armstrong, former Institute director and Brierley Endowed Professor.

## FASTEST-GROWING ENTREPRENEURIAL COMPANIES IN THE DALLAS AREA

Frisco-based cloud technology company MTX Group was recognized as the fastest-growing entrepreneurial company in the Dallas area according to the SMU Cox School of Business's Caruth Institute for Entrepreneurship. The company and all 100 companies honored at this year's event managed to achieve impressive growth, especially in light of the pandemic's challenges. The institute's annual Dallas 100 is a celebration of the fastest-growing privately held businesses in the Dallas area, revealed the area's top entrepreneurial companies in rank order from 100 to one at the annual Dallas 100 Awards Ceremony, held at the Omni Dallas Hotel in November.

To rank as the top company this year, MTX Group's sales increased more than 200% over the last three years, says Simon Mak, the Linda A. and Kenneth R. Morris Endowed Director of the Caruth Institute for Entrepreneurship. That accomplishment would be impressive anytime, but in the years that included COVID-19, it is phenomenal. Even more impressive, the combined sales of all the top 10 companies in this year's 100 grew just over 400% over three years. The winners of this year's Dallas 100 deserve special congratulations not only for their growth and perseverance, but especially for their contributions to keeping our local economy strong.

The Caruth Institute for Entrepreneurship ranked the area's top 100 entrepreneurial companies based on percentage growth and absolute dollar growth over the previous three years, emphasizing their economic contributions to the Dallas area economy. Factoring all 100 companies together, this year's companies generated more than \$8.5 billion in revenue during the past three years.



Das Noble, co-founder and CEO of global technology consulting company MTX Group Inc., at center (red bow tie) celebrates with the founders of the other Top 10 fastest-growing entrepreneurial companies during the Caruth Institute's 2021 Dallas 100 Awards Ceremony.

**NEW HIRE** **MARK G. ROBERTS** **JOINS** **THE COX SCHOOL'S** **REAL ESTATE RESEARCH INSTITUTE**



Mark Roberts, Folsom Institute and Crow Holdings Researcher

In a joint hire with Crow Holdings, the Cox School's Robert and Margaret Folsom Institute for Real Estate welcomed acclaimed real estate professional Mark G. Roberts as Director of Research in March. As the research director for both organizations, Roberts develops insights, market research and commentary on real estate topics of interest to investors, developers, operators and other industry participants. His expertise extends into the classroom, where he teaches market analysis and strategy to undergraduate and graduate students. Roberts came to the Cox School from UT Austin's McCombs School of Business, where he served as Executive Director of the Real Estate Center.

A fellow at the Real Estate Research Institute, a regular contributor to the National Council of Real Estate Investment Fiduciaries and a registered architect, Roberts has more than 30 years of real estate experience. Prior to entering academia, he served as a managing director at DWS Real Estate, where he held several senior leadership positions including Head of Research & Strategy, Alternatives and Real Assets, Head of U.S. Multi-Asset & Solutions, and Co-Head of Research.



(Left to right) Philip Bowie, MBA '23, Matthew Culver, MBA '23, James Avondet, MBA '22, Ethan Burgh, MBA '22 and Mark Jungmann, MBA '23.

**COX SCHOOL** **WINS** **FIRST PLACE** **AT** **THE** **FALL** **2021** **NATIONAL** **ENERGY** **FINANCE** **CHALLENGE**

The SMU Cox MBA team took first place at the Fall 2021 National Energy Finance Challenge. The case competition, hosted by Texas McCombs School of Business, allows MBA students from around the country to compete and showcase their knowledge of the energy landscape. Teams participated from UT Austin, Rice and Dartmouth, among others. First place team members were the Cox School's second-year MBA students Ethan Burgh and James Avondet and first-year students Philip Bowie, Matthew Culver and Mark Jungmann. The competition was hosted virtually, and the teams worked around the clock in the Maguire Energy Institute's Sheffield Energy Lab to get the win.

**THE** **MAGUIRE** **ENERGY** **INSTITUTE'S** **11TH** **ANNUAL** **L. FRANK** **PITTS** **ENERGY** **LEADERSHIP** **AWARDS** **LUNCHEON** **HONORED** **JEFF** **MILLER** **AND** **MIKE** **BOWLIN**

The Maguire Energy Institute's 11th Annual L. Frank Pitts Energy Leadership Awards Luncheon was held in April. Energy industry leaders gathered in SMU's Mack Ballroom to honor Halliburton Chairman, President and CEO Jeff Miller as this year's Pitts Energy Leadership honoree. Retired Atlantic Richfield Company (ARCO) Chair and CEO Mike Bowlin was honored with the Pioneer Award. The Maguire Institute's Energy Leadership Awards Committee considers long-term impact to the energy industry as a key factor when it selects oil and gas leaders for both awards. The Pitts Energy Leadership Award is presented annually to an individual who exemplifies a spirit of ethical industry leadership. The committee identifies industry trailblazers as Pioneer Award recipients. Luncheon proceeds benefit scholarships to energy students. The 2022 scholarship winners were Jack Gebhardt, BBA '22, and Ethan Burgh, FT MBA '22.



(Left to right) Dr. Bobby Lyle, SMU Board of Trustees and 2019 Pioneer Award honoree, Mike Bowlin, 2022 Pioneer Award honoree, Ethan Burgh, 2022 MBA Energy Scholarship Winner, Jack Gebhardt, 2022 BBA Scholarship Winner, Jeff Miller, 2022 L. Frank Pitts Energy Leadership honoree, Bruce Bullock, Maguire Energy Institute Director and SMU President, and R. Gerald Turner.

# COX MAGUIRE ENERGY INSTITUTE

## STUDENTS PITCH ENERGY STOCK INVESTMENTS TO A 10-MEMBER ADVISORY BOARD MONTHLY DURING THE ACADEMIC YEAR.

The second Thursday of each month three teams of students in the Mustang Spindletop Fund program make their energy stock investment pitches to a 10-member advisory board of leading energy investment professionals. The highly selective program in the Cox Maguire Energy Institute provides SMU students studying energy real-time experiential learning in research investing portfolio



Students pitch energy stock investments to a 10-member advisory board monthly during the academic year.

management and the dynamics of energy markets as they relate to investing in energy-related equities. The student-managed energy investment fund is one of the first energy-only student-managed investment funds among 300 programs in the U.S.

The 'Shark Tank' format of the investment committee presentations provides students with a unique educational opportunity to think through real-world investment strategies for the portfolio and learn through a Q&A session with established professional energy investors says Tim Perry, Global Chairman, Credit Suisse Energy and Infrastructure, and member of the investment committee that hears student pitches each month.

Investment board member Pete LaNasa, previously an investment banking associate at Intrepid Financial Partners and an alumnus of the Spindletop program says, "The Spindletop program is such a unique opportunity for students. They not only learn how to analyze and value companies but also how to present their ideas in a formal investment committee setting. It's really fun to see the students evolve and improve every year."

Students use industry-specific data feeds and modeling capabilities and tools to evaluate potential investment opportunities in preparing their investment recommendations. Since the program started in 2014, the Spindletop fund has out-earned all industry benchmark funds.

Spindletop has done more than any other organization at SMU to prepare me for a career in energy finance, says 2021-22 Spindletop President Jack Gebhardt, MBA '22. The faculty members and investment board offer a lot of insight on industry terms and valuation practices. It made me much more confident entering my internship at Jefferies last summer and I recommend the program for any student who plans to work in finance."

## SMU LIBRARIES INFORMATION LITERACY FALL 2021 STIPEND AWARD WINNER DAVID JACOBSON PARTNERED WITH THE BUSINESS LIBRARY TO ENGAGE GRADUATE STUDENTS IN CONDUCTING IN-DEPTH RESEARCH TO SUPPORT THEIR COMPLEX PROBLEM-SOLVING.

SMU Libraries Information Literacy Fall 2021 Stipend award winner David Jacobson partnered with the Business Library to engage graduate students in conducting in-depth research to support their complex problem-solving. Students experienced a new way to gain expertise in library research via a fast-paced learning experience. As always, the course culminated with students partnering with corporations, nonprofits and other global organizations to solve their most challenging problems in a consulting capacity.

The Business Library, which has been participating in this course for some time, collaborated with Jacobson to create modules that not only taught the students to perform complicated global business research but gave them a number of practice sessions where the skills are learned in a manner similar to the way a student becomes proficient at a sport or a musical instrument. Students engaged with librarians throughout the course, through both synchronous and asynchronous instruction, and participated in an evaluation of skills and concepts learned. Fifty-six students in two sections of the course completed some or all of the module. This represents 91% of the students enrolled in the classes. Students reported that these exercises gave them both the skills and confidence to conduct this research and to implement the complex problem-solving methodology, says Business Library Director Sandy Miller. "Going forward, we are committed to these module components and lesson plans."



## CEO **??T?? ?? ???? ???? ?** **S?????? ?? C?? S????????**



Truist Financial CEO Kelly King was one of the BLC Executive Speaker Series headliners in academic year 2021-22.

In October, the Business Leadership Center (BLC) welcomed the executive chairman of Truist Financial, Kelly King, to campus from the North Carolina office. Truist is currently the sixth largest commercial bank in the U.S. King spoke to graduate students and undergrad real estate majors about the five characteristics of

outstanding achievers, his outlook on U.S./global landscapes and his philosophy on innovation in existing businesses.

Students were thrilled to have the opportunity to hear from a C-Suite level executive with 49 years of experience in the banking industry. Full-Time One-Year MBA student Bill Patton '22 commented that King provided insights on where the country and corporate America are headed and the tools needed to be an overachiever and effective leader.

King's talk was part of the ongoing Executive Speaker Series offered by the BLC. The program offers an unmatched opportunity for Cox MBA students to learn from extraordinary C-level business executives in a small group/boardroom environment. Executives enter the room eager to share their professional background and work ventures along with their successes and failures. This is an unparalleled opportunity for students to learn from and network with seasoned professionals.

## **????? ???? ???? ???? ???? ? C????? ???? ???? ???? ???? ?** **E????? ???? ???? ???? ???? ???? ? ???? ? ???? ???? ???? ???? ?**

During the winter holiday break, 46 Cox MBA students traveled to Orlando, Florida, to attend the Business Leadership Center's five-day program, "Leading and Sustaining a Service Culture." Based on real-world experiences from both leaders and employees (cast members) within The Walt Disney Company's parks and resorts, students learned what Disney does differently that creates culture and consistent business results. The students participated in lectures, activities and field experiences that showed how Disney's business model can be translated and implemented within many different industries, functional areas and levels of an organization.

Students see both long-term and immediate benefits from the knowledge they gain at the Disney Institute. Mauricio Bueno Escamilla, Full-Time Two-Year MBA '22, sees great value in the program. "We were given unique access to the Disney Institute program and learning the culture of leadership and service that makes the Disney experience," he says. "The Disney brand will surely stand out on my CV, but the experience walking the parks, seeing behind the scenes and observing how the cast members embody the culture of service stands out in my Cox experiences." Adam Martin, PMBA '22, added that "the introspective activities have helped me think of how to be a better leader and how to recognize leadership in an organization."

SMU Cox is the only graduate school to offer this customized program on-site at the Disney Institute.



Forty-six MBA students gained unique knowledge about the Disney service culture leadership philosophy.

## Cox School of Business Wins Diversity Awards

The Cox School of Business was a co-sponsor of the Dallas Business Journal's Leaders in Diversity Awards. The event held in March at the Fairmont Hotel honored 11 individuals and five companies for their diversity efforts. The Cox School sponsorship agreement with the DBJ that began last year is comprised of a triad of diversity, equity and inclusion award events which also includes the 40 Under 40 and Women in Business awards. Cox School Assistant Dean of Diversity Steve Denson presented a message via video at the event. Managing Director of Corporate Engagement and Strategic Partnerships Lisa Tran helped present the awards along with a representative of fellow co-sponsor Bell Nunnally Law Firm. Honorees have shown leadership and bolster equality across all areas of diversity including age, disability, gender, sexual orientation, race and religion. A contingent of staff members represented the Cox School at the event.

## Cox EMBA '22 Nominates 10th President



Cox EMBA Wendell Godwin becomes university president in Oklahoma.

Wendell L. Godwin, Cox EMBA '05, was named the 10th president of East Central University in Ada, Oklahoma, and began his duties in July. The Cox School has worked with Godwin to increase the number of Native and Oklahoma students applying to Cox over the years.

Godwin most recently served as dean of ECU's Stonecipher School of Business since 2010. The Cox School has hosted many Stonecipher students for summer visits. Godwin has been instrumental in the capital funding campaign for the Chickasaw Business & Conference Center and the Stonecipher School. He created Oklahoma Business Week and U.S./Africa Business Week, which provide opportunities for students and business professionals to put their business skills to use in the service of others.



(Left to right) Edwin D. Tatum, EMBA '19, Troy Alley III, BBA '15, and Erica Hicks Anderson, EMBA '22, with moderator I.K. Okafor, OMB '22.

## Working Professional MBA Admissions Panel

The Working Professional MBA Admissions team worked with the Cox School's Black Graduate Student Association (BGSA) to host the BGSA's first Black-Owned Business Panel discussion in the Collins Center. The event, open to all Cox graduate students and the community, offered an opportunity to celebrate Black History Month by hearing from four business owners about their successes and challenges. The panel consisted of Troy Alley III, BBA '15, president and CEO of Third Generation Capital Management, Erica Hicks Anderson, EMBA '22, founder and CEO of PR Vein, and Edwin D. Tatum, EMBA '19, CEO of Tatum Tek. The panel discussion was also accessible via Zoom and was moderated by current Online MBA student I.K. Okafor, who serves as president of the Cox Black Graduate Student Association. An in-person networking reception followed the panel session.



