Steven R. Kursh, Ph.D., CSDP, CLP

August 2013

Professional Experience

Independent Consultant (d/b/a Software Analysis Group – www.softwareanalysisgroup.com)
September 1994 to present

- Provide consulting services to Global 2000/Fortune 500 companies, closely-held businesses, and investors. Clients have included ACS (division of Xerox), AT&T, BAE Systems, Caterpillar, Citibank, FAST Search & Transfer (division of Microsoft), Hartford, HP, IBM, Marriott, SAIC, Sun Microsystems (division of Oracle), Telcordia Technologies, Verizon and private equity firms.

- Provide litigation support services to law firms, including serving as an expert witness or consultant in matters relating to software intellectual property (patents, trade secrets, copyrights and trademarks); the computer software industry (industry-standard practices in licensing, software development, software implementations, management, marketing, valuation, and contract compliance); the Internet (e-commerce); and telecommunications (including mobile).

- Admitted as an expert before arbitration panels, state courts, and federal courts.

Founder and President
Blackacre Financial Software, Inc.
September 1986 to August 1994
(Sabbatical Year from September 1993 to August 1994)

- Responsible for general management of a financial and legal software company. Tasks included negotiating license agreements with clients, joint development agreements with partners, reseller agreements with distribution channel partners, and licenses with other technology developers.

- Developed and executed software architecture and design strategies, including leadership of the company's internal programming and external (*i.e.* outsourced) programming and consulting teams that installed, configured, and customized the company's workflow software at client sites.

- Grew company from zero sales to leading market position with more than 200 independent resellers; clients included Citicorp, Dime Savings Bank, Shawmut Bank, law firms, title insurance companies, and mortgage companies.

- Negotiated sale of company's assets, including copyrighted software and trademarks, to McGraw-Hill in 1993.

Consultant
Omega, Consultants to Bank Management
May 1984 to September 1986

- Provided technical support and revisions to the commercial credit products, including *Commercial Loans to Business* and *Understanding Business Cashflow*, (then) the leading commercial lender training systems in the world.

- Provided consulting services relating to commercial banking and retail banking to financial institutions including Bank of America, Norwest, Wells Fargo, Bank of Boston, and Chase.

- Designed and developed software that linked the company's commercial credit products with credit analysis software; developed tests and statistical norms for evaluating commercial loan officers.

- Awarded Rising Star Award for outstanding contributions to the company.

Academic Appointments

Executive Professor
D'Amore-McKim School *of* Business (also teach courses in the College of Engineering)
Northeastern University, Boston, MA 02115
September 1994 to present; June 1980 to May 1984 (took leave of absence to work in industry)

- Develop and teach courses in the College of Business and the College of Engineering. Courses taught include Finance, Managerial Economics, Telecommunications, and multidisciplinary courses that include topic coverage of software architectures, software project implementations, Information Technology (IT) investments, Mobile E-Commerce, and IT assessments.

- Earned Beta Gamma Sigma Award for Best Teacher and University Excellence in Teaching Award. Teaching evaluations consistently among the highest in the university.

- Develop and teach Continuing Professional Education courses in Business Analytics and Decision Tools, Software Project Management, Innovation and Growth, and Intellectual Property and Valuation to CPAs, attorneys, project managers, and other professionals. Teaching evaluations among the highest for all instructions in these programs.

- Developed and taught classes for Level I and Level II of the Chartered Financial Analyst (CFA) Examination.

- Principal investigator in joint business and engineering education project funded by the General Electric Foundation; awarded grant by the Kauffman Foundation.

- Academic Coordinator, MBA Programs (1996-1998); Director, MBA Team Consulting Projects (1995-1998); serve on committees, including Chair of Undergraduate Programs Committee (1994-1995), Graduate Programs Committee (1999-2000; 2003-2005) and College Technology Committee (2000–2007).

- Faculty Associate, Center for Information Systems Deployment (2004 to 2007).

- Ph.D. Advisor and Dissertation Committee, Ms. Kholoud Khateeb, College of Engineering (2008 to present).

Fulbright Scholar

Leon Kozminski Academy of Entrepreneurship and Management (award granted for my research and teaching at this institution)

Warsaw, Poland

Fall Semester 2005

- Developed and taught courses and conducted research related to innovation, information technologies, and finance.

Instructor

Harvard University, Summer School Programs and Extension School

June 2004 to May 2005

- Developed and taught two courses: Capital Acquisition and the Investment Banking Process; Starting and Growing a Business.

Education and Professional Certifications

University of Pennsylvania

- Ph.D. awarded May, 1983; City and Regional Planning Graduate Group; major course work and concentrations (Preliminary Examinations) in Housing and Real Estate, Finance (Wharton School), and Marketing (Wharton School). Additional course work in Accounting, Economics, Statistics, and Econometrics; learned and used APL, Fortran, SPSS, and BMDP in research and courses.

- Research Fellow (1975 and 1979); Graduate Teaching Assistant (1976-1977).

- Grader, Wharton MBA Marketing and Marketing Research Courses (1979-1980).

- Developed and taught graduate courses in Statistics and Real Estate Finance (1978-1979).

Boston College

- A.B. degree awarded May, 1975, major in Political Science; Honors Program, *Magna Cum Laude*, *Scholar of the College*; learned and used Fortran and Basic for academic courses in Economics.

