

Charles Daniel Schewe

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PERSONAL INFORMATION:

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EDUCATION:

Honorary Doctorate, University of Lund, Sweden, 2012
Ph.D., Marketing, Northwestern University, 1972
M.B.A., Marketing, University of Michigan, 1965
A.B., Economics, University of Michigan, 1964
Also attended Xavier University, 1960-61

AREAS OF INTEREST

Strategic Planning, Consumer Behavior, Marketing Research, Marketing Implications of an Aging Population, Health Care Marketing, Generational Cohort Segmentation.

TEACHING EXPERIENCE:

UNIVERSITY OF MASSACHUSETTS, Amherst, Mass., Present Position, since September 1972, Full Professor, teaching Introduction to Marketing, Marketing Information and Decision-Making (undergraduate and graduate levels), Buyer Behavior (undergraduate and doctoral), Marketing Environment (graduate level), Marketing Intelligence (undergraduate and graduate), International Marketing, and Marketing Management (undergraduate and graduate level), Tools for Professional Success in Marketing (undergraduate Commonwealth College Honors students).

MASSEY UNIVERSITY, The School of Business, Albany, New Zealand, 2010, Fulbright Senior Scholar teaching Consumer Behavior and conducting research on cohorts as well as giving faculty seminars at six universities around New Zealand.

STOCKHOLM UNIVERSITY, The School of Business, Stockholm, Sweden, 2010, Visiting Professor conducting faculty seminars and research on Millennials with some guest lecturing.

UNIVERSITY OF LUND, The Holger Crafoord School of Economics and Management, Lund, Sweden, 1990-3, appointment as the Findus Visiting Professor, teaching marketing management, counseling doctoral students, and conducting management seminars.

ROOSEVELT UNIVERSITY, Chicago, Illinois, 1970-72, Assistant Professor, teaching Introduction to Marketing, Marketing Management, and Introduction to Marketing (graduate level).

LOYOLA UNIVERSITY, Chicago, Illinois, 1970, Lecturer in Marketing, teaching Introduction to Marketing.

ILLINOIS INSTITUTE OF TECHNOLOGY, Chicago, Illinois, 1970, Lecturer in Marketing, teaching Introduction to Marketing (graduate level).

UNIVERSITY OF ILLINOIS AT CHICAGO CIRCLE, Chicago, Illinois, 1967-68, Lecturer in Marketing, teaching Introduction to Marketing.

LANSING COMMUNITY COLLEGE, Lansing Michigan, 1966-67, Instructor in marketing, teaching Introduction to Marketing, Marketing Management, Sales Force Management, Advertising, Retailing, and Public Relations.

BUSINESS EXPERIENCE:

Lifestage Matrix Marketing, Amherst, Massachusetts, 1994-Present. Principal and partner, consulting included positioning organizations for an aging marketplace. A partial list of client engagements include Eastman Kodak, Kellogg USA, The Vermont Country Store, Viacom, Levi Strauss, Time, Inc., Coca-Cola, The Goodlife TV Channel, The California Prune Board, The State of Pennsylvania, The Forethought Group (a Division of Batesville Casket), Otterbein Retirement Communities and Time Warner Cable.

The Alexis Group, Washington, D.C., 1992-1993. Responsibilities included consultation to nurseries and gardening products manufacturers on the impact and implications of an aging market place.

Spalding Sports Worldwide, Chicopee, Massachusetts, 1991-1992. Consultant, responsibilities included competitive and industry analysis of customer service activities conducting a survey of dealer perceptions of Spalding's customer service.

International Business Machines, White Plains, New York, 1990. Consultant, responsibilities included competitive analysis and market segmentation.

Age Wave, Emeryville, California, 1990-1993. Executive Consultant, responsibilities included an industry structure analysis and competitive intelligence, product analysis and strategic plan development for a mature adult program for a retail chain. Clients advised include RJR Nabisco, Procter & Gamble, Grand Metropolitan, Kraft General Foods, Sara Lee, RJR Tobacco, Kmart, and Lucky Stores.

International Business Machines, White Plains, New York, 1989. Consultant, responsibilities included competitive intelligence.

Echo Village Corporation, Amherst, Massachusetts, 1989. Consultant, responsibilities include designing concept for an industrial park.

United Engineers Inc., Holyoke, Massachusetts, 1989-1991. Consultant, responsibilities include audit of marketing activity, development of strategic plan, and competitive intelligence.

International Business Machines, Milford, Connecticut, 1987. Consultant, responsibilities included competitive intelligence.

International Business Machines, White Plains, New York, 1987. Consultant, responsibilities included designing and moderating focus groups.

InterSearch, Horesham, Pennsylvania 1987. Focus group moderator, responsibilities included conducting focus groups in cities around the United States.

O'Connell Engineering and Financial, Inc., Holyoke, Massachusetts, 1987-1988. Consultant, responsibilities included auditing the company, developing, conducting a strategic plan, and designing a senior living community concept.

International Packaging Systems, Inc., Norwalk, Connecticut, 1985. Consultant, responsibility centered on strategic plan development.

International Business Machines, Milford, Connecticut, 1984. Consultant, responsibility was to critique all the steps in a proposed market research study.

Saint Mary of Nazareth Hospital, Chicago, Illinois, 1984. Consultant, responsibilities including business audit with emphasis on improving marketing activities.

Stephen Winchell & Associates, Inc., Washington, D.C., 1984. Consultant, responsibilities included business audit with emphasis on marketing.

CBS Educational and Professional Publishing, New York, New York, 1983. Consultant, activities include developing and implementing a strategic marketing plan for telecourses aimed at two-year and four-year colleges.

Buckheim and Rowland, Inc., Ann Arbor, Michigan, 1982. Consultant, activities included coordinating and collecting data from national sample of doctoral students for study of University Microfilms International, a Division of Xerox Corporation.

Data Resources, Inc., Lexington, Massachusetts, 1980-81. Consultant, activities included conducting a survey of customers.

Nolan, Norton and Company, Inc., Lexington, Massachusetts, 1980. Consultant, activities including conducting a marketing audit of the consulting firm's activities, analyzing the selling process involved in marketing consulting services.

McGraw-Hill Book Company, New York, New York, 1976-7. Consultant, activities include analyzing the marketing of college textbooks, improving personal selling program, and conducting focus group sessions to uncover marketing problems.

WHMP, Northampton, Massachusetts, 1976. Marketing Research, activities included conducting a telephone survey to identify listener characteristics and program preferences for FM radio station.

Toolkraft, Springfield, Massachusetts, 1976. Marketing Research, activities included conducting a survey of power tool buyers to identify buyer characteristics, important power tool attributes, and market potential.

Field Enterprises, Inc., Merchandise Mart, Chicago, Illinois, 1971. Consultant, activities include multivariate analysis of World Book mailing list to increase selectivity of mailing and specification of data needs for marketing information system.

Direct Lumber, Inc., Burr Oak, Michigan, 1969 and 1966. Consultant, activities included conducting corporate image surveys, reorganizing financial structure, developing sales force compensation program, and improving promotional campaigns, and determining optimal level of sales effort.

Donald R. Booz and Associates, Chicago, Illinois, 1968. Consultant, activities included canned fruit and vegetable industry study and analysis of problems facing various associations in Chicago area.

United Air Lines, Elk Grove, Illinois, 1967. Marketing Analysis, activities included forecasting air traffic and passenger load factors.

Standard Ready-Mix Co., Lansing, Michigan, 1967. Consultant, activities included improving the routing of trucks and increasing the efficiency of operation.

Standard Building Supply Co., Lansing, Michigan, 1967. Consultant, activities included conducting surveys of consumer preferences and analysis of past data.

General Motors--Styling, Warren, Lansing, Michigan, 1965. Market Research, activities included conducting surveys of consumer preferences and analysis of past data.

General Motors--Chevrolet, Detroit, Michigan, 1964. Accounting, activities included recording and paying bills for administrative supplies.