Roxane Bile, accounting scholarship winner

## Cox Graduate Accounting Student Awarded Scholarship

Cox graduate accounting student Roxane Bile, BBA '21, was awarded a Black Alumni Scholarship by the Black Alumni of SMU Board. The Black Alumni of SMU Board works with the Association of Black Students (ABS) each year to award scholarships to deserving students. This year, Bile is among eight students to receive the scholarship. She is using the \$4,000 scholarship for direct tuition assistance. Originally from Abidjan, Ivory Coast, Bile graduated with a BBA in accounting last May and is currently in the Cox School's MSA program.

**SMU Cox Faculty and Staff Celebrate Odell Brown**

Cox faculty and staff joined in an appreciation and farewell celebration event for Odell Brown, the executive director of the DFW Accounting Career Awareness Program (ACAP). Throughout 21 years since the founding of DFW ACAP, Brown has served as executive director, helping maximize the potential of countless students and in turn, helped diversify accounting classes and the accounting profession. Steve Denson, Cox Assistant Dean for Diversity, says over the course of his career, Brown has given 46 years of continuous service on the local, regional and national levels within the National Association of Black Accountants, Inc. (NABA). He was the first to help lay the ground for ACAP executive director. Brown was a recipient of NABA's Dallas/Fort Worth Chapter's Outstanding Member Achievement in Industry and Meritorious Service awards. At the national level, Brown has been honored as an ACAP National Outstanding Member and has received awards for National Achievement in Industry and National Community Service.

**SMU PPIA Celebrates 40 Valued Alumni**



Steve Denson, Assistant Dean of Diversity

The nonprofit Public Policy and International Affairs Program (PPIA) selected the Cox School's Assistant Dean of Diversity Steve Denson as one of its 40 Public Policy and International Affairs (PPIA) Program Changemakers this spring. In honor of PPIA's more than 40 years of diversity and leadership in public service, the nonprofit celebrated 40 valued alumni and Denson is one. The organization shared 40 changemakers profiles, including Denson's, on its social media accounts, website and newsletters over several months. Denson is in good company as Dallas Mayor Eric Johnson was also one of the 40 PPIA alumni honored. Johnson completed the program's Junior Summer Institute at the University of California, Berkeley in 1997.

**SMU Cox Hosts First One-Mile Fun Run**

**SMU Cox Hosts First One-Mile Fun Run**

SMU Cox hosted its first one-mile fun run through campus in May on the eve of the renovation and expansion groundbreaking. Co-sponsored by Crow Holdings, Goldman Sachs and software company Willow, the run raised funds for Cox Community Scholarships. About 200 people participated.



Applause for the Elite Women Winners after the run.



Winners announcements took place in front of Moody Coliseum. The fastest runner completed the run in a little over four minutes.

# FACULTY NEWS

SUMMER 2022

## FACULTY AND STAFF ACHIEVEMENTS



**Dr. Ahu** has been promoted from Assistant Professor of ITOM to Associate Professor with Tenure. He has been part of the Cox School faculty in the ITOM department since 2014. Ahu also teaches as an adjunct Assistant Professor of Clinical Sciences at the University of Texas Southwestern Medical Center and has done so since 2015. Before joining Cox, he did his postdoctoral fellowship at the National Institute on Aging, The University of Chicago. He maintains academic affiliations with the Department of Veterans Affairs in the North Texas Health Care System, the Center for Chronic Disease Research and Policy at The University of Chicago, and the VA Primary Care High Risk Investigator Network. He earned his PhD and an MBA at Chicago's Booth School of Business. Ahu holds a Master of Applied Science from the University of Toronto and a Bachelor of Engineering from Panjab University in India. His work has been published in healthcare, manufacturing and ITOM publications. His research looks at developing decision analytic tools that can be implemented easily by healthcare professionals and policymakers to improve patient health, advance the quality of care and enhance the efficiency of delivery of care. A focus of his research is chronic diseases, diabetes in particular, where Ahu intends to implement analytical tools to improve patient outcomes.

In February, Ahu was a panelist in a one-day symposium organized by SMU Law School titled "Medicine & AI: The Emerging Legal and Ethical Frameworks for Artificial Intelligence in Medicine." The symposium explored the impact that the quick pace of healthcare innovations in AI are having in practical, legal and ethical dilemmas, especially with respect to issues of bias in the development and deployment of healthcare AI, the use of AI in practice and the regulation of AI at the state, national and global levels.



**Brierley** Endowed Professor stepped down in May as director of the Brierley Institute for Customer Engagement, a position she's held since the Institute's founding in 2016.

"I feel that now is the perfect time for a new leader to leverage the momentum we have built and take the Institute to the next level," Armstrong says. "I am genuinely grateful to have had the opportunity to work hand in hand with Hal Brierley to operationalize his vision for the Institute. I would like to thank Hal for being a generous, visionary leader, sincerely committed to SMU Cox customer engagement students and their mastery of customer engagement

principles, strategy and tactics. I will forever remember working so closely with Hal, I have learned so much."

Armstrong continues to teach graduate marketing classes. As an affiliated faculty member with the Institute, she carries on experiential learning through Institute projects, teaching some of the courses required for the MBA Customer Engagement specialization. At the time of publication, the next Brierley Institute director has not been confirmed. Armstrong, who previously served as Associate Dean of Cox Graduate Programs for almost 20 years, will continue as Brierley Endowed Professor for the immediate future.



**Ca**, longtime Cox School employee, retired in the spring after a long tenure with the Cox School. She served in the Office of Graduate Student Enrollment and Engagement, formerly Graduate Programs Student Services, for 15 years.



A distinguished professor of accounting and distinguished chair in accounting, presented the paper, "The SEC's Short Sale Experiment: Evidence on Causal Channels and the Importance of Specification Choice in Randomized and Natural Experiments," at Carnegie Mellon University in October. The same paper was presented by co-authors at the Financial Management Association's annual meetings in Orlando and at the American Law and Economics Association's virtual meetings, both in October.



A Business Library full-time librarian joined the Business Library full-time in fall 2021 as Student Success Librarian. She has worked part-time with the Business Library since 2013, teaching workshops, presenting at OMBA library orientations, creating research guides and supervising student assistants, among other activities. She completed her master's degree practicum at DeGolyer Library and teaches research skills and strategies to graduate students in David Jacobson's Complex Problem Solving courses. Through such efforts as teaching entrepreneurship students at Highland Park High School and Incubator, SMU students in the Entrepreneur Fellows program, she also reaches across campus and into the community to bring valuable business research training. Freeman Staggs holds a BBA in accounting from UT Arlington and a Master of Library Science degree from the University of North Texas.





**T. Ta**, associate professor in the information technology and operations management department, received the 2021 Management Science Distinguished Award from the scholarly Journal of Management Science.

His paper, "E-commerce Sales Concentration and Inventory Management," a joint work with Nitish Jain from London Business School, was accepted for publication at Manufacturing and Service Operations Management, one of the top journals in the operations management field. He was also invited to give a seminar talk on omnichannel delivery time at John Hopkins University.



**T. Thomas**, who joined the Cox School as an associate professor of marketing in 2008, has been promoted to full professor of marketing. A Frank and Susan Dunlevy Faculty Fellow, Thomas first came

to the Cox School from Northwestern University's Kellogg Graduate School of Management. Previously, she was an assistant professor at Stanford Graduate School of Business and Emory's Goizueta Business School. She earned her PhD, Master of Science and Bachelor of Arts in Marketing at Northwestern. Since joining Cox, she has won numerous Cox teaching awards, national academic honors and research grants, co-authored a book and book chapters and had numerous research papers published in leading marketing journals. Her research interest focuses on, among other areas, customer relationship management strategies, customer equity analysis, and social media and marketing communications. Thomas was unanimously elected to the Board of Directors of the Sheth Foundation, a nonprofit organization that supports emerging scholarship in marketing, with significant global reach, societal focus and thought leadership. She was also appointed vice president of diversity, equity and inclusion for Informs Society of Marketing Science. Her paper, "Email Marketing as a Tool for Strategic Persuasion," was accepted to the Journal of Interactive Marketing.



**T. Maguire**, professor of finance and Maguire Chair in Energy Management, was invited by the U.S. Department of Agriculture to participate in the interdisciplinary Collaborative Workshop on

Market Power Issues in Agriculture, which was held in March. The workshop considered ways to build better markets and policies in agricultural systems.



**T. Assistant Professor**, assistant professor of strategy and entrepreneurship, participated in the Strategic Management Society's virtual annual conference, where he chaired "Revisiting the Historical

Perspectives in Executive Research" and "Different Shades: The Influence of Shareholder Activism and Stakeholder Activism on Strategic Decisions." He also presented these papers: "Family CEOs: Acquisition Premiums and Stock Market Performance of Domestic Acquisitions," "Evidence from China," and "Rival CEO Death and Firm Competitive Actions," "The Role of CEO Regulatory Focus."

2021-2022

## FACULTY EXCELLENCE AWARDS

C. Jackson Grayson Endowed Faculty Innovation Award  
**DR. T. THOMAS**

Boghetich Family Distinguished Teaching Award  
**TO. TAN**

Eugene T. Byrne Endowed Faculty Innovation Award  
**DR. T. THOMAS**

Research Excellence  
**DR. T. THOMAS**

Carl Sewell Distinguished Service to the Community Award  
**DR. T. THOMAS**

Research Excellence  
**DR. T. THOMAS**

Barbara & James Mangum Endowed Award for Teaching Excellence  
**DR. T. THOMAS**

2021-2022

## STAFF RECOGNITION AWARDS

**CATHERINE COVENS**  
**BOB FROST**  
**EMILY ETT**  
**CELENE COVENS**

**EMILY ETT**  
**BOB FROST**  
**EMILY ETT**  
**BOB FROST**

2021-2022

## MEDIA AWARDS

Noted in The Wall Street Journal  
**BOB FROST**

Noted in Associated Press  
**BOB FROST**

Noted in The Wall Street Journal  
**BOB FROST**

Sound bite on The Wall Street Journal on NPR  
**BOB FROST**

Op-Ed published in The Wall Street Journal  
**BOB FROST**  
**BOB FROST**

Research commentary published in The Wall Street Journal  
**BOB FROST**

Noted in The Wall Street Journal  
**BOB FROST**  
**BOB FROST**

Noted in The Wall Street Journal  
**BOB FROST**



# QUOTABLES

Assistant professor of marketing analyzed purchase data from more than 10,000 customers at a top U.S. retailer. In an article co-authored with his research partner, the pair explain how they identified customer segments considered highly profitable and determined the metric of location was more profitable than past spending. We fed extensive data on both spending and physical locations of customers into a simple machine learning model. The model found that small differences in location could make a big difference in ROI, highlighting how automated tools can segment customers in ways that may not seem intuitive, but which can be incredibly impactful to the bottom line.

## How to Make Your Loyalty Program Pay Off

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Associate professor of information technology and operations management advises that in an era of inflation and labor shortages, some manufacturers are relying on so-called shrinkflation to keep costs from rising. Shrinkflation is when makers of consumer staples downsize a product to save on costs rather than risk shopper backlash by upping the price. Many consumers may not notice the shrinkage since the price remains the same, but inflation and shrinkflation could lead to changes in buying habits. Shasharan warns with shoppers opting for lower-priced products or reducing their consumption. He says it also prevents you from being able to reach the consumer in the future because their consumption patterns have dramatically and drastically changed.

## What Will Inflation Look Like One Year from Now?

Professor of practice in finance and former executive vice president of the Federal Reserve Bank of Dallas weighs in as part of a story regarding the economic outlook for the end of 2022/beginning of 2023. He offers the opinion that the major factor driving inflation now and for the next several years will be the willingness to print money and lean on central banks to finance government deficits.

Executive in residence at the Bridwell Institute for Economic Freedom and former chief economist for the Federal Reserve Bank of Dallas interviewed live about the Fed's latest policy announcement and the implications of inflation. He contends that too much money was pumped into the economy over the past two years. I'm not sure the taper is aggressive enough. I think the Fed may have gone too far during COVID.

## Fed Doubles Pace of Taper to \$3B Per Month

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Director of the Maguire Energy Institute contributes to a story addressing the increase in electricity prices across Texas. High natural gas costs are partly behind the electricity rise, but he says we think we can certainly attribute some of the price increases we have seen to the preparations that are being asked of providers of electricity in response to the storm last February. I would anticipate more to come.

## Texas Public Utility Commission Approves More Changes to Power Grid, but Some Remain Concerned

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Associate professor and management and organizations department chair is quoted in an article about parental identity threat and loss of work productivity. Parental identity threat is the sense that career demands challenge an employee's role as a parent. Butts' research suggests employers should understand the psychological challenges working parents face and try to reduce feelings of shame among those employees. Further, he says managers can send the message that work and parenting aren't in conflict by offering lots of schedule flexibility.

## Working Parents Feel Torn Between Personal and Work Identities

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and S. M. M. and S. M. M. Badr and S. M. M. Badr talk about the advantage their three-day war games experience gives Cox MBA students who will soon face an uncertain world of market and business challenges. The virtual learning experience which divides students into teams to outmaneuver one another through a given challenge grew out of talks with corporate partners who hire MBAs. When we talked about what their needs are, in their own way, they all said the same thing: We can hire lots of good MBA students who have gone through lots of good MBA programs, but what's missing is the ability to engage uncertainty.

