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MHR 7320: Fundamentals of Business Excellence I
Gerlach 305 – Thursdays – 6:15 – 9:30 - Autumn 2017
Fisher College of Business
Instructor: William Shepherd, Ph.D.
Shepherd.315@osu.edu
Phone: 614-725-7132 (cell)
Office Hours: After class and by appointment

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COURSE DESCRIPTION AND OBJECTIVES:
In today's world, a successful HR manager is expected to demonstrate much more than mere mastery of tactical HR issues and knowledge of relevant employment laws. It is imperative that an HR leader is able to speak the language of business and articulate how the HR function supports and complements the various functional areas in an organization. This course is designed to give a student with little or no prior business experience a quick overview of key business functions. The objective of the course is to help you become better HR managers by enhancing your understanding of strategy, the general business environment, operations & technology, marketing, and finance.

The format of this course requires your active participation. Before each class, I would ask that each of you invest the time and effort to read and understand the assigned materials. In addition, I encourage you to go beyond the assigned materials and read other related content. In class, my aspiration is for the entire class to engage in an energetic, spirited dialogue and debate about the topics. Be prepared to answer the weekly questions listed in the syllabus.

You are expected to take ownership of your learning experience. My role, and my commitment, is to be a facilitator of your learning. Unlike some undergraduate courses you may have experienced, my role will not be to review each element of the assigned readings in class. I will assume you have read the assigned materials. We will cover a lot of diverse material as we take our whirlwind tour through business functions. It is crucial that you **keep up with your readings** and **be an active participant** in all class activities.

REQUIRED MATERIALS: Other required materials may be posted on the Carmen course web site. It is your responsibility to check regularly for updates.
- Textbook: Solomon & Poatsy & Martin: Better Business 5/e
- Reading Packet:
    1. Reading: Looking inside for Competitive Advantage, Jay B. Barney, The Academy of Management Executive, Vol. 9, No. 4 (Nov. 1995), pp. 49-61
    2. Reading: The Five Competitive Forces That Shape Strategy (Product #: R0801E-PDF-ENG)
    3. Case: Amazon, Apple, Facebook, and Google (Product #: 513060-PDF-ENG)
    4. Case: IKEA's Global Sourcing Challenge: Indian Rugs and Child Labor (A) (Product #: 906414-PDF-ENG)
    5. Case: L'Oreal and the Globalization of American Beauty (Product #: 805086-PDF-ENG)
    6. Case: JetBlue Airways: Starting from Scratch (Product #: 801354-PDF-ENG)
    7. Case: Starbucks Coffee Company: Transformation and Renewal (Product #: 314068-PDF-ENG)
    8. Case: The Wonderful World of Human Resources at Disney (Product number: UV6787-PDF-ENG)
    9. Case: Does Mattel's Iconic Barbie Doll Need a Makeover? (Product #: W16090-PDF-ENG)
    10. Case: LinkedIn Corporation, 2012 (Product #: 713420-PDF-ENG)
    11. Case: Cirque du Soleil - 9-403-006 - Delong & Vijayaraghavan, Rev. October 2002
    12. Case: Ethics: A Basic Framework – Lynn Paine

COURSE POLICIES

Standards of Integrity and Conduct:

Each student in this course is expected to be familiar with and abide by the principles and standards set forth in The Ohio State University's code of student conduct and code of academic conduct. You can view these documents or download pdf versions at:

http://studentaffairs.osu.edu/resource_csc.asp

http://www.gradsch.osu.edu/Content.aspx?Content=10&itemid=1.

It is also expected that each student will behave in a manner that is consistent with the Fisher Honor Statement, which reads as follows:
> *As a member of the Fisher College of Business Community, I am personally committed to the highest standards of behavior. Honesty and integrity are the foundations from which I will measure my actions. I will hold myself accountable to adhere to those standards. As a future leader in the community and business environment, I pledge to live by these principles and celebrate those who share these ideals.*

While most students have high standards and behave honorably, like every academic institution we sometimes encounter cases of academic misconduct. It is the obligation of students and faculty to report suspected cases of academic and student misconduct. Students can report suspected violations of academic integrity or student misconduct to faculty or to a program's leadership. All reported cases of academic misconduct are actively pursued and confidentiality is maintained.

