



Wharton Club Leadership Conference November 8, 2019 · Philadelphia

I. Welcome by Sam Lundquist, Vice Dean, Wharton External Affairs

- Volunteer leadership amplifies the Wharton brand worldwide
- Updates from Wharton:
 - **Dean transition and search**
 - Consultative committee established by President Amy Gutmann
 - Confidentiality is key regarding candidates
 - Wharton faculty, students, and university trustees on committee
 - Committee role will diminish as pool of candidates gets smaller
 - Expectation that search firm/committee will narrow down to 12 candidates
 - Candidate pool reduced to final 4 people in winter
 - Strong emphasis on academic background, must have PhD and faculty experience
 - Final decision by president and provost, likely in March or April
 - Alumni can submit feedback directly to committee at whartondeansearch@upenn.edu
 - **Campaign**
 - Capital Projects
 - Academic Research building (WARB)
 - Tangen Hall
 - 40th and Sansom
 - Westward end of campus is different now than it was even five years ago
 - Home of venture lab and will house two new entrepreneurship programs
 - New College House
 - New requirement for undergrads to live on campus for two years
 - Relieves stress of finding 2nd year housing early in students' first year on campus
 - Strategic Priorities
 - Success of campaign aligns strategic priorities with direction of philanthropy
 - Future of finance
 - Keeping pace to remain *the* premier finance school
 - Harris Program for Alternative Investments
 - Ross Stevens Center
 - Business model research center
 - Focused on crypto currencies, fintech and block chain
 - Analytics at Wharton
 - Venture Lab
 - Idea is to equip students with “start here” mentality
 - Focus on how to start a company and grow it to IPO and beyond
 - Leadership is embedded in curriculum
 - Three priorities working together
 - Always raise money for research and financial
 - 82% achieved of 1 Billion Dollar Goal
 - June 30, 2021 is the campaign end date
 - Part of comprehensive university campaign
 - Thank you tour for President Gutmann in the year between end of tenure and campaign end
 - Provides space for next president to strategize ahead of next campaign

II. Welcome by Kelly Lauersen, Senior Associate Director, Global Clubs

- **Introductions:** Club storytelling
 - Photo from each club and introductions with short story of the event

III. Workshop: The Leader as Storyteller, Quinn Bauridel, Pig Iron Theatre Company Director

- Quinn facilitates leadership workshops for large companies and Wharton programs
- Stories are essential ways to create indelible images
- Stories are impactful because they connect with us and share neuropathy
 - i. What are people going to absorb and take away from your story
 - ii. Adam Grant's research
 1. 63% remember a story
 2. 5% remember a fact
 3. How to create "stickiness" in the brain
- Power of stories
 - i. Stories transport the listener out of one's own life and into another's experience
 - ii. Emotional intelligence and empathy are large parts of a storytelling experience
 - iii. Understanding 1:1 human encounters as a singular that stands in for the whole
- Great stories follow structure
 - i. PASTO
 1. Preparation
 2. Action
 3. Struggle
 4. Turn
 - a. Decisions to move beyond struggle
 5. Outcome
 - a. Good things provide a positive outcome
 - b. Learn value from negative outcome
 - c. Evaluate priorities
 - ii. Option 1: Think of the stories of your individual club
 1. How you would recruit new members and the impact on a singular individual
 2. Animate the story and bring it to life
 3. Something compelling that makes people want to join the club
 4. Conveying value of your club to new members
 - iii. Option 2: Think of the story of your life at Wharton
 1. Ways in which it transformed your life
 2. What was the moment in which you were different at the end from the beginning

IV. Research Center Roundup

- [Wharton Talking Points for Club Leaders](#)
- 20+ research centers at the school
 - i. [Mack Institute for Innovation Management](#) (Saikat Chaudhuri, Executive Director)
 1. Think about established corporations
 - a. How do they respond to innovation?
 - b. How do they deal with disruption?

- c. How do they deal with remaining innovation over time?
 - 2. 50 projects a year, 20+ corporate partners
 - 3. What happens when you have an emerging innovation?
 - a. Think about capturing value
 - b. Creativity
 - c. Organizing
 - 4. Ways to engage
 - a. Corporate partner program
 - i. Global
 - ii. Worldwide
 - iii. Industry transcendent
 - b. Partner with alumni clubs
 - 5. Want to build customized relationships with all corporations
 - a. Array of programs for companies given the challenges that they face
 - b. Partner events, themes that cut across different types of industries
 - c. Smaller workshops in different markets
 - d. Programs that work deeply with corporations that are facing challenges
 - i. Students help out with live projects
- ii. **Wharton Risk Management and Decision-Processes Center** (Helen Wiley, Policy Analyst & Project Manager)
 - 1. Research leader in catastrophe risk management
 - 2. Currently reconfiguring ongoing research into 5 research labs
 - a. Disaster Risk Management is one of the largest focuses of the lab
 - 3. New initiative is the policy incubator
 - a. Focus on building expertise
 - b. Partnering with corporate sponsors and public policy collaborators
 - i. Example: Portland Government on Disaster Insurance projects
 - 1. Research centers can more actively work with local government
 - 4. Student engagement
 - a. 4 new programs for student engagement
 - b. Increasing demand to have climate career information
 - c. Participants in the Hackathon
 - d. Student listserv to better project what they're doing around the university and to broadcast to all Penn about opportunities
 - 5. Looking for new partnerships
- iii. **Wharton Customer Analytics** (Matthew Gray, Senior Associate Director, Operations)
 - 1. Research center that focuses on customer analytics
 - 2. Intersection of academics and industry
 - 3. Take companies with unique business issues
 - a. Students help companies understand the potential of their data
 - 4. Partner with researchers across the world and crowdsource to help solve company problems and publish research
 - 5. Industry agnostic with corporate partners
 - 6. Increased number of analytics courses across the School
 - 7. Hosting 20+ analytics focused events throughout the year
- iv. **Wharton Neuroscience Initiative** (Zab Johnson, PhD, Executive Director & Senior Fellow)

