



Cyber & Homeland Security

Innovation Bridge Program
January 12 – 24, 2020

Welcome from the Merage Institute CEO

Dear Participants,

I would like to welcome you to the US-Israel Innovation Bridge Executive Leadership Program for Israeli executives. Over the past years, we have had the privilege and honor of sharing this program with more than 650 Israeli executives who have become Merage fellows.

This has been a wonderful and rewarding experience for my family and I. We have met some of Israel's best and brightest and have established warm friendships with many. But the most rewarding to us has been the response we have received from executives who have, in many cases, found the two weeks they have spent here "a life changing experience."

We have continued to refine this program based on the feedback and observation of previous fellows. It has been carefully and painstakingly constructed to provide you with hands-on, practical tools to enhance your strategic understanding of the American market.

I personally look forward to meeting you in the coming weeks and welcoming you to the program and to our home.

Paul Merage



Founder & Chief Executive Officer
Merage Institute

Welcome from the US-Israel Innovation Bridge Executive Director

Dear Participants,

On behalf of Katherine, Paul, and Lilly Merage, I am pleased to send you the schedule for the Merage Institute's Business Leadership Training Program, which will take place **January 12-24th** in Newport Beach, California.

The faculty is amongst the best in the United States. You will train with top business school professors, respected CEOs, and leading practitioners. You will also have the opportunity to learn from the business experiences of community leaders over evening dinners.

You will find all the pre-reading material and other useful information at the Merage Institute's Website: www.merageinstitute.org. We have planned some leisure activities for you, but your schedule will be intense during both weeks. The schedule below is divided into carefully integrated modules ranging from general marketing to business development principles and strategies applicable to the US market. All sessions will take place in the **Westin** conference room. Evenings will be informal. Dinners will generally be hosted in private homes, and will be followed by discussions with top leaders in the community.

Throughout the program you will be staying at the **Westin South Coast Plaza, 686 Anton Blvd. Costa Mesa, CA 92626. Ph: (714) 540-2500.** Please be sure to arrive in time for an informal gathering and dinner being held on Sunday evening, **January 12th at 18:00.** We will meet in the hotel lobby.

Dress for days and evenings will be business casual. Pack work-out clothes if you wish to exercise. It can get cool, particularly at night, so bring a light jacket or sweater. Please let us know in advance if you have any dietary restrictions.

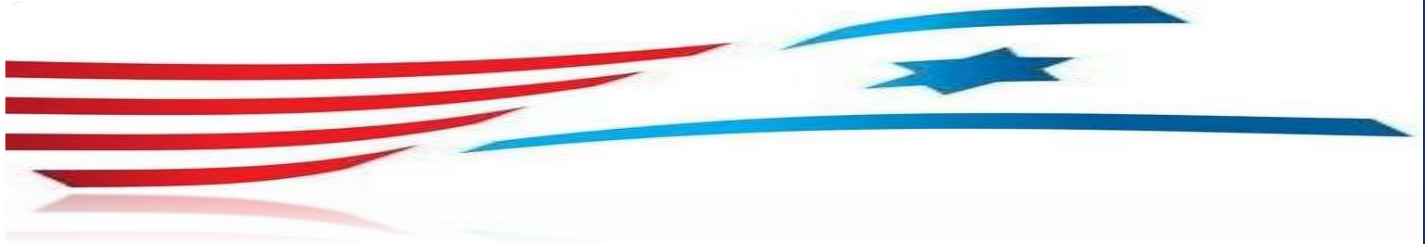
During the week, breakfast will be at 7am. Morning sessions will start promptly at **8am**. *Most evenings we will meet directly outside of the hotel.* Transportation has been arranged for all dinners and evening sessions. Please be ready for pick up **at 18:00 p.m.**

If you have any further questions about the program, please feel free to contact us: Yishay Aizik (yaizik@merageinstitute.org) Israel: 03-7229878 California: (949) 701-7576 or Kristie Eidlhuber (KEidlhuber@merageinstitute.org).

We look forward to your visit.

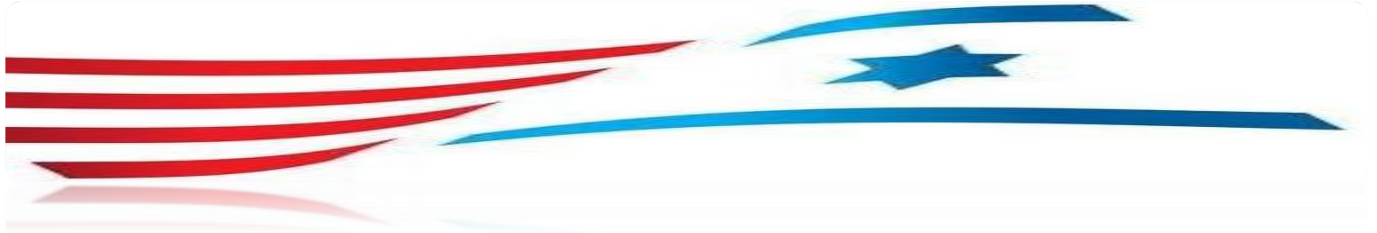
Sincerely,

Yishay Aizik,
Executive Director
Merage Institute,
US-Israel Innovation Bridge



Week One: January 12 - 18

	Morning	Afternoon	Evening
Sun 12	Arrival at Westin/Check-in		18:00 Welcome Dinner at Capital Grille - Costa Mesa with Paul Merage & Faculty
	Breakfast: HOTEL	Lunch: HOTEL	Dinner: HOTEL 18:00
Mon 13	08:00-12:00 Marketing Imran Currim	12:30 – 14:00 The Merage Story Lunch with Paul	14:00-17:30 Marketing (continued) Imran Currim
	Breakfast: HOTEL	Lunch: HOTEL	on the bus 18:00
Tues 14	08:00-12:00 Marketing (continued) Imran Currim	13:00-17:00 Elevator Pitch Joel Calvo	18:00 Dinner hosted by: Molly & Israel Weinberg Presentation: Yonatan Winetraub
	Breakfast: HOTEL	Lunch: HOTEL	on the bus 18:00
Wed 15	08:00-11:00 Elevator Pitch (continued) Joel Calvo	11:00-12:30 CTTSO Adam Tarsi	13:00-17:00 Branding Sasha Strauss
	Breakfast: HOTEL	Lunch: HOTEL	on the bus 18:30
Thurs 16	08:30-12:00 Negotiations Lisa Barron	13:00-17:00 Negotiations (continued) Lisa Barron	18:30 Dinner hosted by: Arik Vrobel Presentation: Rep. Loretta Sanchez
	Breakfast: HOTEL	Lunch: HOTEL	on the bus 17:15
Fri 17	08:00-12:00 Strategic Networking Bruce Money	13:00-17:00 Strategic Networking (continued) Bruce Money	17:30 Dinner hosted by: University Synagogue Dinner & Service
Breakfast vouchers will be in your room upon arrival.			
Sat 18	Free day – no organized schedule/meals. Enjoy!		



