

EDUCATION:

CANDIDATE FOR DOCTOR OF PHILOSOPHY, Strategic Management <i>York University – Schulich School of Business</i>	In progress (Expected 2014)
MASTER OF APPLIED SCIENCE, Technology Innovation Management <i>Carleton University</i>	Dec, 2008
BACHELOR OF ARTS, Psychology <i>Carleton University</i>	Jun, 2006
BACHELOR OF ENGINEERING, Computer Systems, <i>with distinction</i> <i>Carleton University</i>	Jun, 2005

PEER-REVIEWED PUBLICATIONS and CONFERENCES:

- **Imploding vs. Drifting Apart – The Shifting Density of Free/Libre/Open Source Communities.** *Presented at the IEEE/FOSSLC SC2011 Conference.* Ottawa, ON. August, 2011.
- **The Frontiers of the Philosophy of Science in Strategic Management.** *Presented at ASAC 2011.* Montreal, QC. July, 2011
- **Every Eyeball Has Value!: The User as a Passive Participant in Open Source Ecosystems.** *Presented at the IEEE/FOSSLC SC2010 Open Source Technology Showcase Conference.* Ottawa, ON. August, 2010.
- **Understanding the User: The Marginalized Open Source Contributor.** *Proceedings of the 2010 Cambridge University Interdisciplinary Conference.* University of Cambridge. Cambridge, U.K. June, 2010. (Refereed conference)
- **Integrating Lessons from Other Disciplines into Open Source Practice.** *Open Source Business Resource.* August, 2010. (Peer-reviewed publication)
- **Growing Revenue with Open Source.** *Open Source Business Resource.* June, 2010. (Peer-reviewed publication)
- **The Business of Open: Common Pitfalls for Open Source Startups.** *Open Source Business Resource.* February, 2010. (Peer-reviewed publication)
- **What's the Value of an Eyeball? Passive Participation in Open Source Ecosystems.** *Open Source Business Resource.* January, 2010. (Peer-reviewed publication)
- **Switching Barriers Between Microsoft Office and OpenOffice.org: The User Perspective.** *Presented at the FOSSLC SC2009 Conference.* May, 2009.

JOURNAL EDITORIAL and GRANT REVIEW DUTIES:

- **Open Source Business Resource.** August, 2010 Issue: Interdisciplinary Lessons. *Guest editor for issue.* (Peer-reviewed publication)
- **Open Source Business Resource.** June, 2010 Issue: Growing Business. *Guest editor for issue.* (Peer-reviewed publication)
- **Foundry Program.** Member of review board for \$15,000 innovation and entrepreneurship grants. Carleton University Technology Transfer Office. 2006-2007.

THESIS, UNPUBLISHED and WORKING PAPERS:

- **Reassessing the User Innovativeness Scale: The Case for Importance as Distinct from User Innovativeness and Product Involvement.** *Working paper (Unpublished).* In progress.
- **Different Strategies for the Same Problems: Unexplored Cross-Pollination Between the Alliance and Acquisitions Literatures.** *Working paper (Unpublished).* In progress.
- **Assessing the Switching Barriers Between Microsoft Office and OpenOffice.org.** *Master's Thesis (Unpublished).* January, 2009.

- **Strategizing Consumer Value Creation.** *Working paper (Unpublished).* In progress.
- **Make, Buy, or Open Source: Maximizing Appropriable Value by Reducing the Transaction Costs of Leveraging Knowledge Assets.** *Working paper (Unpublished).* In progress.
- **The Frontiers of Philosophy of Science in Strategic Management.** *Working paper (Unpublished).* In progress.
- **Revisiting Traditional Consumer Marketing Measures for Application to Software Adoption Modeling.** *Working paper (Unpublished).* In progress.
- **Open Architecture: Collaborating on a World Scale.** *Working paper (Unpublished).* Co-authored with Sarah Gelbard. In progress.
- **Bending it like Beckham: Shifting Gender Roles and a Marketing Revolution.** *Working paper (Unpublished).* Co-authored with Teresa Jewell. In progress.
- **Starting projects and attracting developers: What practitioners say and don't say on community forums.** *Working paper (Unpublished).* Co-authored with Steven Muegge. In progress.
- **OS Strategy Research Blog.** *Collaborative business strategy research discussion space.*
<http://blog.osstrategy.org>
- **Action Plan for Skype Software Limited: An Open Source Business Strategy.** *Position paper (Unpublished).* March, 2007.