1. New era of analytics
2. Psychologists are now a part of business
3. Incorporate the analytics that the brain makes and build better business through brain science
4. Wharton is first of its kind to bring this kind of initiative to the forefront
5. Neuroscience provides new insights into business space
6. Thought leaders across all disciplines come together to have more impact on business itself
7. 5 pillars:
 - a. Grounded in science
 - i. Move lab based into real application space
 - ii. Innovate business decisions
 - b. Education
 - i. Neuroscience initiatives into curriculum
 - ii. Learning by doing through innovative applied research
 - c. Community
 - i. Build dialogue around where neuroscience can impact business decisions
 - d. Partnership
 - i. Corporate partners
 - ii. Alumni groups
 - iii. Constant dialogue of scientific insights into practical solutions
 - e. Programs
 - i. Dialogue around what is emerging in the field
8. 1000 students will have completed courses by Spring 2020
 - a. Well received and big impact on where they can go
9. Free annual summit, usually held in the fall
 - a. Day long opportunity to get to know information around emerging theme
 - b. Deep dive into neuroscience and how science is making an impact
- v. **Stevens Center for Innovation in Finance (David Musto, Faculty Director)**
 1. Inaugural event held in April 2019
 2. Center explores all the ways that technology is disrupting finance
 3. Event focused on cryptocurrency with industry leaders
 4. Inbound expressions of interest from companies with Wharton alumni
 - a. Engaging students with a collaborative project
 - b. Students work on fintech issue through the semester and then present to the company
 - c. Projects currently underway with Square, PayPal, Plaid, SoFi
- vi. **Penn Wharton Entrepreneurship (Valentina Goutorova, Director)**
 1. Resource for students interested in entrepreneurship and innovation
 - a. Becoming an investor
 - b. Joining a startup
 - c. Engaging with community
 2. Alumni engagement
 - a. Constituents, clubs who would like to actively engage with entrepreneurs
 3. Tangen Hall
 - a. Physical hive of entrepreneurship
 - b. New home in Fall 2020 to venture labs
 - c. Hands on experience

V. Club-to-Club Consulting

- SMART Goals
 - i. Specific
 - ii. Measurable
 - iii. Achievable
 - iv. Realistic
 - v. Timely
- Resources available from the School
 - i. [Wharton Officers](#)
 - ii. [Facebook Group](#)
 - iii. [Staff liaisons](#)
- Goal setting and Accountability Buddies
 - i. Identifying goal of the club and tracking progress throughout the year with another club leader
 - ii. Blue Group
 1. Rob Dinerman (Wharton Club of New York)
 - a. **Accountability Buddy:** Debbie Mason Pontual
 - b. **Goal:** leadership planning and succession
 2. John Buggie (Wharton Club of Charlotte)
 - a. **Accountability Buddy:** Warren Wang
 - b. **Goal:** Expand presence in Carolinas and stay in touch
 3. Warren Wang (Wharton Club of Western Pennsylvania)
 - a. **Accountability Buddy:** John Buggie
 - b. **Goal:** Engage alumni base in Western PA and have board represent that
 4. Stacie Hyatt (Wharton Club of Dallas-Ft. Worth)
 - a. **Accountability Buddy:** Stephanie McAlaine
 - b. **Goal:** Strengthen next term board by 7 people
 5. Stephanie McAlaine (Wharton Private Equity & Venture Capital Alumni Association)
 - a. **Accountability Buddy:** Stacie Hyatt
 - b. **Goal:** Looking to finish planning and rolling out 9 replicable events at small dinners
 6. Shari Wakiyama (Wharton Club of Southern California)
 - a. **Accountability Buddy:** Chuck Marion
 - b. **Goal:** Build out leadership team and engage more volunteers for events
 7. Chuck Marion (Wharton Club of Philadelphia)
 - a. **Accountability Buddy:** Shari Wakiyama
 - b. **Goal:** Increase membership by 10% by end of academic year
 8. Debbie Mason Pontual (Wharton Club of Brazil)
 - a. **Accountability Buddy:** Rob Dinerman
 - b. **Goal:** Reengage current club leaders
 - iii. Red Group
 1. Mindy Feldman (Wharton Club of Africa)
 - a. **Accountability Buddy:** Narges Zamani
 - b. **Goal:** Establish more consistent programming presence in Africa, Europe, and US
 2. Raj Merchant (Wharton Club of Charlotte)
 - a. **Accountability Buddy:** Kapil Kedia
 - b. **Goal:** Revamp programming to bring in more young alumni
 3. Blair Carnahan (Wharton Club of Atlanta)