## War Games Prepare MBA Students for Strategic Battles

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## Inflation Leading to Smaller Toilet Paper Rolls or Less Toothpaste in the Tube

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## A High Percentage of Consumers Really Don't Understand Percentages

Assistant professors of marketing received coverage for a co-authored paper showing that consumers often miscalculate percentages in marketing claims, thus leaving money on the table. It seems participants often revert to a more common use of percentages that express relative size of the whole, says Fisher, who explains that one reason for the miscalculation is that distinguishing between relative size (0.02 of) and relative change (0.02 more or 0.02 less) often hinges on a single word. People tend to be really bad at understanding percentages, says Mormann, adding that people are better able to understand phrases like twice as much or multiples. Using 2.3 times rather than 130% is a way more effective way to communicate.

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# Consumer Choice: The Off by 100 Bias

## Consumers face difficulties when processing percentages, especially given their variety of uses in today's information-heavy marketing and data-rich environment. In new research, assistant professors of marketing Matthew Fisher and Milica Mormann shed light on a surprising, persistent mistake that consumers make with important consequences. The off by 100 bias the authors observe impacts purchase decisions with implications for everyday shopping decisions and even on trading with platforms like Robinhood and E\*Trade.

By [Matthew Fisher and Milica Mormann](#)

Consumers face difficulties when processing percentages, especially given their variety of uses in today's information-heavy marketing and data-rich environment. In new research, assistant professors of marketing Matthew Fisher and Milica Mormann shed light on a surprising, persistent mistake that consumers make with important consequences. The off by 100 bias the authors observe impacts purchase decisions with implications for everyday shopping decisions and even on trading with platforms like Robinhood and E\*Trade.

According to Mormann, this effect is especially interesting in the context of today's attention economy—a world in which people have limited amounts of attention to allocate across tons of information. When consumers see 30% more, they likely do not put much thought or effort into actually computing what it means, she adds. Instead, the consumer's mind jumps to the first thing that makes sense—the straight 30% more calculation.

Communication about percentage changes greater than 100% are pervasive in the marketplace. Here's a little shift in how people will invest based on some minor feature. It's not like they're off by 10%; it's this whopping 100%, says Fisher.

Fisher and Mormann tied the percentage challenge to financial incentives to see if that focused the attention of people with skin in the game. As a default, they say, people tend to think of percentage information like slices of a pie using the part mentality. How much of the pie is that? My investment portfolio is worth \$100,000. If you say it's grown 90%, people can do that math.  $\$100,000 \times .9 = \$90,000$ . We use relative size of the pie concept versus relative change. But if you say the portfolio has grown 110%, they are likely to think it's just 10% more for \$100,000. However, 110% is  $\$100,000 \times 1.10 = \$110,000$  plus the \$100,000 added to the principal of \$100,000 (100 + 10 = 110). That is 2.1 times the original \$100,000 for \$210,000.

Fisher caught himself making this very mistake. He thought 100% more than 10% more. Was it 1.10 x 100 or 2.1 times more? As a trained researcher, if I'm having to pause to work through such a basic question, I was wondering if it tripped people up, Fisher recalls. The authors observed from their bottom-up process and six studies later, they found this was trickier than it should be. It happens frequently.

Relative change is where people have problems defaulting to basic thinking, he says. Part of the problem is that there are numerous usages of percentages. The relative change usage represents one of the most complex usages of percentages and even after being taught how to compute it, people struggle with providing accurate estimates. While these two usages may appear similar (e.g., 25% more vs. 25% of), they lead to vastly different magnitudes.

Relative change, such as 125% more, leads to magnitudes 100% larger than those of relative size (i.e., 25% more). Their research indicates that when consumers encounter percentage changes greater than 100%, they tend to incorrectly apply the relative size usage, which utilizes part-whole logic, instead of the appropriate relative change usage. This leads many consumers to systematically underestimate percentage changes greater than 100% by exactly 100% (e.g., computing 25% more runtime instead of 225% more runtime) — the phenomenon they call the off by 100% bias.

Marketers and policymakers communicating numerical information should be aware in presenting information or statistics, say Fisher and Mormann. People tend to overestimate or underestimate percent-related numbers. Bottom line: The off by 100% phenomenon is tricky and persistent. The paper, "The Off by 100% Bias: The Effects of Percentage Changes Greater Than 100% on Magnitude Judgments and Consumer Choice," is forthcoming in the Journal of Consumer Research.



## THE COMPETITIVE SHOCK OF SOFTWARE PATENT INFRINGEMENT

By [Wendy Bradley](#) and [Julian Kolev](#)

The shock of intellectual property piracy leads large technology firms to innovate more, according to research from Assistant Professor of Strategy Wendy Bradley and co-author Julian Kolev of the U.S. Patent and Trademark Office. Their research observes how technology companies altered their intellectual property (IP) portfolio strategies after a period of piracy motivated more diversified innovation strategies.

Bradley says their work is an interpretation of piracy. We talk about piracy as a competitive shock. The advent of this major piracy shock was the debut of BitTorrent in July 2001. BitTorrent was a widely embraced file-sharing technology that made it much easier to transfer large files and thus pirate software.

The authors look at how their IP portfolios differ in the period before the piracy event versus after, how firms change or protect IP via the instruments of patents, trademarks and copyrights. Patents are the longer, more arduous journey for firms. Copyright and trademark protections can be filed and obtained more quickly, though the value and level of protection may be lower than for patents. After the shock, these firms that tend to file more patents began filing more copyrights and trademarks than in the past, Bradley notes.

For firms that rely on software code, the IP protection arsenal offers a wide array of choices based on strategy, timing and value. Large firms, patent-heavy ones, may realize that they want to complement the value of their patents with copyrights and trademarks. Piracy may weaken the value of patents and their enforceability, the value of which cannot be realized if work is being stolen, Bradley explains. A firm's assessment of how to add value is being recalibrated in the post-piracy shock period.

Piracy is on the rise again, and BitTorrent activity is increasing. Even before the pandemic, piracy was increasing. Some believe piracy

is a reaction to the boom of software subscriptions, or so-called subscription fatigue. Subscriptions were a market-based solution to the piracy problem but now it's creating other problems, including anti-competitive behavior. Consumers likely just stick with the dominant type of industry software, such as Microsoft Word for word processing, rather than branching out to try others, such as Google Docs. This lack of choice may be pushing consumers toward piracy, which forces firms to rethink the subscription model or lose market share.

As long as more and more products are digital, piracy isn't going away, says Bradley. The big fear was that all piracy leads to massive sales loss and firm failure, she says. Our paper determines a resounding 'not true.'

The paper, "Software Piracy and IP Management Practices: Strategic Responses to Product Market Imitation," is under review.

For more Cox faculty research projects, please visit [cox.emory.edu/faculty-research](#).

# Sreekumar Bhaskaran Brings Product Development and Innovation to the Classroom

The SMU Cox associate professor of information technology and operations management draws on his business research to enrich his students' learning process.

By Robert Ito

**S**reekumar Bhaskaran studies the process of new product development and innovation, trying to understand how products are designed, developed and brought to market. Why do some flourish while others fail? It helps to start with a great idea, he says, but even the best ideas are not guaranteed to succeed. Any company that takes a new item to market has to navigate a series of complex issues, from how they're going to design and manufacture their products to who they're going to collaborate with, and finally, how they should optimize their supply chains.

"There's a significant amount of uncertainty that companies need to deal with, and also a lot of challenges from different angles," says Bhaskaran, an associate professor of information technology and operations management (ITOM) at SMU Cox. "Being able to bring some structure to this complex environment is indeed a fascinating problem."

In many ways, Bhaskaran's academic and work background makes him ideally suited for the task. As an undergrad, he studied mechanical engineering. "That's all about how things work, and how you can make things more efficient," he says. An MBA in operations and marketing came next, which included a strong grounding in information technology. "It was almost like a triple major." At Cadbury's, while managing the distribution network for the confectionery giant, Bhaskaran was involved in four product launches, including two that were completely new to the market. After that, Bhaskaran came to the University of Texas at Austin to pursue a PhD in supply chain and operations management.

"New product development and innovation is a practical topic, one that all of us can relate to both as consumers and business professionals," he says. "And naturally, it was always something



Associate Professor of Information Technology and Operations Management Sreekumar Bhaskaran also holds a Corrigan Endowment Professorship.

that fascinated me. However, the diverse academic training and work experience sensitized me to the unique challenges of this field, motivating me to think deeper about how the process of developing such products could and should be managed."

Bhaskaran currently teaches three courses at the Cox School, all graduate-level classes. Operations Management is a core ITOM class that looks at how businesses can improve efficiencies and processes and manage supply chains, among other things. Bhaskaran also teaches two elective courses, Project Management and Operations Analytics, both of which address how companies can manage uncertainty in all its various forms.

"There's uncertainty from a demand side, there's uncertainty from a supply side, there's uncertainty from a technology side," he says. "So how do you deal with all those things? First,

you have to understand the uncertainty, and we do that by marrying the context with the data. And then we build models in class that enable students and managers to make better decisions in an uncertain environment. It is about combining what is theoretically possible to what is practically relevant."

In addition to his teaching schedule, Bhaskaran is an active researcher, publishing his findings in Management Science, Marketing Science and Production and Operations Management Journal, along with other premier outlets. He's currently working on projects that look at how companies leverage technology — including data and information technology — to sustain their development and innovation processes. He's also studying how to engage customers in the design process and how to bring them along as firms continue to develop new products. This requires an understanding of not only the technical capabilities of products, but also how consumers use them.

"I discuss my research papers in my elective courses," he says. "I believe many faculty at Cox do this routinely, and this is what adds to the uniqueness of the programs here. This has led to many interesting discussions with students after class, and in some instances, that has motivated me to pursue new streams of research."

In addition to enriching the learning process and sparking new research ideas, the discussions help Cox students apply what they learn in the classroom to their respective jobs. With many of his students coming from Fortune 500 companies, the in-class chats have real-world consequences. "The student body at Cox is very diverse and has a wealth of experience," he says. "In many cases, I've had students come back and tell me how they were able to apply what they learned in those discussions to the challenging projects in their jobs."

# Stacey Jacobsen Finds Synergy Between Research and the Classroom

The SMU Cox associate professor of finance uses her research papers to inform how she instructs students for today's changing business world.

By Natalie Gempel



Associate Professor of Finance Stacey Jacobsen is also the Fabacher Endowed Professor of Alternative Asset Management.

**P**reparing students to enter the business world in today's rapidly changing climate is no easy feat, but for Cox School of Business Associate Professor of Finance Stacey Jacobsen, giving them the tools they need to adapt and swim with the current is her priority.

"That's always been the case, but today in particular, I think students really need to be flexible," says Jacobsen. "They need to be able to anticipate and respond to all of these changes. The big institutional details are always changing. When students attend SMU or any school, we may not be able to discuss all of these forthcoming issues, but the hope is that they have the basic theoretical framework and tools to respond to whatever comes their way."

Jacobsen, whose parents, brother, aunts and uncles are all academics and who grew up in college towns, received her PhD at Indiana University. She took her first academic job at SMU Cox just over a decade ago and practices this adaptability in her own career every day. The finance professor has a dual research focus, homing in on both market microstructure research and corporate finance research. Naturally, her own discoveries have shaped her teaching style and presented an invaluable resource for her students.

Currently, she's working on major papers in both of these areas. On the market microstructure side, she's been working alongside fellow Cox finance department co-authors Bill Maxwell and Kumar Venkataraman,

and another co-author, Hank Bessembinder from Arizona State University, on a paper exploring the issuance process in the corporate bond market.

"This has been a fun paper because there is a massive literature that looks at the issuance dynamics in the equity market, but we know very little about the process in the corporate bond market," says Jacobsen. "This is important because the corporate bond market is many times larger than the equity market. Really, what we want to understand is whether the underwriter who manages the issuance undertakes any activities to stabilize the price of the bond following the issuance."

On the corporate finance side, Jacobsen says she has been working on a research paper (co-authored with Ben-David Itzhak, Jack Liebersohn and Zach Tzachi) that presents a somewhat controversial finding.

"We're arguing that many corporate policies can be explained by a simple framework — namely, managers' fixation on earnings per share, or EPS, and that this simple framework can explain managerial decisions in a more comprehensive manner than other theories regarding corporate policies," she says.

With every new finding from her research, Jacobsen adapts her lessons to better prepare students to enter the finance field well-versed.

"I think it took me a few years to really see the huge potential synergies that exist between the two," says Jacobsen. "I bring my research findings and the research of other faculty members into each lecture. But importantly, I learn a lot from my students. I teach at the graduate level, so most of my students have quite a bit of work experience."

This two-way synergy flow is an unexpected bonus for Jacobsen — and it has become an important part of her research process.



These SMU Cox students are using their Bachelor of Business Administration degrees to **create positive change** in the real world.

By **Dr. Simon Mak**

**F**or SMU Cox BBA '23 student Raleigh Dewan, Parkinson's disease and the debilitating tremors it can cause are issues that have weighed heavily on his heart and mind for years. After his grandmother developed the disease and could not feed herself due to extreme hand tremors, he wanted to find a way to help her and the other millions of people around the globe who have Parkinson's. He had an idea for a product that could create real positive change, but Dewan needed financial assistance and a platform to pitch his business plan. He successfully participated in the University's annual Big Ideas Business Plan Competition, a pitch contest.