Week Two: January 19 - 24

	Morning		Afternoon		Evening
Sun 19			12:00-17:00 Lunch hosted by: Eyal, Yael, Yuval and Irit Aronoff		12:00-17:00 Presentation: Finding Success in the US Federal Market Doug Harpel, Aerospace Intelligence LLC
Free night – no activities/dinner arranged.					
Breakfast: HOTEL		Lunch: HOTEL		on the bus 18:00	
Mon 20	08:00-12:00 Startup Marketing Essentials Michael Swenson		13:00-17:00 Startup Marketing Essentials (continued) Michael Swenson		19:00 Dinner hosted by: Mike & Nancy Meyer Presentation: Victor Mintz , Counsel for the Israeli MOD Mission to the US
Breakfast: ON THE BUS 6:30		Lunch: ON THE BUS 12:00		on the bus 18:30	
Tues 21	08:30-10:00 San Diego Tour: Port Authority, Harbor Police Department SD Chief of Police	10:00-12:00 Strategies for Entering the U.S. Markets Panel Ira Hoffman, Gordon Kesting, Amit Gavish, and Victor Mintz	13:00-15:00 Coping with U.S. Rules Affecting Israeli HLS/Cyber Companies Ira Hoffman	15:00-17:00 SD Cyber Ecosystem Panel Richard Miller, Shelton Darensburg, Jesse Gipe, Steve Kelley, John Peterson, Chris Simpson	17:00 Dinner at Green Acre Campus Pointe
Breakfast: HOTEL		Lunch: HOTEL		on the bus 17:30	
Wed 22	08:00-10:00 Procurement in Law Enforcement Systems/Message to Investors Arie Shen, Kevin McDonald	10:00-12:00 BIRD Foundation Maya Vardi- Shoshani, Dr. Eitan Yudilevich	13:00-16:30 Overview of the Military Branches/USSOCOM LTC (Res) Razi Atuar, LTC Marcos Cervantes, LTC (Ret) Brent Jorgensen	19:00 Networking Event hosted by: Katherine Kahen & Jacob Segal	
Breakfast: HOTEL		Lunch: HOTEL		on the bus 17:30	
Thurs 23	08:00-12:00 Effectiveness and Leadership Alan Sellers		13:00-17:00 Octane Launchpad Jc Ruffalo, Paul Symczak, and Octane panelists		18:00 (for group) 18:30 (for guests) Graduation and Farewell Dinner hosted by Paul and Lilly Merage at Big Canyon
Breakfast: HOTEL					
Fri 24	-THE END-				

Module Details

Monday, January 13, 2020

MODULE: Marketing, Sales and Distribution

Dr. Imran Currim

<https://merage.uci.edu/research-faculty/faculty-directory/Imran-Currim.html>

Monday, January 13, 8:00-12:00 and 14:00-17:30

Tuesday, January 14, 8:00-12:00

Marketing Strategy

This module will help Israeli business people understand and develop alternative marketing strategies for U.S. markets. We will focus on organic growth, when companies grow through existing or new products or services in existing or new markets. Discussions will cover securing new markets through expanding geographically and targeting new segments (or customers). Learning is facilitated through a combination of readings, case discussions, and an assignment.

Text, Articles, and Cases

1. “What High Tech Managers Need to Know About Brands,” *Harvard Business Review*, July August 1999.
2. *Biopure, *Harvard Business School Case* 9-598-150.
3. *Siemens CerberusEco in China: Introducing Low-frills Products in a High-quality Company, *European School of Management and Technology Case* ESMT-311-0123-8

*Please read items 2 and 3 before my Monday session and briefly write your thoughts on each of the questions on the cases (see below). This is important for the group discussion. Items 1, 2, and 3 can be ordered from www.hbsp.com (Harvard Business School Publishing).

Monday, January 13

8:00 – 12:00 Introduction, Alternative Growth Strategies, Honda Motor Car Company

12:00 – 1:00 Lunch

1:00 – 2:30 Biopure

1. How do you assess Biopure’s potential in the human market? The animal market?
2. What are the biggest obstacles to Biopure’s success in the human market? The animal market?
3. How might Oxyglobin be a threat to Hemopure? How might it be an asset to Hemopure?

4. What should Biopure do regarding the commercial release of Oxyglobin? If they release, what price should they set? How should it be distributed?

2:45 -5:00 Siemens CerberusEco

1. What general options does Siemens have to fight emerging low-cost rivals for fire safety and security in China?
2. How would you assess Carsten Liesener's plan for China?

Tuesday, January 14, 2020

MODULE: Marketing, Sales and Distribution

Dr. Imran Currim

<https://merage.uci.edu/research-faculty/faculty-directory/Imran-Currim.html>

Tuesday, January 14, 8:00-12:00

8.00 – 12.00 Customization of Marketing Strategies and Group Discussion

8:00 – 8:15 We will make a list of Israeli products or services for export. The participants will be divided into groups. Each group will select a product or service offered by a group member firm for export.

8:15 – 10.00 Dr. Currim will lead a brainstorming session on key questions and methodology for development of export plan

10.00 – 11.00 Group Develops Marketing Strategy for Israeli Exports to the U.S.

Each group will come up with:

(a) key questions to be answered in order to judge the export potential of the product or service, to be summarized on 1-2 transparencies, and

(b) an outline of a process or methodology for answering the key questions, to be summarized on 1-2 transparencies.

11:15 – 12:00 Group Presentations and Discussion

Each group will present the output of the 9.45-10.45 session, followed by a discussion on how the questions and methodology can be enhanced (15-20 minutes per group).

MODULE: Elevator Pitch

Joel Calvo

Tuesday, January 14, 13:00-17:00

Module Description:

Creating an Unforgettable Elevator Pitch

Almost every entrepreneur has heard of needing an “elevator speech,” a succinct explanation of what you do that is simple enough for your mother to understand and short enough to be delivered in 60 seconds or less. This concise, carefully planned, and well-practiced description of you and your company is as essential as your business card, but surprisingly few entrepreneurs can actually deliver it.

In this session you will learn to write and present an unforgettable “elevator speech” that will grab your audience’s interest and leave them eager to learn more.

Wednesday, January 15, 2020

MODULE: Elevator Pitch

Joel Calvo

Wednesday, January 15, 8:00-11:00 (continued)

MODULE: CTTSO

Adam Tarsi

Wednesday, January 15, 11:00-12:30

Module Description:

Overview of the CTTSO (Combating Terrorism Technical Support Office), with specific attention to the CTTSO mission, current R&D requirements, and business methodology. This will be an opportunity for participants to learn more about the U.S. Department of Defense and, more generally, the federal government.

MODULE: Branding

Sasha Strauss

Wednesday, January 15, 13:00-17:00

Module Description:

A rich introduction to all things branding — from naming and brand architecture to visual design and brand extension. We’ll look at why brands matter, who they matter to, how you can build them into your marketing, advertising and public relations strategies. A great start for professional communicators or those simply interested in brand strategy.

Thursday, January 16, 2020

MODULE: Negotiations

Lisa A. Barron, Ph.D., MBA

Thursday, January 16, 08:30-12:00 and 13:00-17:00

Module Description:

The purpose of this Module is to provide opportunities for participants to develop their negotiating abilities for use in organizational and other settings. The module is premised on the assumption that negotiating concepts are best learned through practice grounded in rigorous analysis and reflection. Theoretical principles and concepts from various reference disciplines (such as social psychology, sociology, and economics) will be

presented through lectures and readings, with the focus primarily on improving practical skills through participation in simulations.

Participants will not only learn to enhance their individual abilities in dyadic and group situations, but also to analyze contexts for the most effective application of these skills.

Negotiation Curriculum:

1. What is negotiation?
2. What is a negotiation issue?
3. Distributive vs. Integrative Negotiations
4. Interests and Positions
 - explanation
 - exercises (these will involve generic situations)
 - wide application of interest and position concepts
5. Additional negotiation concepts

Negotiation Issues

BATNA

Target

Reservation price

6. How to prepare - introduction to the prep sheet

7. Negotiation simulation

- prepare in dyads
- negotiate in dyads (privately)
- group debrief

8. “Informal” negotiations – how to use concepts in situations that don’t necessarily present as negotiations

9. Advanced techniques for multiple-issue negotiations

10. Questions, review, wrap-up

Friday, January 17, 2020

MODULE: Strategic Networking

Bruce Money

Friday, January 17, 08:00-12:00 & 13:00-17:00

Module Description:

This module focuses on networking in a strategic sense; that is, how to form and utilize connections with people for successful entry and growth. As the saying goes, it’s not *what* you know, it’s *who* you know. When it comes to networks, it’s sometimes *how* you know them as well. In the vast market of the U.S., learning the strategic aspects of forming the right kinds of relationships is important to the success of Israeli ventures in America. Through case studies, simulations, and other examples, we will review and explore the frameworks that govern how action-oriented networks are formed and maintained. Participants will analyze various types of networks and their relevance to Israelis (e.g., product- or service-oriented, community, Jewish leaders, professional, etc.). You will also identify and discuss strategies relevant to Israeli businesses operating in the U.S. regarding creating and sustaining networks. Learning how networks operate demonstrates that, as in many areas of business, advantage may not go to the one with the most resources, but rather to the one who knows what’s going on.

A few pre-readings and a case for this course will be sent to you by the Merage Institute. Dr. Money will give you additional articles at the seminar.