OSU Disability Policy: The University strives to make all learning experiences as accessible as possible. If you anticipate or experience academic barriers based on your disability (including mental health, chronic or temporary medical conditions), please let me know immediately so that we can privately discuss options. You are also welcome to register with Student Life Disability Services to establish reasonable accommodations. After registration, make arrangements with me as soon as possible to discuss your accommodations so that they may be implemented in a timely fashion. SLDS contact information: slds@osu.edu; 614-292-3307; slds.osu.edu; 098 Baker Hall, 113 W. 12th Avenue.

Academic Misconduct: The Ohio State University's Code of Student Conduct, Section 3335-23-04 defines academic misconduct as: "Any activity that tends to compromise the academic integrity of the University, or subvert the educational process." Examples of academic misconduct include (but are not limited to) plagiarism, collusion (unauthorized collaboration), copying the work of another student, and possession of unauthorized materials during an examination. Ignorance of the University's Code of Student Conduct is never considered an "excuse" for academic misconduct. The Ohio State University and the Committee on Academic Misconduct (COAM) expect that all students have read and understand the University's Code of Student Conduct, and that all students will complete all academic and scholarly assignments with fairness and honesty. Failure to follow the rules and guidelines established in the University's Code of Student Conduct may constitute "Academic Misconduct." Sanctions for the misconduct could include a failing grade in this course and suspension or dismissal from the University. For more information, please reference:
http://oaa.osu.edu/coamfaqs.html#academicmisconductstatement

GRADING:

With the objective of establishing as dynamic and effective a learning environment as possible, the course requires a commitment on your part not only to attend all classes, but to prepare fully and to participate. We will work together to create an environment in which open, rigorous discourse is the standard. Thus, each of you must be willing not only to share your ideas and analysis with your colleagues, but be open to challenges of those ideas. The following are the fundamental principles for grading in this course:

- The requirements of the course are identical for everyone. This means it is not possible to "make up" for poor performance through "extra credit" work.

- The scheduled assignments/exam cannot be retaken or taken at other than the scheduled time except under circumstances of extreme hardship.

- It is possible to earn any of the official OSU grades in this course.

Sometimes alleged cases of academic misconduct arise due to apparent confusion over the degree of collaboration allowed on assignments. University policy clearly states that it is each student's responsibility to resolve issues that appear ambiguous directly with the faculty member. However, to help create clarity and avoid potential misunderstanding, we use the following categories to indicate the degree of collaboration allowed on each assignment.
- Individual: No Collaboration of Any Kind Allowed
- Team: Collaboration with Teammates Only Allowed

Category	Relative Weight
Current Event Lead (Team)	0%
Team Chapter Lead (Team)	10%
Organizational Analysis Paper (Team)	20%
Organizational Analysis Presentation (Team)	10%
Business Simulation (Team)	5%
Peer Feedback about Chapter Lead/Organizational Analysis Work (Individual)	5%
Exam (Individual)	35%
Attendance and Class Contribution (Individual)	15%

Current Event Lead (Team) – Prior to your assigned class session, your team should review a variety of news sources (e.g., Wall Street Journal, New York Times, The Economist) to identify one business article about a current topic in the news that is having an impact, or could have an impact, on organizations. Two days prior to your assigned class session (by the end of the day Tuesday prior to the class), you should send a copy of the article via email to the class and instructor. At the beginning of the class, you should BRIEFLY (3 minutes or less) review the key issues of the topic. This is not a presentation. The intent is for you to create spirited dialogue, debate, and energy about the topic.

