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OVERVIEW

- Expert in the development and execution of strategy with large organizations, including strategy mapping, foundational and dynamic capabilities, business growth, action planning, strategic risk, measurement systems, organizational design and transformational change
- Possesses an outstanding track record of developing leaders who create value and inspire followers
- Experienced with strategy projects in multinational, corporate development, business, functional, government, non-profit and education settings
- Provided executive leadership of a large advisory firm, producing significant growth of revenue and profitability
- Skilled negotiator and integrator in business combination (M&A) and dispute resolution contexts
- Tactically achievement-oriented; goals realized through a practical, systematic and organized approach
- Works in a positive, collaborative and professional manner

EDUCATION

- Princeton, Ph.D.
- Harvard Business School, Leadership Program
- University of Houston, M.S., Psychology (In Progress)
- Wheaton College, Social Sciences (Economics, Psychology, Sociology)

PROFESSIONAL EMPLOYMENT HISTORY

- Berkeley Research Group, Managing Director and Co-Leader of the BRG Strategy Practice, 2013-Present
- Breakthrough Leadership Strategies, Managing Director, Strategy and Organization Design, 2010-2013
- UHY Advisors, Chief Operating Officer and Leader of National Strategy Practice, 2002-2010
- EMBA Professor, Bauer College of Business, University of Houston and Rice University, 1997-2004
- Breakthrough Leadership Strategies, LLP,, Managing Director, 1995-2002

REPRESENTATIVE ENGAGEMENTS (Descriptions provided with client approval)

Royal Dutch Shell, The Hague, Netherlands, Houston, TX (2011-2013). Developed, implemented and transitioned to executive team the 2012 and 2013 Capability Strategy for Global Exploration and Production.

- Identified foundational and dynamic capabilities related to capacity, technical competence, deployment, ways of working and HSSE.
- Assessed capability strengths and weaknesses, developed and implemented regional and global capability improvement plans, and set up execution teams.
- Led the Exploration Capability Leadership Team and the Regional Chief Capability Team, which aligned the work of Capability Providers (HR, Recruitment, Managed Open Resources, Learning and Development and Organizational Development) with the requirements of the Ventures, and prioritized and coordinated their improvement efforts.
- Managed the change to make Capability improvement a cultural imperative for Exploration: wrote the business case, prepared presentations for key stakeholders, planned and led workshops, coached leaders and teams, conducted progress reviews, managed plan implementation dynamically, developed scorecards and performance reports for the Global Exploration Leadership Team.

Hess Corporation, Houston, TX (2010-2011). Led a major transformation of the Global Drilling and Completions Division of Hess Corporation, which addressed post-Macondo (Deepwater Horizon) risk implications. Joined a traditional change model with an improvisational change model to successfully resolve centralized/decentralized issues in a multinational corporation.

- Managed the implementation of new well design software applications, a new global IT infrastructure and data management strategy, which increased global collaboration, aligned the global team on workflow processes, and created a centralized database as a repository for all well designs.
- Developed, trained and managed project teams in Houston, London, Jakarta, and Perth, creating a global team to manage well design operations. Coached team leaders.
- Fostered collaboration between Hess and a major global oilfield services company to reduce project risk and achieve significant efficiencies.
- Delivered project under budget and beat delivery deadline by three months.

UHY Advisors, Houston, TX, (2006-2010). As Chief Operating Officer, responsible for the development and execution of strategy, change management, core operational processes, and expansion efforts. Directed and coached Managing Directors, Service Line, and Functional Leaders. Provided executive oversight of offices in Houston, Dallas and The Woodlands, and the Forensic, Legal and Valuation Services (FLVS) practices in Houston, Dallas, Boston, New York, DC, and Chicago. Served on the UHY National Management Team.

- Developed strategy, managed the business planning process and firm operations, which annually produced over \$150M revenue, resulted in a three-year annual growth rate over 25%, a significant move up-market, the addition of 300+ professionals, and greater efficiency of processes.
- Directed Service Line Leaders in the day-to-day execution of the operating plan; among UHY's 26 US offices and 156 International offices, UHY-TX was the largest, the fastest growing and the most profitable.

- Coordinated the annual 1X100 business development program, which targeted 100 up-market prospects in six geographies, resulted in 195 major new engagements and a 33.1% increase in engagements in one year.
- Managed the profitability of the firm client portfolio and standardized client service methodology, which increased realization, utilization, profitability and client satisfaction across all service lines.
- Guided HR team to execute firm People Strategy; authored and led our “Winning Culture” program, which resulted in UHY-TX being named Houston’s “Best Place to Work” (2007-2010).