- a. **Accountability Buddy:** Meesh Pierce
 - b. **Goal:** Succession planning, find officers by end of year
 - 4. Kapil Kedia (Penn & Wharton Club of Michigan)
 - a. **Accountability Buddy:** Raj Merchant
 - b. **Goal:** Work on board structure and governance
 - 5. Meesh Pierce (Wharton Club of Southern California)
 - a. **Accountability Buddy:** Blair Carnahan
 - b. **Goal:** Get new website up by end of year
 - 6. Narges Zamani (Wharton Club of the National Capital Region)
 - a. **Accountability Buddy:** Mindy Feldman
 - b. **Goal:** Goal to tap into higher C-suite potential donors
 - 7. MJ Torres-Martin (Wharton Club of Philadelphia)
 - a. **Accountability Buddy:** Ferdi Cheuk
 - b. **Goal:** More key events in fall and spring
 - 8. Ferdi Cheuk (Wharton Club of Hong Kong)
 - a. **Accountability Buddy:** MJ Torres-Martin
 - b. **Goal:** Goal of engaging young alumni
- iv. Orange Group
 - 1. Leslie Golden (Wharton Private Equity & Venture Capital Alumni Association)
 - a. **Accountability Buddy:** Robert Befidi
 - b. **Goal:** Reengage cohorts on board or replace, 5 additional active memberships by April annual event
 - 2. Robert Befidi (Wharton Club of Minnesota)
 - a. **Accountability Buddy:** Leslie Golden
 - b. **Goal:** Revamp programming for 2020
 - 3. Cathryn Taylor (Wharton Club of Chicago)
 - a. **Accountability Buddy:** Alex Rodriguez
 - b. **Goal:** Increase paid membership from 148 to 200 by December 31, 2020
 - 4. Alex Rodriguez (Wharton Club of South Florida)
 - a. **Accountability Buddy:** Cathryn Taylor
 - b. **Goal:** 5 young alumni to drive young alumni initiatives
 - 5. Nancy Csaplar (Wharton Club of Boston)
 - a. **Accountability Buddy:** D.C. Moore
 - b. **Goal:** Increase (2x) programming including faculty events
 - 6. Neeta Mukerjee (Wharton Club of New Jersey)
 - a. **Accountability Buddy:** Rav Mediratta
 - b. **Goal:** Increase event attendance by 50% ASAP
 - 7. Rav Mendiratta (Wharton Club of Philadelphia)
 - a. **Accountability Buddy:** Neeta Mukerjee
 - b. **Goal:** Increase social media engagement
 - 8. D.C. Moore (Wharton Club of South Africa)
 - a. **Accountability Buddy:** Nancy Csaplar
 - b. **Goal:** Expand presence to West Africa, link to South Africa
 - c. **Goal:** Formal structure in place in Lagos and Ghana
- v. Green Group
 - 1. Andy Cohen (Wharton Club of Charlotte)

- a. **Accountability Buddy:** Jennifer Schick-Gregoriou
 - b. **Goal:** Succession Plan
2. John Kozora (Wharton Club of Western Pennsylvania)
 - a. **Accountability Buddy:** Mazen Haffar
 - b. **Goal:** Form Board in Q1 2020 and plan 3-4 events
3. Bruce Aranoff (Wharton Club of Dallas- Fort Worth)
 - a. **Accountability Buddy:** Denise Aranoff
 - b. **Goal:** Expedite succession
4. Kalpi Desai (Wharton Club of Atlanta)
 - a. **Accountability Buddy:** Jason Rodriguez
 - b. **Goal:** Focus on young alumni
5. Denise Aranoff (Wharton Club of the National Capital Region)
 - a. **Accountability Buddy:** Bruce Aranoff
 - b. **Goal:** Put together strategic plan for renewal cycle with Feb kickoff
6. Jason Rodriguez (Wharton Club of Philadelphia)
 - a. **Accountability Buddy:** Kalpi Desai
 - b. **Goal:** Focus on young alumni
7. Mazen Haffar (Wharton Club of the Middle East)
 - a. **Accountability Buddy:** John Kozora
 - b. **Goal:** Board refresh and get people more excited
8. Jennifer Schick-Gregoriou (Wharton Club of New York)
 - a. **Accountability Buddy:** Andy Cohen
 - b. **Goal:** Share Women Initiative in WCNY

VI. Closing

- Network continues to grow and thrive
 - i. 77 clubs
 - ii. 723 club leaders
 - iii. 2 new clubs added this year
 1. Wharton Club of the National Capital Region
 2. Wharton Alumnae Founders and Funders Association
- The club network has collectively hosted 1000+ events in FY19
- Campaign Engagement
 - i. 22% of all alumni have given to More Than Ever campaign
 - ii. 47% of club leaders have given to More Than Ever campaign