Team Chapter Lead (Team) - You should assume the rest of the class has read and understands the chapter. You should not teach the chapter. Your team's job is to focus on one or more aspects of the chapter and stimulate a class discussion that will deepen our understanding of the topic. You may use any combination of PowerPoint slides, handouts, videos, exercises, or discussions. You assigned team will have a total of 20 minutes of class time. Have fun and be creative. You are responsible for bringing an external drive or pulling up your presentation from a cloud account on the day of the presentation.
Please arrive early to log-in and gain access to any files, videos, etc. you may need to present.

Organization Analysis. You will read two articles (Barney's VIRO model, Porter's 5-Forces Model) that each provide a framework for analyzing strategy. As a team, you will write a paper analyzing the organization using each model. You will choose an organization that you can interact with either directly as a consumer (e.g., in a retail store or restaurant) or with employees of that organization. Your organization must be approved by professor. The objective of the organizational analysis is for you to learn about a new organization; therefore, it should not be an organization where any of the team members have worked (or the focus of another class project). Also, it may not be one of the organizations featured in the case studies (e.g., Apple, Google, Facebook, or Amazon). You must tell me the organization by September 7. The analysis is due on November 16 by 5 pm via email to me.

You should conduct research on your assigned company. The research should be multi-faceted and include resources such as:
- the Company's Careers page to learn how the company describes its career opportunities, organizational culture, training, etc.
- the Company's overall website to learn about its operations, community involvement, and financial performance
- the popular press (general interest newspapers, magazines)
- financial press (Wall Street Journal, Financial Times)
- visiting one or more locations and talking to employees informally/formally
- reviewing job descriptions
- third-party sites (Fortune's "Best Places To Work," glassdoor.com, LinkedIn, Facebook)

The deliverable is a team report. For the report, your task is to produce a document that is approximately 10 pages of text, single-spaced or 20 pages of text, double-spaced with 12-point font and one-inch margins all around. In addition to the body of the report, prepare a 1 page executive summary of the project. Each page should have a page number and a header or footer identifying the team. The pages of the report should be fastened together with a staple or using a binding method of some kind. There is no need for a cover. You may attach up to 5 additional pages of exhibits. Exhibits must be well-formatted, well-documented and professional in appearance. Failure to follow any of these formatting guidelines will result in a reduction of at least 10% in your final score on the project.

You must structure your paper using around the following outline:

a) Briefly describe the organization

VRIO and Five Forces Analysis
b) Based on your analysis, to what extent does the organization's resources and capabilities address the questions of:
1. Value
2. Rareness
3. Imitability
4. Organization

c) Based on your analysis, to what extent are the following factors influencing the organization's industry competition:
1. Threat of new entrants
2. Bargaining power of buyers
3. Threat of substitute products or services
4. Bargaining power of suppliers
5. Rivalry among existing competitors

d) Based on your VRIO and Five Forces analyses, what recommendations do you have for the organization?

Organizational Analysis Presentation (Team) - The other deliverable is the class presentation on November 30. You will have 12 minutes to present. Time limits will be strictly enforced; you will be cut off at 12 minutes as we will need to move on to the next presentation. This is a group grade. Not everyone on the team is required to present. You should practice your presentation time to ensure smooth transitions between presenters and that you are within the time limit. You are responsible for bringing an external drive or pulling up your presentation from a cloud account on the day of the presentation.

For purposes of the presentation, assume you are a team of consultants presenting your recommendations to senior executives at the organization. Based on the organizational analysis that you conducted, describe the top recommendations you have for the organization. For example, you may have a recommendation based on a new threat (new entrants, substitute products or services) or change in bargaining power (for buyers or suppliers), or new resource or capability to pursue internally. You should not present on the VIRO and Five Forces analyses you wrote about in the paper. You should focus on (a) and (d) from your paper, not (b) and (c).

Tips for a high-impact presentation: do not read your slides; do not stand behind the lectern; create visually appealing, easy to read and understand slides; keep the number of bullet points and text to a minimum on each slide; speak in a loud, clear voice.

Organizational analysis presentation slides are due to me via email by 5 pm on Tuesday, November 28. On November 30 you should bring me paper copies of your presentation.

