



**Daniela Montemerlo**

UNIVERSITY OF INSUBRIA



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## Contact data

### Associate Professor

#### Department of Economics

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## Biography

### Education

- Degree in Business Administration with Honors, Bocconi University, 1989
- PhD in Business Administration, Bocconi University, 1994

### Academic Experience

- 1999-2006 Assistant Professor of Business Administration, Bocconi University, Milan
- 2005-, Professor of Family Business Strategic Management, Bocconi University, Milan
- 1996 - Faculty member and director of family business executive programs, Strategic and Entrepreneurial Management Department, SDA Bocconi School of management, Milan

### Research projects

- 2006-, Generational transitions in family SMEs, University of Insubria and Chamber of Commerce, Varese
- 2005-, From the founder to a multigenerational family business, AldAF-Alberto Falck Family Business Chair, Bocconi University; University of Palermo, EBS, Wiesbaden
- 2003-2005, Growth dynamics in Italian family business, SDA Bocconi School of Management, Unicredit, AidAF
- 2000-, Corporate governance structures and processes in family-owned SMEs, in collaboration with Norwegian School of Management BI and with The Weatherhead School of Management, USA
- 2000-2004, Generational transition processes in family-owned SMEs: successful experiences and best practises, funded by the Ministry of University and Research, Bocconi University and Catholic University of Piacenza
- 1999-2001, Success as a Function of Love, Trust and Freedom in Family Business", SDA Bocconi School of Management; Brigham Young University, UK; IESE, Spain; University of Palermo
- 1997-1998, Ethics in Family Business, IESE, Spain
- 1996-1997, Survey of family-owned SMEs based on MassMutual's framework, SDA Bocconi School of Management-ISVI
- 1991 – 1993, Transition processes in family business, SDA Bocconi School of Management - Mediocredito Lombardo
- 1991 – 1993, Institutional structures and governance, Bocconi University

### Cooperation with Italian research centers and Associations

- Entrepreneurship and Family Business, AldAF-Alberto Falck Chair in Strategic Management in Family Business
- AldAF, Italian Association of Family Business
- ITFERA, Italian Family Enterprise Research Academy

## **Membership in International Committees**

### *The Family Business Network (FBN):*

- member of the Organizing Committee of 2001 Annual Conference, Roma
- member of the Scientific Committee of 2002 Annual Conference, Helsinki
- member of the Organizing Committee of 2003 Research Forum, Lausanne
- Chair of Best Research Papers' Awards Committee, Annual Conference, Copenhagen 2004
- member of the Organizing Committee of the 2006 World Summit

### *International Family Enterprise Research Academy (IFERA):*

- founding board member, chair of 2003 Annual meeting, Milano, Bocconi University
- member of the Organizing Committee of 2004 Annual Meeting, Jonkoping, Sweden
- member of Review Board, Annual Conference, 2007

### *The Family Firm Institute (FFI):*

- Member of the Advisory Board organizing Annual Conferences, 1998-2002

### *Family Enterprise Research Conference (FERC):*

- Member of Review board for 2006 and 2007.

## **Qualifications and awards**

Co-winner of EFMD Best case study award for Costa Case Study, with Guido Corbetta, SDA Bocconi School of Management, 1998

Co-winner of FFI International award, 2001, with Guido Corbetta and Andrew Keyt, SDA Bocconi School of Management and Loyola University Chicago

## **Research interests**

Family business: generational transition processes, growth strategies, evolution of ownership and governance structures, managerialization processes, teams at the top, family constitutions, family governance, family and business values.

## **Teaching experience and appointments**

- 2003-2006, Business Administration, University of Insubria, Varese
- 1994-2006 Business Administration, Bocconi University, Milan
- 2005-, Family Business Strategic Management, Bocconi University, Milan
- 1994 -, Family Business, Bocconi University and SDA Bocconi School of Management, Milan

## **Representative publications**

### **Books**

Il governo delle imprese familiari. Modelli e strumenti per gestire i rapporti tra proprietà e impresa (Family Business Governance. Models and tools to manage family-firm relationship), Milano, EGEA, 2000 IT

The role of Family in Family Business (edited with G. Corbetta), EGEA, 2001

The Family Constitution: Agreements to Secure and Perpetuate Your Family and Your Business (with J. L. Ward), Family Enterprise Publishers, 2005

