



## HARVARD | BUSINESS | SCHOOL

ANGELA Q. CRISPI |  
EXECUTIVE DEAN FOR ADMINISTRATION

The following information has been compiled for the purpose of the June 28, 2017 Faculty Review Board meeting and includes a record of staff and faculty reflections on and intersections with Associate Professor Ben Edelman between September 2016 through April 2017, organized in reverse chronological order.

### April 2017

#### *Harbus interview (attached)*

- Reflecting on the media coverage following the confrontation with local Boston small businesses Ben noted, "...to be sure, my tone was out of line. These days I try to be more careful that my approach reflects my true purposes and conveys what I am trying to achieve."
- [REDACTED] held a candid and constructive conversation with Ben.
- [REDACTED] asked that Ben refrain from acting as an agent or A/V problem solver for other faculty members except in pre-agreed and coordinated ways with Media Services (e.g. assisting [REDACTED]).
- In the case of [REDACTED], [REDACTED] explained that it was fine to assist [REDACTED] in submitting the initial request, but that his on-going participation has been disruptive.
- Asked that Ben reach out to Kate (or [REDACTED]) when he wants to explore how to pursue some of his ideas (versus going directly to Media Services staff).
- Discussed Prof. Badaracco's situation and agreed this was a situation where good intentions went wrong. Steve further explained how this resulted in our services being viewed negatively.

Ben was very collegial, and he graciously received the feedback. As a follow-up, the Media Services team aims to find a graceful way to allow him to step back from [REDACTED] solution.

[REDACTED] observed that Ben brings a lot of energy and creativity to bear and asked his team to continue partnering with Ben while keeping the boundaries clarified.

### March 2017

#### *Intersections with Media Services team:*

1. LCA and Kaltura - Professor Edelman encouraged a workflow that was not actually using the KMS in the classroom at all, but when it went poorly in classroom execution by several faculty the ultimate blame went to Kaltura. Professor Edelman then wrote negative remarks about Kaltura and our efforts to all of LCA. (can forward emails if you have not seen these threads)
2. Apple TV in the classroom suggestion - stemmed from the above threads was the mention of how one could bring an Apple TV into a classroom and it would be fine

This file is part of [Edelman v. Harvard - Summary Judgment](#).

CONFIDENTIAL – IDENTITY NOT TO  
BE PUBLICLY DISCLOSED



3. [REDACTED] hearing assist need – We received a ticket from Ben Edelman requesting microphones at each desk in a classroom for a faculty member that was having difficulty hearing students due to a hearing impairment. We responded and he did give us the name of the faculty member, [REDACTED] Ben Frey worked directly with [REDACTED] audiologist a year or so ago and we came up with a working classroom solution in collaboration with renting equipment and borrowing some from the Harvard Law School. We know how to assist [REDACTED] but when we tried to set-up a meeting he said that he wanted Professor Edelman to be a part of the discussion.
4. The rolling cart - This request, to store the cart somewhere in Aldrich, boomeranged back to me at least 3 times.
5. Voting app – in all fairness this has died down but can't be forgotten.

How do we gain his confidence and teach him to direct inquiries before he starts solutioning? We do not need him to solution for IT or spread any negative opinions of IT that he may have. We simply need him to direct his colleagues to us so that we can learn about their needs.

*Email exchange with Angela Crispi*

Angela provided Ben with a framework and guidance on engaging an executive coach (attached).

**February 2017**

*Observations from [REDACTED]*

- Leaves a lot of work for people doing things
- Not being badly behaved
- Well intentioned

**January 2017**

*Observations from [REDACTED]*

- When Linda and Felix in room more in control
- Comes across as arrogant
- Long emails, inappropriate
- Absorbs meetings

**December 2016**

*Email exchange with [REDACTED]*

[REDACTED] and Ben exchanged emails regarding classroom polling software (attached).