DISSERTATION

"The Impact of Marketing Information Systems on the System User's Attitudes and System Usage." This research discovers the important variables influencing the usage of computer-based information systems by marketing decision-makers. The variables studied include component elements of the information system (e.g., speed, ease of use) as well as other significant variables (e.g., system user's age, education, top management support of system). The importance of these variables upon user's attitudes and system usage is determined by a stepwise regression analysis.

PUBLICATIONS

Books

Managing by Defining Moments: Innovative Strategies for Motivating 5 Very Different Generational Cohorts. co-authored with Geoffrey E. Meredith and Alexander Hiam (New York: John Wiley: 2002)

Defining Markets, Defining Moments: America's 7 Generational Cohorts, Their Shared Experiences, and Why Businesses Should Care (co-authored with Geoffrey E. Meredith) (New York: John Wiley: 2002, Revised 2007).

The Portable MBA in Marketing (co-authored with Alex Hiam) (New York: John Wiley, 1992). (Second Edition, Spring, 1998).

Exploring The World of Business (co-authored with Ken Blanchard, Alex Hiam and Robert Nelson) (New York: Worth Publishers, Inc., 1996).

Marketing Management Issues in Ambulatory Health Care, (Binghamton, New York: The Haworth Press, 1991).

Marketing to an Aging Population: Selected Readings (co-edited with Anne L. Balazs) (Chicago: The American Marketing Association, 1990).

An Annotated Bibliography for Marketing to an Older Population (co-authored with Anne L. Balazs and Harlan E. Spotts, Jr.) (Chicago: The American Marketing Association, 1989).

Marketing: Principles and Strategies (New York: Random House, 1987).

The Elderly Market: Selected Readings (Chicago: The American Marketing Association, 1985).

Marketing: Concepts and Applications (co-authored with Reuben M. Smith) (New York: McGraw-Hill Book Company, 1980, 1983). Book has been translated into Spanish and Portuguese and has Canadian and English reprint editions.

Study Guide to Accompany Schewe and Smith, Marketing: Concepts and Applications (co-authored with Robert Weber) (New York: McGraw-Hill Book Company, 1983).

Marketing Information Systems: Selected Readings (Chicago: The American Marketing Association, 1976).

Articles

“Health is an Issue of Mind Over Matter, If You Don’t Mind, It May Actually Matter!”: An Empirical Examination of Subject Age in Older Adults,” (co-authored with David Agogo, Fatima Hajjat, George Milne and Bruce Perrott, *Health Marketing Quarterly*, Vol. 33, No. 1 (2017), pp. 62-79.

“Time-benders: A Model of Subjective-Aging in Aging Adults,” (co-authored with David Agogo and George Milne), *Health Marketing Quarterly*, Vol. 31, No. 4 (2015), pp. 383-398.

“Empirical Examination of Subjective Age in Older Adults,” (co-authored with David Agogo, George Milne and Fatimah al-Hajjat), *Proceedings of AMHCR Conference* (2014), pp. 9-25.

“If You’ve Seen One, You’ve Seen Them All!’ Are Young Millennials the Same Worldwide?” (co-authored with Kathleen Debevec, Thomas Madden, Anders Parment, Andrew Murphy, and William Diamond), *Journal of International Consumer Marketing*, Vol 25, No. 1 (January, 2013), pp. 3-15.

“Are Today’s Millennials Splintering into a New Generational Cohort? Maybe!” (co-authored with Kathleen Debevec, Thomas Madden and William Diamond), *Journal of Consumer Behavior*, Vol. 12, No. 1 (January/February, 2013), pp. 20-31.

“Do Defining Moments Leave their Mark for Life? The Case of Sweden,” (co-authored with Benny Carlson, Per Broome and Ingvar Holmberg), (2011) published in the MIM Working Paper Series at the University of Malmo:

<http://www.mah.se/english/research/Our-research/Centers/Malmo-Institute-for-Studies-of-Migration-Diversity-and-Welfare/Publications1/MIM-Working-Papers-Series/MIM-working-papers-series-111-Do-Defining-Moments-Leave-Their-Mark-for-Life-The-Case-of-Sweden/>

“Generational Cohorts Hold the Key to Understanding Patients and Health Care Providers: Coming-of-Age Experiences Influence Health Care Behaviors for a Lifetime,” (co-authored with Eric Berkowitz), *Health Marketing Quarterly*, Vol. 28, (Spring, 2011), pp. 190-204.

“Are Marketing Management Decisions Shaped During One’s Coming of Age?” (co-authored with Paulo Cesar Motta), *Management Decisions*, Vol. 46, No. 7, (Fall, 2008), pp. 1096-1110.

“Age Matters: Segmenting Swedish Markets by Generational Cohorts,” (co-authored with Benny Carlson), *Revista Portuguesa de Marketing*, Vol. 10, No. 18, (October, 2006), pp. 65-73.

“Segmenting Global Markets by Generational Cohorts: Determining Motivations by Age,” (co-authored with Geoffrey E. Meredith), *Journal of Consumer Behaviour*, Vol. 4, Issue 1, (October, 2004), pp. 51-63.

“Preferences in Health Care Service and Treatment: A Generational Perspective,” (co-authored with Stephanie M. Noble and Michelle Kuhr), *Journal of Business Research*, Vol. 57, No. 9, (September, 2004), pp. 1033-1041.

“Cohort Segmentation: An Exploration of Its Validity.” (co-authored with Stephanie M. Noble), *Journal of Business Research*, Vol. 56, No. 12, (December, 2003), pp. 979-987.

“Generational Marketing: Exploring Cohort-Programmed Values and Their Implications on Cross-Cultural Variations in Consumer Behavior Between Brazil and United States,” (co-authored with Paulo Cesar Motta and Monica Rossi), *Revista Portuguesa de Marketing*, Vol. 6, No. 12, (December, 2002), pp. 11-21.

“Defining Moments: Segmenting by Cohorts,” (co-authored with Geoffrey E. Meredith and Stephanie M. Noble) *Marketing Management*, Vol. 9, No. 3, (Fall, 2000), pp. 48-53. Reprinted in *Annual Editions-Marketing 02/03*, Twenty-Fourth Edition, John E. Richardson (ed.) (Guilford, CT: McGraw-Hill/Duskin, 2002)

“Market Segmentation By Cohorts: The Value and Validity of Cohorts in America and Abroad,” (co-authored with Stephanie M. Noble). *Journal of Marketing Management*, Vol. 16, No. 1, (Jan/Feb/April, 2000), pp. 129-142.

"Making Health Care Decisions: A Cohort Perspective," (co-authored with Stephanie M. Noble) *Advances in Health Care Research*, Joe F. Hair, Jr., (ed.), Madison, WI: Omnipress, 1999, pp. 130-136.

"Adote Consumidores Mais Velhos No Marketing Das Artes," (co-authored with Paulo Cesar Motta), *Revista de Administracao de Empresas*, Vol. 35, No. 2, (March/April 1995), pp. 23-32.

"Digging Deep to Delight Older Adult Consumers," (co-authored with Geoffrey E. Meredith), *Marketing Management*, Vol. 3, No. 3 (Winter, 1994), pp. 20-35.

"Atmospheric Segmentation: Nostalgic Music and Supermarket Shopping Behavior," (co-authored with Charles Gulas), *Proceedings of AMA Educator's Conference*, August, 1994.

"Researching Older Consumers," (co-authored with Thomas S. Gruca), *Marketing Research: A Magazine of Management and Applications*, Vol. 4, No. 3, (September, 1992), pp. 16-21.

"Neglected Widowhood: Marketers Missing the Boat," (co-authored with Linda J. Shea), *Developments in Quality-of-Life Studies in Marketing*, M. Joseph Sirgy et al. (eds.), Volume IV (Blacksburg, VA: Academy of Marketing Science, 1992), pp. 2-6.

"Detroit and Department Stores: It's Deja Vu All Over Again," (co-authored with Thomas S. Gruca), *Journal of Marketing Channels*, Vol. 1, No. 4, (1992), pp. 17-30.