Pre-Readings (*Please read before the module begins.*)

1. “How Leaders Create and Use Networks,” by H. Ibarra and M. Hunter, *Harvard Business Review*, January 2007.
2. “A Blueprint for Constructing a Personal and Professional Network,” by T. Krattenmaker, *Harvard Management Communication Newsletter*, April 2002, Harvard Business School Publishing.
3. “Heidi Roizen,” Harvard Business School Case 9-800-228, by Nicole Tempest, 2000, Harvard Business School Publishing. This is a case study about a successful venture capitalist in Silicon Valley who is a very active networker.

Please read through the cases and prepare to discuss the following questions:

1. What are the strengths of Roizen’s network as we see it at the end of the case? The weaknesses?
2. What specific steps did Roizen take to develop her network? To maintain it?
3. What strategic lessons can you apply from Roizen’s experience to your own networking efforts for marketing, financing, and other help?

Schedule

8:00-12:00 The Nature of Networking Concepts

- The “small world” phenomenon
- Networking vocabulary
- Strong vs. weak ties
- The power of “structural holes”
- Networking tools
- Types of networks
- Building and managing your network
- Currencies of network exchange (the right kind of reciprocity)
- Avoiding the “top dog” syndrome

Networking Vehicles

- Wider-scope networks (community, government, etc.)
- Cross-cultural networking considerations
- Specific networking help for Israeli companies in the U.S.
- Strategic blogging

13:00-17:00 Putting Networks to Work for Your Business

- Industry examples of how networks have assisted businesses in U.S.
- Harvard and other case study examples from Israel companies
- Hypothetical mini-cases for networking strategies in various business stages of start-up, growth, etc.

Presenting Your Own Strategic Networking Plan

Based on course learning tools, participants will formulate and briefly present (seven minutes or so) a strategic networking plan for preferably an actual business for a specific business need or situation (marketing, capital, etc.). Questions to consider include:

1. Who are the types of people you eventually need to contact?
2. Through what strategic network will you contact them?
3. What will you specifically do to make contact and follow up?

As a class we will listen to the plans, provide feedback, etc.

Other Readings

Business Press/Newspaper Articles (to be distributed in class, with others)

“The Network Effect,” *The Economist*, January 17, 2015

“The Dunbar Number,” *Fortune*, February 6, 2013

“LinkedIn: How it’s Changing Business,” July 1, 2013

“The Power of Networks,” special issue of *Forbes*, May 7, 2007 (selected articles)

“How to Network—And Enjoy It,” *Fortune*, April 4, 2005

“Passengers Are Cleared to Network about the Cabin,” *New York Times*, September 14, 2004.

“The Fine Art of Following Up,” *Business Week*, October 21, 2002.

“Bridging the Gap,” *Entrepreneur*, November, 2004.

Other Harvard/Stanford Readings (Recommended for further reading—can be ordered online from HBS Publishing website, www.hbsp.com)

“[Discovery Skill #4: Networking-How Interacting with People Outside Your Social and Professional Spheres Can Jump-Start Innovation](#)” by [Jeffrey H. Dyer](#), [Hal B. Gregersen](#), [Clayton M. Christensen](#), 2011, in *The Innovator’s DNA*, Harvard Business School Publishing.

“A Note on Social Networks and Network Structure” by Jeffrey Pfeffer, 2008, Stanford Business School, available from Harvard Business School Publishing.

“How to Build Your Network” by Brian Uzzi and Shannon Dunlap, *Harvard Business Review*, December 2005, Harvard Business School Publishing.

“Are You Ready to Get Serious About Networking?” by S. Parker, *Harvard Management Communication Newsletter*, February 2003, Harvard Business School Publishing.

“The Science of Networking,” by L. Gary, *Harvard Management Update*, January 2004, Harvard Business School Publishing.

“Note on Industry Peer Networks,” by S. Sgourev, 2002, Stanford Business School, available from Harvard Business School Publishing.

“Can a Shy Person Learn to Network?” by H. Ibarra, *Harvard Management Update*, September 1996, Harvard Business School Publishing.

Books on Networking (Recommended for further reading—can be ordered online at www.amazon.com) or from other booksellers)

The Hidden Power of Social Networks, by R. Cross and A. Parker, 2004, Harvard Business School Press, ISBN: 159139270.

Power Networking, 2nd Edition, by [D. Fisher](#), [S. Vilas](#), 2000, Bard Press, ISBN: 1885167474.

Hidden Assets: Harnessing the Power of Informal Networks, by [C. Ehin](#), 2004, Springer-Verlag Telos, ISBN: 1402080816.

Smart Networking, by L. Lynch, 2009, McGraw-Hill, ISBN: 9780071602945

Never Eat Alone, by K. Ferrazzi and T. Raz, 2014, Crown Business, ISBN: 9780385346658

Monday, January 20, 2020

MODULE: Startup Marketing Essentials

Michael Swenson

Monday, January 20, 8:00-12:00 and 13:00-17:00

Module Description:

Startup businesses must fight their way into the marketplace without the benefit of a familiar brand name, big money for flashy advertising campaigns, dream-team corporate talent, or large-scale product development programs. As a result, many new companies start with a whimper and fade out quickly. Yet some new companies start fast and accelerate. This module will help Israeli entrepreneurs and small business owners learn from field-tested entrepreneurs who have trained themselves to see the world of customers and marketing in ways that markedly improve their chances for success.

As you develop your business idea and launch your new venture, consider the following questions: What is your competitive angle? What tactic will you use to break through customer hurdles? How will you turn your good competitive angle into a great one? How will you leverage your competitive angle and begin marketing your startup with little or no money?

After ten years of observing and interviewing over 100 entrepreneurs and starting five new ventures, my colleagues and I developed a framework that provides practical answers to these questions. With the help of entrepreneur mentors, we identified five categories of best practices: (1) Employing a Bottom-Up Mindset, (2) Developing Competitive Angles, (3) Leveraging Leverage, (4) Thinking Big and Acting Big, and (5) Launching and Accelerating the Startup with Marketing Tactics. Each category includes entrepreneur-tested best practices that have contributed to successful new products and businesses.

Schedule

8:00-12:00

- Employing Bottom-Up, Tactic-Driven Marketing and Product Development
- Developing Competitive Angles to Make Competitors Irrelevant
- Using the Ideation Process to Sharpen Competitive Angles

13:00-17:00

- Leveraging Leverage—Working Smarter
- Thinking Big and Acting Big
- Launching and Accelerating the Startup with Marketing Tactics

Tuesday, January 21, 2020

MODULE: San Diego Tour - Port Authority & Harbor Police Department

San Diego Harbor Chief of Police
Tuesday, January 21, 8:30-10:00

MODULE: Strategies for Israeli Companies to Enter the U.S. HLS and Cyber Markets

Ira Hoffman, Gordon Kesting, Amit Gavish, and Victor Mintz
Tuesday, January 21, 10:00-12:00

Module Description:

This seminar led by Ira Hoffman will discuss strategies for coping with U.S. Rules Affecting Israeli HLS/Cyber. Following the seminar will be a panel discussion moderated by Ira Hoffman, with panelists Gordon Kesting (Elbit Systems), Amit Gavish (Voyager Labs), and Victor Mintz (Israeli MOD Mission to U.S.).

MODULE: Coping with U.S. Rules Affecting HLS and Cyber Companies

Ira Hoffman
Tuesday, January 21, 13:00-15:00

MODULE: Panel - San Diego's Cyber Ecosystem

Richard Miller, Shelton Darensburg, Jesse Gipe, Steve Kelley, John Peterson, Chris Simpson
Tuesday, January 21, 15:00-17:00

Module Description:

Panel to be moderated by Richard Miller, President of Sentek Global. Panelists include Shelton Darensburg, CISO, ViaSat; Jesse Gipe, Director, World Trade Center San Diego; Steve Kelley, CRO, GoSecure and CCOE Board Member; John Peterson, Senior Program Manager at Red Horse Corp.; and Chris Simpson, Director for the Center for Cybersecurity, National University and CCOE Board Member.