*Observations from [REDACTED]*

- Felix and Linda not at meeting so like the cover not there
- Started to go off the rails
- Doesn't know as much as he thinks he knows
- Goes off on tangents – course evaluation as examples
- Dropping in jargon
- Takes them in an unproductive path and then people tune you out
- Unintentionally and well intentioned
- No filter can't always stop yourself but bite your tongue more.

**October 2016**

*Ben suggests solutions for Assistant Professor [REDACTED]*

1. Ben Edelman has developed a way to connect slides shown in HBS classrooms to a device like an iPad. It seems likely to work.

2. For seminar talks, an effective approach has just involved informing the audience to verbally interrupt. If I am not teaching a large MBA class, then the need to solve this problem is minimal. If I am teaching a large MBA class, Ben Edelman has developed some very nice software that uses the polling systems in classes to keep track of who has a question. An algorithm then determines which person should be called – and that person's name is played into my ear via Bluetooth.

*Observations from* [REDACTED]

- People can see making effort and noticed
- People are glad to see he's trying
- Reading a situation
- Well intentioned contrib. has achieved its objective
- Establishing authority

2015-16

*Recommendation actions*

- Teach LCA beginning in 2016-17
- Join LCA teaching group in 2015-16
- Relocate office to Morgan Hall 4<sup>th</sup> floor
- Join IT Strategy Board chaired by Bob Dolan and Steve Gallagher
- Retain an executive coach if he wants one

*Next steps*

1. NN to ask Paul Healy to talk to Joe Badaracco about LCA
2. NN to update Brian Hall on planned recommendations before meeting with Ben
3. NN to meet with Ben
4. AC to talk to Valerie Porciello about office and possible teaching assignment in LCA
5. AC to talk to Bob Dolan and Steve Gallagher about IT Strategy Board

**September 2016**

*Nitin Nohria and Paul Healy*

- Check in
- Habits over a lifetime
- Learn to take feedback from staff not just Felix, organizational realities they are dealing with
- By mid October (how's it going, here's what seeing, do you need/want a coach?)
- Stay
- Are you learning?
- Eventually tell NN+PH every 4-6 weeks
- Have Joe and others be observant
- He deserves the feedback

*Observations from* [REDACTED]

- Jury is out
- Academic technology steering committing meeting observation
  - Features with Canvas
  - Section content management feature
  - Started to go down same path
  - Math wizard
  - Wouldn't let go – yes a legitimate concern
  - Email follow-ups

- [REDACTED] yellow flags
- [REDACTED] stepped in and said stop – he did
- He latches on to things!
- Decent contributor
- Feel we see him catching himself. one year ago he would have not taken no as an answer
- Doing some small innovations w [REDACTED] – visually impaired faculty, hearing encouraging things
- Don't know if he has a coach
- He walks to the line and backs off – that's better.

**Feedback on B. Edelman  
Summer 2017**

**[REDACTED] - 7/25/17**

- Had multiple issues
- Nothing but positive things to say
- Interaction goes way back
- Worked closely with him on participation tracker
- Most recently developing tools and apps for CE
- A debrief with her and KM – very moving
- At times has a rough edge to him
- Good colleague and went above and beyond
- He always contacts us if working on something with pedagogy
- Incorporates feedback
- Learned over time that how he presents matters
- On ATSC with him, he's been perceptive
- Taught in LCA for first time
- Had ideas and sought advice on how to approach teaching plan
- Wanted feedback on how to present it
- Reached out to understand at deeper level impact for teaching group
- Haven't met since taught LCA; was euphoric and eager to be in a teaching group
- Had to learn a lot of new stuff; never grit his teeth
- "When I know I will interact with, I'm glad"
- He'll have new perspectives and think out of the box and I love that.