Other Strategy Engagements (1995-2010). As Managing Director of Breakthrough Leadership Strategies and as Practice Leader for the UHY National Strategy Practice, I provided strategy and change management consulting for corporate, educational, and governmental institutions. Strategy clients included the Methodist Hospital System (Houston and New Orleans), Toyota, Tyson, Shell, Conoco, HP/Compaq, Exxon, Oceaneering, Texaco, Lyondell, Chase Bank, ITC, United States Air Force, The University of Denver, Rice University, and the Houston Police Department. Representative engagements are described below.

- Led acquisition integration projects for **Tyson Foods** (IBC, ITC); led organizational transformation of a 2000-employee plant, which reduced turnover from 143% to 22% within 2 years, increased productivity and morale, and realized significant savings in legal and recruitment costs.
- Assisted in the establishment of **Conoco** University. Coached Conoco leaders. Trained Conoco Remediation Group managers in advanced negotiation skills, which strengthened their ability to resolve community vs. company environmental disputes.
- Developed strategy and managed the change process for the College of Education at the **University of Denver** to develop educational leadership for public and corporate contexts, collaborative problem-solving relationships among government, corporate, community and academic entities, and the resolution of longstanding problems that had inhibited quality learning in the Rocky Mountain region.
- Led and managed the development of the **Dow Corning Settlement Facility**, which administered the distribution of \$4.13B to over 500,000 claimants. Led strategy sessions with the executive team, designed organizational structure.
- Worked with the **Office of the Governor of the State of Texas** to develop strategy for the Texas Workforce Commission.
- Led the **Rice University** Facilities and Engineering leadership team to develop and implement business process and performance management systems. Deliverables described to the Rice Trustees as “Excellent in the Absolute” by McKinsey.
- Advised the **Houston Police Department** in the development of the Command College; trained officers in crisis negotiation. Assisted mayor in the development and training of the Anti-Gang Task Force.
- Managed **UH Downtown** project to develop the state’s first Criminal Justice Master’s Degree program.
- Led strategic planning sessions for the **Methodist Hospital System, Toyota, Tyson and Oceaneering**
- Negotiated contracts and settlements in diverse environments and mediated complex disputes in pre-litigation and court-ordered settings.
- Taught in EMBA and PMBA Program, Bauer College of Business, University of Houston and Rice University.

- Coached corporate executives, attorneys, managers, teachers, and government officials in 26 different organizations, including NBC News, Exxon, Conoco, Texaco, Hess, Lyondell, Oceaneering, 3M, Compaq/HP, Chase Bank, Toyota, The International Monetary Fund, The Theoretical Physics Lab at Los Alamos, The United States Air Force, The Office of the Governor of the State of Texas, Tyson Foods, The Methodist Hospital, The University of Denver and Rice University, which resulted in the development of leadership capabilities, increased influence and stronger relationships within and across their organizations, an alignment of executive actions and priorities with corporate strategic direction, and an increased ability to manage transformational change.

PRESENTATIONS (Talks, Classes, Workshops)

- How Great Leaders Make Decisions and Get What They Want
- Strategy Mapping: Systemic Strategy Designs that Work
- Foundational and Dynamic Capabilities as Strategic Differentiators
- Managing Strategic Risks
- Strategy Killers
- Strategy under Uncertainty
- Making Decisions in the New Economy: Approaching Unbounded Rationality
- Understanding the Transformational Process
- Best Practices in Managing Transformational Change
- Hard Metrics for Managing Change
- Keeping Score: How to Measure Your Strategic Imperatives
- What Leaders Do
- The Building Blocks of a Winning Culture
- Jazz and Managing the Centralized-Decentralized Polarity in Multinational Corporations
- Ten Trends that Are Shaping the Business World
- Managing Workplace Stress
- The Importance of Dissent
- Executive Coaching and Strategic Effectiveness
- Talking Things Through: Great Tools for Communicating at Work
- Finding Happiness in a World of Taxes
- Ten Ways to Act as an Owner
- The Challenges of the Producing Manager
- Developing the Leaders of Tomorrow
- Never Fire Anyone Again
- Four Ways to Tell Right from Wrong
- Getting Your Customers to Complain
- Twelve Magical Questions that Drive Employee Engagement
- Strengthening Core Business Processes
- What I've Learned about Leading
- The Making of the Corporate Athlete
- How to Work with People You Can't Stand
- Reaching Agreements: Best Practices in Negotiation
- What It Means to be a Professional
- Preventing Divorce in Your Family Business
- Diversity as a Strategic Initiative
- Power, Politics and Influence

- Building Effective Teams
- The Role of Mission and Presence in Leadership
- Making the Best of a Broken Plan
- Bringing Out the Best in People
- The Meticulousness Test
- Seven Key Workplace Competencies
- Critical Thinking
- The Knowing-Doing Gap