Certification and Continuing Professional Education

- **CLP** – Certified Licensing Professional. Certification by the Licensing Executives Society (LES), July, 2008. (Certification requires documentation of competencies in business, technology and the law. Candidates must also now take an examination.) Recertified in July 2011 (for July 2011 to July 2014).

- **CSDP** - Certified Software Development Professional. Certification by the Institute of Electrical and Electronics Engineers (IEEE), June, 2004. (Certification requires documentation of at least 9,000 hours of professional work in software development and passage of an examination covering the Software Engineering Body of Knowledge.)

Recertified in June, 2007; Recertified in February, 2010; Recertified in February, 2013 (for June 2013 to June 2016).

- Participate in live and distance-learning courses offered by the Association for Computing Machinery (ACM), the Institute for Electrical and Electronics Engineers (IEEE), and other organizations including Microsoft, IBM, and Oracle, 1987 to present.

- Participated in courses offered by the Institute for Business Appraisers (IBA); passed certification examination for business valuation.

Professional Activities

Editorial

General Editor and Reviewer, Pearson Custom Business Resources Program, Finance and Information Technology, January, 2005 to present.

Patent

Inventor, US Patent 7,110,952, "Computer Accounting Method Using Natural Language Speech Recognition." Patent awarded September 19, 2006.

Book

Minding the Corporate Checkbook: A Manager's Guide for Executing Successful Business Investments, (with James Donovan), March, 2004, (Financial Times Prentice-Hall, New York).

Peer-Reviewed Academic Cases

"Street Furniture: Business Model Design." *Journal of Academy of Business Education*. 14 , Spring 2013, (with Marc Meyer and Fred Crane).

"Teaching Note for Street Furniture: Business Model Design." *Journal of Academy of Business Education*. Spring 2013, (with Marc Meyer and Fred Crane). (The teaching note is provided to professors upon request.)

"ElderAlert: Building a Business Model for a Home Healthcare Automation Venture." *International Review of Entrepreneurship Review*. 10 (4), (with Marc Meyer).

"Teaching Note for ElderAlert: Building a Business Model for a Home Healthcare Automation Venture." *International Review of Entrepreneurship*. 10 (4), (with Marc Meyer). (The teaching note is provided to professors upon request.)

"The Server Consolidation Case." *Journal of Academy of Business Education,* 12, 170-188, (with Marc Meyer and Krishna Valluru).

"Teaching Note for The Server Consolidation Case." *Journal of Academy of Business Education,* (with Marc Meyer and Krishna Valluru)*.* (The teaching note is provided to professors upon request.)

"Bioblood: M&A in the Biotech World." *International Journal of Entrepreneurial Education*, 6, 2, 2008, (with Marc Meyer, John Friar, and Dennis Shaughnessy).

"Teaching Note for Bioblood: M&A in the Biotech World." *International Journal of Entrepreneurial Education,* (with Marc Meyer John Friar, and Dennis Shaughnessy)*.* (The teaching note is provided to professors upon request.)

"Mercedes-Benz: Investing in IT Infrastructure." Ivey School of Business, University of Western Ontario, Harvard Business School Publishing, 2006 (with Michael Hoch).

"Mercedes-Benz: Investing in IT Infrastructure." Teaching Note, Ivey School of Business, University of Western Ontario, Harvard Business School Publishing, 2006. (The teaching note is provided to professors upon request.)

"Implications of Streaming Media: A Technical Note." Ivey School of Business, University of Western Ontario, Harvard Business School Publishing, 2006 (with Michael Hoch).

"Bell Financial Software, Inc." *Journal of Financial Education*, Fall 2005, 31, p. 99-112.

"Teaching Note for Bell Financial Software, Inc." *Journal of Financial Education*, Fall 2005, 31. (The teaching note is provided to professors upon request.)

"Note on Valuing Computer Software and Computer Software Companies." *Journal of Financial Education,* Fall 2005, 31, p. 113-124.

"The Bank for Savings." Case Research Association, January, 1983.

"Teaching Note: The Bank for Savings." Case Research Association, January, 1983.

"The Boston Office Supply Company (A) and (B)." Harvard Business School Publishing, Boston, MA (with John Edmunds). March, 1983.

"Research Ethics and Managers in the Public and Not-for-Profit Sectors (A)." Harvard Business School Publishing, Boston, MA (with Nan Rubenstein), September, 1980.

Expert Witness Testimony

Epicor Retail Solutions Corporation v. Kliger-Weiss Infosystems, Inc., American Arbitration Association, Hearing Testimony, July, 2013.

Covered Business Method Post Grant Review, US Patent No. 7,941,357, Patent Trial and Appeal Board, U.S. Patent and Trademark Office, Alexandria, VA 22313-1450, Markets-Alert Pty. Ltd., v. Bloomberg Finance L.P/, et al, United States District Court, District of Delaware, Deposition testimony, June, 2013.

John M. Floyd & Associates, Inc. v. Fiserv Solutions, Inc., District Court of Collin County, Texas, Deposition testimony, April, 2013.

Corelogic Information Systems, Inc. v. Fiserv, Inc., Interthinx, Inc., and American Flood Research, Inc., United States District Court, Eastern Division of Texas, Deposition testimony, August, 2012; Trial testimony, September, 2012.

Actuate Corporation v. Aon Corporation and TWG Warrant Group, Inc., United States District Court, Northern District of California, Deposition testimony, May, 2012.

My485, Inc. v. Riverside Partners, LLC, d/b/a The Riverside Company and Healthcare First, Inc., District Court of Tarrant County, Texas, Deposition testimony, May, 2012.

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