**[REDACTED] Faculty Support Specialist (7/21/17)**

- Supported Ben this past year while juggling David Garvin and Joe Badaracco
- Has found Ben to be good to work with
- He is a methodical and scientific thinker, who has very specific ways that he likes things to be done.
- Often asks if she has time to take something on so is accommodating
- He sometimes leaves candy for others around the office
- He has even said it can be helpful to get others opinions
- He was helpful with the LCA teaching group so saw him in action there too.
- He seemed to enjoy the cases he taught.
- They set up together tools for LCA with dropbox

**[REDACTED] Director, Learning Technologies and Instructional Design Services (7/18/17)**

- Interacted with him on several efforts over the years – Canvas and Kaltura to be specific.
- Also interacted when developing in class polling for [REDACTED]
- Interactions have been in person and over email
- Also had interacted with him since she was the service owner for seat charts which he launched.
- He has great ideas and they come from a good place
- Appreciates that he really tries
- He has a hard time thinking about other perspectives

- Can have a tendency to threaten to take something to the next level, but he has taken a step back
- "If you don't make the customization, I will."
- I've seen him change his behavior and less "I'll just do it."
- With [REDACTED] went backwards a bit.
- A noble cause
- He seems to be trying
- Can be disruptive
- He is earnest and we appreciate his desire for change
- Lacks understanding of an appropriate path to a goal
- Has a clear vision of what he wants to achieve.

**[REDACTED] (8/10/17)**

- Is aware of the concerns with him and had interactions over 3 years with FIELD; only ran into him once this year since FIELD 3 ended
- Looking back, she had the unique vantage point of working with him teaching group meetings
- Earnest, committed, participatory
- So smart; blows everyone out of the water with his knowledge
- Tendency to go down rabbit holes that others are not interested in
- Open to redirection
- Responsibly engaged
- Not persistent in an inappropriate way
- Helpful in finding productive solutions
- Worked well with teams and students
- Very committed to their success; occasionally tried to help them
- 1 student issue in particular with vendor squawking and causing a fuss
- He clearly understood the students opinion but saw we needed to have a 2 way relationship with the vendor; he didn't fight the battle; made it clear how he felt but tried to balance the situation
- With his expertise in IT, her team had a rocky start with him; he could write code overnight but we can't move that nimbly
- Always wanted quick solutions
- We learned his style
- Sometimes such a pain but well intentioned
- Made some solutions for us
- It always a process with him but he is receptive to feedback
- Tony Mayo gave him lots of coaching
- Over the arch of two years he did less harping
- He's grown some but we learned how to deal with him
- So justice oriented
- A quirky guy
- Bag of leftovers at a catering event – started spouting how much RA charges
- Admire his morals; he wants the right thing
- Often "why are we talking about this?"



FRB/BE – Interview Notes

(7/26/17)

- [REDACTED] first interacted with BE in exec program for media managers, asked BE to teach. BE is not impressed with our teaching norms, created special slides, was a disaster.
- Is amazed he's never been able to put an MBA course together, hasn't been able or willing to teach using our pedagogy
- But in LCA has been super successful, is enjoying it, students love the course and teaching ratings are increasing. [REDACTED] has interacted with BE re: "adjusted" teaching ratings (controlling for superstar teachers in other sections, courses that in general score more poorly, etc.) – he seems to have discovered a subject that's close to his heart [REDACTED] is happy it's happened
- BE sits on IT/MBA/faculty steering committee [REDACTED] has seen both the good and the bad of BE.
  - Good: is engaged, cares about the outcome, highly knowledgeable about IT.
  - Bad: Incapable of seeing why his preferred solution can't/won't be implemented, but doesn't come from a bad place, he really believes his way is the right and only way. But he can't see why some things are just not feasible for the IT group, or are not best for other EC instructors. Displays really limited judgment; doesn't understand the consequences of his own actions, unable to be reasonable.
  - Recent example: There is overwhelming demand by faculty to be videotaped, but IT faces capacity constraints. But BE has a particular view, doesn't understand why all faculty and classes can't be videotaped given technology that's available to support this (could videotape every class continuously, edit later). IT argues [REDACTED] agrees) this is not practical, yet BE pushes back, not empathetic to other side or point of view, can't relate to others. In conversations, BE is abrasive, arrogant, stubborn
- [REDACTED] has never seen BE change his mind in any conversation that he's ever witnessed
- Mind boggling to [REDACTED] that BE can't develop his own EC course given how relevant his expertise is re: current issues (technology/legal)
- Is not obvious to [REDACTED] that BE's success in LCA will be maintained
- No lack of engagement whatsoever, can go to BE with anything and ask for help
- The world is B&W to BE.
- Unable to restrain himself. Comes from a good place, but no sense of what's appropriate. Is unable to see other side's point of view (contrary to HBS, where the case method is based upon finding common ground, trying to understand the perspective of those who disagree with you)
- [REDACTED] is concerned that BE's approach harkens back to the "older model" of faculty/staff interactions (I'm smarter than you are, you are inferior), has no sense that BE can/will change, risk of creating a bad environment, fostering heightened fear of failure