TEACHING and RESEARCH EXPERIENCE:

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| Sep, 2010 to Present | Schulich School of Business, York University, Toronto ON |
| RESEARCH ASSISTANT | <ul style="list-style-type: none"> • Researching and contributing to current topics on strategic management • Developing research and theory-based papers for publication in peer-reviewed journals • Gathering and analyzing data to support scholarly research activities |
| Nov, 2009 to Present | OSStrategy.org, Toronto ON |
| PRINCIPAL CONSULTANT | <ul style="list-style-type: none"> • Conducting research on intellectual property strategy for small and medium enterprises with a focus on open source business models • Reviewing IP portfolio management for companies using evidence-based research approach to model best strategic fit for company's industry and position • Assisting startups with ecosystem review, and positioning • Contributing research papers to business publications • Attending academic and business conferences • Developing company strategy and marketing plan • Identifying collaborative research opportunities |
| Sep, 2006 to Apr, 2008 | Technology Innovation Management Dept., Carleton University, Ottawa ON |
| TEACHING & RESEARCH ASSISTANT | <ul style="list-style-type: none"> • Researched and contributed to current topics on technology management, policy, strategy, process efficiency, client/supplier relations, stakeholder motivations and participations in inter-corporate ecosystems, government technology policy evolution, open source business models, modern information technology tools and processes, agile project management, corporate decision making structures, cost-benefit and return on investment analyses, forecasting, entrepreneurship and startup models, end user feedback and perception management, and more. • Assisted in the instruction of students on management of new products, manufacturing processes, theories, concepts of business strategy, entrepreneurship, financing, growth strategy and the technology adoption life cycle, marketing, and principles of academic research |
| Oct, 2006 to Apr, 2007 | Carleton University Technology Transfer Office, Ottawa ON |
| INNOVATION CONSULTANT | <ul style="list-style-type: none"> • Assessed, evaluated, conducted reviews and offered recommendations on technology commercialization initiatives by faculty, staff and students at Carleton University • Developed funding proposals for potential investors • Provided expert consultation on mapping of business processes to the successful |

commercialization of new technologies

- Developed and reviewed business plans for startup companies, including budgets, project timeframes, staffing, investment and other funding sources, patent and other legal obligations, and supplier chains, to maximize their potential for success
- Provided expertise in modeling of business processes in a startup company

INDUSTRY EXPERIENCE:

Jun, 2008 to Aug, 2010

Elections Canada, Ottawa ON

PROJECT LEADER

- Managed employees and consultants engaged in IT innovation research
- Managed IM/IT projects to address the needs of the Directorate
- Conducted research and development on technologies suitable for use during federal elections and referendums

Mar, 2007 to May, 2008

IBM, Ottawa ON

SYSTEMS

ADMINISTRATOR

- Conducted research and development on technologies to support clients
- Developed policies and strategies for management of IT activities

Sep, 2002 to Jun, 2010

MekTek Solutions, Ottawa ON

PRESIDENT

- Managed business stakeholder relations through networking and meetings with decision makers, and end users to identify operational requirements of systems, goals, and financial constraints.
- Innovated methodologies and generated unique solutions to customer problems
- Managed network of consultants with broad skills sets to complete projects to better streamline customer IT practices
- Researched market potential and viability of numerous hardware and software products for company's business line
- Researched and implemented company policies regarding product selection, expenditures, financial projections and future projects.
- Provided business systems consulting and analysis

May, 2003 to Apr, 2004

NAFTA Secretariat - Canadian Section, Ottawa ON

SYSTEMS

ADMINISTRATOR

- Researched, reviewed, analyzed, designed, planned and implemented new enterprise network system setup to improve efficiency and streamline processes for internal and external users of NAFTA IT infrastructure.
- Researched, analyzed and advised on mapping of XML-based technologies to internal processes
- Participated in design sessions, technology reviews, budget planning, and prototyping of NAFTA digitization initiative

Oct, 1999 to Feb, 2001

Nortel Networks, Ottawa ON

WEB ADMINISTRATOR /
PROGRAMMER

- Designed, managed, and maintained essential departmental software, web pages and organizational charts.