Exam (Individual) - The in-class exam will consist of multiple essay questions. These questions will be aimed at assessing students' understanding of and ability to integrate and apply the basic concepts and issues covered in class discussions, readings, cases and assignments.

Attendance and Class Contribution (Individual):
Fisher College of Business strongly enforces University attendance policies. As per University rule 3335-8-33, any student may be disenrolled from a course for failure to attend by the first Friday of the term, or by the 3rd instructional day of the term, or by the second class meeting, **_whichever occurs first._**
http://trustees.osu.edu/rules/university-rules/rules8/ru8-33.html

Attendance and contribution are extremely important. Attendance at each session is mandatory. Most of your learning will occur in preparation for and participating in discussions. To enhance your preparation and learning, I strongly encourage you to form study groups to discuss the day's material prior to class.

As noted earlier, the complexity of the course material relies heavily on discussion learning. This process allows the cumulative insights of your colleagues to contribute to the evolution of the class's learning. Thus, the entire class learning experience relies on each of you taking responsibility for contributing to the discussion. In order to do so, it is imperative that each of you arrives on time and fully prepared each day.

In order to emphasize the necessity to be prepared for and to contribute to each class, class contribution will comprise a significant portion of your grade. As is the case with real world work environments, you are judged by what you contribute. Even if you feel that you know the material, unless you share your insights with the class, no one can adequately evaluate your preparedness and contribution. Students are not penalized for making comments that don't appear to be the "right answer." It is only through consideration of many diverse opinions and viewpoints that we will move toward a greater shared understanding of the multi-dimensional material that this course includes.

Each day, I may ask one or more individuals to "open" the discussion with a summary of the key issues along with his or her analysis of those issues. It is important that each of you be prepared to respond to the invitation to open the discussion. In the unlikely event that you are not prepared for class, then please let me know beforehand so that we might spare both of us the embarrassment of my calling on you. You should be able to identify the key issues, problems and opportunities facing the central case protagonists, to articulate and evaluate alternative approaches to problems, and to describe the course of action that you recommend and the reasons for yours recommendations. We may begin the discussion with one of the questions in the assignment or with another question.

It is important to appreciate that every student is an important cog in the class discussion, and that it is equally important that each of us listen carefully to one another and attempt to build on or constructively critique prior comments. Please resist the temptation to jump to topics that are not specifically open for discussion. It is also important to note that you are rewarded for your contribution, not just participation. Your contribution score will be based on how much you contribute to the class' learning, not just by how much you talk in class.

Some of the specific things that will have an impact on effective class participation and on which you will be evaluated include:

- Is there a willingness to take intellectual risks and test new ideas, or are all comments "safe"? (Safe comments include repetition of case facts without analysis or conclusions or repeating comments that have already been made by someone else.)
- Are the points made relevant to the discussion? Are they linked to the comments of others and to the themes that the class is exploring together?
- Do the comments add to our understanding of the situation? Are they incisive? Do they cut to the core of the problem?
- Is there a willingness to challenge the ideas that are being expressed?
- Does the participant integrate material from past classes or the readings where appropriate?
- Do the comments reflect cumulative learning over the course and the MLHR curriculum, or does the participant merely consider each case in isolation?
- Is theoretical material applied effectively and appropriately?

Some people find it easy to raise their hand and talk. Others find it more difficult. The point is not to simply talk, but to make a contribution to the collective class experience. Here are three types of class comments that typically add value to the classroom discussion (there are others):

- **Expansion**: I did some additional research on this topic and wanted to share the following...
- **Discourse**: I have the following alternative point of view/interpretation of the research/readings or the view/interpretation of others in the classroom...
- **Application**: Based on the research/readings, I am going to take the following actions in my organization or HR career...