- [REDACTED] should be having this kind of discussion at the Associate review, not when someone is coming up for Tenure

(7/26/17)

- BE is an unbelievably moral and caring person, but can come across as lawyerly, blunt and almost disrespectful
- Has learned from Chinese Restaurant (CR) episode: BE has viewed this as getting more "data" (Mr. Spock as opposed to Captain Kirk), has learned that what/how you say things, when you push back or just let it go - these matter. Obvious to the rest of us, but he is wired differently. Has cognitive disconnects similar to children on the "spectrum": doesn't read body language, sense cues, know what's inappropriate to say. Has poor social skills
- But is the least manipulative/Machiavellian person on the planet
- Acts very nice towards, tries to help to the victims/weaker/disadvantaged (so when I pushed [REDACTED] whether this extended to his interactions with HBS staff, he responded: with the incident around reducing # of clicks to enter class participation, BE may rebuke staff who disagree with him, but in his mind he's working to help other staff who are "victimized" by having to do the extra work)
- To understand him, need to factor in 3 important contexts: (1) he's trained as lawyer, as were both his parents, (2) he comes from a very justice-oriented family (aunt Marion Wright Edelman was a black civil rights activist, knew MLK), (3) 1/3 to 1/2 of his research is about bad stuff on the internet (Sheriff of the Internet), so he has an activist mindset
- In CR case, his immature perspective was based on his view that the owner was ripping off customers who would never know. BTW, he never identified himself as a Harvard professor, owner figured it out and played BE brilliantly, he is no babe in woods (was on GC)
- Jan Rifkin's advice to BE was to repeat back - aloud - the argument of the other person before you state your own view, so you better understand what the other person's perspective is - [REDACTED] says BE told him this was incredibly helpful
- Blinkx incident:
  - [REDACTED] response was much less confident to my question about the Blinkx incident, and how he ([REDACTED]) would explain that in terms of cognitive disconnects.
  - [REDACTED] rationale/defense of BE: He could have made a gazillion dollars by shorting Blinkx's stock, but chose not to do so; Blinkx's stock has stayed low since, suggesting that BE was right about the company; he only accepted a speaking fee of \$10K which is small potatoes to BE, he might not even have noticed it given how much income he makes (i.e., it was not about the money - and, in general, it's never about the money with BE, he lives modestly and will probably give most of it away at the end); and this episode was a wakeup call for BE that this was not appropriate. (SG: less charitably, he got caught).
  - BE's response to Blinkx incident has been to set up a series of filters to prevent this from happening again (more discipline, report more to the Dean, will be more transparent, will become more consumer focused,



with think more in advance about potential conflicts of interest) BE doesn't think like other people, he is totally unique/one of a kind

- ■■■ believes the incident "was all legally and ethically ok" and BE wasn't trying to do anything sleazy, now recognizes this created "the appearance of conflict"

- Going forward BE's focus will be on class actions where individual consumers are being screwed a small dollar amount, but across lots of consumers it amounts to a lot of money
- Is incapable of being two-faced, couldn't fake it
- BE isn't desperate to stay at HBS, has lot of options (other top business schools, private practice/doing his thing full-time)
- BE makes a lot of his money bringing class action lawsuits (with several partners) against companies that screw individual consumers by a small dollar amount, so they wouldn't bother to sue, but across all the consumers who are being victimized the dollar amounts at stake are huge.
- Has no charm, won't try to charm his way out of anything
- Is principled, but needs to learn to respect other (principled) people's points of view, that you can't argue them to death, but sometimes have to agree to disagree
- Persists in fighting people because that's the right thing to do