When asked about the interest from this current generation of students like Raleigh in socially beneficial, entrepreneurial-focused opportunities such as Big Ideas, Jim Bryan, associate dean of BBA Programs at the Cox School, thinks there's more to that interest than just starting a business.

"I think as a general rule, students have always been this way," Bryan says. "But I do think this generation may be more driven toward entrepreneurial efforts and social entrepreneurial efforts to make their community better."

He's talking about the awareness that many Gen Z students seem to have for the world around them, and a better yet, their drive to address the myriad issues or problems they see by creating positive change. "The difference is the ease at which they can do that," Bryan adds. "I'm not sure that the same resources were available to students 20 years ago."

**COX SCHOOL OF BUSINESS**

At the Cox School, those resources come in many shapes and forms, including willing professors and administrators, a campus-wide



SMU Cox BBA student Raleigh Dewan discusses Steadyspoon, his self-stabilizing eating device for people with Parkinson's disease, at TCU's Values & Ventures Competition.

interdisciplinary culture and initiatives from SMU's Office of Engaged Learning, including the business plan pitch contest.

Winners of the pitch contest receive up to \$10,000 in seed money and then get the chance to pitch their business plans for an additional \$5,000 in funding. Eventually, they showcase their prototypes to entrepreneurs, business owners, alumni and investors at the community-wide Demo Day Fair.

For many of these students, their winning ideas fall into a startup category called social ventures, which can be for-profit or nonprofit. "A social venture is a startup founded with a mission to help solve a societal problem, such as in the areas of education, healthcare, poverty, the environment, etc.," explains Simon Mak, executive director of the Caruth Institute for Entrepreneurship and professor of practice in the Department of Strategy, Entrepreneurship and Business Economics at Cox.

Some of the 2021-22 winning ventures included ideas to address homelessness, human trafficking, menstrual care, food deserts and, in Dewan's case, Parkinson's disease.

"My grandmother developed Parkinson's and began to experience severe hand tremors, so bad that she could no longer feed herself," Dewan says. "She wouldn't really want to even eat with us because she was so embarrassed by them."

Dewan, who grew up around film sets watching the cameras roll, was fascinated by the gimbal stabilists used during explosive action scenes to help each camera capture a steady shot.

"I had these two things weighing on my mind that were connected," Dewan says. "How could we stabilize these massive cameras on Hollywood film sets but not stabilize my 90-pound grandmother's trembling hand?"

**Simon Mak**

Professor Simon Mak explains the difference between for-profit social ventures and nonprofit social ventures.

"A for-profit social venture is a startup that has created a business model that provides for independent financial sustainability. It sells goods or services to customers who can and will pay. This is the 'do well by doing well' philosophy, sometimes called the double bottom line."

"A nonprofit social venture is a startup that has created a business model that depends on donations for financial sustainability. It typically sells goods or services to customers who cannot afford to pay, therefore needing donations to subsidize the company's financial health."

So began working with a team of biomedical engineers across the country to develop the Steadyspoon, a self-stabilizing eating device that enables people with Parkinson's and essential hand tremors to regain agency, autonomy and dignity in their lives.

Unfortunately, Dewan's grandmother passed away before he was able to complete the project, but his vision for positive change remains the same. It really is about helping people," he says. "Over 70 million people worldwide suffer from these diseases. So almost everybody has someone in their life who's affected by these things. So for me, it really is, 'How can I create a solution that will be able to help all these people?'"

**Keyshon Jones '23**

Keyshon Jones '23 also found inspiration in wanting to help people, and he joined forces with Dewan to pitch Sister Shaq's Sweet Tea, a socially conscious beverage company with a mission to end human trafficking.

"Raleigh brought this idea to me freshman year and it resonated with me," Jones says. "I was excited to help a cause that I was passionate about because of how prevalent human trafficking was in Baltimore, my hometown."

For each Sister Shaq product, which includes a variety of loose-leaf teas, consumers are able to choose one of the company's partner charities to receive a portion of the proceeds from the purchase.

While these products and ideas have found their callings in doing good, the students behind them have also learned a lot about what it takes to run a business for good.

"It was an amazing experience to be able to organize and present our work to the experienced judges for the competition," Jones says. "SMU has been a great resource for us as we continue to develop our brand and build the company. From working with professors and their willingness to spend their time helping us better understand how to market ourselves to the dining services team building a relationship with us, we have been met with nothing but support from the SMU community."

Freshman Mason Kenmore '25 pitched a winning idea for Sanctuary Showers, a company that provides portable shower tents and hygiene products in homeless communities. For him, the support was also an incredible learning experience.

"SMU and Cox have helped me tremendously along the way," Kenmore says. "I'm starting to see my idea come to life thanks to the funding that I've won through the competitions they put on. Also, the skills that I have been taught through Cox have really sharpened my business skills. Just being a first-year has taught me so much about communications and how to be an effective leader, which I have utilized entirely throughout this process to better progress my goal of the business and get others onboard with this vision."

And for these winners, it's that inspirational vision that resonates with the rest of the Hilltop, not just their fellow students but faculty and staff as well.

"These are great students," Bryan says. "I'm very proud of them. They make us realize why we're really here, and it warms all of our hearts to see them. We're so proud of all of them. And we just want them to keep doing the great things that they're doing."

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Claire Ellis '18 with Cox Professor Simon Mak.

**3 Tips for Aspiring Entrepreneurs**

Just a few years ago, Cox BBA alumna Claire Ellis '18 sat where today's students are sitting. Now the founder of Malibu Apothecary, a nontoxic, environmentally friendly fragrance company that supports coastal conservation, she returned to Professor Simon Mak's entrepreneurship class in the spring to offer BBAs some pointers that apply to all types of entrepreneurship. Here, she gives three tips for aspiring entrepreneurs.

1. **Step in front of the other.** If you take one step in front of the other, you will eventually look back and be surprised at how far you have gone.
2. **Reach out to three people.** We live in a time where we have never been more connected and accessible. Reach out to the three people who could make the biggest impact to your success. Ask them for nothing else except their time to talk about themselves. I assure you if you do this, you will get a lot more back, and you will also find your biggest and best marketers.
3. **You cannot be afraid of hard work.** Like most business owners, you give up working a 9-to-5, just to be lucky if you get five to nine hours of sleep. There is flexibility and freedom involved, but everything comes at a cost. Gone are the days of PTO or, in many cases, co-workers. It can be a lonely process, but you have to have a passion for the process and not the results or benefits that come after the hard work. Otherwise, it is not sustainable.



Keyshon Jones '23 won the Office of Engaged Learning Big iDeas Pitch Competition in fall 2021 with his company, Sister Shaq.

# Alts Program Changes Game for Finance Students' Careers

The rigorous EnCap Investments & LCM Group Alternative Asset Management Center, known as the Alts program at the Cox School, is **preparing students at the highest level** for successful finance careers.

By Shawn Shinneman

In December 2021, shortly before he graduated, SMU Cox student Julian LaNeve, BBA '21, was the only undergraduate on his four-person team at The Data Open Championship. The national competition hosts some of the smartest students from PhD, master's and undergrad programs across the country in a weeklong affair to tackle pressing challenges with advanced data. LaNeve's teammates were two Duke University PhDs and a master's student from UC Berkeley.

During the course of a week on campus at Duke — the group put up the money to work in person despite the competition's otherwise virtual backdrop — LaNeve would prove a worthy team member, leaning on his backgrounds in data and software engineering. But the December '21 SMU Cox grad also had a secret weapon in his tool belt: He'd tested his abilities, competitive drive and confidence in the Cox School of Business' EnCap Investments & LCM Group Alternative Asset Management Center (AAMC), a highly regarded honors program known as "Alts."

Highly selective, with a median GPA of 3.8 in 2020, Alts pulls in students who are extremely motivated, smart and ethical for intensive training that begins with a case-based course during spring semester of junior year. The program also includes an internship at an investment bank, consulting firm, hedge fund or money management firm, plus additional classwork and a voluntary CFA review course. The results speak for themselves: So far, the average starting salary for 2021-22 Alts graduates is \$102,500, and the Alts alumni network continues to grow, encompassing a who's who of the most desirable financial workplaces in the country.

"A lot of people will decide they want to go into investment banking or private equity or hedge funds without actually understanding or really knowing what the work looks like," LaNeve says. "So getting that early exposure, getting a head start, ends up being really valuable when you start to go out into the real world."

When it was all said and done, LaNeve's team took home the \$100,000 first place prize at The Data Open. His involvement is a testament not only to how Alts nurtures students for success but also to the caliber of student the program attracts. LaNeve chose SMU Cox in large part for Alts.

"I'd love to take credit for that, but I can't," says Bill Maxwell, the program's academic director. "You can help train them along the way. But to get to that level, that says a lot about the person."

## SMU Cox's Alts Program Requires Dedication

Serving as the Alts director during the past decade, Maxwell has helped turn the dial on an already successful program. Jim Bryan, associate dean of BBA programs, says the fact that Alts has been so effective at producing students who go on to successful careers is "almost 100% attributable" to its director.

"Dr. Maxwell pushes these students to their limits, and they love him for it," Bryan says. "He knows exactly what kind of competition they will be facing when they graduate, and he gets them ready to kick down all the doors in front of them."

With Maxwell at the helm, Alts has become an even bigger boon for the Cox School overall, which benefits from having a standout program within its most popular major: finance. "It is one of the drivers behind our brand as a business school," Bryan says.

Gaining admission into Alts is tough. In addition to requiring a high GPA, students are put under the microscope during a four-month application process that takes into account strength of courses, the student's demonstrated work ethic, recommendation letters and an interview process. Junior and senior Alts students, as well as alumni, are involved in the process. "I say this, and I believe it's 100% true: When you walk on campus at SMU, if you want to be an Alt, you can be an Alt — the choice is yours," Maxwell says. "But to make that decision, that takes

a ton of work. You have to pretty much start from the day you show up on campus to have a focus on performing and working hard to position yourself well for success.”

With that dedication now part of the program’s DNA, Maxwell says he’s been able to keep adding material each year without taking anything out. Training continues to get more intense, and results have followed suit. The 2022 class alone saw students snag full-time positions at Bain & Company, Boston Consulting Group, Citi, Goldman Sachs, Guggenheim Securities, JPMorgan Chase, Morgan Stanley, Wells Fargo and many other prominent companies in the world of finance.

“We’re going to make sure we teach you the right skills that are going to differentiate you from day one when you get on your job,” Maxwell says. “The only way to get there is you’re literally going to work harder in this program than you will in any other program out there.”

That could only happen with, as Bryan calls Alts students, the “most motivated and driven group of students certainly in Cox but maybe at the entire University.”

“Is it difficult?” he says. “Of course. But these students don’t know how to function in any other type of environment.”

### Students Are Set Up for Real-World Success

The EnCap Investments & LCM Group Alternative Asset Management Center, which was founded in 2008, was the brainchild of current chair of SMU’s Board of Trustees David Miller, BBA ’72, MBA ’73, and Scott Luttrell, BBA ’77, Miller’s fellow Cox Executive Board member at the time. Miller is the founder and managing partner of EnCap Investments LP and Luttrell is CEO of LCM Group. Their lead gifts and continued financial support have been vital to the success of one of the most challenging, and arguably most effective, undergraduate finance programs in the country.

“Scott and I have been in the investment management business for many years,” Miller says, “so we had a pretty good sense for the skill set the industry is looking for. Our students had the talent, we just didn’t have the curriculum in place to prepare them for those jobs. And to me, that’s what it was all about: job placement for our top finance students. Go back 15 years, and we would be lucky each year to place a handful of graduates with the top tier investment banking and consulting firms, which often is the stepping stone to private equity or the fund management business. Today, thanks to the Alternative Asset Management Program, the number annually is over 10 times that.”



Bill Maxwell



Julian LaNeve

“We couldn’t be prouder of the students who’ve been selected for and taken part in the Alts program,” Luttrell adds. “When they graduate, these students go on to successful careers, which of course benefits them as well as the industry, not to mention the Cox School’s reputation as an outstanding provider of business education. David and I are thrilled with the success of the Cox Alternative Asset Management Program — it has exceeded even our most optimistic hopes and expectations.”

The case-based structure of the rigorous first semester challenges students to analyze real-world corporate challenges, albeit with company names and numbers often obscured. LaNeve recalls the class advancing incrementally, with assignments mirroring the actual work

done by investment bankers by semester’s end. The program also dips into the worlds of private equity and hedge funds. “I’ve read countless stories of students sitting next to some Ivy League graduate, working in investment banking, and these Alts students are just taking laps around these Ivy League kids because of the program,” LaNeve says.

The more Alts graduates gain a reputation at financial firms across the country, the more attention it receives from new applicants. “It’s funny: The early classes are always worried I’m going soft on them. We’re now up to 70 students, and there were 20 when we started,” Maxwell says. “It’s like, you don’t understand; people come for one reason: being in Alts.”

With numbers on the rise, the alumni web has multiplied, making it easier for graduates to find the job placements they desire, again contributing to a virtuous cycle that brings more applicants into the system. Maxwell says that he’s seen Alts alumni go the extra mile time and time again to ensure the next generation has what they need to succeed — whether it’s picking up the phone, answering an email to talk about a career opportunity or just making sure students are aware of openings at top firms. “When you’re an Alt, you’re an Alt for life,” Maxwell says. “One of the great strengths of the program is just that we’ve built in a culture of giving back and staying connected.”

It will be LaNeve who’s soon in the position to give back, and whose accomplishments now only add to the Alts prestige. For now, since he’s graduated and taken a fully remote product manager position with data company Astronomer, he’s ready to fully embrace the work-from-anywhere lifestyle and see the world.