Wednesday, January 22, 2020

MODULE: Procurement in Law Enforcement Systems & Message to Investors

Arie Shen, Kevin McDonald
Wednesday, January 22, 08:00-10:00

MODULE: BIRD Foundation

Maya Vardi Shoshani, Dr. Eitan Yudilevich
Wednesday, January 22, 10:00-12:00

MODULE: Overview of the Military Branches/USSOCOM

LTC (Res) Razi Atuar, LTC Marcos Cervantes, LTC (Ret) Brent Jorgensen
Wednesday, January 22, 13:00-16:30

Module Description:

This presentation will focus on USSOCOM (US Special Operations Command) with specific attention to USSOCOM mission, current R&D requirements, and business methodology. This will be an opportunity for participants to learn more about the USSOCOM, meet with the client, and get a better understanding of the process and its needs.

Schedule:

- From working as Israeli in the US to Israeli working in the US - LTC (Res) Razi Atuar
- DOD/ SOCOM 101 and How to Approach Your Client - LTC (Ret.) Jorgensen
- Working with USSOCOM - LTC Cervantes

Thursday, January 23, 2020

MODULE: Effectiveness and Leadership; Winning Consistently in Business

Alan Sellers

Thursday, January 23, 08:00-12:00

Module Description:

A review of tools to enhance the effectiveness of the organization (including The Four C's, and The People Model of Business). We will gain a practical perspective on what is required to succeed in growing a company in the United States. This is intended to be a hands-on, participative session in which the members of the class will interact with the presenter and explore how to more effectively conduct business.

MODULE: Octane Launchpad

JC Ruffalo, Paul Symczak, and Octane Panelists

Thursday, January 23, 13:00-17:00

Module Description:

A select group of three companies will each have 10 minutes to present their investor deck presentation to a group of cybersecurity industry experts, including industry professionals, investors, service providers and fellow entrepreneurs. The panelists have expertise in all aspects of commercialization, including operations, regulatory, financing, business strategy, and intellectual property. The panelists will rate presentations on a 30-point checklist/evaluation form that will be compared to the historical database of other similar companies to produce a statistical report. Using this predictive analytics database, LaunchPad evaluates how likely a company is to attract investment capital, and provides valuable feedback for startup companies.

Professors and Presenters



LTC (Res) Razi Atuar
CEO, Zotagroup LLC

LTC (Res) Razi Atuar is the CEO of Zotagroup LLC, a US company specializing in translating Israeli innovative defense technologies into solutions for the US warfighters and law-enforcement. He has advanced training and experience in both military and civilian roles. He has served in and commanded an elite IDF Special Mission Unit, and worked as a Special Agent of the Israeli Secret Service on complex missions in foreign countries. His private sector experience includes co-founding Duke Airborne Systems LTD, serving as CEO of Duke Robotics, Inc, and consultancy at IMI.



Lisa Barron
Senior Lecturer, Negotiations
lbarron@uci.edu

Dr. Lisa Barron is a faculty member of Organization and Management at The Paul Merage School of Business, University of California, Irvine.

Her teaching interests focus on creativity, negotiation, communication, organizational behavior and leadership. She has taught negotiation and leadership techniques to members of large and small organizations including Microsoft, Medtronic, Ingram Micro, State Street, MicroSemi, and Boeing and to executives, career counselors, undergraduate and graduate students, academic staff and faculty. Her current coaching work focuses on helping executives and doctors become more effective leaders, communicators and problem-solvers.

Lisa's research has been published in the journals *Human Relations*, *Career Development International*, and *Journal of Management Inquiry* and has been written about or recognized in *The Boston Globe*, *The Washington Post*, *The New York Times*, *Glamour*, *The Huffington Post*, and the *Orange County Register*. In addition, she has appeared on radio programs for WBUR, KNX, CBS and NPR.

Lisa's negotiation courses and workshops focus on developing people's ability to better understand their underlying interests and negotiate effectively. Her creativity courses focus on developing people's ability to think creatively and to use that thinking to solve problems. She also coaches executives and doctors regarding development of their leadership abilities. Lisa has taught graduate and undergraduate courses in organizational behavior and negotiation at Pepperdine University, The Claremont Graduate School and The Paul Merage School of Business at University of California, Irvine and Executive Education at UCLA and UCI. She has taught negotiation workshops at UCLA, CalTech, UCI, the Keck Graduate School and Utah State University.

Lisa has received sixteen teaching awards for her negotiation and her strategic communication courses. In addition to her academic experience, Dr. Barron has worked as an advisor to undergraduates and as a consultant and trainer at the Data Center at Stanford University. She also has experience marketing IT training programs.

Lisa is a member of the Academy of Management, the American Psychological Association, and the Association for Psychological Types. She is also a certified mediator. She has reviewed for leading journals in the fields of Management and Psychology. She received her Ph.D. in Organizational Behavior from The Anderson School at UCLA.

In addition, she has an MBA from The Anderson School at UCLA and a BA in Psychology and English from Stanford University. She loves to travel, cook (and eat), cycle, read, scuba dive, draw, paint and collect handmade earrings and folk art.



Joel Calvo

Board of Directors, Independent Trustee, C-Level Leader, Keynote Speaker

Joel Calvo is an active board member and trustee, leadership mentor, strategic investor, and keynote speaker, whose career spans 30 years as a C-level executive in the financial services industry. His exceptionally broad range of experience across the financial services industry includes CEO and Board Chairman roles with national mutual fund companies, broker/dealers, municipal finance, commodity firms, hedge funds, insurance companies and real estate partnerships.

Joel has served as the President, CEO and Board Chair of a broad range of financial services institutions including roles as Chairman and CEO of Washington Mutual's WM Group of Funds, WM Financial Services and Washington Mutual Insurance; President of PNC Investments; PNC Capital Markets; and President of Main Street Trading.

Joel served as Chairman and CEO of the WM Mutual Fund Complex encompassing WM Advisors, WM Distributors, and WM Shareholder Services. During his tenure assets under management grew by 110% to \$28 billion in under 5 years; the fund's net sales grew by 400% in 3 years; and was chosen by Barron's as a top 10 performing mutual fund complex nationally moving from #61 to #5 in just 3 years.

He served as Chairman and CEO of WM Financial Services (a national broker/dealer) where he directed 3500+ employees and more than 2,000 licensed brokers. In this role he implemented a combination of innovative and broad-based distribution strategies along with disciplined financial management, and as a result it was ranked as a top 10 performing bank broker/dealer nationally.

He currently serves on the Board of the Vancouver Economic Commission, and has served as a Board of Director, and Executive Committee Member for several civic organizations including the University of California-Irvine School of Business and the Segerstrom Center for the Arts.

LTC Marcus Cervantes

PM SOF Lethality/PEO SOF Warrior, USSOCOM



Imran Currim

Chancellor's Professor at University of California, Irvine

Imran Currim is Chancellor's Professor at the University of California, Irvine, and Director, Beall Center for Innovation and Entrepreneurship. He served the Paul Merage School of Business as Associate Dean for 8 years overseeing Executive, Health Care Executive, Fully Employed and Full Time Masters, Undergraduate and Doctoral Programs.

Professor Currim is the recipient of two of the highest honors in marketing:

- the American Marketing Association William O'Dell Award for "the article judged to have made the most significant five year contribution to marketing theory, methodology, and practice," and
- the American Marketing Association/Houghton Mifflin Distinguished Teaching in Marketing Award, "for contributions to teaching excellence."

Professor Currim's recent papers have been finalists for:

- the American Marketing Association Paul E. Green Award for best paper published in Journal of Marketing Research.
- the European Marketing Academy Award for best paper published in International Journal of Research in Marketing.

Professor Currim received:

- Wall Street Journal's Favorite Professor in an Executive MBA Program.
- Business Week ranked his marketing course taught in the Executive MBA Program #3 in the world.

Professor Currim was recently re-appointed twice as Chancellor's Professor at UCI, to "recognize full Professors who have demonstrated unusual academic merit and whose continued promise for scholarly achievement makes them of exceptional value to the university." He also received one of the highest commendations awarded by the University of California Irvine Academic Senate, the Distinguished Faculty Lectureship Award.