[REDACTED] (8/3/17)

- Lives close to BE, sees him walking around the Brookline reservoir
- On whole BE was an excellent colleague in LCA, saw no behavior that was akin to what he did with the local Chinese restaurant (David Scharfstein also lives in area, confirms the restaurant has been doing that for years)
- [REDACTED] was alerted to the issues, kept his eyes open
- Thought BE was between "very good" to "exemplary" colleague: agreed to do case writing, got better snacks for the teaching group meetings, got along with everybody
- Only slight flaw: Is on the spectrum, sometimes when in one-on-one, eyes will stop blinking and he'll go on and on (but could describe a number of our colleagues)
- Sat in one class, had very good rapport with students, wasn't too tough, challenged them and pushed back, didn't put anyone down
- BE turned out to really like LCA, students liked his approach, he would like to teach LCA indefinitely, was willing to teach 2 sections (even though not required to)
- [REDACTED] was aware why BE was put in LCA, did wonder if BE would try hard to exhibit his best behavior. Did seem that BE was trying to be careful (who wouldn't in that situation?), but JB had the sense that he wasn't seeing a "performance," was just seeing Ben. Feels that way with a "fair degree of confidence."
- Gives a "green light" on this.

(8/8/17)

- 2<sup>nd</sup>/3<sup>rd</sup> hand: knows BE to be "indelicate," understands he might treat an assistant differently from how he treats a superior (doesn't like that). believes it's not done out of disrespect, but rather BE is not good at being delicate – if he thinks something is unfair or wrong, he can come across as harsh at times
- With his superiors he has more of a filter (as we all probably do)
- This aside, this is not a person who's looking out only for himself, or who is trying to cut corners or pull a fast one; rather, he will waste a tone of time b/c he believes what is "right" should be pursued over what is "wrong" – even if it's what we would consider to be a trivial issue
- He's just wired that way
- believes BE's intentions are good, which is the most important thing in JC's view
- Had interaction with BE within last 3 years regarding his key role in developing a new system to allow students to "raise their hands" electronically (motivated by vision-impaired students, ). Great idea that will even try, allows instructor to collect data on whose hands went up, identify bias in calling patterns. BE spent way too much time building this thing, went out of his way to develop this based on a conversation or two that he had with people; interactions with BE over this, providing feedback (while was on leave), could not have been better
- has no problem with BE being tenured as long as his intentions are good, and is extremely confident that BE is coming from the very best place
- One risk of tenuring someone is not an issue with BE, i.e., that the "real you" will come out after you get tenure. With BE, the "real you" is already out there. views this as a strong positive.

8/10/17)