“There’s no better time to do it,” he says. “Especially now that I have the means.”





Incoming OneYear FullTime MBA students got the opportunity to meet William S. Spears and his family list after the historic Spears Gift announcement.

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  strengthens entrepreneurial leadership in Dallas and beyond.



In late April, we celebrated energy expert and philanthropist William S. Spears made the largest gift by a non-alumnus in the history of SMU—a commitment that will establish the William S. Spears Institute for Entrepreneurial Leadership in the SMU Cox School of Business. One of the largest gifts in the history of SMU—Spears' investment will encourage business creation, leadership development and economic growth, strengthening areas that are critical to the future of the Dallas business economy.

William Spears is renowned throughout the energy industry, his knowledge and dedication have led to innovations throughout the country, says SMU President R. Gerald Turner. We are honored that he leveraged his ingenuity and purpose to champion our University's faculty and students, bolstering the future of industry and discovery in Dallas.

At the heart of the Spears Institute for Entrepreneurial Leadership lies the Spears Accelerator, offering a range of support services and funding opportunities for the conception, creation and development of new businesses, services and products. Through external partnerships, the accelerator will help students, faculty and local industries strengthen their research and development processes, ultimately

speeding the creation of valuable new products. Additionally, the accelerator will create new revenue streams for the University, benefiting its students, faculty and programs.

I'm proud to partner with SMU for this exciting new initiative, and I look forward to seeing the creativity and opportunities the Spears Institute will inspire throughout Dallas and beyond, says Spears, Cenergistic founder and CEO. I feel honored to be counted as a member of the Mustang community, and I hope that, through this gift, the Cox School will be a positive driver for pioneering innovation and enterprising development across Dallas.

The Spears Institute will facilitate student success through new leadership programming, scholarships and internships for SMU Cox School of Business students. Unique, specialized curricula in the Spears Entrepreneurial Leadership Program for MBAs and BBAs will prepare students to become innovative corporate leaders through real-world experiences and academic coursework in areas such as new product and process development and the generation of venture capital. The highly competitive Spears Scholars Program will attract and retain future leaders who will contribute to the economic vibrancy



The Spears announcement was the last University event in the Fincher Building EY Gallery prior to the start of the renovation and expansion project.

of the region. These meritorious undergraduate and MBA students will pursue their academic and professional goals in the North Texas business climate. Through the Spears Interns Program, the students will gain unique insights and opportunities for personal and professional growth in other global cities such as New York, Washington, D.C., London and more.

The Cox School of Business is a pioneer in the business education field, known for training outstanding business leaders and innovative thinkers, says Dallas Mayor Eric Johnson. Now, through the Spears Institute, Dallas and SMU can expand our thriving partnership and make our city an even more dynamic hub for entrepreneurial activity.

The Spears Institute for Entrepreneurial Leadership will be led by an executive director who will hold an endowed position. The executive director's experience and business industry insights will be crucial to the development of the institute and its programs, maximizing the impact of the Spears Institute regionally and nationally. To bolster Cox School faculty research initiatives, the Spears Faculty Fellows Program will support the development of innovative curricula and programming.

The Spears Institute will also create the Spears Speaker Series, bringing to Dallas high-profile leaders and business experts from a variety of personal and professional backgrounds. Their unique perspectives and insightful knowledge will benefit SMU students, faculty and the broader community.

The Spears Institute will accelerate groundbreaking innovation at the Cox School by expanding student potential and broadening faculty outreach, says Matthew B. Myers, dean of the Cox School of Business. Through our partnership with William Spears, the SMU Cox School will strengthen its ability to prepare our students to tackle grand challenges, spark bold new ideas and become industry front-runners.

With his gift to the multiyear \$1.5 billion campaign for impact, SMU Ignited: Boldly Shaping Tomorrow, Spears joins the company of the largest donors in University history. Other donors who have shaped the University and its growth include the Dedman family and The Dedman Foundation, Gerald J. Ford '66-'69 and Kelli O. Ford and The Gerald J. Ford Family Foundation, Roy M. Huffington '38, Nancy Ann Hunter Hunt '65 and Ray L. Hunt '65, Bobby B. Lyle '67, The Meadows Foundation,



(Left to right) John Spears, Candye Spears, William S. Spears, SMU President R. Gerald Turner, Cox Dean Matthew B. Myers and Robert Dedman Jr., immediate past chair of SMU Board of Trustees

## William S. Spears

William S. Spears is a renowned civic and financial leader known throughout the region for his work in the energy sector, the many boards on which he has served and his dedication to excellence in the education field. Introduced to SMU through his wife, Candye Gould Spears, '06 and stepdaughter, Meghan Bartos, '05, both SMU alumni, Spears' gift to the Edwin L. Cox School of Business builds on a long legacy of philanthropy across the country and a lifelong passion for business excellence that stretches far beyond the University.

Spears earned a Bachelor of Science degree from Oklahoma State University, which established the Spears School of Business in 2004. He additionally holds an MBA from Wharton School at the University of Pennsylvania and a Doctor of Business Administration from H. Wayne Huizenga College of Business and Entrepreneurship at Nova Southeastern University.

He has more than 40 years of experience in public school, college, university, large church and health care energy management. Launching his career into the utility management industry was Spears' invention of the nation's first utility savings program, designed to solve a budgetary shortfall in the Wichita Falls, Texas, school board on which he served. Following this, Spears founded Cenergistic in 1986, a Dallas-based energy conservation company of which he is the CEO. Since its establishment, Cenergistic has garnered national praise and recognition in providing health care, religious and educational institutions with cost-effective energy solutions that reduce energy usage.

Spears has served the community throughout his career, supporting civic and cultural causes including the American Cancer Society, Ford's Theatre in Washington, D.C., Lincoln Forum in Gettysburg, Pennsylvania, Oklahoma State University, North Texas Council Boy Scouts of America, North Texas Easter Seal Rehabilitation Center, Southwestern Medical Foundation, Ulysses S. Grant Association, and Young Life, among others.

In addition to these causes, Spears is the founder of the Christian Businessman's Committee, founder and president of the Times Publishing Company Charities and founder and president of the Red River Civil War Roundtable.

David B. Miller, '72-'73, and Carolyn L. Miller and The David B. Miller Family Foundation, the Moody Foundation, Joe J. Perkins and Lois Craddock Perkins, Carl Sewell, '66, and Peggy Higgins Sewell, '72, Harold C. and Annette C. Simmons, '57, and the Garry Weber Foundation, among others.

William Spears provides a powerful example of how our community is strengthening the landscape of education and business development through investments in SMU, says Brad E. Cheves, vice president for Development and External Affairs. SMU Ignited continues to receive broad support from alumni and civic and business leaders throughout North Texas, and this gift illustrates the vital role that premier private universities like SMU play in the education and business landscapes.



William S. Spears and Candye Spears, who completed her Master of Arts in Dispute Resolution from SMU in 2007.





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## SOUTHEAST HALL

A hall located in the southeast corner of the Quad providing students, faculty, staff and visitors with spaces for collaboration and community featuring the Cox School's new Bistro, the Business Center and the South Overlook Lobby, as well as a 320-person seminar room and office spaces. The Southeast Hall is made possible through the generosity of an anonymous donor. Spaces listed through page 41 have been named since our Fall 2021 publication. Watercolor renderings on pages 36-45 provided by Jeff Stikeman Architectural Art.

## DUDA FAMILY BUSINESS LIBRARY

A dedicated library offering career preparedness programs, cutting-edge technology and resources for in-depth research in a variety of industry topics. The Duda Family Library is made possible through the generosity of Fritz Duda and Mary Lee Duda and The Fritz and Mary Lee Duda Foundation.



## COOPER TERRACE

The Cooper Terrace is a rooftop event space that will be designed to take advantage of the North Texas seasons for outdoor events, receptions and academic gatherings. The Cooper Terrace will overlook the Turner Centennial Quadrangle and Crain Family Centennial Promenade and offer striking views of SMU's campus. The Cooper Terrace is made possible through the generosity of Susan Smith Cooper '62.







## CLYDE/MURPHY USA BOARDROOM

A premier second-floor space and the school's only conference room to offer an expansive view of the new hub of the Cox School at the Heppner Family Commons. The Clyde/Murphy USA Boardroom will facilitate seating for up to 20, allowing for deliberation and collaboration among colleagues and valued University partners. The Clyde/Murphy USA Boardroom is made possible through the generosity of Jennifer Tucker Clyde '85 and R. Andrew Clyde BBA '85 and Murphy USA.



## **MCGUIRE FAMILY SUITE FOR BBA ADMISSIONS, ACADEMIC ADVISING AND RECORDS**

This hub for BBA student advancement and recruitment will include offices for undergraduate administration and records. The suite will also include spaces for academic advising and assistance. The McGuire Family Suite is made possible through the generosity of Michael T. McGuire BBA '05 and Natalie K. McGuire.

## BENNERS FAMILY LOBBY, CROW BUILDING; GRIEGE FAMILY LOBBY, MAGUIRE BUILDING

Public lobbies will prominently welcome guests to the Trammell Crow Building and Cary M. Maguire Building, boasting large windows overlooking with natural light, visuals displaying the history of the Cox School and a variety of spaces for group work and/or individual study. The Benners Family Lobby in the Crow Building is made possible through the generosity of Allison T. Benners and Frederick H. Benners Jr. BBA '00, MBA '07. The Grieg Family Lobby in the Maguire Building is made possible through the generosity of Mark C. Grieg BBA '81 and Peggy Grieg.

## CROW GALLERY

The Crow Gallery will be the preeminent location in the Cox School, serving as the backbone that connects the Crow and Maguire buildings and the school's other hubs of academic activity. The Crow Gallery will showcase the achievements of our outstanding BBA and graduate students and honor the career accomplishments of our distinguished alumni. The Crow Gallery is made possible through the generosity of Harlan R. Crow and Katherine Raymond Crow '04.

## GEORGAS TERRACE LOBBY

A premier space for intimate, elevated events, located adjacent to the Graduate Admissions Suite and the Terrace on the third floor, offering nearly 600 square feet of floor-to-ceiling windows and sweeping views across the Turner Centennial quadrangle and the Crain Family Centennial Promenade. The Georgas Terrace Lobby is made possible through the generosity of Katherine E. Georgas and William J. Georgas.

## MORRIS FOUNDATION SUITE FOR GRADUATE STUDENT SERVICES

This will be the home to the Cox School's graduate programs, prominently located adjacent to the Heppner Family Commons, Dean's Suite and EY Gallery, with 2,220 square feet of meeting rooms and spaces for academic advising and student services/engagement. The Morris Foundation Suite for Graduate Student Services is made possible through the generosity of Kenneth R. Morris BBA '72 and Linda A. Morris and Morris Foundation.

## RIMER FAMILY SUITE FOR ALUMNI RELATIONS AND EXTERNAL AFFAIRS

Centrally located space at the entrance of Bolin-Bridwell Hall dedicated to the Cox alumni mantra of staying informed, involved and invested and offering a place for visiting alumni to gather and reconnect with faculty, staff and each other. The Rimer Family Suite for Alumni Relations and External Affairs is made possible through the generosity of Kirk Rimer '89 and Jane Rimer.

*Artist's renderings are not available for the named spaces listed on this page.*

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Additional spaces are still available for naming. If you have questions about a naming opportunity or would like to support the renovation and expansion effort, contact Cox School Director of Development Ashley Pitts, [apitts@smu.edu](mailto:apitts@smu.edu).

## DEAN'S SUITE

At the epicenter of Cox School of Business operations, the suite will house the dean's office and his administrative team as well as the JPMorgan Chase Parlor. The inviting and functional space will support collaborations with industry partners and Dallas leadership representatives, while still being available to the school's faculty, staff and students.



## CAREER MANAGEMENT CENTER

A center for professional growth, offering a variety of spaces for interviews, career development and industry collaboration.



## BISTRO

A productive and collaborative space, offering quality food options and expanded hours to fuel academic activity.

## CENTER/INSTITUTE SUITES

Dedicated spaces for each of the Cox School's 10 institutes and centers including the Brierley Institute for Customer Engagement, the Bridwell Institute for Economic Freedom, the Caruth Institute for Entrepreneurship, the EnCap Investments and LCM Group Alternative Asset Management Center/Don Jackson Center for Financial Studies, the Robert and Margaret Folsom Institute for Real Estate, the Maguire Energy Institute and the Albert W. Niemi Center for Economic Growth and Leadership Development. Among others, will provide unique, dynamic facilities to support the students of Cox School and SMU, including administrative offices, meeting rooms and spaces to host workshops and presentations.



## PLAZA

Dynamic, upgraded academic, an outdoor gathering space between Bolin, Bridwell Hall and Sheffield Hall will have room for expanded foot traffic, sitting areas for student collaboration and direct access to the expansive Katy and Kyle Miller Courtyard.

## COMMONS OVERLOOK

This open and inviting expanse between the Heppner Family Commons and the EY Gallery will provide sweeping views of the Commons and Katy and Kyle Miller Courtyard. Easy access via a striking central stairway and additional study spaces and collaboration areas.



## GRADUATE ADMISSIONS SUITE

An expansive third-floor suite home to the admissions offices for the school's growing graduate programs.