Research

- How customers make choices
- How competitive product and service features, marketing mix variables such as price, sales promotion, advertising, and distribution, and customer variables such as loyalty, choice set effects, and background variables, influence customer choice.
- Published articles on this topic in various journals such as the European Journal of Operations Research, International Journal of Research in Marketing, Inquiry, Journal of Consumer Research, Journal of Marketing, International Journal of Internet Marketing and Advertising, Journal of Marketing Research, Management Science, Marketing Letters, Marketing Science, and Organizational Behavior and Human Decision Processes. Publications are available at <http://web.merage.uci.edu/~currim/publications.htm>
- Served as Area and Associate Editor of Marketing Science, and Management Science for 13 years.
- Serves/d on the editorial boards of the Journal of Marketing Research, International Journal of Research in Marketing, Journal of Interactive Marketing, International Journal of Electronic Business, and International Journal of Internet Marketing and Advertising.

Consulting, Executive Training, and Teaching

- Recognized as an international expert in the area of design and marketing of products and services, and market research.
- Consulted for companies such as Altiris, AT&T, Baxter, Dell, Elcam Medical (Israel), Inabata (U.S. and Japan), Johnson and Johnson, Los Angeles Times, Orange County Register, St. Joseph's Hospital, Twentieth Century Fox, Warner Brothers, and smaller profit and not-for-profit organizations. Conducted executive training programs at companies such as Astro Asia (Thailand), Bioscience Webster, British Petroleum, Children's Hospital of Orange County (CHOC), Conexant, First Auto Works (China), Fluor-Daniel, Hyundai, Ingram-Micro, Microsemi, Merage Foundation Export Program, Orange County Register, PAAMCO, Panasonic Avionics, Suwon (Korea), Shinsegae (Korea), and Triage Consulting.
- Received 25 Excellence in Teaching Awards most of which are for his teaching in the Executive and Fully Employed MBA Programs at UCI, New York University, and UCLA.

Education

- PhD (Business) Stanford University
- MS (Statistics) Stanford University
- MBA University of Wisconsin
- BE (Electrical Engineering) Victoria Jubilee Technical Institute, University of Bombay

Prior Academic Appointments

Before joining UCI in 1989 he was a member of the business school faculties of UCLA Anderson School of Management, New York University Stern School of Business, and Yale School of Organization and Management



Amit Gavish

Executive Vice President - Americas, Voyager Labs

Amit Gavish is the Executive Vice President- Americas at Voyager Labs. Voyager Labs is a market leader in AI driven open source intelligence systems. The company raised over \$100M in investments and its platform is being used by leading agencies in the federal, state & local government as well as major fortune 500 companies.

Prior to joining Voyager Labs, Amit Gavish was the General Manager of BriefCam, the world leading video analytics platform. Amit led the US office from initial start-up mode through the successful acquisition of the company by Canon Japan in 2018.

Amit is a dual citizen of both US and Israel, former deputy director of security at the office of the president of Israel, and lives in Connecticut married with three kids.



Douglas Harpel
Aerospace Intelligence LLC

Douglas Harpel is a defense market expert with 30 years of experience in aerospace and defense industry consulting.

Mr. Harpel specializes in providing market assessment and competitive intelligence as well as business development counsel in the defense and aerospace fields. He has extensive expertise in international armaments cooperation and technology transfer issues and has focused heavily on the forging and sustainment of industrial alliances between U.S. and international government officials and aerospace companies.

Mr. Harpel provides technical research, analysis, writing, planning and client-government liaison in support of the strategic planning and domestic and international business development efforts of his clients in the defense and aerospace arena.

Mr. Harpel has written and published hundreds of articles on an array of defense and national security topics including trans-Atlantic armaments cooperation, naval force projection, nuclear and conventional arms control, C3I issues, NATO force modernization, and missile defense. A graduate of Georgetown University's School of Foreign Service, Mr. Harpel studied at Leningrad State University and is proficient in the Russian language. Mr. Harpel has also completed advanced coursework at the Defense Acquisition University in areas including Acquisition Management, Defense Contracting, and System Test & Evaluation. Mr. Harpel is a certified Project Management Professional (PMP).



Ira Hoffman
Shareholder, Butzel Long
hoffmani@butzel.com

Ira E. Hoffman is a Shareholder in the Washington, D.C. office of Butzel Long, a prominent multi-state law firm. His practice has focused on government contracts and international law for over 30 years, and on cybersecurity law more recently. He also conducts seminars and webinars on government contracts law, including new and emerging requirements for supply chain protection, Foreign Military Sales (FMS), Foreign Military Financing (FMF), and export controls (ITAR, EAR and OFAC sanctions) for the Public Contracting Institute (PCI). He is a Mentor for the Merage Institute; a Fellow for the Cyber Security Forum Initiative (CSFI); and a Senior Policy Adviser for CyberUSA.

Previously, Mr. Hoffman was the Editor of THE ANNOTATED EXPORT ADMINISTRATION REGULATIONS DESK REFERENCE (West 2010-13); authored or co-authored a number of articles on government contracts and international compliance issues, and cyber law and policy; and served as Counsel to the Israeli Ministry of Defense Mission to the U.S., and as Counsel to the Vice Chairman of the U.S. International Trade Commission. He has also taught courses in "International Trade Law" and "European Union Law" as an adjunct professor at the George Mason University School of Law; and was a Research Fellow at Tel Aviv University's Moshe Dayan Center for Middle East and African Studies.

Mr. Hoffman earned a J.D. degree (cum laude) from the University of Miami School of Law, where he was an editor on the Law Review; an M.Sc from the London School of Economics, where he also taught; and a B.A. from the University of Michigan.



LTC (Ret.) Brent Jorgensen

PM SOF-Lethality National Capital Region Liaison, USSOCOM

Retired Green Beret after 25 years of service, among his positions he served as a SOLO (Special Operations Liaison Officer) to Israel. Currently he serves as USSOCOM, PM SOF-Lethality National Capital Region Liaison.



Gordon Kesting

VP at C4I Solutions, Elbit Systems of America, LLC

Gordon Kesting is the Vice President for Command and Control Systems and Homeland Security Solutions of the C4I Solutions Business Unit of Elbit Systems of America, LLC, a leading provider of innovative products and systems solutions for the defense, homeland security, commercial aviation and medical instrumentation markets. Mr. Kesting has held his current position since 2009 and is responsible for providing command and control solutions to the military services and DoD prime contractors.

Mr. Kesting is also responsible for supporting the needs of the Department of Homeland Security through utilizing the breadth of Elbit's security related technologies in areas such as border security, critical infrastructure protection, intelligence, training & simulation and communications, many of which have been developed and deployed in Israel and other countries.

Prior to his current role, Mr. Kesting was the Vice President of Border and Force Protection Systems at DRS Technologies where he led the company's involvement in the SBInet program as the sensor integration partner. Mr. Kesting has worked in the national security industry for over 29 years at companies such as BAE Systems, Raytheon, DRS Technologies, and Northrop Grumman in roles ranging from system engineering, general/program management, business development, strategic planning, and mergers & acquisitions. His experience includes developing electronic systems for a wide variety of national security needs including integrated surveillance systems for security and safety, radar and electro-optical sensors, and flight control and avionics systems for military and commercial aircraft.

Mr. Kesting holds a bachelor's degree in mechanical engineering from the University of Illinois in Champaign-Urbana, a master's degree in electrical engineering from the University of California at Los Angeles, and an MBA from Pepperdine University in Malibu California. He lives in northern Virginia with his wife and three sons.



Josh Kram

Executive Director, Middle East Affairs, U.S. Chamber of Commerce

Josh Kram is Executive Director for Middle East Affairs at the U.S. Chamber of Commerce where he oversees a practice area focused on trade and investment issues in the Middle East.

Kram founded and serves as managing director of the U.S.-Israel Business Initiative, the Middle East Commercial Center, and BusinessH2O: Water Innovation Initiative. In these capacities, Kram leads coalitions of multinational corporations and organizations and develops policies and programs to advance U.S.-Middle East business interests and priorities.

Previously, Josh was the head of government relations for the American Jewish Joint Distribution Committee, one of the largest humanitarian aid organizations in the world, and led Foxhall Strategies, a business advisory firm.

Earlier in his career, Kram advised Fortune 100 companies, political candidates, and startup companies in marketing and branding strategy at firms in Atlanta and Jerusalem.

