

Dr. Juan P. Montermoso

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Summary of Qualifications

Education and marketing professional with extensive experience both in graduate level teaching and in high tech marketing and supply chain management. Ability to utilize technology to solve marketing problems as well as to apply marketing frameworks and tools to meet high tech business challenges. Expertise in program planning and effectively linking technology to marketing operations on an international scale. Track record of accomplishments include:

- Offering quality marketing education to MBA candidates from Silicon Valley and Europe
- Providing leadership development programs for corporate executives in Japan, Europe, and the US
- Mentoring Bay Area entrepreneurs for the Clean Tech Open and the SCU CAPE program
- Training operations professionals for APICS certification in supply chain management
- Assisting local non-profits in strategy and marketing on a “pro bono” basis
- Authoring 11 articles in the areas of marketing, customer sales, and IT management
- Growing PC and printer business internationally by 264% over three year time frame
- Establishing CRM framework for North American indirect channel sales force
- Incubating e-business startup capabilities to support six fold increase in business worldwide

Education

Harvard Business School	Doctor of Business Administration Computer Based Systems Doctoral Dissertation: “The Integrative Role of Information Systems for Agribusiness”	Cambridge, MA
Harvard University	Master of Science Applied Math and Computer Science	Cambridge, MA
Yale University	Bachelor of Science (cum laude) Engineering and Applied Science	New Haven, CT

Professional Development

APICS	Certified in Production and Inventory Management (CPIM) Certified in Integrated Resource Management (CIRM) Certified Supply Chain Professional (CSCP) Speaker, APICS International Conferences (1995, 1997, 1999, 2001) Contributing Subject Matter Expert, <i>Identifying and Creating Demand</i> Certification Course
Speaker	Southeast Asia Regional Computer Conferences Philippine Computer Society Conferences International Symposiums for Mini and Microcomputers Hewlett-Packard Intercontinental Dealer Conferences

Lecturer APICS Certification Course modules (CPIM, CIRM) including:
Strategic Management of Resources, Execution and Control of Operations,
Delivering Products and Services, and Integrated Enterprise Management

Teaching Experience

2007-- Adjunct Lecturer Santa Clara University Santa Clara, CA

Instructor for the required case-oriented course on Competitive Marketing Strategy for MBA students at the Leavey School of Business. Also teach elective courses in Services Marketing, Business-to-Business Marketing, and Brand Management. Course ratings of 4.5 or better on scale of 1 to 5. Co-developed a new short course MBA elective on brand leadership.

2006—2008 Adjunct Faculty University of San Francisco San Francisco, CA

Taught both the introductory course and the advanced strategy seminar in Information Systems Management at the undergraduate and graduate level in the College of Professional Studies. Rated outstanding by the students.

2001-2009 Adjunct Lecturer St. Mary's College Moraga, CA

Designed and taught Executive MBA courses in Marketing and in Forecasting/Operations Management for Bay Area and European participants, offering a balanced view of both hi-tech and consumer environments. Primarily utilized the case method, supplemented by team exercises, industry speakers, and lecture/discussions. Received excellent course ratings each quarter.

**1979-81 Assistant Professor of Business Ateneo de Manila University
 Metro Manila, Philippines**

Taught the MBA course in Quantitative Methods and Decision Making. Introduced students to fundamental approach such as decision trees, optimization techniques, and operations research tools.

1970-71 Assistant Professor of Mathematics Ateneo de Manila University

Taught undergraduate courses in calculus and introductory computing systems.

Industry Experience

**Montermoso Associates, Sunnyvale, CA
 2006- President**

Assist high-tech businesses with marketing analysis, program management, and operational effectiveness. Provide management seminars in marketing, program management, supply chain, and global leadership to corporate executives in Europe and Japan. Currently Director for the Silicon Valley chapter of the COO Forum. Supported a channel metrics program for a large Fortune 20 high technology company. Served as a strategy and marketing mentor for several “clean tech” entrepreneurial ventures as well as being a guest speaker for various international gatherings. Devised strategic branding approaches for three Bay Area non-profits on a “pro bono” basis.

Hewlett-Packard Company Cupertino, CA 1981-2005**2002-2005 Manager, Business Planning, Worldwide E-Business and Customer Operations**

Developed strategic and tactical plans to ensure cost-effective flow of product and services content to business and consumer markets over the Internet. Coordinated timely implementation of software projects and measured financial, operational, and market success of the e-business model.