- Wonders if we've considered if BE has a behavioral dysfunction (has heard lots of tech CEOs like Bill Gates are "on the spectrum"), must be other examples of this at Harvard
- Her sense is that he sees the world differently, really is something going on here, best route could be a really, really good therapist who knows about this in high-performance individuals
- This is not something he can self-correct (as with a jerk who is told he needs to stop being like that). There's something here in the wiring, in the cards he was dealt, it's not just about "clean up your act."
- BE seems lonely, isolated, carries it with him
- Is he a Ted Kaczynski or a John Nash?
- [REDACTED] believes he wants to be helpful and to engage, but she's also seen enough of the oddness that it's not just typical bad behavior, rather a disability of some kind – and if it's a disability, should we deal with this any differently from how we deal with physical disabilities (like vision impairment) – the school has gone out of its way to accommodate and support faculty who are going blind; should the same flexibility be shown to someone suffering from a mental disability? Does this raise certain legal issues?
- [REDACTED] is really torn: she really likes the guy, and found him to be really helpful
- THE FOLLOWING SHOULD NOT BE CITED IN REPORT B/C WOULD IDENTIFY CM: Taught FIELD with BE in the year it was announced it would be cancelled, so [REDACTED] suggested having a party for the teaching group to celebrate their time together at a lunch/party/etc. So BE took ownership of organizing this, created a dedicated Wiki for people to sign up, and then he unilaterally announced the date/time/place the event would be held. However on this date Jill and Tony (who headed the course) couldn't make it, which [REDACTED] thought was awkward and inappropriate b/c the event was obviously meant to thank them (it should have been obvious that their attendance was a given). [REDACTED] was struck that this nuance never occurred to BE, rather he picked the date based on maximizing attendance. So he was very well intentioned, but didn't occur to him that you wouldn't just add up the number of attendees. Jill later said to [REDACTED] "I'm not surprised, given that BE was in charge." (This was not said with any anger.)
- [REDACTED] takeaway: Hope we can accommodate quirks; I like him as a colleague, like his helpfulness and generosity; I like talking to him. She wants her comments to be taken as a net positive. He contributes in a whole variety of ways to the School.
- BE invested a lot in FIELD, was very generous with [REDACTED] in sharing notes, insights
- Re: Chinese restaurant episode: the restaurant owner was no dummy; after this happened, [REDACTED] own local Chinese restaurant adjusted its posted prices to eliminate inconsistency with online prices – so BE had an impact!
- [REDACTED] Would "give me the creeps" if this would be a barrier to getting tenure
- Worries that junior faculty at HBS are overly obsequious to senior faculty (relative to other schools), are too worried what senior faculty think. So if BE is

fired over the Chinese restaurant episode, what will this do to junior faculty paranoia over senior faculty?



- Current Interactions with BE
  - Different building/different course
  - Less time
  - Occasionally for coffee a Nom event
- i.e. CANVAS IT suggestions – asked for advice on how to handle – but now less often than the past
- No outside interaction
- Like and respect what he does
- Pretty comfortable with him
- Maybe 1x a month?

+ and –'s

- No negative interactions with him
- All neutral a positive
- No concerns > pleased that he still reaches out
- He is even more conscious of what he is dealing with and thinking about

Interactions are good – tried to do the right thing – a month a two of self-reflection after FRB report

Saw me maybe every other day—

Getting to conclusion of process

- he understands his instincts are not solid
- Habits are habits for a reason → so how to handle behavior change until it becomes a habit
- “If I am trying and having these negative consequences, need to be mindful of the things to do to fix it”
- emblematic of the shift to new habits → he is much more cautious, these days
- Don’t want to “Rip out his soul”

Feedback

- Standard sr./jr. faculty conversations
- Looking for a 2<sup>nd</sup> opinion (now increasingly routine)
- No emotional issues observed for the 2 years

LCA

- Think the course was a really positive experience
- NOM coffee time was the major time for interaction
- He seemed energized by LCA

### Concerns

-think he is in better shape and above the bar for our standards

Honesty ++

Integrity ++

Respect for others - neutral

Junior faculty look to him

### Community

- Assume he makes his fair share and actually does more than others
- Willingness to help colleagues is extraordinary
- There are things he doesn't need to do but does simply as a great colleague who can.
- #1 among non-senior faculty

What he made for the [REDACTED] structure was amazing – his instinct is to help while most of us are still feeling badly I simply gave advice to her and he really addressed it – just to help a coworker

- His instinct is simply to help
  - o It's an emotional and empathetic self
  - o Not just a critique but action
  - o Will simply solve the problem

### Cost benefit analysis

There is a level beyond which we should not tolerate – he is now way below it given the benefits he offers

7/18/17

#### Interactions

- On sabbatical 15-16 – in Barcelona so very little interaction.
- Disappointed his office had moved
- Can ask him anything – IT brings up plug ins – could ask him to do it will IT 2 Weeks
- How does he do it?
- No tenure track faculty in his new hallway
- Now meet about 1x a week – talk over case ideas for LCA
- Observed the teacher 2x in LCA
- We will back and forth regularly