## FACULTY LOUNGE AND GRADUATE STUDENT LOUNGE

A dedicated space at the heart of the faculty floor on the second level adjacent to the EnCap Investments and LCM Group Alternative Asset Management Center/Don Jackson Center for Financial Studies and the Albert W. Niemi Center for Economic Growth and Leadership will encourage Cox School faculty to share expertise, celebrate individual and departmental accomplishments and collaborate in groundbreaking research and innovation. No image is available for a separate Graduate Student Lounge which will offer a dedicated space for graduate students to collaborate on team projects and/or relax and socialize between classes.



## CLASSROOMS

Dynamic upgraded academic spaces will include traditional lecture halls, cluster-style classrooms and hybrid model classrooms that enhance the educational experience through revolutionary technology, project-based learning, modern pedagogy and collaborative research. Pictured above, example of a cluster-style classroom.



# GROUNDBREAKING CHANGE

SMU breaks ground on extensive renovation and expansion of the Cox School of Business

**S**MU celebrated the future of the Cox School of Business and its role as a driver of Dallas innovation — breaking ground in May on a \$140 million renovation and expansion project designed to train students for a collaborative and technologically integrated world.



Donors, alumni, students, faculty and staff were on hand for history in the making.





At left (left to right): SMU Vice President of Development and External Affairs Brad Cheves; Gary T. Crum '69; Sylvie Crum; William C. Shaddock '74; Kim M. Shaddock; Bryan S. Sheffield '01; Sharoll M. Sheffield; Carolyn L. Miller; David B. Miller '72, '73 (immediately behind Carolyn Miller); SMU President R. Gerald Turner; Gina L. Bridwell; Tucker S. Bridwell '73, '74 (immediately behind Gina Bridwell); Aurelia C. Heppner; Brad K. Heppner '88 (immediately behind Aurelia Heppner); Pat S. Bolin '73; Jane R. Bolin; Fritz Duda; SMU Provost Elizabeth Lobo; Cox School Dean Matthew B. Myers.



The groundbreaking ceremony took place Friday, May 6. Construction got underway 10 days later.

**“Our improved facilities will nurture an environment that will lead to a richer learning experience and a lifetime of connections. This really marks a new era for the Cox School.”**

— Cox School Dean Matthew B. Myers



(Left to right) Incoming SMU Board of Trustees Chair David B. Miller, BBA '72, MBA '73; Cox School Dean Matthew B. Myers; Incoming Cox Executive Board Chair Tucker Bridwell, BBA '73, MBA '74; and Cox Executive Board Member Kirk Rimer, MBA '89. As co-chairs of the Cox School's Campaign Steering Committee, they help drive the fundraising efforts for the renovation and expansion project. Co-chairs not in this photo are Cox Executive Board Members Kyle D. Miller '01 and Mark B. Plunkett '96.



(Left to right) SMU Vice President of Development and External Affairs Brad Cheves, Angela Cheves, Berry Cox '77, SMU Trustee Jeanne Tower Cox '78, John Cox '11 and Cox Executive Board member Justin Cox '08 celebrate groundbreaking day with a barbecue lunch hosted by SMU.



(Left to right) Incoming Cox Executive Board Chair Tucker S. Bridwell, SMU President R. Gerald Turner and Gail Turner.

The two-year project will expand the School's footprint by more than 30%, with the construction of four new buildings connecting the existing facilities into cohesive space that supports collaboration within the Cox School and across the campus, as well as with the Dallas business community.

"This project will add to the Cox School's stellar national reputation and will enable it to continue attracting outstanding students, faculty and industry partners," says SMU President R. Gerald Turner. "Since 75% of our Cox School graduates stay in Texas, this ambitious project is a commitment to SMU's role as a talent magnet for the state and the North Texas region."

Turner announced that the Cox School's renovated and expanded facilities will be called the David B. Miller Business Quadrangle, honoring Miller for his decades-long financial support and leadership of the Cox School. A former Mustang basketball standout, Miller, BBA '72, MBA '73, and his wife, Carolyn, along with The David B. Miller Family Foundation, made a \$50 million commitment to SMU in October 2019 – half of which was earmarked for the Cox School project. That historic commitment, the largest alumni gift in the history of the University, is a dramatic punctuation to the relationship that began when Miller arrived at SMU in 1968 on an athletic scholarship.

As part of the University's multiyear fundraising campaign, SMU Ignited: Boldly Shaping Tomorrow, more than 50 generous donors have already invested more than \$100

million toward new and enhanced facilities at Cox, including new principal gifts:

- \$5 million from Fritz Duda and Mary Lee Duda and The Fritz and Mary Lee Duda Foundation
- \$2 million from Susan Smith Cooper, BBA '62
- \$1 million from Harlan R. Crow and Katherine Raymond Crow, BBA '94
- \$1 million from Jennifer Tucker Clyde, BBA '85, and R. Andrew Clyde, BBA '85, and Murphy USA

A list of those who have given \$1 million or more to the project appears on page 35, and the full list of donors to date is available at [smu.edu/cox-future](http://smu.edu/cox-future).

"We are re-tooling the Cox School to create a more collaborative environment – to

give students and faculty easier access to collaborate, to gather and share ideas and gain inspiration from one another," says Cox School Dean Matthew B. Myers. "We will offer students more opportunity to obtain their business education in a '9 to 9' environment, meaning they'll come to classes, stay for lunch or dinner, work together with other students and their professors and remain connected with and at Cox all day long. In short, our improved facilities will nurture an environment that will lead to a richer learning experience and a lifetime of connections. This really marks a new era for the Cox School."

Go online to find more information on the renovation and expansion plans – including a virtual tour of the future David B. Miller Business Quadrangle – also at [smu.edu/cox-future](http://smu.edu/cox-future).



All groundbreaking attendees were invited to an on-site post-event picnic.

# WHERE WILL EVERYONE BE DURING CONSTRUCTION?

With the renovation and expansion project underway at the Cox School, the work that usually takes place in the Fincher, Crow and Maguire buildings will be taking place in other SMU locations for the next two years. Locations may change from semester to semester for undergraduates and mod to mod for graduate students, depending on building availability.

**Undergraduate classes** will be held in various buildings around campus. Alphabetically by school, they are buildings in Dedman College: Clements Hall, Dallas Hall, Dedman Life Science Building, Fondren Science Building, Hyer Hall; Meadows School of Arts: Hamon Arts Library

(for the Business Library and Kitt Center), Umphrey Lee Center; Perkins School of Theology: Elizabeth Perkins Prothro Hall; and Simmons School of Education and Human Development: Annette Caldwell Simmons Hall, Harold Clark Simmons Hall.

**Graduate classes** will be in the Cox School's Collins Center, Dedman School of Law buildings: Carr Collins, Florence Hall, Underwood Law Library; Lyle School of Engineering buildings: Caruth Hall, Junkins Building; and the Hamon Arts Library (for the Business Library and Kitt Center) in the Meadows School.

**Faculty and staff** will be working in buildings highlighted in red below.

## FACULTY & STAFF #

### 1. Underwood Law Library

Graduate Student Services

### 2. Embrey

BLC/BLI  
Faculty Offices

### 3. Caruth

Caruth Institute  
Faculty Offices  
Behavioral Lab

### 4. Manhattan Building

Faculty Hoteling  
Faculty Offices  
Faculty Support Staff  
Cox Career Center

### 5. Expressway Tower

Bridwell Institute  
Folsom Institute  
Brierley  
Maguire Institute  
Diversity Office  
OIT Support  
Faculty Offices  
Alternative Assets

### 6. Blanton

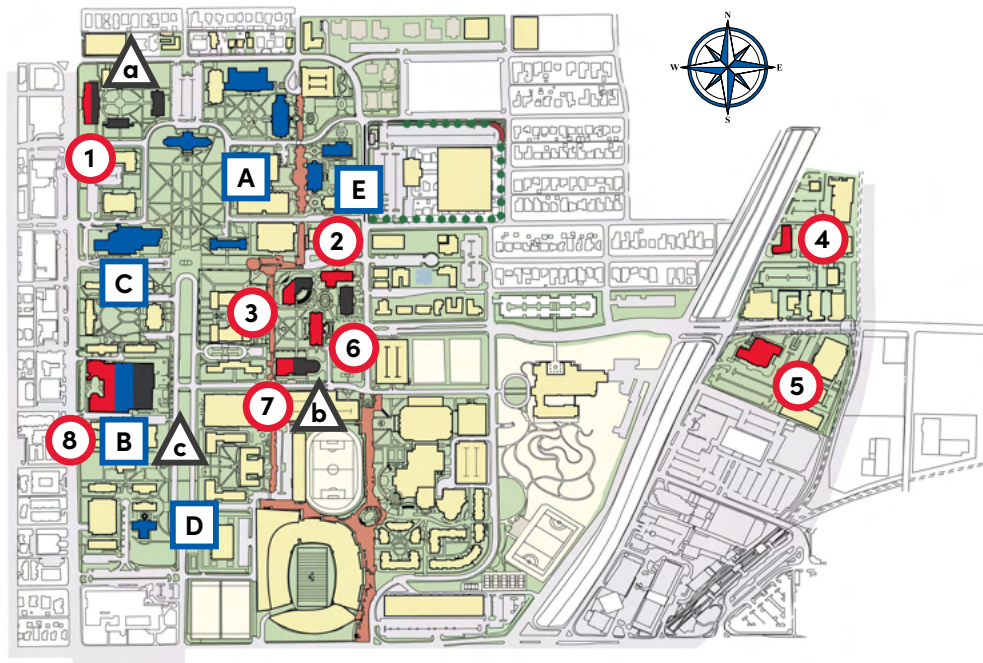
BBA Admissions  
BBA Advising  
BBA Career Services

### 7. Collins

DAAS Testing  
Deans Suite  
SWGSB  
External Relations  
Grad. Admissions/Student Services Hoteling  
Support Staff  
Marketing Hoteling  
GLP

### 8. Hamon Arts

Kitt Center/Business Library



## UNDERGRADUATE CLASSES A

### A. Dedman College

Clements Hall  
Dallas Hall  
Dedman Life Science Building  
Hyer Hall

### B. Meadows School of Arts

Hamon Arts Library (for Business Library & Kitt Center)

### C. Umphrey Lee Center

### D. Perkins School of Theology

Elizabeth Perkins Prothro Hall

### E. Simmons School of Education & Human Development

Annette Caldwell Simmons Hall  
Harold Clark Simmons Hall

## GRADUATE CLASSES a

### a. Dedman School of Law

Carr Collins  
Florence Hall  
Underwood Law Library

### b. Lyle School of Engineering

Caruth Hall  
Junkins Building

### c. Meadows School of Arts

Hamon Arts Library (for Business Library & Kitt Center)

# Brigadier General Harry Bendorf

SMU Cox's highest-ranking veteran alumnus reflects on how his time at the business school led to a decorated military career and beyond.

*By Will Maddox*

**M**oments of transition define Brigadier General Harry Bendorf's life. He fled from Germany's shift toward Nazism, witnessed World War II veterans move into civilian life at SMU's business school and rose through the ranks of the U.S. Air Force as the Cold War took hold of U.S. foreign policy. He is also the highest-ranking veteran alumnus of SMU Cox School of Business.

Born in Germany in 1928, Bendorf and his family escaped their home country and the Nazi regime, arriving in the United States in 1939 when he was just 11 years old. They eventually settled in East Dallas, where he graduated from Woodrow Wilson High School. As he followed the war from the relative safety of the United States, Bendorf developed a respect for the military. He knew that the U.S. had given him and his family an incredible opportunity, and it helped inspire his desire to be a part of the armed forces.

"When I came over as a refugee, I always wanted something to give back to this country because it gave me opportunity and freedom," he says. "I felt I needed to give something back, and that was one way I could do it."

## **An SMU Business Education**

Bendorf's family emphasized the importance of getting an education, but he knew he would need to pay his way through school if he wanted to go to college. Going to school nearby meant he could save money by living at home and keeping his department store job where he could work nights, weekends and summers.

SMU checked all of Bendorf's boxes. It was nearby, it offered a growing business school (before it became the Cox School) where Bendorf would go on to major in leadership management and it also had an air force ROTC program, which would allow him to get a reserve commission following graduation. "SMU had excellent



Commissioned through the ROTC program in 1951, Harry Bendorf was named brigadier general in 1979 and retired in 1981.

academic reputation, and it offered the discipline that I was interested in. My major was called Leadership Management, and I was able to combine management and my military aspirations, which interested me very much," he says.

While at SMU, Bendorf witnessed the building of the middle class, as millions of veterans returned from World War II and went to college because of the G.I. Bill. He also enjoyed being present in the glory years of SMU football, with Doak Walker leading the team to a Southwest Conference Championship, earning multiple All-American honors and a Heisman Trophy along the way.

The veteran presence on campus created a more professional culture. Many of the former soldiers had wives and children and were more focused on their education than the average college student. SMU in the post-war years accelerated Bendorf's maturity. "It's a maturation process," he says. "It helps shape you in deciding what you may wish to do later in life, and it's a development process."



SMU President Dr. Umphrey Lee awards Harry Bendorf the ROTC "outstanding student" plaque in 1952.

**“As you rise through the ranks and as you decide what you want to do, be sure to take care of your people so that they take care of you.”**

— General Harry Bendorf

### From the Classroom to Combat

Bendorf's time in the business school served him well in the military and beyond. His leadership management focus gave him the tools to successfully serve the country and build a career. "Leadership always intrigued me, and I felt I wanted to lead something," he says. "My view is that you lead people, and you manage things, but it's an interesting combination because that's what business is about."