"Role Transitions in Older Adults: A Marketing Opportunity" (co-authored with Anne L. Balazs), *Psychology and Marketing*, Vol. 9, No. 2, (March, 1992), pp. 87-101.

"Strategically Positioning Your Way into the Aging Marketplace," *Business Horizons*, Vol. 34, No. 3 (May-June, 1991), pp. 59-66. Reprinted in *Annual Editions: Marketing 92/93*, John E. Richardson (ed.) (Guilford, CT: Duskin Publishing Group, 1992), pp. 107-114.

"Communication Principles For Health Care Marketers," (co-authored with Harlan E. Spotts, Jr.), *Clinical Laboratory Management Review*, (September - October, 1990), pp. 219-224.

"The Impact of Changing Roles on Mature Consumers," (co-authored with Anne L. Balazs) in *Quality-of-Life Studies in Marketing and Management: Proceedings of The Third Conference on Quality of Life and Marketing*, H. Lee Meadow and M. Joseph Sirgy, (eds.), (Blacksburg, VA: Virginia Polytechnic Institute and State University, 1990), pp. 254-264.

"Methodological Issues in Aging Research," (co-authored with Thomas S. Gruca and Anne L. Balazs). *Advances in Health Care Research*, Debra L. Scammon and M.

Venkatesan, (eds.), Salt Lake City, Utah: University of Utah Printing Service, College of Business, University of Utah, 1990, pp. 1-5.

"Communicating with the Elderly Consumer: The Growing Health Care Challenge," (co-authored with Harlan E. Spotts, Jr.), *Journal of HealthCare Marketing*, Vol. 9, No. 3, (September, 1989), pp. 36-44.

"Communicating More Effectively With Our Aging Population," *Business Horizons*, Vol. 31, No. 1 (January-February, 1989), pp. 19-25. Reprinted in *Marketing to an Aging Population: Selected Readings*, Charles D. Schewe and Anne L. Balazs (eds.) (Chicago: The American Marketing Association, 1990).

"Marketing to Our Aging Population: Responding to Physiological Changes," *The Journal of Consumer Marketing*, Vol. 5, No. 3 (Summer, 1988), pp. 61-73. Reprinted in *Marketing to an Aging Population: Selected Readings*, Charles D. Schewe and Anne L. Balazs (eds.) (Chicago: The American Marketing Association, 1990).

"Communicating To a Mature Market: Principles From the Behavioral Sciences," (co-authored with Harlan E. Spotts), *Advances in Health Care Research*, M. Venkatesan and Wade Lancaster, (eds.), Dayton, Ohio: Wright State University, 1986, pp. 1-5.

"Strategic Planning -- Fulfilling the Promise," (co-authored with Larry Rosenberg), *Business Horizons*, Vol. 28, No. 4 (July/August, 1985) pp. 54-62.

"Gray America Goes to Market," *Business: The Magazine of Managerial Thought and Action*, Vol. 35, No. 2 (April-June, 1985), pp. 3-9.

"Locus of Control: Implications for the Elderly," (co-authored with Jacquelyn L. Twible), *Advances in Health Care Research*, Scott M. Smith and M. Venkatesan, (eds.) Provo, Utah: Institute of Business Management, College of Business Administration, Brigham Young University, 1985, pp. 71-75.

"How to Better Serve the Health Care Needs and Wants of the Elderly: An Exploratory Study" (co-authored with Thomas J. Madden and Jacquelyn L. Twible). *Advances in Health Care Research*, Scott M. Smith and M. Venkatesan, (eds.), Provo, Utah: Institute of Business Management, College of Business Administration, Brigham Young University, 1984, pp. 62-66.

"Buying and Consuming Behavior of the Elderly: Findings from Behavioral Research," *Advances in Consumer Research*, Vol. XI, Thomas C. Kinnear, (ed.), Provo, Utah: Association for Consumer Research, 1984, pp. 558-562.

"The Marketing Orientation of Hospital Administrators: An Exploratory Comparison with Marketing Managers," (co-authored with Pamela Bartlett and Chris Allen). *Health Care Management Review*, Vol. 9, No. 1 (Winter, 1984), pp. 77-86.

"Some Guidelines for Marketing to the Elderly." *Advances in Health Care Research*, Scott M. Smith and M. Venkatesan, (eds.), Provo, Utah: Institute of Business Management, College of Business Administration, Brigham Young University, 1983, pp. 77-80.

"A Canonical Analysis Approach to the Retail Segment-Media Matching Problem," (co-authored with Roger Calantone and David Litvak). *Marketing 1982 - The Future: Today's Challenge*, Michel Laroche (ed.), Vol. 3, Part 3, Montreal, Canada: Concordia University, 1982, pp. 21-30.

"The Marketing Orientation of Hospital Administrators: A Comparison with Museum Directors and Marketing Managers," (co-authored with Pamela Bartlett). *Advances in Health Care Research*, Scott M. Smith and M. Venkatesan, (eds.), Provo, Utah: Institute of Business Management, College of Business Administration, Brigham Young University, 1982, pp. 64-68.

'Consumers' Attitudes About Energy Conservation in Sweden, Canada, and the United States," (co-authored) with Chris Allen and Roger Calantone). *Journal of Marketing and Public Policy*, Vol. 1, 1982, Division of Research, Graduate School of Business Administration, University of Michigan, pp. 57-68.

"Cross-Cultural Comparisons of a Conservation - Orientation Model," (co-authored with Chris Allen and Bertil Liander), *Consumers and Energy Conservation: International Perspective on Research and Policy Options*, John D. Claxton, C. Dennis Anderson, J.R. Brent Richie, and Gordon H.G. McDougall (eds.), New York: Praeger Publishers, 1981, pp. 152-159.

"An Empirical Assessment of the Relative Orientations of Museum Directors and Marketing Practitioners," (co-authored with Chris Allen and Judith Weber), *Proceedings*, American Marketing Association, Fall Educator's Conference, Washington, D.C., August, 1981, pp. 70-73.

"Closing the Gap on Nonresponse Error," (co-authored with Jan Persson, Gosta Wijk, and Chris Allen), *Proceedings*, European Academy for Advanced Research in Marketing, Copenhagen, Denmark, March, 1981, pp. 58-76.

"Using Real World Examples to Teach Undergraduates Consumer Behavior," *Journal of Marketing Education*, Vol. 4, No. 2, (November 1980) pp. 60-67.

"An Exploratory Investigation of Consumer Alienation From the Marketplace: Sweden vs. The United States," (co-authored with Chris Allen, Gosta Wijk and Bertil Liander). *Proceedings*, American Marketing Association, Fall Educator's Conference, Chicago, Ill., August, 1980, pp. 444-447.

"More on Self-Perception Theory's Foot Technique in the Pre-Cass/Mail Survey Setting," (co-authored with Chris Allen and Gosta Wijk), *Journal of Marketing Research*, Vol. 17, No. 4, November, 1980, pp. 498-502.

"Targeting Specific Advertising Messages at Tourist Segments," (co-authored with Roger Calantone and Chris Allen), *Tourism Marketing and Management Issues*, Donald E. Hawkins, Elwood L. Schafer, and James M. Rovelstad (eds.), (Washington: George Washington University, 1980), pp. 149-160.

"A Multi-Brand Multi Attribute Model of Tourist State Choice", (co-authored with Douglas Scott and Donald Frederick), *Journal of Travel Research*, Vol. 17, No. 1, Summer, 1978, pp. 23-29.

"MIS Utilization: An Application of Self-Concept Theory," (co-authored with William Dillon). *Journal of Business Research*, Vol. 6, No. 1, January, 1978, pp. 67-79.

"Psychographic Segmentation of Tourists," (co-authored with Roger Calantone), *Journal of Travel Research*, Vol. 16, No. 3, Winter, 1978 pp. 14-20.