He also served as deputy political director and foreign policy adviser to Hillary Clinton's 2008 presidential campaign.

Kram has conducted extensive research and has written on the topics of innovation and entrepreneurship. He collaborated on two books related to these topics: *The Great Entrepreneurial Divide* (Rathskeller) and *Start-up Nation: The Story of Israel's Economic Miracle* (Hachette).

He graduated from the University of Florida and holds an M.B.A. from Emory University, where he was a Goizueta Leadership Fellow. He is a Fellow at the Truman National Security Project.



Kevin McDonald

COO/CISO, Alvaka Networks

Kevin B. McDonald, HCISPP is COO and CISO at Alvaka Networks. He has been with Alvaka for 16 years. Kevin is the appointed Chairman of the Orange County Sheriff/Coroner's Technology Advisory Council (T.A.C), a member of the Orange County Homeland Security Advisory Council, FBI Infragard, The High Tech Crimes Consortium and the US Secret Service's Electronic Crimes Task Force. Kevin is a trusted technology and security practitioner and public policy advisor to some of America's most influential people and organizations. He advises corporate executives, federal and state legislators, law enforcement and high net worth individuals among others.



Katherine Merage

Philanthropist, Community Leader

Katherine Merage is a leader in the Jewish community of Los Angeles and Orange County. Indeed, she has been a leader in every community she has ever been part of. Born in Iran, Mrs. Merage is a noted philanthropist and visionary with respect to the health and well-being of the Jewish Community in Israel and the U.S. Her leadership and financial support has helped sustain the quality and related reputation of Hadassah Hospital in Jerusalem. Katherine's generosity contributed to the development of the University Synagogue and the Jewish Community Center in Orange County. Both facilities are named after her and her late husband Andre. Katherine is committed to the growth and development of the Negev in Israel as a welcoming place of opportunity for the Jewish people.



Lilly Merage

Philanthropist

Lilly Merage is an immigrant from Iran. She was, as Paul says, his "partner" in the development of Chef America. Lilly has been and continues to be involved in and a supporter of the arts. She is a leader in the development of the innovative Artists in Residence program, joining the Merage Foundations to Chapman University Film School and the Orange County High School of the Arts. During the summer, fifteen high school students, many of them from low-income and immigrant families, spend two weeks at Chapman College learning filmmaking.



Paul Merage

Founder, Chairman, and CEO of the Merage Institute

Paul Merage is the Founder and Chairman of the Merage Institute. Paul has over 35 years of experience in consumer products. Following ten years of management experience with major packaged food companies, Paul founded ChefAmerica, a startup frozen food company in 1975 along with his brother David. In time ChefAmerica became one of the largest and most profitable privately held food companies in the US. It is best known for Hot Pockets and Lean Pockets. ChefAmerica operated nationally with a workforce of over 2000. ChefAmerica was sold to Nestle in 2002 for \$2.6 billion.

He is now actively engaged in providing vision and strategic direction for the MIG CAPITAL and its affiliate companies. MIG CAPITAL and its affiliates were a natural progression of the need for a platform to carefully and professionally manage, preserve and enhance the family capital. Paul is also highly focused on a mission to "give back to America." Paul and his family created The Merage Institute. The Institute's programs are all aimed at improving quality of life through education. Each has gained positive national and indeed, International attention. He is active with the University of California Irvine's Paul Merage School of Business as the Chair of the Executive Committee of the Dean's advisory board. In addition Paul and the Merage family support a number of other philanthropic efforts. Paul received a B.S. in Economics and a MBA from the University of California.



Bruce Money, PhD

Executive Director, Whitmore Global Management Center, Fred Meyer
Professor of Marketing and International Business
moneyb@byu.edu

Dr. Bruce Money is Executive Director of the Global Management Center and Professor of Marketing and International Business at Brigham Young University's Marriott School of Business. He is an internationally recognized expert in strategic networking and has been a visiting professor at business schools in Austria, Greece, and Singapore. Dr. Money has also received 7 outstanding teaching awards at undergraduate, MBA, and Executive MBA levels.

Prior to his academic career, Dr. Money worked in the marketing of financial services. Proficient in Japanese, his most recent business position was Vice President in the Los Angeles office of The Sakura Bank, Ltd. (now Sumitomo Mitsui), one of the world's largest banks. There he directed the bank's marketing strategy to Fortune 100 prospects for the Western U.S. and managed a corporate loan portfolio of \$200 million. Dr. Money also served as partner in a consultancy to William E. Simon, former U.S. Secretary of the Treasury, for whom he initiated a Japanese investment program. Dr. Money also directed \$1 billion in Japanese debt and equity relationships for The Koll Company (now CBRE), the West Coast's largest real estate developer.

He has taught in over 75 executive education programs, for the University of Southern California, National University of Singapore, and the University of South Carolina, among others. He has acted as training consultant for Adobe, Bayer Pharmaceuticals, CSX World Terminals, Blue Cross Blue Shield, Eurobank, Fujifilm, National Instruments, Nissan, Prysmian Group/Pirelli, Robert Bosch Corporation, Sonoco, and Zions Bank. He holds an undergraduate degree from Brigham Young University, an MBA from the Harvard Business School, and a PhD from the Paul Merage School of Business at University California Irvine, where his dissertation subject was strategic networking and national culture.



Rabbi Arnold Rachlis

University Synagogue

Rabbi Arnold Rachlis is the spiritual leader of University Synagogue in Irvine, California. Born in Philadelphia, Rabbi Rachlis received a B.A. from the University of Pennsylvania, an M.A. from Temple University and ordination and a Doctor of Divinity degree from the Reconstructionist Rabbinical College.

Rabbi Rachlis has taught at Temple University and Spertus College and has published scholarly articles, opinion pieces and poetry in a variety of publications, including *Judaism*, *Reconstructionist*, *National Jewish Monthly*, *Chicago Tribune*, *Chicago Sun-Times*, *Los Angeles Times*, *Orange County Register*, *Jewish Journal*, *Maj'shavot Pensamientos* and *A Psychology – Judaism Reader*.

Rabbi Rachlis has served in Washington, D.C. as a White House Fellow, an honor annually accorded to only a dozen national leaders, and as a Senior Foreign Affairs advisor in the State

Department. He was appointed a regional panelist for the President's Commission on White House Fellowships in both Democratic and Republican administrations, and was also selected as a Fellow in Leadership Greater Chicago. Rabbi Rachlis was chosen by the White House to give the invocation for President Obama's Town Hall meeting and he was also selected as one of the 25 most influential leaders in Orange County.

Rabbi Rachlis has served as Chair of Mazon: A Jewish Response to Hunger, a coalition of over a thousand synagogues and Jewish organizations across the country.

The former rabbi of the Jewish Reconstructionist Congregation in Evanston, Illinois, Rabbi Rachlis was the youngest rabbi ever elected president of the Chicago Board of Rabbis. His service to the community includes the boards or advisory boards of Jewish Fund for Justice, U.S. Interreligious Committee for Peace in the Middle East, Americans for Peace Now, China Judaic Studies Association of Nanjing University, University of Illinois Fund for Gerontology Research, National B'nai Brith Hillel Commission, the American Jewish Committee, New Israel Fund, Orange Coast Interfaith Shelter and the Reconstructionist Rabbinical Association, of which he was a past president. He has also served on the executive committee of the Southern California Board of Rabbis and as a member of the Orange County Board of Rabbis.

For nine years, Rabbi Rachlis hosted *Of Cabbages and Kings* on ABC-TV, as well as a syndicated cable television show on contemporary Jewish issues, *Hayom*. He has appeared as a guest on *National Public Radio*, *CBS*, *CNN* and *PBS*, and has been interviewed frequently by such publications as the *New York Times*. He was profiled in the award-winning documentary film, *The Legacy*, and has served as a Judaica consultant for *Compton's Encyclopedia*.