Bendorf hoped to have a reserve commission in the Air Force but didn't necessarily have dreams of a career in the military — the Korean War, however, changed those plans. Bendorf graduated as a distinguished member of ROTC and a second lieutenant in the Air Force and entered into flight training in 1951, months after graduating from SMU business, to prepare for the ongoing Korean War.

He went through combat crew training on the B-29 aircraft and flew a combat tour of duty during the war as a master navigator. The professionalism and leadership training gained at SMU served him well in his most harrowing moments. "When you're flying in combat, you have a mission to perform, and there's no question about it," he says. "Are people scared? Sometimes they are. It's a job like anything else. This is your mission. This is what you're asked to do and what you're trained to do. You have to do your job when you're in the military to serve the country."

### Applying Experience to the Business World

Military promotions slowed following the Korean War, and Bendorf considered moving into the civilian world and pursuing a business career. He eventually received a regular commission and began rising through the ranks in the Air Force — and was named brigadier general in 1979. When he retired from the Air Force, he spent 17 years as an executive at Boeing, where his knowledge of the military allowed him to develop the company's marketing strategy as it sought government contracts.



General Bendorf and his wife, Angela, in the Shenandoah Mountains.

In his corporate and civilian life, Bendorf embraced a world of change and carried with him the lessons he learned at SMU, which helped him adjust to a life that didn't turn out how he might have planned it. He found comfort in a helpful Yogi Berra adage: "When you come to a fork in the road, you take it," Bendorf says. "You take the forks in the road, you develop, and it all comes together. You don't necessarily plan it all."

In a life defined by transitions, 93-year-old Bendorf's admonition to students and alumni is fittingly centered on ageless advice. "Take full advantage of your education," he says. "Your time at school is probably the happiest time that you spend in your early life. As you rise through the ranks and as you decide what you want to do, be sure to take care of your people so that they take care of you."

# SMU Cox Honors 4 Alumni

The SMU Cox School of Business presented the Distinguished Alumni and Outstanding Young Alumni Awards at a luncheon in SMU's Collins Executive Education Center the day before commencement in May. The event celebrated two Distinguished Alumni Award honorees and two Outstanding Young Alumni Award honorees.

In alphabetical order, this year's SMU Cox Distinguished Alumni Award winners are Nancy S. Loewe, Executive MBA '18, and Garry A. Weber, BBA '58. The Cox School's 2022 Outstanding Young Alumni honorees, alphabetically, are Jessica L. Boghetich, BBA '08, and Trey Rome, BBA '08. Award nominations are submitted to the SMU Cox Alumni Association for consideration by a selection committee.



(Front row, left to right) Cox School Dean Matt Myers; 2022 Cox Distinguished Alumnus Garry A. Weber, BBA '58; SMU President R. Gerald Turner. (Back row, left to right) 2022 Cox Outstanding Young Alumna Jessica L. Boghetich, BBA '08, and 2022 Cox Outstanding Alumnus Trey Rome, BBA '08.



Nancy S. Loewe, EMBA '18, second from left, was presented her award by Assistant Dean of Cox External Affairs Kevin Knox (far left), Cox Dean Matthew B. Myers and Assistant Dean of Cox Working Professional MBA Programs Jill Melton.

## Nomination Requirements

SMU Cox Distinguished Alumni candidates must hold an undergraduate or graduate degree from SMU and a position of distinction in the business community, demonstrate outstanding career success, be active civic leaders and community partners and be involved with SMU and the Cox School through activities and contributions. Those recognized as SMU Cox Outstanding Young Alumni must meet the same criteria but can be no more than 40 years of age at the time of the awards luncheon. Nominations for either honor may be sent to Kevin Knox, assistant dean of external relations and executive director of the SMU Cox Alumni Association, at [kknox@cox.smu.edu](mailto:kknox@cox.smu.edu).

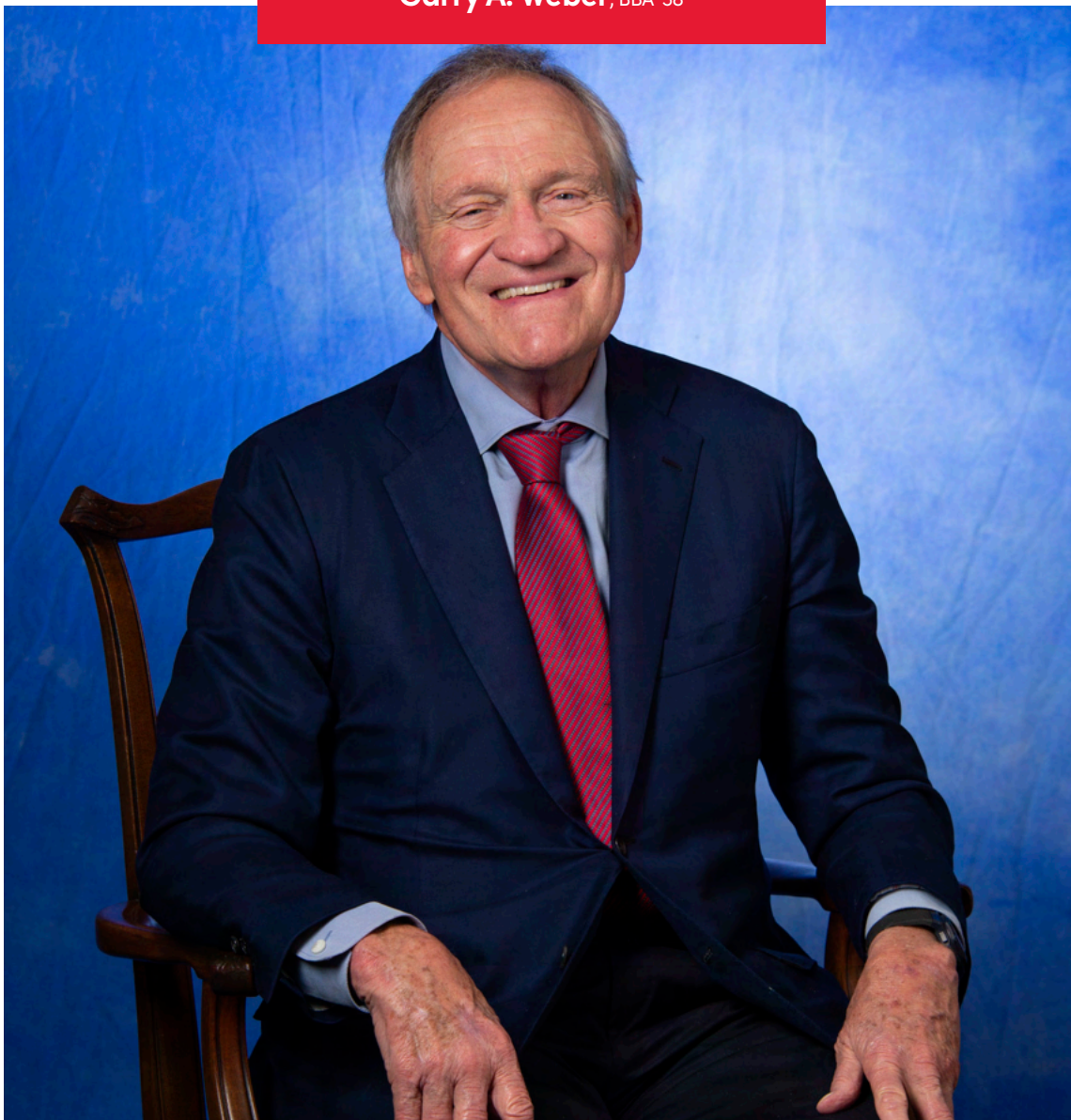
## SMU COX DISTINGUISHED ALUMNI 2022

Nancy S. Loewe, EMBA '18



Nancy S. Loewe, Executive MBA '18, was unable to attend the awards luncheon and received her award at a private presentation the following week. Loewe is an advisor and investor in early-stage startups. Most recently, she was the senior vice president and chief financial officer of Weyerhaeuser, one of the world's largest private owners of timberlands. Prior to joining Weyerhaeuser, she was senior vice president of finance for Visa Inc. Previously, she was CFO for Kimberly-Clark International, after having served as chief strategy officer and global treasurer for Kimberly-Clark Corporation. Before that, Loewe served as executive vice president and chief financial officer for PepsiCo's Frito-Lay North America business unit. She also held a number of senior finance roles during her two-decade tenure with General Electric Company, including CFO for the Consumer & Industrial, Plastics Asia and Healthcare Services business units. Loewe earned an MBA from SMU Cox and a BBA in general business and finance from the University of Massachusetts Amherst. She serves on the Cox School's Executive Board and is a director for Cinemark Holdings Inc.

**Garry A. Weber**, BBA '58



Garry A. Weber, BBA '58, is a former member of the Mustang football team and earned his BBA at SMU in 1958, before the business school had its name. He later founded Weber Financial and remains its chairman and CEO. Weber is active as an investor in venture capital and late-stage hedge funds. A former Dallas County judge and Dallas City Council member, he served on the SMU Board of Trustees from 1984 to 1996, and he's been a member of the Cox School's Executive Board for more than 30 years. In 1998, the University granted its highest honor to Weber, naming him a Distinguished Alumnus of SMU. He is also the recipient of the 2015 Silver Anniversary Mustang Award presented by the SMU Lettermen's Association. In January of this year, the Garry Weber Foundation committed to a historic \$50 million gift to create a three-level Garry Weber End Zone Complex at the Gerald J. Ford Stadium. The complex will increase the functionality, efficiency and overall experience of Mustang Football and its fans.



## SMU COX OUTSTANDING YOUNG ALUMNI 2022

Jessica L. Boghetich, BBA '08



Jessica L. Boghetich holds a BBA '08 from SMU Cox and a BA '08 in Political Science from SMU Dedman College. When she graduated, the SMU Mother's Club recognized her as the Most Outstanding Senior Woman in Business. A Certified Financial Planner and a Certified Trust Financial Advisor, Boghetich currently serves as a senior director on the Financial Planning Team of RGT Wealth Advisors. She also serves on RGT's Financial Planning Policy Committee with leadership in the area of RGT University. D Magazine has recognized Boghetich several times as one of the top wealth managers and best financial planners in Dallas. She is active in a number of professional and charitable organizations, including the Financial Planning Association, Junior League of Dallas, SMU Emerging Leaders mentor program and Children's Medical Center, and she was selected to participate in the T. Boone Pickens Leadership Institute. Boghetich is a longtime member of the Cox School's Alumni Board and joined the SMU Planned Giving Council in 2019.

**Trey Rome**, BBA '08



Trey Rome, BBA '08, is the founder and CEO of Dallas-based Home Tax Solutions (HTS). A fourth-generation Texan, Rome worked his way up at Amegy Bank in the private equity acquisition finance group. Eventually, he got the entrepreneurial bug when he saw an opportunity to offer services to families facing high property taxes. Rome started HTS solo at his kitchen table. This year, the company is celebrating its 10th anniversary. With five offices throughout Texas and a staff of 23 employees, HTS has originated more than a quarter of a billion dollars helping more than 10,000 Texas property owners pay their taxes – and has become the largest property tax loan originator in the state. Rome founded HTS on his personal value system: happiness. He believes employees can have a good time while excelling professionally at their job. His philosophy is working: HTS has been recognized as one of “The Fastest-Growing Private Companies in America” by Inc. 5000, one of the “Top 250 Most Inspiring Companies in Texas” by Inc. and for the third year, one of the “Top 100 Dallas Privately Held Entrepreneurial Companies” by the Cox School’s Caruth Institute for Entrepreneurship.

DALLAS, TX	<b>Bill Ajello</b>	EMBA '19	bajello@origin.bank
	<b>Troy Alley</b>	BBA '15	talley@thirdgencapital.com
	<b>Jessica L. Boghetich</b>	BBA '08	jboghetich@rgt.net
	<b>Genevieve Collins</b>	PMBA '16	gcollins@afphq.org
	<b>Brittany Dewan Frazier</b>	BBA '08, MSA '09	brittdfrazier@gmail.com
	<b>Chris Hanna</b>	MBA '02	clhanna099@yahoo.com
	<b>Tessa Hoskin</b>	EMBA '09	cehoskin@hotmail.com
	<b>Laura Howard</b>	BBA '00	laura.howard@ey.com
	<b>Nick Kapral</b>	PMBA '10	nicholas.kapral@gmail.com
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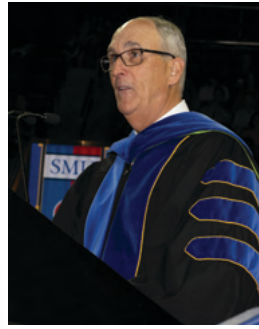
COX CONNECTIONS COMMENCEMENT

# COMMENCEMENT

SMU Cox returned to Moody Coliseum in May for its Spring 2022 Commencement Ceremonies, the School's first indoor commencement ceremonies since 2019. This year's undergraduate and graduate ceremonies took place May 14 at 1 p.m. and 3 p.m., respectively. Moody was packed during both events. SMU held its All-University Commencement Ceremony outdoors at

Gerald Ford Stadium in the morning prior to the Cox School's indoor afternoon ceremonies. Following each of the Cox events, business school graduates and their families were invited to celebrate their special day at the University's Indoor Performance Center (IPC). This is the first time Cox graduation receptions have been held at the spacious IPC.









Elizabeth Whatley '15 and her committee at Forest Forward held a reception at the Forest Theater and announced plans for the theater's total renovation.



At the December graduation reception, Dean Matt Myers congratulates Dom Haskett on completing his MBA.