"Marketing the MIS" (co-authored with James L. Wiek and Robert T. Dann), *Information and Management*, Vol. 1, No. 1, November, 1977, pp. 11-20.

"Guide to MIS User Satisfaction," (co-authored with James L. Wiek). *Journal of Systems Management*, Vol. 28, No. 6, June, 1977, pp. 6-10.

"Innovative Strategies for Improving MIS Utilization." (co-authored with James L. Wiek). *Academy of Management Review*, Vol. 2, No. 1 (January, 1977), pp. 138-142.

"Marketing Information System Usage: An Exploratory Behavioral Analysis, *Academy of Management Journal*, Vol. 19, No. 4 (December, 1976), pp. 577-590.

"Marketing to Blacks: Research Implications for Managers," *Atlanta Economic Review*, Vol. 26, No. 5 (Sept./Oct., 1976), pp. 34-40.

"Using Benefit Segmentation to Increase Marketing Information System Usage," (co-authored with James L. Wiek and Roger Calantone), *Proceedings*, American Marketing Association, Fall Educator's Conference, Memphis, TN, August, 1976, pp. 630-633.

"Prepaid vs. Promised Monetary Incentives for Questionnaire Response: Further Evidence" (co-authored with Norman G. Cournoyer), *Public Opinion Quarterly*, Vol. 41, No. 2 (Spring, 1976), pp. 105-107.

"Improving Marketing Information System Design: Considering System User Behavioral Phenomena," *Proceedings*, Southeast Regional Conference, American Institute for Decision Science, Atlanta, GA, February, 1976.

"Advanced Marketing Information Systems: An Empirical Investigation of System Usage Problems," (co-authored with James L. Wiek and Robert T. Dann), *Proceedings, Sixth Annual Conference, American Institute for Decision Sciences, Atlanta, GA, November, 1974.*

"Marketing Information Systems--A Promise Not Yet Realized," *Management Informatics*, Vol. 3, No. 5 (October, 1974), pp. 251-256. Reprinted in Marketing Information Systems: Selected Readings, Charles D. Schewe (ed.) (Chicago: The American Marketing Association, 1976).

"Curriculum Design for Improved Computer Utilization in Marketing: An Exploratory Study," (co-authored with Joseph P. Guiltinan), *Proceedings, Southeast Regional Conference American Institute for Decision Sciences, New Orleans, LA, February, 1974.*

"Marketing Information Systems: The Problem of System Usage," *Journal of the Academy of Marketing Science*, Vol. 2, No. 1 (Winter, 1974), pp. 290-298.

"Selected Social Psychological Models for Analyzing Buyers," *Journal of Marketing*, Vol. 37, No. 3 (July, 1973), pp. 31-39. Reprinted in *Fundamentals of Marketing: Additional Dimensions*, Jack L. Taylor and James F. Robb (eds.) (New York: McGraw-Hill Book Company, 1975); *Modern Marketing Thought*, J.H. Westing and Gerald Albaum (eds.) (New York: MacMillan Company, 1975); *Consumer Transactions: Cases and Materials*, David A. Rice (New York: Little, Brown and Company, 1975); and *Strategic Advertising Decisions: Selected Readings*, Ronald D. Michman and Donald Jugenheimer (eds.). Louis Boone (ed.) (Encino, CA: Dickenson Publishing Company, 1977); and *Marketing Policy: Integrated Readings, Text and Cases* by Marvin A. Jolson (New York: MacMillan Publishing Company, 1978); Marketing Anthology, James S. Gould (ed.) (St. Paul, Minn: West Publishing Co., 1979); *Dimensions of Consumer Behavior*, James H. McNeal and Stephen W. McDaniel (eds.) (Cambridge, MA.: Winthrop Publishers, Inc., 1982).

"Marketing Information Systems: A Preliminary Investigation of the Attitude-Behavior Relationship" (co-authored with Philip C. Burger), *Proceedings, Northeast Regional Conference, American Institute for Decision Sciences, Kingston, R.I., April, 1973.*

"The Forgotten Man," *Journal of Systems Management*, Vol. 24, No. 1 (January, 1973), pp. 30-33.

Papers Presented

“‘You Make Me Feel So Young’: How Aging Adults Capture the Feeling that ‘Spring has Sprung,’” (co-authored with George Milne, Bruce Perrott and Fatima Hajjat), presented at Association for Marketing & Health Care Research Conference, Crested Butte, Colorado, February 25, 2016.

“‘Health is an Issue of Mind Over Matter, If You Don’t Mind, It May Actually Matter!’: An Empirical Examination of Subjective Age in Older Adults,” (co-authored with David Agogo, Fatima Hajjat, George Milne and Bruce Perrott), presented at Association for Marketing & Health Care Research Conference, Steamboat Springs, Colorado, February 26, 2015.

“Time Benders: An Empirical Examination of Subjective Aging in Older Adults,” (co-authored with David Agogo, Fatimah Al-Hajjat, and George Milne), Association for Marketing & Health Care Research Conference, Telluride, Colorado, February 27, 2014.

“Who Wants to Age? Maybe You Will!” (co-authored with David Agogo and George R. Milne), Association for Marketing & Health Care Research Conference, Big Sky Resort, Big Sky, Montana, March 1, 2013.

“Are Today’s Millennials About to Splinter into a New Generational Cohort? An Analysis of College Upperclassmen,” (co-authored with Kathleen Debevec and William Diamond), Summer American Marketing Association Conference, Boston, MA, August, 2010.

“Are Marketing Decisions Shaped During One’s Coming of Age?” (co-authored with Paulo Cesar Motta). Presented at the European Marketing Academy, 35th Conference, Athens, Greece, May, 2006.

“Managing by Shared Experiences: How Incentives in the Workplace are Shaped During One’s Coming of Age.” Presented at European Academy of Management, Capetown, South Africa, June 30, 2005.

“Segmenting on Shared Experiences: A Look at Cohort Analysis.” Presented at Academy of Marketing Science Annual Conference, Tampa, Florida, May 27, 2005.

"The Globalization of Values: A Comparison of the United States and The Hashemite Kingdom of Jordan" (co-authored with Stephanie M. Noble). Presented at American Marketing Association, Winter Educator’s Conference, Scottsdale, Arizona, February, 2001.

"Making Health Care Decisions: A Cohort Perspective," (with Stephanie M. Noble). Presented at Health Care Marketing Conference, Breckinridge, CO, April 3, 1999.

"Understanding the Power of Cohort Effects," Presented at American Marketing Association, Winter Educator's Conference, Austin, Texas, February, 1998.

"Atmospheric Segmentation: Nostalgic Music and Supermarket Shopping Behavior," (with Charles Gulas). Presented at AMA Educator's Conference, San Francisco, California, August, 1994.

"Neglected Widowhood: Marketers Missing the Boat," (co-authored with Linda J. Shea), Presented at the Fourth Quality of Life Conference, Washington, DC, November 21, 1992.

"The Impact of Changing Roles on the Mature Consumer," (co-authored with Anne L. Balazs), Presented at the Third Quality of Life/Marketing Conference, Blacksburg, Virginia, November 9, 1986.

"Communicating To a Mature Market: Principles From the Behavioral Sciences," (co-authored with Harlan E. Spotts). Presented at Health Care Marketing Conference, Snowbird, Utah, April 3, 1986.

"Locus of Control: Implications for the Elderly," (co-authored with Jacquelyn L. Twible). Presented at Health Care Marketing Conference, Park City, Utah, April 13, 1985.

How to Better Serve the Health Care Needs and Wants of the Elderly: An Exploratory Study," (co-authored with Thomas J. Madden and Jacquelyn L. Twible). Presented at Health Care Marketing Conference, Park City, Utah, April 16, 1984.

"Buying and Consuming Behavior of the Elderly: Findings from Behavioral Research," Presented at Annual Association for Consumer Research, Chicago, Illinois, October 20-22, 1983.

"Some Guidelines for Marketing to the Elderly," Presented at Health Care Marketing Conference, Snowbird, Utah, April 9, 1983.