2000-2002 Planning Manager, Business Customer Organization

Formulated strategic programs and web capabilities for the PC Direct business model. Applied a quality approach to global customers through assessment of customer needs and satisfaction. Offered customers an integrated value chain for procurement, deployment, and use of volume products to support 170% annual growth of worldwide direct revenues in one year to \$440 million.

1997-2000 Sales Productivity Manager, Commercial Customer Organization

Provided leadership to extended staff of 15 professionals in managing key Customer Relationship Management initiatives for North America. Guided cross-organizational team in design and development of web-based capabilities for account profiling, funnel management, a marketing encyclopedia, and electronic communication. Enhanced sales and marketing collaboration through implementation of a channel sales metrics project with a budget of \$6.2 million.

1993-1997 Information Systems Manager, Worldwide Channel Programs

Provided strategic leadership and support on Lotus Notes-based capabilities for pricing, reseller profiling, and account management in Europe, Asia Pacific, and the Americas. Deployed next generation communications tools such as desktop videoconferencing.

1988-1993 Intercontinental Channel Marketing Manager

Planned and implemented channel development and program activities through innovative training, incentives, and use of systems. Completed each year at or below targeted expense levels for PCs and printers in Canada, Latin America, and Asia Pacific. Managed extended staff in growing dealer business from \$148 million to \$391 million over the period 1988-1991. During 1991-1993, focused on achieving 35% growth per year in Canada and Latin America.

1986-1988 International Marketing Center Manager

Coordinated Business Systems strategies, programs, product pricing, and introductions for Canada, Latin America, and Australia/New Zealand. Directed staff of nine in providing market development support and sales training to HP sales reps and resellers. Oversaw relations with HP Customer User Groups. Completed final year under target in expenses and over target in dollar business volume.

1981-1986 HP Staff

Served in various marketing and sales support positions including Region Market Development Manager (Intercontinental Sales Operation), Product Manager for Implementation Services (Application Marketing Division), and Sales Development/Trainer (Manufacturing Systems Operation).

First Philippine Holdings Corporation Metro Manila, Philippines**1978-1981 Vice-President, Comptrollership Group**

Designed and implemented a planning and control system used by 13 subsidiaries in this financial-industrial conglomerate. Initiated microcomputer use for evaluating investment proposals and established group wide EDP policies. Managed five professionals in assessing subsidiary performance and conducting operational audits. Presented plans annually to the Board of Directors.

Honors and Awards

National Science Foundation Traineeship; Harvard University Teaching Fellow; Designated as a Philippine Government Homecoming Scientist Awardee (1980)

Publications of Dr. Juan P. Montermoso

“Initial Reference Customer Selection for High Technology Products,” *Management Decision*, Volume 45, Number 6, June 2007, pp 982-990

“Leveraging the Customer Life Cycle for a Competitive Edge,” *2001 APICS International Conference Proceedings*, San Antonio, TX, October 28-31, 2001, pp. 1-6

“Customer Loyalty Through Internet-Based Knowledge Management,” *1999 APICS International Conference Proceedings*, New Orleans, LA, October 24-27, 1999, pp. 173-176

“TKO: A Breakthrough Approach to Maximizing the Value of Internet Technology,” *1997 APICS International Conference Proceedings*, Washington, DC, October 26-29, 1997, pp. 325-328

“Using Information Technology to Forge Robust Organizations,” *Congress for Progress XXI Conference Proceedings*, Hershey, PA, April 17-19, 1996, pp. 55-61

“Empowering the Employee for the Information Superhighway,” *1995 APICS International Conference Proceedings*, Orlando, FL, October 22-27, 1995, pp. 430-434

“A Microcomputer-Based Approach to Computer Concepts for Managers,” *International Society for Mini and Microcomputers Fourteenth International Symposium*, San Diego, CA, January 1981, pp. 53-55

“Toward a Strategy for Data Base Implementation in a Developing Country,” *South East Asia Regional Computer Conference Proceedings*, Jakarta, Indonesia, October 21-24, 1980, pp. 57-64

“The Interpersonal Style of Effective EDP Managers,” *Philippine Computer Society CHIPS80 Convention Proceedings*, Manila, Philippines, March 17-21, 1980

“The Microcomputer: Versatile Tool for Developing Country Computerization,” *Proceedings of the ISMM International Symposium*, Asilomar, CA, January 1980, pp. 168-171

“Supportive Information Systems for Agribusiness Management,” *South East Asia Regional Computer Conference Proceedings*, Manila, Philippines, September 4-8, 1978, pp. 199-205