### **Articles and book chapters**

Quando i concorrenti si associano (When competitors cooperate), *Economia & Management*, vol. 21, luglio 1991 IT

La dinamica consenso-opposizione e i processi di comunicazione nel modello italiano di management (The dynamics of consensus and conflict and communication processes in the Italian management model, with G. Colombo), *Economia & Management*, n. 6, dicembre 1992 IT

Assetti istituzionali e gestione strategica nello sviluppo delle imprese familiari (Institutional structures and strategic management in family business, with G. Colombo), in C. Demattè e G. Corbetta (editors), I processi di transizione delle imprese familiari, Edizioni Mediocredito Lombardo, 1993 IT

Assetti istituzionali e servizi professionali (Institutional structures and professional services), in: G. Airoidi, F. Amatori e G. Invernizzi (editors), Proprietà e governo delle aziende italiane, EGEA, 1995 IT

Evoluzione della compagine proprietaria e rapporto con gli intermediari finanziari (Ownership evolution and relations with financial intermediaries), in G. Corbetta e G. Forestieri (editors), Le banche italiane dal credito al merchant banking, Mediocredito Lombardo, 1997 IT

Strutture proprietarie, complessità gestionale e sistemi di governance nelle piccole e medie imprese (Ownership, business complexity and governance systems in SMEs, with G. Airoidi and L. Gnan), in G. Airoidi, G. Forestieri (editors), Corporate Governance. Analisi e prospettive del caso italiano, ETAS, 1998 IT

Il processo di successione nelle imprese familiari di piccole e medie dimensioni (The succession process in family-owned SMEs, with L. Gnan): alcuni confronti tra Italia e Stati Uniti, Economia & Management, n. 2, marzo 1999 IT

Equilibrar propiedad y direcci3n en la empresa familiar ampliada (Balancing ownership and management in extended family business, with G. Corbetta), in Gallo M. A. (editor), La empresa familiar, 1999, Estudios y Ediciones IESE, pp 123-142 ES

Le medie imprese familiari verso il riassetto normativo; quale impatto sui sistemi di governance (Medium-sized family business towards a law reform; impact on governance systems, with G. Brunetti), Economia & Management, n. 5, settembre-ottobre 2001 IT

Structure and dynamics of ownership, governance and strategy: role of family and impact on performance in Italian SMEs (with L. Gnan), in G. Corbetta, D. Montemerlo (editors), The role of Family in Family Business, EGEA, 2001

When unity and commitment are threatened; coping with family business crises, in AA.VV., Success as a function of love, trust and freedom in family businesses, IESE, Monographics n. 4, 2001

La propriet  familiare: motore per la crescita o impianto frenante? (Family ownership: boost or obstacle to growth?), in G. Corbetta (editor), Capaci di crescere (Capable to grow), EGEA, 2005 IT

Family-firm relations in Italian SMES. Ownership and governance issues in a double-fold theoretical perspective, in P.Z. Poutziouris, K.X. Smyrniotis, S.B. Klein (eds), Handbook of Research on Family business, Edward Elgar Publishing, 2006

### **Conference Papers (all published)**

Internationalization Strategies in Family Businesses: Implications for Family and Company (with G. Corbetta), in Planning for Successful Generational Transition: the Global Challenge, FBN Conference Proceedings, 1996

Ownership, Governance and Management Issues in Italian Family Business: a Survey, in Shaping the Future of Your Family Business, FBN Conference Proceedings, 1997

Regulating relations between family, ownership and company: the role and variety of formal agreements; some Italian experiences, Tradition or Entrepreneurship in The New Economy? , 2000 FBN Conference Proceedings

The multiple facets of family firms' social role: empirical evidence from Italian SMEs (with L. Gnan), in M. Koiranen, N. Karlsson (editors), The Future of Family Business. Values and Social Responsibility, FBN Conference Proceedings 2002

Leading family firms: a double challenge (with G. Corbetta), in P. Poutziouris, L. Steier (editors), New Frontiers in Family Business Research: the Leadership Challenge, Manchester Business School and Alberta School of Business, 2003

Governance structures in Italian Family SMEs (with L. Gnan, W. Schulze, G. Corbetta), in S. Tomaselli, Leif Melin (editors), Family Firms in the Wind of Change, Research Forum Proceedings, FBN 2004