JC Ruffalo

Director of LaunchPad SBDC and Investor Relations, OCTANe

JC Ruffalo joined the OCTANe team in June 2014 and is the Director of LaunchPad SBDC and Investor Relations. OCTANe has created one of the nation's most dynamic ecosystems to drive technology industry growth in Southern California by connecting ideas and people with resources, expertise and capital. OCTANe LaunchPad focuses on helping later staged startups with their investor deck presentations and capital funding strategies. Alumni companies that have graduated from the OCTANe LaunchPad program have gone on to raise over one billion in capital and produced over ten thousand new jobs. JC Ruffalo has been recognized as an active, young entrepreneur filled with high energy, passion, and new ideas. JC kicked off his entrepreneurial career at the age of nine founding an action sports clothing company. Following the clothing line, he later cofounded an email marketing company as well as a global truck supply company. JC graduated from Chapman University Argyros School of Business in 2011 with a business administration degree with an emphasis in Entrepreneurship and Economics.



Jacob Segal

Principal, Investors Research Group
jsegal@investorsresearchgroup.com

Mr. Jacob Segal, Principal of Investors Research Group (IRG), is an active investor/advisor to Southern California-based companies with sales in the \$3-20 million dollar range. His investment experience includes transactions with companies in the airport concessions business, financial services marketing, wire and cable manufacturing, radio programming distribution, medical devices, intelligent sensors and early stage companies. Mr. Segal is/was an investor/advisor in Creative Host Services, Thaya Communications, Suede AM Pack, American Equity Trust, Rhythm Radio, Electrical Grid Monitoring, Medical Tactile and Earth Bar. Additionally, Mr. Segal participated in the acquisition, management and disposition of over \$300 million in real estate investments including apartment buildings, shopping centers and office buildings. Mr. Segal received his Bachelor's in Economics and Statistics from the Hebrew University in Jerusalem and his MBA from UCLA.

Board of Directors: Romanian American Professional Network, South East Europe Film Festival, Byzantine Latino Quarters - Business Improvement District, Children Uniting Nations, Southern California Israel Chamber of Commerce, Star World Corporation, MTI Foundation

Instructor/Lecturer: Institute of Financial Education, UCLA Extension



Alan B. Sellers

CEO of Precision Restaurant Group LLC
alanbsellers@gmail.com

Alan Sellers is currently CEO of Precision Restaurant Group LLC (a food tech company), having previously served as Chairman & CEO of an emerging medical device company as well as a cybersecurity company. He recently published a non-fiction book, based on 30 years of research in the business world, entitled THE CHECKMATE FORMULA—How Serial Entrepreneurs & CEOs Win Consistently In the “Chess Game” of Business. He is the CEO of Checkmate Protocols LLC, a force multiplier & ally for businesses, entrepreneurs and executives facing serious challenges.

For decades he has observed and studied recurring patterns in business. Sellers has a history with financier/ industrialist/entrepreneurs who are members of the Forbes 400, and with multiple founders, entrepreneurs, CEOs, scientists, engineers, visionaries and inventors. He has been involved for decades at the highest levels with companies that are high tech and low tech, domestic and international, private and public, large and small.

Sellers specializes in technology start-up companies, and is accustomed to rolling up his sleeves in emerging businesses. He has 30 years of senior leadership roles in operations, private equity and Boards of Directors, including multiple emerging growth companies. Sellers has served in numerous C-level operating roles, including Chairman, Chief Executive Officer, Chief Legal Officer, Chief Financial Officer, and Chief Administrative Officer at NYSE (\$5 Billion), NASDAQ (\$25 Million), and/or numerous private companies of varying revenue levels from start-up to mid-size.

He has 15 years of Partner-level private equity and venture capital experience in growing companies and capital structure. He practiced law and public accounting at internationally ranked law and accounting firms. Alan has deep expertise in Mergers & Acquisitions, in deals ranging from \$1 Million to \$5 Billion, and in Special Ops, including dispute resolution and governance. Alan holds a BS in Economics from Yale University, an MBA from The Wharton School, a law degree from Columbia University, and a CPA from the State of New York.

He is a member of the California Bar. In his spare time he has served on the Executive Committees & Advisory Boards at both the Business School and Center for Innovation & Entrepreneurship at University of California Irvine, as an Expert In Residence at UCI Applied Innovation, and as Professor at The Merage Institute's Executive Leadership Program for CEOs in Orange County, California.



Arie Shen

Software creation and implementation, Executive Sales and Business Development, Branding and Marketing, Technology Project Management, Entrepreneur and Investor.

For more than two decades, Shen managed and lead software projects, software creation and Implementations, and ran P&L operations with sales responsibility for publicly traded software vendors. Subsequently, Shen has enjoyed a diverse and successful consulting career growing companies and leveraging business opportunities. With his broad international background, experience and training, he has successfully guided a wide range of companies, including B2B, B2C and non-profit organizations. In addition to technology project management, Shen is expert in creating and implementing management strategy: developing and executing market penetration, defining strategies for growth and allocating resources to achieve them, and selecting and negotiating joint venture opportunities.



Dean Eric R. Spangenberg

Dean of The Paul Merage School of Business, UC Irvine

Eric Spangenberg is the current dean of The Paul Merage School of Business at UC Irvine effective June 1, 2014. Professor Spangenberg received his PhD from the University of Washington in 1990, and then joined the faculty at the Carson College of Business at Washington State University (WSU). He was promoted to associate professor in 1997 and named the Maughmer Freedom Philosophy Chair and Professor of Marketing at WSU in 2003. Spangenberg served as associate dean for Faculty Affairs and Research from 2002 to 2005 and then as dean of the Carson College of Business at Washington State University from 2005 to 2014.

His key accomplishments include establishing entrepreneurial initiatives at WSU now generating multimillion-dollar revenue streams. In addition, Spangenberg oversaw historic increases in MBA and PhD enrollments while strategically revising curricula. He led a team in developing and launching online MBA programs that were ranked No. 1 in 2013 by *U.S. News*

& *World Report*, and online undergraduate degree programs grew by more than 50 percent during his tenure. Additionally, the Carson College's international business programs were consistently ranked by *U.S. News & World Report* in the top 25 during Spangenberg's deanship.

He is a recognized international scholar and committed fundraiser who served in leadership positions on faculty senate and faculty affairs committees before entering administration and is an active volunteer for the Association to Advance Collegiate Schools of Business, the largest and most prestigious international accrediting body for business schools.

Renowned for his work on the effects of olfactory and musical cues in the retail environment and the effects of self-prediction on people's behavior, his research has been published in the field's top journals. His work has been covered in *The Economist*, *Fast Company*, *The New York Times*, *The Wall Street Journal* and *The Washington Post*, and on the BBC, CBS, Yahoo News, Salon and Boing, as well as numerous other international print, television and online media outlets. He has also been consulted by similar outlets as an expert in online education.

He has authored and co-authored more than 40 journal articles, book chapters and other published material focusing on his key research areas, which include marketing and consumer psychology topics such as: question-behavior effects, psychometrics, consumer skepticism toward advertising, environmental psychology and brand extended self-construal. He also is on the editorial review board for the *Journal of Consumer Psychology* and maintains professional affiliations with the Association for Consumer Research, the American Psychological Association and the Society for Consumer Psychology.



Sasha Strauss

Managing Director Innovation Protocol Strategic Brand Development
sstrauss@innovationprotocol.com

Clients, agencies, media and academic institutions call upon Sasha Strauss' award-winning forums worldwide; from Romania to China, Switzerland to Mexico. Media channels like National Public Radio (NPR), Forbes and The Wall Street Journal seek his expertise on branding everything from presidential candidates to innovative start-ups and Fortune 500s.

He has keynoted with notable speakers such as Magic Johnson, Tony Hsieh, Frank Gehry, Biz Stone and Simon Sinek. With over 17 years in strategic brand development, Mr. Strauss has built brands at the world's leading advertising, PR, marketing and branding agencies.

In 2006, Mr. Strauss founded Innovation Protocol, a brand strategy consulting firm that exclusively serves innovators. As the Managing Director, Mr. Strauss leads a team of 30 strategy consultants that serve clients such as Warner Bros, Johnson & Johnson, Korn/Ferry International, ADP, Evite and PayPal. Innovation Protocol also allocates 10% of the company's brand development services to non-profits, with millions of dollars in philanthropic work being delivered since the firm's founding.