The following rating scale provides examples of behavioral anchors for different levels of class contribution:

1. Consistently contributes to class discussion through insightful comments based on a thorough analysis of assigned readings. An initiator of class discussion. Excels in interacting with class fellows in a professional manner. Comments are focused, integrative, demonstrate preparation, and indicate active listening.
2. Regularly contributes to class based on sound preparation. Regularly responds to instructor's comments and questions and to comments of classmates. Occasionally takes the lead in class discussion. Often volunteers illustrations about the subjects being discussed.
3. Occasionally contributes to class through responding to remarks of the instructor and/or classmates, not necessarily indicative of prior sound preparation. Rarely, if ever, volunteers to begin a discussion.
4. Infrequently contributes to class discussion by answering questions from the instructor and or classmates. Does not demonstrate solid preparation of assigned materials.
5. Makes very few positive contributions to the class discussion.

Frequently rate yourself on the above criteria and critically self-evaluate your level of contributions. Finally, we understand that participating in class can be an intimidating experience initially, and I will try to help you as much as I can. We may have in-class exercises that will contribute to your final grade.

Class attendance is vital. You can't contribute to class discussions if you are not present. If you are going to be absent, please send an email to me with your name and the class number (7320) in the email subject line.

Technology In The Classroom

I have a strong preference that students not use laptops in class. They can distract the attention of the laptop users as well as those around them. As a classroom participant, one of the most important things you can do to get the most from the class is to "be here now" and stay focused on the class content and discussion. Our brains cannot do to things at once - you cannot truly multi-task. You can be focused on your laptop or the classroom but can't do both at once. You can very quickly move back and forth from one task to another, but it is inefficient. If you absolutely feel you need to take notes or reference materials on your laptop during class I am supportive, but please don't utilize the laptop for other non-class related content and shut your laptop when not in use.

Please refrain from using your phone/tablet for personal use and/or accessing social media or non-class related content during class. If you need to do so, please step outside the classroom as it is distracting to me and others. Thank you.

COURSE OUTLINE

The purpose of the course is to provide you exposure to and experience with the business world. This will be accomplished in multiple ways. There will be readings and case studies. You should also keep up-to-date with current events and issues in the news that are impacting business. I may spend segments talking in class about the week's events. This is an opportunity for you to knowledgeably contribute and engage in the conversation as you would be expected to do in a business setting.

Please be prepared to answer the chapter Critical Thinking Questions from the end of the chapters as well as the below discussions questions.

Class 1: August 24

- Article: Looking Inside for Competitive Advantage
- Article: The Five Competitive Forces That Shape Strategy
- Chapter 1: Business Basics
- Case: Amazon, Apple, Facebook, and Google

1. *Think of the industry of higher education universities that offer Master of Human Resource Management degrees. Who are some of the suppliers, buyers, and substitutes? What is the bargaining power of suppliers? Of substitutes? How high is the threat of substitutes? Of new entrants? How intense is the rivalry?*
2. *Focus on one specific factor of production at The Ohio State University (labor, natural resources, capital, entrepreneurial talent, intellectual property, technology). Analyze it using the VRIO model. Is it valuable? Rare? Can it be imitated? Organizationally aligned?*

Class 2: August 31

- Current Event Discussion Lead (Team 5)
- Chapter 7: Business Management and Organization (Team 1)
- Case: JetBlue Airways: Starting from Scratch

1. *What are the key success factors for JetBlue? What are the HR practices that make it work? What will it take to execute on these factors? What is JetBlue's strategy? How is the same/different from Southwest? What are the strengths/weaknesses of Jet Blue?*
2. *What are Jet Blue's Strengths, Weaknesses, Opportunities, and Threats (use the SWOT model from the chapter)?*

Class 3: September 7
- Current Event Discussion Lead (Team 6)
- Chapter 4: Business in a Global Economy (Team 2)
- Case: L'Oreal and the Globalization of American Beauty

1. *Use Geert Hofstede's cross-cultural model to compare the United States with two other countries and be prepared to discuss the similarities and differences across the countries (https://geert-hofstede.com/countries.html).*
2. *What is a beauty product and what are people buying when they buy a beauty product? What did L'Oreal buy when it bought Redken, Maybelline, Matrix, Softsheen, and Kiehl's? Why not develop their own brands? What are the global opportunities for Kiehl's? What are the limits, if any?*