Feb, 2001 to May, 2001

MediaHouse Software Inc. (Now Microsoft), Hull QC

SOFTWARE

DEVELOPER

- Designed and implemented network and web monitoring and analyzing software
- Researched development potentials for expansion modules

Sep, 2005 to Jan, 2007

Ottawa West-Nepean Federal Liberal Association, Ottawa ON

TECHNICAL

ADVISOR

- Researched and drafted proposals for implementation of current technologies for use in marketing and communications strategies
- Sat on board of directors to advise on development of information technology policies and practices
- Provided cost-benefit analyses for web technologies

ADDITIONAL EXPERIENCE AND SKILL SET:

Business Administration/Management and Entrepreneurship:

- Management of emerging telecommunications technology and network services
- Strategic Action, Growth, and Marketing plan creation and implementation; Venture strategy development; Disruptive technology assessment; Opportunity definition; Industry forecasting; Assessment and strategy in early market environments; Competitive differentiation, intelligence and strategy; Innovation best practices
- Industrial marketing and commercialization: Market opportunity assessment; Market segmentation and analysis; Marketing program implementation and evaluation; Product positioning; Product marketing mixes
- Managerial economics: Economic and risk assessment; Pro-forma financial forecasting; financial planning; Pricing strategy
- Entrepreneur, business plan/model development and startup planning

Social Sciences Research Methodologies and Practices

- Experience designing social science research studies using formalized methodologies
- Experience conducting survey based research
- Well-read in business, psychology, law, sociology, and related areas, with strong interest in research opportunities related to strategic management of intellectual property in large firms

AWARDS AND SCHOLARSHIPS:

- 2011 – ASAC 2011 Best Reviewer Award
- 2010 - Schulich School of Business Scholarship of Merit for PhDs - \$12,100.00
- 2008 - Technology Innovation Management Master's Research Grant - \$1657.76
- 2008 - Technology Innovation Management Master's Scholarship - \$1249.92
- 2007 - Technology Innovation Management Master's Research Grant - \$2468.70
- 2007 - Technology Innovation Management Master's Scholarship - \$1875.00
- 2006 - Technology Innovation Management Master's Research Grant - \$ 828.88
- 2006 - Technology Innovation Management Master's Scholarship - \$625.00
- 2005 - Carleton University Wesley Nicol Award - \$3,000.00
- 2005 - Carleton University Entrepreneurialist Culture Award - \$200.00
- 2005 - Carleton University IEEE Papers Competition Award - \$50.00
- 2000 - Carleton University Scholarship - \$6,000.00
- 2000 - Nortel Networks Scholarship - \$1,000.00
- 1999 - Nortel Networks Spot Award for Initiative - \$100.00
- Three-time semi-finalist - \$10,000 Ottawa Technology Venture Challenge Business Competition 2005/2007

PROFESSIONAL ASSOCIATIONS:

- Licensed Professional Engineer (P.Eng.) with Professional Engineers of Ontario (PEO)
- Sit on Board of Directors for Free and Open Source Software Learning Center (FOSSLC)
- Member of IEEE and IEEE Engineering Management Society
- Member of Planetary Society
- Member of Electronic Frontier Foundation (EFF)
- Member of Free Software Foundation (FSF)
- Member of TalentFirst Network
- Member of Centre de Recherche et Développement Expérimental en Informatique Libre (CREDIL)
- Member of GOSLING Ottawa/Toronto