"A Canonical Analysis Approach to the Retail Segment-Media Matching Problem" (co-authored with Roger Calantone and David Litvak). Presented at Annual Administrative Sciences Association of Canada Conference, University of Ottawa, Canada, May 31, 1982.

"The Marketing Orientation of Hospital Administrators: A Comparison with Museum Directors and Marketing Managers," (Co-authored with Pamela Bartlett). Presented at Health Care Marketing Conference, Snowbird, Utah, April 16, 1982.

"An Empirical Assessment of the Relative Marketing Orientations of Museum Directors and Marketing Practitioners," (co-authored with Chris Allen and Judith Weber). Presented at American Marketing Association, Fall Educator's Conference, Washington, D.C., August, 1981.

"Closing the Gap on Nonresponse Error," (co-authored with Jan Persson, Gosta Wijk, and Chris Allen). Presented at the 1981 Annual Meeting of the European Academy for Advanced Research in Marketing, Copenhagen, Denmark, March 26, 1981.

"Determinants of Conservation-Oriented Consumption: Sweden vs. The United States," (co-authored with Chris Allen and Bertil Liander). presented at International Conference on Consumer and Energy Use, Banff, Canada, September 18, 1980.

"An Exploratory Investigation of Consumer Alienation From the Marketplace: Sweden vs. The United States," (co-authored with Chris Allen, Gosta Wijk and Bertil Liander). Presented at American Marketing Association, Fall Educator's Conference, Chicago, Ill., August 5, 1980.

"Research Perspectives in Tourism Marketing: Presented at Southeast Regional Conference, American Institute for Decision Sciences, Orlando, Fla., February 22, 1980.

"Targeting Specific Advertising Messages at Tourist Segments," (co-authored with William R. Dillon and Gordon W. Paul). Presented at Southwestern Marketing Federation, Dallas, Texas, March, 1978.

"Marketing Information System Usage: An Application of Benefit Bundle Segmentation," (co-authored with James L. Wiek and Roger Calantone). Presented at American Marketing Association Educator's Conference, Memphis, TN., August 11, 1976.

"Management Information System Implementation: A Cross Validation of the Attitude-Behavior Relationships," (co-authored with Alden S. Bean). Presented at Implementation II Conference, Pittsburgh, PA, February, 1976.

"Improving Marketing Information System Design: Considering system User Behavioral Phenomena." Presented at Southeast Regional Conference, American Institute for Decision Sciences, Atlanta, Georgia, February, 1976.

"A Working Model for the Economic and Marketing Analysis of Tourism Applied to Massachusetts: (co-authored with James K. Kindahl and Norman G. Cournoyer). Presented at Northeast Regional Science Association, University of Massachusetts, Amherst, MA, April 18, 1975.

"Advanced Marketing Information Systems: An Empirical Investigation of System Usage Problems," (co-authored with James L. Wiek and Robert T. Dann). Presented at the National Conference of American Institute for Decision Sciences, Atlanta, GA, October 30 - November 2, 1974.

"Curriculum Design for Improved Computer Utilization in Marketing: An Exploratory Study," (co-authored with Joseph P. Guiltinan). Presented at American Institute for Decision Sciences, Southeast Regional Conference, International Hotel, New Orleans, LA, February 22, 1974.

"Marketing Information Systems: A Preliminary Investigation of the Attitude-Behavior Relationships," (co-authored with Philip C. Burger). Presented at American Institute for

Decision Science, Northeast Regional Conference, University of Rhode Island, Kingston, RI, April 14, 1973.

Miscellaneous

"Marketing to My Generation...and Yours," *Direct News: Newsletter of the Nontraditional Marketing Section*, Number 50, May, 2005, pp. 8-10.

"Defining Moments: Segmenting by Cohorts," *Benefits Marketing Online Magazine*, April, 2005, www.benefitsmarketing.org/april2005.htm

"Marketing to My Generation...And Yours" (co-authored with Geoffrey E. Meredith) in *Competitive Edge*, July/August, 2002 pp. 32-33, and *The Advertiser*, April, 2002, pp. 24-28.

"Segmenting the Market by Cohorts: Age Really Matters – Coming of Age, That Is!" (co-authored with Geoffrey E. Meredith) in *Taking Sides: Clashing Views on Controversial Issues in Marketing*, Barton Macchiette and Abhijit Roy (eds.), (Guilford, CT: Duskin/McGraw Hill, 2000).

"Aging Boomers Will Demand Change," *Springfield Union News*, July 5, 1999.

"Marketing by Cohorts, Not Generations," (co-authored with Geoffrey E. Meredith) *Marketing News*, February 1, 1999, p.22.

"The Powers of Cohorts," (co-authored with Geoffrey E. Meredith), *American Demographics*, December, 1994, Vol. 14, No. 12, pp. 22-31.

"Enhancing the Quality of Life During Widowhood: A Marketing Challenge," (co-authored with Linda J. Shea) in *New Dimensions in Marketing/Quality-of-Life Research*, A. Coskum Samli and Joseph Singy, eds., (Westport CT: Greenwood Publishing Group, 1995), pp. 137-150.

"The Golden Years," *American Nurseryman*, Vol. 180, No. 6, (September 15, 1994) pp. 61-67.

"Adding 'Benefits to the Bag' Is Costly Service," (co-authored with (Alexander Hiam) *Marketing News*, December 7, 1992, Vol. 26, No. 25, pp. 4,6.

"Marketing For the Long-Term Healthcare Organization," (co-authored with Linda J. Shea) in *Essentials of Long Term Care Administration*, Seth B. Goldsmith (ed.) (Gaithersburg, MD: Aspen Publishers, Inc., 1994), pp. 155-171.

"A Proposed New Exam Method," in *Great Ideas for Teaching Marketing*, Joseph F. Hair, Jr., Charles W. Lambert, Jr., and Carl McDaniel (eds.) (Cincinnati: Southwestern, 1991), pp. 284-286.

"How to Communicate with Older Adults," *American Demographics*, August, 1991, Vol. 13, No. 8, p. 53.

Apple Case in *Cases in Marketing Management*, Joseph P. Gultinan and Gordon W. Paul (New York: McGraw-Hill, 1991), pp. 395-414.

"Get In Position For The Older Market," *American Demographics*, June, 1990, Vol. 12, No. 6, pp. 38-41, 61-62; reprinted in Bedtimes.

"To Market: Interview with Dr. Charles D. Schewe," *Business Digest*, June, 1990, Vol. 5, No. 2, pp. 37-39.

"Playing the Part," *American Demographics*, April, 1990, Vol. 12, No. 4, pp. 24-30.

Book Review: John F. Wasik, *The Electronic Business Information Sourcebook*, (New York: John Wiley & Sons, Inc., 1987) in *Journal of Marketing Research*, Vol. 25, No. 3, August, 1988.

Book Review: Kirk Tyson, *Business Intelligence: Putting It All Together*, (Lombard, IL: Leading Edge Publications, 1986) in *Journal of Marketing Research*, Vol. 25, No. 1, February, 1988.

Book Review: Leonard M. Fuld, *Competitive Intelligence: How to Get It, How to Use It*, (New York: John Wiley & Sons), 1985) in *Journal of Marketing Research*, Vol. 23 No. 4, November 1986.

"Aged Consumers-Behavior in the Marketplace," in *Gerontology Connection*, University of Massachusetts Center on Aging, Winter 1985.

"Marketing Information Systems: An Evolutionary Approach," Chapter in *Handbook of Modern Marketing*, Victor Buell, editor (New York: McGraw-Hill, 1986) pp. 44-1 to 44-11.

"Research Dispels Myths about Elderly; Suggests Marketing Opportunities," *Marketing News*, May 25, 1984, Section 1, p. 12.

"Market Researchers Who Use Minicomputers Want More Support Services, System Security," *Marketing News*, November 27, 1981, pp. 12 (second section).