When not supporting Innovation Protocol's international clientele, Mr. Strauss teaches graduate brand strategy at USC's Marshall School of Business and Annenberg School for

Communication. After only five years of teaching, both courses have a year waiting list and remain the most impacted courses in both programs.

On the other side of town at UCLA's Anderson School of Management, Mr. Strauss is an Executive in Residence, coaching EMBA's in corporate and professional brand development. Via these professorial roles, Mr. Strauss also teaches at preeminent graduate programs such as MIT Sloan and The Johnson School at Cornell. Mr. Strauss holds a bachelor's degree from UC Irvine, a masters in strategic corporate communication management from USC and an executive business management degree from UCLA's Anderson Graduate School of Management.

Mr. Strauss is a certified Toastmaster, an Entrepreneur's Organization leader, a Big Brother (mentor), an Eagle Scout and a swooning husband.



Michael J. Swenson, PhD

Christensen Professor of Marketing
ms@byu.edu

Michael Swenson is the Christensen Professor of Marketing at the Marriott School, Brigham Young University. He holds a PhD in Marketing from the University of Oregon. Professor Swenson's research interests include sales force performance, marketing strategy, and marketing new ventures. He has published over 50 articles in journals and conference proceedings. In addition, he has published two books--*Marketing Fundamentals* and *Startup Marketing Essentials*. Professor Swenson is an active member of the American Marketing Association.

Prior to his academic career, Professor Swenson worked in business-to-business sales for Xerox and Digital Equipment Corporation (DEC). He has contributed to the success of startup businesses.

Professor Swenson is a recipient of various "teaching excellence" awards. He has taught in executive education programs across the United States and around the world.



Paul Symczak

Vice-President of Entrepreneurship, OCTANe

Paul Symczak is Vice-President, Entrepreneurship for OCTANe and is also the Executive Director of the LaunchPad Small Business Development Center hosted by OCTANe. He is a seasoned senior management executive with diverse experience in the telecom, wireless, online, high tech and broadcast media industries. He was the co-founder and operator of Prism Strategic Consulting LLC and has been actively involved with the CONNECT Springboard entrepreneurial mentoring program in San Diego, CA. Previously, Paul held senior business development, strategic alliances and operational positions with Verizon, GTE and Qualcomm, working in subsidiaries focused on leading edge and innovative products and services. He has also worked with non-profit organizations, including serving as Senior Vice-President, General Counsel and Board Secretary for the Corporation for Public Broadcasting in Washington DC. Paul has a J.D. degree from the George Washington University Law School and a BA in Economics from the University of Pittsburgh.



Adam Tarsi

Chief of Staff, Combating Terrorism Technical Support Office (CTTSO)

Mr. Adam Tarsi is a senior leader the Combating Terrorism Technical Support Office (CTTSO) in. CTTSO executes the US interagency and international research and development program for combating terrorism.

During his tenure, Mr. Tarsi has been the Chief of Staff, International Program Manager, Authorizing Office for all Information Technology, Head of Innovation, and Financial Manager.

Mr. Tarsi has been directly responsible for the daily operations of CTTSO to include strategic planning and execution of contracts, finance, information systems and technology, program resources, external outreach, legal oversight, security, facilities, transportation, SETA support contractors, and administrative staff.

Mr. Tarsi has been the International Program Manager of CTTSO since July 2004. He has oversight of all technical and programmatic execution of the CTTSO international relationships and projects. Mr. Tarsi negotiates and manages formal bilateral relationships with Australia, Canada, Israel, Singapore, and the United Kingdom as well as working relations with France, South Africa, Japan, NATO, and non-governmental organizations worldwide.

Mr. Tarsi attended the National War College and earned a Master's Degree in National Security Strategic Studies in 2004. Other degree programs completed include: Master's Degree in Business Administration with a concentration in Strategy from George Mason University and a Bachelor's degree in Finance from The Pennsylvania State University

Adam and his wife Kelly have three kids, Evan, Jake, and Siena. They live outside of Annapolis, MD.



Maya Vardi-Shoshani

West Coast Representative, BIRD Foundation

The BIRD Foundation (www.birdf.com) was established in 1977 by the U.S. and Israeli governments to develop and fund industrial research and development partnerships between companies from both countries on a project specific basis. The BIRD Foundation supports selected collaborations and provides them with non-dilutive funding of up to 50% of their combined R&D budget associated with the joint project (up to \$1M per project), without receiving any equity or intellectual property rights in the participating companies or in the project itself.

Located in the Silicon Valley, Ms. Vardi-Shoshani is responsible for initiating business activities between U.S. and Israeli companies, business development and relationship management with West Coast hi-tech companies, and strategic growth initiatives.

Before joining the BIRD Foundation, Ms. Vardi-Shoshani worked as a prosecutor at the District Attorney's office in Tel Aviv, Israel, as an attorney and litigator at law firms and at the International Tenders, Contracting and Procurement department at the Israeli Railways. Ms. Vardi-Shoshani was a Psychotechnic Interviewer and Evaluator in the Israel Defense Forces and holds an LL.B., degree from the Tel-Aviv University.



Yonatan Winetraub
Co-founder, SpaceIL

Yonatan has spoken about space technology and radical shifts in the space industry to audiences all over the world and has been featured in the Forbes Israel 30 Under 30 list and the Globes 40 under 40 list. In addition, he participated in an International Space University program exploring the creation of Martian colonies. Yonatan earned a master's degree in electrical engineering and studied computational neuroscience at Tel Aviv University. In addition to his work with SpaceIL, he is currently a Ph.D. candidate in biophysics and a Bio-X Bowes Fellow at Stanford University.



Dr. Eitan Yudilevich
Executive Director, BIRD Foundation

San Diego's Cyber Ecosystem Panelists



Richard Miller
President
Sentek Global



Shelton Darensburg
CISO
ViaSat Inc.



Jesse Gipe
Director
World Trade Center
San Diego



Steve Kelley
CRO & CCOE Board Member
GoSecure



John Peterson
*Senior Program
Manager*
Red Horse Corp.



Chris Simpson
Director & CCOE Board Member
National University Center for
Cybersecurity

Octane Launchpad Panelists



Tim Armstrong
VP, Investor
Sageview Capital



Marc Bellotti
Partner
Fuel Source Partners



John Casalaspi
*Senior Business
Development Manager*
Tech Data - GCC



Shawn Dougherty
Founder & CEO
EXOIO



David Friedman
VP & Angel Investor
Tech Coast Angels



Bob Jacobson
*Principal Business Advisor &
Consulting Leader*
RSM US LLP



Paul Kagoo
VP, Corporate Strategy
Western Digital



Jason Lantgen
Senior VP
JLL



Andrew Lyon
*Founding Dean, Dale E.
and Sarah Ann Fowler
School of Engineering
Chapman University*



James Park
*Sr. Director, Strategy &
Corporate Development
Western Digital Corp.*



Michael Sawitz
*Chief Enthusiasm Officer
FastStart.studio*



Matty Squarzoni
*Co-Founder & CEO
Sitch Ai*



George Stepancich
*Founder & CEO
Invisionate, LLC*



Rob Talbot
*Partner, CMO
Chief Outsiders*



Fred Thiel
*Chairman & Chief Advisor
Thiel Advisors, Inc.*



Troy Varenchik
*Partner
Deloitte Tax LLP*

Merage Fellows – HLS & Cybersecurity 2020

- ❖ Alex Milstein - CYBEAR
- ❖ Alon Abelson - High Lander
- ❖ Alon Kloss - Golddrone
- ❖ Alon Stopel - Elbit Systems Ltd.
- ❖ Anat Leykin - Rafael Advanced Defence Systems Ltd.
- ❖ Aviv Yehezkel - Cynamics Inc.
- ❖ Daniel Ben Dov - NSLComm
- ❖ David Horesh – Toref
- ❖ Dotan Gabai - Tomer - A government owned company Ltd.
- ❖ Eli Cohen - Elta Systems Ltd.
- ❖ Itai Straus - Aircort
- ❖ Itzik Malka - 4M Analytics
- ❖ Liba Shem Tov - Be Safe
- ❖ Mali Marton - Elta Systems Ltd.
- ❖ Moshe Patel - Israeli Missile Defense Organization (IMDO)
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