Name of organization for Organizational Analysis due

Class 4: September 14
- Current Event Discussion Lead (Team 7)
- Chapter 5: Small Business and the Entrepreneur (Team 3)
- Chapter 6: Forms of Business Ownership (Team 4)
- Case: Cirque du Soleil

1. *Go online and watch a few clips of Cirque performances. What are the unique challenges of recruiting talent for Cirque? What are the pros and cons of growing the Cirque business larger? What are the creative tensions within the business?*
2. *Assume you are advising the following five types of businesses on what would be the best type of business ownership (e.g., LLC, partnership) for their organizations. What type would you recommend for each and why? Roofing and siding company; Ice cream parlor; Yoga instruction; Lawn-mowing company; and Clothing donation company.*

Class 5: September 21
- Current Event Discussion Lead (Team 8)
- Chapter 10: Online Business and Technology (Team 5)
- Case: LinkedIn Corporation, 2012

1. *Employee Monitoring - Should employers be allowed to use GPS devices to keep track of their employees' whereabouts during work hours? Should employers routinely screen their employees' email? Should an employer routinely record telephone conversations held by employees during work hours?*
2. *What are the 3 primary revenue streams of LinkedIn? What are the strengths / weaknesses of LinkedIn's business model? Who are the various customers/users of LinkedIn and how do they interact to make LinkedIn more valuable? What would you focus on next if you were Jeff Weiner? Why did Microsoft buy LinkedIn?*

Class 6: September 28
- Current Event Discussion Lead (Team 9)
- Chapter 3: Ethics in Business (Team 6)
- Chapter 11: Production, Operations, and the Supply Chain (Team 7)
- Case: IKEA's Global Sourcing Challenge: Indian Rugs and Child Labor

1. *Consider all the IKEA stakeholders (customers, employees, shareholders, etc.). How is IKEA helping them and how are they hurting them? How should Marianne Barner respond to the invitation for IKEA to have a representative appear on the upcoming broadcast of the German video program? What actions should she take regarding the IDEA supply contract with Rangan Exports? What long-term strategy would you suggest she take regarding IKEA's continued operation in India? Should the company stay or should it exit?*
2. *Think about your team's assigned organization. How effective is its operations management (e.g., facility locations, layouts, etc.)? How effective is its supply chain (e.g., create and deliver their goods and services)? What improvements could your organization make?*

Class 7: October 5
- Exam

October 12
- No Class (Final Exam Week for First Term 7-week Classes)

Class 8: October 19
- Current Event Discussion Lead (Team 1)
- Chapter 12: Marketing and Consumer Behavior (Team 8)
- Case: Starbucks Coffee Company: Transformation and Renewal

1. *Assume you oversee recruiting new students to Ohio State's MHR program. Of the six components (Political and regulatory environment; Competitive environment; Social and cultural environment; Economic environment; Technological environment; Global environment) of the Marketing Environment, in the next two years which two components do you think will have the biggest impact on your program and why?*
2. *What were the most important factors in Starbucks decline in 2007-8? What were the most important aspects of Starbucks transformation? What do you make of Schultz's take on corporate responsibility?*

Class 9: October 26
- Current Event Discussion Lead (Team 2)
- Chapter 13: Product Development and Pricing Strategies (Team 9)
- Chapter 14 Promotion and Distribution
- Case: Does Mattel's Iconic Barbie Doll Need a Makeover?