"New Exam Method Lets Students Earn Grades While Learning Real-World Marketing Concepts," *Marketing News*, July 24, 1981, p.28.

"Facilitators Can Help Marketing Manager Get the Most Out of Computer-based Info Systems," *Marketing News*, December 12, 1980, p. 1.

"Marketing," *Collier's Encyclopedia*, 1981 and subsequent editions, (New York: MacMillan, 1981).

"Three Screen Projection Enhances Learning in Large Marketing Classes," *Marketing News*, July 25, 1980, p. 11.

"Traditional Marketing Techniques Can Improve Acceptance of MIS," *Marketing News*, November 16, 1979, p.5.

"Pharmatech Systems, Inc.," and "The Christie Candy Company," cases published in Randall L. Schultz, Gerald Zaltman and Philip C. Burger, *Cases in Marketing Research* (Hinsdale, IL: The Dryden Press, 1975); "The Christie Candy Company," is reprinted in *Cases in Marketing Research*, Donald Sciglimpaglia, William G. Zikmund, and William J. Lundstrom (Hinsdale, IL: The Dryden Press, 1975).

"A Framework for Marketing Analysis," Chapter in *The Economic Impact of Tourism on the Commonwealth of Massachusetts*, Research Report to the Department of Commerce and Development, State of Massachusetts. December, 1974.

Working Papers

"Closer Together or Further Apart? Values of Generations Y and Z During Covid-19," (co-authored with Shabnam Azimi and Yana Andonova).

"Tapping into Millennials Generational Cohort Values to Enhance Learning" (co-authored with Kathleen Debevec).

"History Matters: Understanding Swedish Generational Cohort Segments and Capturing their Minds, Hearts and Consumption Power," (co-authored with Benny Carlson and Anders Parment).

"The Globalization of Values: A Comparison of the United States and the Kingdom of Jordan," (co-authored with Stephanie M. Noble).

"Generational Cohort Marketing: Consumers" Degree of Membership in a Cohort," (co-authored with Paulo Cesar Motta and Monica Rossi).

Present Research and Writing

Work is being conducted to expand and validate the theory of cohort segmentation and to determine the different cohorts in various countries around the world. Additional work

investigates the research question of whether millennials hold the same values around the world. Data have been collected from New Zealand, Sweden and possibly other countries. Conceptualization has begun on a book identifying how defining moments in one's life determine values, attitudes and predispositions and shape one's behavior.

Grant Research

As co-investigator, tourists to the state of Massachusetts were surveyed over a 2 year period. Variables studied included tourist life style characteristics, perceptions of the attributions of Massachusetts and its New England competitors, preferences for a state to visit, media habits, travel behavior and demographic characteristics of tourists. Tourist profiles and state by state competitive comparisons resulted in better Commonwealth resource allocation and improved promotional programs.

PROFESSIONAL INVOLVEMENT

Advisor for Professional Update Diploma (PUD), Executive Development Program, EFL Kunskapsutveckling, Lund University, Lund, Sweden, 1996-present.

Advisor for *Modifying the Marketing Mix: Strategies for the Mixture Consumer*, Clint B. Tankersley (ed.) Syracuse University Series in Gerontology Education (Syracuse: Syracuse University, 1990).

Issue Editor for special edition on marketing in ambulatory care in *The Journal of Ambulatory Care Management*, Volume 12, Number 3 (August, 1989).

Advisor for Administration on Aging Grant to the Marketing Department at Syracuse University to construct an introductory marketing course module that acquaints students with the importance and uniqueness of the mature market.

Advisor for *Marketing Information: A Professional Reference Guide*, Jac L. Goldstucker (ed.) (Atlanta, GA: Georgia State University, 1983).

Consulting Editor (from 1975-1984) for McGraw-Hill Book Company's Series in Marketing. Duties include evaluation of textbook proposals, manuscript solicitation and critical analysis throughout the development of the book. Textbooks developed include:

Marketing Management: A Strategic Planning Approach by Victor Buell.

Selling Dynamics by Robert Allen, Robert Spohn and I. Herbert Wilson.

Marketing Management: Strategies and Programs by Joseph Gultinan and Gordon Paul.

Readings in Marketing Strategies and Programs by Joseph Gultinan and Gordon Paul.

Fundamentals of Marketing by William Stanton.

Retailing by Richard Buskirk and Bruce Buskirk.

Advertising: The Process and Practice by Jack Engel.

Consumer Behavior: Application of Theory by John Howard.

Marketing Research: An Applied Approach by Thomas Kinnear and James Taylor.

Exercises in Marketing Research by Thomas Kinnear and James Taylor.

Consumer Behavior: Concepts and Applications by David Loudon and Albert Della Bitta.

Pricing: Making Profitable Decisions by Kent Monroe. *Textbook of Salesmanship* by Frederic Russell, Frank Beach, and Richard Buskirk.

Reviewer for American Marketing Association Doctoral Dissertation Competition - 1981 and 1982.

Reviewer for the 1992 Marketing and Public Policy Conference.

Reviewer for the Consumer Behavior Track of the 1992 AMA Winter Educators' Conference.

Co-Chairman for Special Session on Marketing to The Elderly, Health Case Marketing Conference, Snowbird, Utah, April 7-9, 1983.

Reviewer for National Conference of the American Institute for Decision Science, 1984.

Reviewer for Academy of Marketing Science Conference Paper Competition, 1983.

Reviewer for Association for Consumer Research conference Paper Competition, 1984.

Reviewer for Atlantic Market Association Conference Paper Competition.

Reviewer for *International Journal of Technology & Aging*.

Reviewer for *Journal of Health Care Marketing*.

Ad Hoc Reviewer for *Marketing Letters*.

Ad Hoc Reviewer for *Journal of Marketing Research*.

Ad Hoc Reviewer for *Journal of Consumer Research*.

Ad Hoc Reviewer for *Journal of the Academy of Marketing Science*.

MANAGEMENT DEVELOPMENT SEMINAR INVOLVEMENT:

“Are Today’s Millennials About to Splinter into a New Generational Cohort? An Analysis of College Upperclassmen,” Faculty Seminars presented at Massey University – Albany, Massey University – Wellington, Victoria University of Wellington, University of Otago, Auckland University of Technology, Waikato University in New Zealand, February-March, 2010.

“Painting the New Face of Your Patient: Marketing to Shared Experiences,” American Academy of Facial Plastic and Reconstructive Surgery, Fall Conference, Chicago, Illinois, September 18, 2008.

“The Cohort Connection: Marketing to Shared Experiences,” RPM-Marketing State of the Art, Lisbon, Portugal, November 15, 2007.

"Understanding the Power of Cohorts," Young Entrepreneurs Association, Amman, The Hashemite Kingdom of Jordan, May 16, 1999; Folksam, Malmo, Sweden, December 10, 2002.

"Marketing to an Aging Population," The School of Management, University of Massachusetts at Amherst, Boston, Massachusetts, February 8-9, 1996.

"Criando Vantagens Competitivas Atraves do Novo Marketing," Portable MBA Seminar Series, Sao Paulo, Brasil, May 18, 1995.

"Effectively Marketing to the Older Consumer: Understanding and Applying the Underlying Realities," Design for Maturity, American Society for Aging, Washington, D.C., June 9, 1994.

"The Changing Perception of Aging in Our Culture and Its Business Impact," National Association for Senior Living Industries, Birmingham, Alabama, May 1, 1994, and Staff Builders Home Health Care, Melville, New York, October 4, 1994.

"Winning Marketing Strategies for the 1990's and Beyond," EFL Kunskaputveckling, Lund, Sweden, January 26, 1994.

"Creating Competitive Advantages with Modern Marketing Approaches," IBM Corporation, Palisades, New York, December 1, 1993 and May 24, 1994.

"Customers of the Future: Dealing with Aging America" Massachusetts Nurserymen's Association, Worcester, Massachusetts, November 9, 1993.

"Um Novo Desafio Ao Marketing," IPAM Forum, Porto, Portugal, May 28, 1992.