Dr. Matt Ridley presented "How Innovation Works and Why it Flourishes in Freedom" as the guest of the Cox School's Bridwell Institute for Economic Freedom.



Rodney and Hayden Howerton, football letterman, attended the December graduation reception.



Rhett Lashlee was introduced as the new head football coach at SMU.



Brittany and John Efantis celebrated their graduation from the Online MBA program.

# EVENTS



📍📍📍📍📍 Newport Beach 📍 Parents Sherri and Mike Skillman (Cox Executive Board) hosted a reception for alumni 📍 friends 📍 students and parents. Shown here 📍 Anna Morongel and Andre Lamadrid 📍 an incoming Cox MBA this fall.



📍📍📍📍📍 Atlanta 📍 Shown here at the reception 📍 Kevin Knox 📍 Jack Chapman (BBA '10 📍 Cox Alumni Board of Directors) and Al Niemi 📍 former dean of SMU Cox.



📍 📍📍📍📍 Simon Mak 📍 director of the Caruth Institute for Entrepreneurship 📍 introduces Igor Karlicic and Bhargav Maganti 📍 along with their football launching machine 📍 which they designed and built.



📍📍📍📍📍 Newport Beach 📍 DJ Bowers 📍 Shannon Bowers and Lauren Bowers 📍 an incoming Cox BBA student this fall



📍📍📍📍📍 Atlanta 📍 Dean Matt Myers had the opportunity to give an update on the renovation plans for Fincher 📍 Crow and Maguire buildings.



📍 📍📍📍📍 St. Louis 📍 Cox alumni Alexis Hiemenz 📍 BBA '11 📍 MSA '12 📍 and Chip Hiemenz 📍 BBA '06 📍 hosted a reception for alumni 📍 friends 📍 students and parents. Here 📍 Chip welcomes all the guests.



📍📍📍📍📍 Newport Beach 📍 Attending the reception 📍 Heather Madden and Jim Madden 📍 BBA '83



📍📍📍📍📍 Atlanta 📍 Fran Raines 📍 former Cox staff member 📍 Cameron Walts 📍 and Catherine Walts 📍 BBA '99 📍 Cox Alumni Board of Directors.



📍📍📍📍📍 Atlanta 📍 Parents Joan and Rick Smith hosted a reception for alumni 📍 friends 📍 students and parents. Pictured here 📍 Rick Smith welcomes the guests.

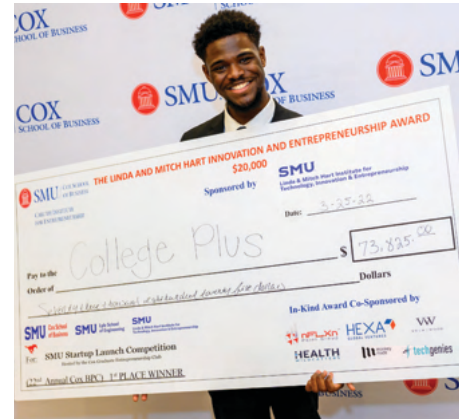


📍 📍📍📍📍 St. Louis 📍 Also attending the reception 📍 Bill Renee and Julia Schmidt 📍 an incoming Cox BBA this fall.





Don Jackson Center for Financial Study and the Alternative Assets program annual recognition event.



The Cox Entrepreneurship Club planned a number of activities for SMU Startup Launch week. Senn Suberu '22 Rotunda Scholar won the business plan competition.



Scottsdale Ann Wang '21 and Shannon Chappell '00



Ron Lanier was introduced as the new men's basketball coach at SMU.

Scottsdale Shannon '00 and Trey Chappell '00 Cox Alumni Board of Directors hosted a reception for alumni, friends, students and parents. Here, Jim Bryan and Trey Chappell welcome the guests and give an update on the Cox School, as parent John Kobierowski and others listen in.



Retail market expert Nick Egelanian, President of Siteworks, gave an outstanding presentation on Rationalizing US Retail.



Scottsdale Cox alumni Jeff Birkelo '83 and Jeff Perry '81 '84.



The Cox Marketing Club invited 7-Eleven Chief Marketing Officer Marissa Jarrett to present to club members, alumni, faculty and staff. Pictured here, Julia Pollock, Laura Hartman, Marissa Jarrett with 7-Eleven Cassie Patton and Jessie Craft. Students are all MBA '22.



Arnold C. White discusses his book Lincoln in Private at Old Parkland. Cox co-sponsored with Shackelford, Bowen, McKinley & Norton LLP.



**2022** Nashville Neely and Frank McGrew BBA '90 Cox Alumni Board of Directors Cox Executive Board hosted a reception for alumni friends students and parents. Here Neely Frank and Jim Bryan Associate Dean of BBA Programs welcome the guests.



**2022** At the 11th Annual L. Frank Pitts Energy Leadership Awards Luncheon Matt Myers awarded the 2022 MBA Energy Scholarship to Ethan Burgh.



**2022** Keynote speaker Mayela Trespalacios BBA '22 a Marketing Award winner when she majored in Marketing at the Cox School shared her story with this year's Marketing Award winners. Trespalacios currently serves as the senior director of strategic business consulting for One Publicis in Dallas part of the Publicis Groupe one of the oldest and largest multinational marketing and communications companies in the world by revenue.



**2022** Nashville Recent Cox graduates Tate Elliott and Mira Swaiseh are both BBA '21.



**2022** Matt Myers awarded the 2022 BBA Energy Scholarship to Jack Gebhardt.



**2022** Former U.S. Ambassador David Miller answers students' questions after a Fireside Chat in the Collins Center about the role the Cox School Executive Education team can play in improving national commercial diplomatic efforts.



**2022** Nashville Also attending the reception Rick Reisher parent David Wood MBA '94 Brendan Finucane BBA '92.



**2022** At the Cox alumni board of directors meeting Shane Goodwin Associate Dean for Graduate and Executive Education was one of the presenters to the board members. Board chairman Frank McGrew also called on Dean Matt Myers Jim Bryan Associate Dean of BBA Programs and Jason Rife Senior Assistant Dean Graduate Admissions and Career Management.



**2022** Denver Neal Pedersen BBA '06 MBA Cox Alumni Board of Directors arranged a social hour for Cox alumni in the Denver area. Jill Lubar Pete Lubar MBA '90 Ashely Eisenkramer BBA '19 Andy Chadwick MBA '97 Linda Panchasarp Fullman MBA '12 Mike Fullman MBA '12 Julia Grice MBA '96 Neal Pedersen Sarah Alfonso BBA '08 Orin Atkins BBA '08 MBA '15 Caitlin Barron BBA '18 Jim Leonard BBA '87 and Kevin Knox.



📷📷📷📷 The first Mustang Mile Fun Run.



📷📷📷📷 Football recruiting coordinator Shay Taylor and head SMU football coach Rhett Lashee served as guest starters for the runners of the Mustang Mile.



📷📷📷📷 The Cox School's groundbreaking for renovation and expansion took place in front of the Fincher Crow and Maguire buildings. Pictured here: Fritz Duda, SMU Provost; Elizabeth Loboa and Dean Matt Myers with their shovels.



📷📷📷📷 The Cox School's awards for Distinguished Alumni and Outstanding Young Alumni. Shown here: Linda Pitts Custard '60; Bill Custard '57; award honoree Garry A. Weber '58; and SMU President R. Gerald Turner.



📷📷📷📷 Award luncheon: Justin Cox '08, Cox Executive Board; Molly Cox '08; Jenna Rome and award honoree Trey Rome '08.



📷📷📷📷 Award luncheon: honoree Jessica L. Boghetch '08 and Cox Professor Robin Pinkley.



📷📷📷📷 Cox Commencement: Frank Agunanne '22, Basketball Letterman; Dan Lafferty '21; and Kat Wright '22.



📷📷📷📷 Cox Executive Board member Norm Bagwell with his son Nolan '22.



📷📷📷📷 Cox Executive Board member Don Carty congratulates his son Will '22 at Commencement.



📷📷📷📷 Charlotte Parents Ann and Wellford Tabor hosted a reception at their home for alumni, friends, students and parents. Pictured here: Jenna Holoman, Mark Holoman '03; and Tucker Bridwell '73, MBA '74.



📷📷📷📷 At the reception, Dean Matt Myers had an opportunity to make remarks to the group and give an update on the Cox School.

Fall 2022

Cox Connections Calendar

SMU Cox Graduate Admissions Events

**9/13** MBA and MS  
On-Campus Info  
Collins Center  
6:30 p.m. - 7:30 p.m.

**9/20** Explore Cox Interactive  
Online Classroom Virtual  
6 p.m.

**9/28** MS Virtual Lunch  
and Learn With Cox  
Admissions Virtual  
12 p.m. - 1 p.m.

**10/11** MBA and MS  
On-Campus Info  
Collins Center  
6:30 p.m. - 7:30 p.m.

Go to [coxgrad.com](http://coxgrad.com) for continuing updates on SMU Cox Graduate Admissions Events. For more information and application deadlines for MBA programs go to [coxgrad.com](http://coxgrad.com). For MS programs go to [coxmasters.com](http://coxmasters.com).

SMU Football Schedule

**9/3** SMU vs UNT

**9/10** Cox Red Zone  
Tailgate (3 hours prior to kickoff)  
SMU hosts Lamar

**9/17** SMU vs Maryland

**9/24** Cox Red Zone  
Tailgate (3 hours prior to kickoff)  
SMU hosts TCU  
(Family Weekend)

**10/1** SMU vs UCF

**10/14** Cox Red Zone  
Tailgate (3 hours prior to kickoff)  
SMU hosts Navy

**10/20** SMU Distinguished  
Alumni Awards  
Program

**10/21** Cox MBA/MS Class  
Reunions for classes  
ending in 2s and 7s  
Highland Hotel  
5300 Mockingbird Ln.  
7 p.m. - 10 p.m.

**10/22** Cox Red Zone  
Tailgate (3 hours prior to kickoff)  
SMU hosts Cincinnati  
(Homecoming)

**10/29** SMU vs Tulsa

**11/5** Cox Red Zone  
Tailgate (3 hours prior to kickoff)  
SMU hosts Houston

**11/12** SMU vs S. Florida

**11/17** SMU vs Tulane

**11/26** SMU hosts Memphis  
at the Cox Distinguished Alumni Awards Luncheon  
at the Cox School of Business  
12 p.m. - 1 p.m.



At the Cox Distinguished Alumni Awards Luncheon, Football Coach Rhett Lashlee congratulates newly named Cox Distinguished Alumnus and former SMU football player Garry A. Weber, BBA '88.



At the Dean Reception on Commencement Day, Alex Tabor, BBA '22, made remarks about his SMU Cox School and student-athlete experience.

**Chairman of the Cox Executive Board**  
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Partner/Managing Director  
Kelso & Company

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Development Officer  
AT&T Inc.

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Bank of Texas NA

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Sales & Leasing Specialist  
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Founder & President  
Bayne Advisors

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Senior Managing Director  
Energy Investment Banking  
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CEO  
Omar B. Milligan  
Enterprises Inc.

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Executive Chairman  
Eagle Oil & Gas Company

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President & CEO  
Robert W. Baird & Co. Inc.

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The Brierley Group LLC

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Brookshire Grocery  
Company

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Chief Investment Officer  
Paragon Holdings Inc.

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Murphy USA Inc.

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Founder & CEO  
Dry Powder Capital

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Cox Partners Inc.

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Dallas Production Inc.

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Comerica Inc.  
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Mary Kay Inc.

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Hart Group Inc.

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Founder & Chairman & CEO  
The Beneficial Company  
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Chairman of the Board  
Folsom Properties Inc.

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Partners

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Chairman of the Board  
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Kansas City Chiefs

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The Karahan Companies

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Founder & Manager  
Pinnacle Family Office  
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Managing Director &  
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Director  
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Founder & Chairman  
Lycy Holdings Inc.

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CoFounder & Principal  
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Managing Director  
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Andrews Distributing  
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EnCap Investments LP

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Founder & President & CEO  
Silver Hill Energy Partners LP

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Executive Chairman  
Genisys Controls LLC

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Chairman & Board of  
Directors & Former CEO  
American Airlines Group

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Patterson Investments Inc.

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CEO & Founder  
Sun Holdings Inc.

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Chairman & Global Co-Head  
of Energy & Transition  
Investment Banking &  
Capital Markets  
Credit Suisse

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Chief Investment Officer  
Hilltop Opportunity Partners

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CEO  
Charles & Potomac  
Capital LLC

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Managing Director  
First Republic Bank

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Former CEO & Chairwoman  
The Container Store

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CH Investment Partners

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Executive Chairman & CEO  
Tenet Healthcare

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Managing Partner & CEO  
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Chairman & CEO  
Roth Capital Partners LLC

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Managing Partner  
Bain & Company Inc.

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Chairman & CEO  
Schlegel Capital LLC  
Founder & CEO  
Bedrock Freight Logistics

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President & CEO  
SW Graduate School of  
Banking Foundation

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Director  
The Mosaic Company

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Sewell Automotive  
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The Bill Shaddock Family  
of Companies

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Executive Chairman of the Board  
Tolleson Wealth  
Management

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Chief Partners LP

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President & COO  
The Goldman Sachs  
Group Inc.

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Amarillo National Bank

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Sunoco Corporation

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Chairman of the Board  
& CEO  
Weber Financial Inc.

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CEO & Owner  
Wheless Properties Inc.

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CEO  
PepsiCo Foods North America

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Director  
Mack O. Forrester & Co. PLLC

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Executive VP  
KemmonsWilson Companies

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EXECUTIVE BOARD

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