1. *Think of one product that is in each of the four stages and explain why: a growth stage, a maturity stage, and a decline stage.*
2. *For each of the four products you thought of above, describe the: (1) advertising strategy you would use and (2) the distribution strategy you would use.*
3. *What are the main issues the Barbie brand faces? What are the main controversies? What is your analysis of Mattel's repositioning efforts? What is the influence of Barbie on society? Is Barbie "good" or "bad" for society? What do you recommend Mattel do next for the Barbie brand?*

Class 10: November 2
- Current Event Discussion Lead (Team 3)
- Chapter 15: Financing and Tracking Business Operations
- Chapter 16: Investment Opportunities in the Securities Market
- Case: The Wonderful World of Human Resources at Disney

1. *In your own words describe: (1) a balance sheet; (2) an income statement; and (3) the difference between the two. For your own personal financial life, what are some of the types of assets and liabilities you have?*
2. *In your own words describe: (1) a stock; (2) a bond; and (3) the difference between the two.*
3. *What kind of culture does Walt Disney Company (WDC) want to create? What is intriguing about how WDC manages its HR practices toward that culture? Is WDC really a "magical" place? Are WDC's HR practices transferable outside the United States?*

Class 11: November 9
- Current Event Discussion Lead (Team 4)
- Business Simulation

Class 12: November 16
- Case: Ethics: A Basic Framework – Lynn Paine
- Guest lecturer: David Freel (freel.8@osu.edu)

Organizational Analysis Paper Due by 5 pm via email
Organizational Analysis Presentation Slides Due at 5 pm via email on Tuesday, November 28

November 23
- No Class – Thanksgiving

Class 13: November 30
- Organizational Analysis Presentations

Bring one copy for me of the presentation slides

December 7
- No class (last day of classes December 6)

Week of December 11
- No meeting week of finals

William Shepherd, Ph.D. - Biographical Information

Dr. Shepherd is the Director of Enterprise Learning and Development at The Wendy's Company. He has responsibilities for the leadership development, executive coaching, organizational culture, and hiring and promotional assessment programs, as well as curriculum development for 6,500 restaurants in over 20 countries. Prior to joining Wendy's, he worked at Huntington National Bank where he was Director of Talent and Organizational Effectiveness and had a wide range of talent management responsibilities, including succession planning, leadership development, executive coaching, performance management, talent acquisition processes, and organizational culture. Huntington was awarded the HRM Impact Award, which recognizes best evidence-based HR practices, by the Society for Industrial and Organizational Psychology (SIOP) and the Society for Human Resource Management (SHRM) for the work Shepherd did developing and leading Huntington's VOICE employee opinion survey program. Shepherd has also won SIOP's "Wiley Award For Excellence In Survey Research" and the "M. Scott Myers Award for Applied Research in the Workplace."

Previously he worked for the international human capital consulting company Personnel Decisions International (now a division of Korn Ferry) where he helped develop and validate large-scale, high-volume hiring tools and systems for a wide variety of organizations and industries, including Target, Sears, LensCrafters, International Monetary Fund, Amtrak, AutoNation, American Express, Citibank, Bank of America, Wells Fargo, and General Mills. He started his career at Verizon in the Employee Selection and Competency Development Group with a focus on developing and validating hiring and promotional interviews and personality and cognitive ability assessments.

Shepherd obtained his doctoral and master's degree in industrial/organization psychology with a minor in quantitative psychology at Bowling Green State University. He received his bachelor's degree in finance and psychology from The University of Northern Iowa. He is a licensed psychologist in Texas and a Fellow of the American Psychological Association (APA) and a Fellow of the Society for Industrial and Organizational Psychology (SIOP). He has held the Senior Professional in Human Resources (SPHR) designation. He has also served as an adjunct professor at Bowling Green State University, Concordia (MN), Minnesota State University, Kent State University, and The Ohio State University teaching at both the undergraduate and graduate levels.

He has presented at The Conference Board's conferences on Executive Coaching, Talent Management Strategies, and Onboarding. In addition to presenting at various conferences, his research has been published in academic journals such as Academy of Management Journal, Personnel Psychology, International Journal of Selection and Assessment, Employment Relations Today, and the International Association for Human Resource Information Management. He has also contributed as a subject matter expert in stories for a wide variety of media outlets such as National Public Radio and HR Magazine.

He is a Board Member of the Friends of the Columbus Metropolitan Library and has previously served on the Board of Leadership Columbus. He and his wife in Dublin and have 3 children.