"Targeting the 50+ Customer: Understanding Life Stage Changes and their Marketing Implication," EFL Kunskaputveckling, Lund, Sweden, May 25, 1992.

"Leading Edge Marketing Topics," Executive Development Program, EFL Kunskaputveckling, Lund, Sweden, May 22, 1990, and at Swedish Nestle Corporation, Bjur, Sweden, May 16, 1991.

"Modern Marketing Techniques in Healthcare Marketing," Sanviken Sjukhus, Sanviken, Sweden, May 23, 1991, and Lund, Sweden, January 14, 1992.

"Metering Customer Service Quality: Towards Creating Legendary Customer Service," International Customer Service Association, Springfield, Massachusetts, September 18, 1991.

"The Role of Strategic Planning in Corporate Entrepreneurship," Marketing Entrepreneurship, AT&T Management Education & Training, Somerset, New Jersey, February 21, 1990.

"The Physiological, Psychological, and Sociological Characteristics of An Aging Population," Swedish Nestle Corporation, Bjur, Sweden, May 21, 1990.

"Var ligger Kopkraften i 90-talets Sverige?" Executive Development Program, EFL Kunskaputveckling, Stockholm, March 10, 1989, and Lund, Sweden, March 14, 1989.

"How to Professionalize and Market Services to the Rural Elderly," Aging in the Next Decade: The Challenge, Ithaca College 1988-89 Seminar Series, Ithaca, New York, April 6, 1989.

"Managing the Image," Executive Development Program for MiL, Management in Lund Foundation, Stockholm, Sweden, November 23, 1988 and March 13, 1989.

"Eliminating Obstacles to Effective Marketing Research Usage," Medical Surgical Marketing Research Group, Dallas, Texas, March 7, 1988.

"Doing Business with the Scandinavians," Orientation: Scandinavia, Joint program of the World Affairs Council of Western Massachusetts and the Western European Studies

Program of the University of Massachusetts at Amherst, Springfield, Massachusetts, September 30, 1988.

"Marketing to the Elderly," 1987 Summer Institute in Gerontology, Boston University, Boston, Massachusetts, June 16, 1987.

"Communicating a Program to the Elderly," Doing Well and Good, Boston, Massachusetts, June 13, 1986 and September 19, 1986.

"Designing the Questionnaire," IBM Marketing Research Program, Boca Raton, Florida, May 20, 1986, and White Plains, New York, November 5, 1986.

"Questionnaire Construction," IBM Marketing Research Program, Park City, Utah, April 16, 1985.

"The Marketing of Oncology Programs," Oncology Economics '85", Universal City, California, September 18, 1985.

"Marketing the Image: Little Things Mean A Lot" Image: You Can Make the Difference, MIC-PRESCAD Annual Conference, Mercy College, Detroit, Michigan, October 31, 1984.

"Basic Building Blocks to Successful Marketing Management," Beatrice Foods Marketing Management Seminar, Northwestern University, August 15, 1983.

"Pricing and Consumer Behavior," New Hampshire Insulation Contractors Association, Concord, New Hampshire, November 17, 1982.

Seminar in "Pricing Strategies for Competitive Advantage," The Graduate School of Sales and Marketing Management, Syracuse, New York, June 11, 1982. Also led discussion of Docutel Case and Lawford Electric Case.

Seminar in "Strategic Marketing Planning," SBA Executive Development Program, University of Massachusetts, June, 1981.

Seminar in "Strategic Marketing Planning for the 1980s" Executive Forum, San Francisco, and Los Angeles, July 14-15, 1981.

Seminar in "Design of MIS," Ekonomisk Forskning, Lund, Sweden, April, 1979.

Seminar in "The Design of a Marketing Information System For Improved Decision-Making Effectiveness," Perstorp AB, Perstorp, Sweden, April, 1979.

Seminar in "Marketing Effectively in the U.S.," Perstorp AB, Perstorp, Sweden, May, 1979.

Seminar in "Marketing of Tourism," Hogskolan, Kalmar, Sweden, May 1, 1979.

Seminar in "Designing and Using Your Marketing Information System," Electronic Industries Association, Chicago, Illinois, June, 1977.

Seminar in "Marketing Information Systems," SBA Executive Development Program, University of Massachusetts, September, 1972, May, 1974, February, 1975.

Seminar in "Problems in MIS Usage," Pharmatech Systems, Inc., Cambridge, Massachusetts, January, 1974.

Seminar in "Practical Marketing Research," SBA Executive Development Program, University of Massachusetts, November, 1974.

Seminar in "Personal Selling," The Northern Trust Company, Chicago, May, 1972.

Seminar in "Sales Territory Analysis," SBA Executive Development Program, University of Massachusetts, December, 1972.

ADDITIONAL LECTURES AND TALKS

"The Millennials are Coming! Can You Hear the Flapping of Their Flip Flops? Are you Ready?" Springfield Area Chamber of Commerce, September 3, 2013; Ad Council of Springfield, April 30, 2014.

"The Boomers are Coming! Can You Hear the Pounding of Their Birkenstocks? Are you Ready?" Collaborative Conference on Aging, Indianapolis, Indiana, November 10, 2009; 2009 MEDichair Annual Conference and Tradeshow, February 13, 2009; Amherst Council on Aging, Amherst, Massachusetts, October 19, 2006; Pennsylvania Council on Aging, Granville, Pennsylvania, October 24, 2006; Connecticut Association of Homes and Services for the Aging, Cromwell, Connecticut, May 4, 2007; Indiana Association of Homes and Services for the Aging, Indianapolis, Indiana, September 19, 2007; Masonicare, North Haven, Connecticut, October, 30, 2007; JCG Group Executive Workshop, New Orleans, Louisiana, March 3, 2008.

"The Cohort Connection: How Shared Experiences Can Open Minds, Hearts, and Pocketbooks of Financial Services Customers," 2005 Educational Symposium, The Financial Planning Association, Nashville, Tennessee, October 19, 2005.

"Coming of Age: Meeting the Needs and Expectations of Alumni and Donors," CASE District I Breakfast Series, Mount Ida College, Newton, Massachusetts, April 15, 2005; Association of Fundraising Professionals, Holyoke, Massachusetts, October 26, 2005; Continuing Education for Fund Raisers, Manchester, New Hampshire, October 20, 2006; Association of Fund Raising Professionals, Portland, Maine, November 9, 2007.

“Generational Marketing: Age Really Matters,” Hospitality Sales & Marketing Association International, Los Angeles, California, May 17, 2005.

“Coming of Age Counts: Generational Cohort Marketing—Baby Boomer Trends and Values,” Scandinavian Seminar/Elderhostel Site Coordinator Meeting, Bergen, Norway, November 12, 2004.

“The Changing Faces of the 50+ Market,” PIMA MarketTech Symposium, Alexandria, Virginia, October 25, 2004; “Learn How to Profit with Generational Marketing” Workshop, PIMA MarketTech Symposium, Alexandria, Virginia, October 26, 2004.

“Coming Home to the Memories: ‘You Are Now What You Were Then,’” UMASS Homecoming 2004, October 16, 2004.

“Coming of Age Counts: Marketing to Defining Moments,” National Spa and Pool Institute, Washington DC, August 14, 2003.

“Coming of Age Counts: The Power of Understanding Cohort Effects,” Canadian College and University Food Service Association, Hamilton, Ontario, June 26, 2003.

“Coming of Age Counts; Generational Cohort Marketing – Baby Boomer Trends and Values,” American Association of Homes and Services for the Aging, Chicago, Illinois, June 10, 2003, Otterbein Homes All Boards Retreat, Dayton, Ohio, January 17, 2004; PANPHA Annual Conference, Hershey, Pennsylvania, June 16, 2004; AOPHA Annual Conference, Dayton, Ohio, September 15, 2004; MassAging, Worcester, Massachusetts, June 16, 2006.

“Age Really Matters: Marketing to Shared Experiences,” Swedish-American Chambers of Commerce, Cambridge, Massachusetts, June 5, 2003.

"Age Matters: There's Something About Those Twenty-Somethings!" Carlsberg Brewery, Copenhagen, Denmark, June 21, 2002.

"Target Cohort Values and Send Your Response Rates Soaring," Keynote Address, Direct Marketing Association of Washington, 46th Annual Conference, Washington DC, July 17, 2001.

"Understanding the Power of Cohort Values: Age ‘Really’ Does Matter, Met Life Investors, Newport Beach, July 27, 2001; August, 17, 2001; Swedish-American Entrepreneurial Days, Gothenburg, Sweden, August 22, 2002, Canadian College and University Food Service Association’s “Changing Tomorrow Today,” Hamilton, Ontario, June 26, 2003.

“Creating Competitive Advantages with Modern Marketing Approaches,” Keynote Address, National Rural Utilities Cooperative Finance Corporation, San Antonio, TX, November 11, 1999.

“Targeting Cohort Values to Capture Explosive Response Rates,” Direct Marketing Association, Annual Conference, Toronto, Canada, October 25, 1999.

"Keys to Unlocking Mature Market Success," Credit Union Executives' Society, Strategic Marketing Conference, Bal Harbor, FL, April 20, 1997; "Builders 100," Hanley-Wood, Inc. Conference, Aventura Fl, May 8, 1999; and "The Aging of America: Economic, Social and Political Points of View", The William Paterson University Conference, Teaneck, N.J. November 9, 2000.

"Understanding the Power of Cohorts," Keynote Address, Credit Union Executives' Society, Strategic Marketing Conference, Boston, Massachusetts, April 10, 1995; Keynote Address, Hanley-Wood Industries, Las Vegas, Nevada, June 5, 1997; Chief's Pow Wow, Food Processing Magazine, St. Petersburg, Florida, February 13, 1998; Strategic Food Alliance, Amherst Massachusetts, April 23, 1998; Direct Marketing Association of Washington, Washington DC, June 11, 1998; Keynote Address, The 4th Annual Arizona Senior Industries Conference and Business-to-Business Expo, Phoenix, AZ, December 2, 1999; Ramada Express Management Conference, Laughlin, Nevada, December 3, 1999.

"The Changing Perception of Aging and Its Business Impact," National Association of Senior Living Industries, Birmingham, Alabama, May 1, 1994 and Staff Builders Home Health Care, Melville, New York, October 4, 1994, and National Wood Windows and Doors Association, Minneapolis, MN, August 19, 1996.

"Effectively Marketing to the Older Consumer," American Society on Aging, Washington D.C., June 9, 1994.

"The Marketing of Consulting," American Society for Training and Development, Holyoke, Massachusetts, February 22, 1994.

"Blending Marketing Strategies with Total Quality Management," Federal Home Loan Bank Strategic Planning Meeting, Chatham, Massachusetts, August 5, 1993.

"Marketing Implications of an Aging Marketplace," Western Massachusetts Chapter of the American Marketing Association, Holyoke, Massachusetts, March 23, 1993.

"Marketing to the Golden Gardener," The Alexis Group Annual Meeting, Denver Colorado, January 29, 1993.

"Marketing to Our Aging Population: Responding to Physiological Changes," Ithaca College Gerontology Speaker Series, Ithaca, New York, April 6, 1989.

"Marketing a Service: Some Conceptual Thoughts," Massachusetts Department of Revenue, Lenox, Massachusetts, October 15, 1986.

"Assessing the Market: Segmenting, Targeting, and Positioning," Health Care for the Elderly: Meeting the Challenge, American Hospital Association, Boston, Massachusetts, June 1986.

"Attitudes and Behavior of the Mature Consumer," Society of Consumer Affairs Professionals in Business, 1985 Spring Conference, Philadelphia, Pennsylvania, April 29, 1985.

"Attitudes and Marketplace Behavior," The Emerging Market: Mature Consumers, Pennsylvania Department of Aging, Hershey, Pennsylvania, May 8, 1984.

"Behaviors in the Marketplace," The Older Consumer: Today's Marketplace Challenge, Council of Better Business Bureaus Annual Forum, Washington, D.C., December, 1983.

"The Key to Success in Marketing," Lynn Foundation Lecturer Series, Florida Atlantic University, Boca Raton, Florida, March, 1982.

"The Future of Strategic Marketing Planning," Lynn Foundation Lecturer Series, Florida Atlantic University, Boca Raton, Florida, March, 1982.

"New Directions in Marketing," Sunrise Seminar, North Shore Community College, Essex, Massachusetts, December, 1981.

"Strategic Marketing Planning," University of Lund, Lund, Sweden, March, 1981.

"The American University System," University of Lund, Sweden, March, 1981.

"Consumer Alienation and Energy Conservation Consumption," University of Lund, Lund, Sweden, March, 1981.

"The Nature of Marketing," Sunrise Seminar, North Shore Community College, Essex, Massachusetts, November, 1980.

UNIVERSITY SERVICE

Coordinator, Commonwealth College Departmental Honors Program
Advisor, Isenberg School of Management (ISOM) Marketing Club 2006-
Member of ISOM Dean Evaluation Committee 2004-05
Member of University of Massachusetts 2004 Homecoming Planning Committee
Member of Associate Dean Evaluation Committee
Member of Eugene Isenberg Chaired Professorship Search Committee
Member of John Smith Chaired Professorship Search Committee
Chairperson, Departmental Head Evaluation Committee
Chairperson, University Space and Calendar Committee
Chairperson, UMass/University of Lund Faculty Exchange Committee
Chairperson, School of Business (SBA) Personnel Committee

University Search Committee for Vice-Chancellor for University Relations and Development
University Academic Priorities Committee
Marketing Department Merit Allocation Committee
MBA Policy Committee
Graduate Studies Committee
Fine Arts Administration Committee
Marketing Department Educational Policy Committee
Marketing Department Ph.D. Examination Committee
Undergraduate Dean Search Committee
Task Force to Change the Name of the School of Business Administration
Secretary to Marketing Department
Secretary to SBA Faculty
Chairperson, Search Committee for Department Head
Chairperson, Task Force for Doctoral Seminars
Alternate on SBA Personnel Committee
MBA Program Review Committee
Faculty Senate
UMASS Faculty Growth Grant Application Reviewer
Freiburg/Baden - Wurttemberg Exchange Committee
SOM International Task Force Committee
The University Fund For The Future, Committee Member
Head, Marketing Department Mentor Program
SOM Student Scholarship Program Committee
Committee for Eugene Isenberg Logo Design
Department Honors Coordinator

PROFESSIONAL ASSOCIATIONS:

American Marketing Association
Academy of Marketing Science
Pi Sigma Epsilon (Business Fraternity)
Association of Marketing and Health Care Research, Co-Founder, Director, and Past President

HONORS:

Honorary Doctorate (Honoris Causa), University of Lund, Sweden, May, 2012
Fulbright Senior Specialist Award and Massey University Distinguished Visitor Award, Massey University, Albany, New Zealand, Winter, 2010
Isenberg School of Management Outstanding Teacher Award, 2002
Findus Visiting Professorship, The Holger Crafoord School of Economics and Management, University of Lund, Lund, Sweden.
Member, Board of Trustees, Historic Deerfield, Deerfield, Massachusetts.

Member, Board of Directors, Summerfield Long Term Care Facilities.
Member, Board of Directors, Atlantic List Company, Washington, D.C.
Member, Board of Directors, Stephen H. Winchell and Associates Washington, D.C.
Fulbright-Hays Award to Sweden, 1978-9.
Twice Nominated for the University of Massachusetts Distinguished Teaching Award
Graduate School of Management Fellowship, Northwestern University, 1968-70
Dean's List Xavier University, 1960-61.
Elected by the American Marketing Association's Collegiate Chapter at the University
Massachusetts as the Outstanding Marketing Professor of 1976.
Selected for Who's Who in the East.

REFERENCES:

Personal references available upon request