Brian takes over for Francesca – now I step in to appointments process

Put his stuff in March

This could have happened earlier – find this problematic and it interferes with letters process

#### Interaction Patterns

- Thinking he has evolved – he is trying to understand the way people respond to him
- 100% honest to the core
- Truth → cares about the integrity of the system around him → has seemingly endless capacity → he has an obligation to correct wrongs
- How could that be wrong?
- Szechuan Gordon – creating externalities that act in opposition to my objectives – assumes all players think and act the same
- Question now is what purpose am I actually serving and how can I do things differently
  - o Possible ways to be perceived as wrong – always follows the letter of the law
  - o Now he steps back and how it might be perceived
  - o Example → HBR request on UBER
  - o When ors should be punished – translates to himself – little wrongs not a good use of his time
  - o How big is the wrong
- Used to shoot a rabbit with a cannon → now understands benefits to restraint
- Ben doesn't care about "friction" – he is skilled to appreciate it and now is more conscious of it
- He relies heavily on Brian and me
  - o Especially post process of FRB last time
  - o Has very strong views

- Key Questions for him today – i.e. American Airlines
  - o Is it big, am I unique, should I use my power for it → looked online → MAX stepped forward to have his name on it
- When he's got a question, then he checks in with us

#### Szechuan Gordon situation

- Blinks followed a letter of law – never dishonest
- Absolutely responds to feedback
  - a) Responding to us
  - b) Doesn't let go – i.e. or seems to not
- He hasn't and shouldn't change
- If he knows you don't have resources he will help you

Works with difficult FSS's – message re: lower status folks.

#### University Themes – really involved

- Not a committee
- Works with David Parke and has suggestions for SEAS/HBS

#### Student Interactions

- Highlights his own inadequacies and his own processing
- Fully respectful of the students

#### Summary

Making the world a better place and HBS is a beneficiary

- Could make a lot more money
- Has really learned from being here
- A powerful force for good
- A powerful intellect
- Actually engages in learning how to adjust his behavior
- The nature of the tenure process is you can't guarantee anything. This is a good bet for a long term learning process

(Field 3)

7/19/17

**Taught Winter 2015** (Toffel and Montgomery as well)

#### **History**

- Know him for a long time well before Field 3 – Max on his dissertation committee, also there is my wife in his unit
  - o Welcomed as a spouse – I went to lots of seminars with him
- Substantive discussions about lots of things
- About legal issues i.e. Google free lunch as a taxable benefit
- More often what kind of monitors and technology to acquire

**Field 3** – I did not staff the course teaching group – was happy to have him.

- He and the other faculty worked on our interaction part of the course infrastructure.
- My interactions with him were quite similar to interchanges with other faculty

**Big Picture** – he was great to have as a teacher and as a member of the Field 3 teaching group.

#### **Distinctive areas of Knowledge and Expertise**

- a) Startup experience
  - b) Knowledge of technology
  - c) Legal background
  - d) Interaction with companies more broadly
- 
- Teaching group and student got access to his depth of expertise
  - Mostly a blessing -> sometimes goes too far
  - My feedback to him:
    - ➔ I want to work with IT after (not during) the course
    - ➔ Idea is perfect for the summer, not for now
  - IT would bring up something (IT related)> potentially controversial and difficult...would always offer to help. – responsive with both faculty and staff
  - It all worked well
  - With Keri Limmer on legal issues that were surfaced by faculty and students
  - If students were going to create an app – he has expertise → shares with students across sections.
  - \* i.e. would want students to talk to the customer – Ben's experience is true. He sold a company without interaction with customers so confronted the "absoluteness" of our advice.
  - He probably restrained himself in the teaching group but provided feedback to me.
  - Interaction with staff – he managed it i.e. classroom set up – occasionally through an extended email exchange
    - o My role as course head was to clarify – how possible is his idea with 3 days to go and faculty wanting different things



### **Summary**

- Got the pushback early on – adjusted his behavior
- No concerns for collegueship ...
- He might uphold standards more than most of us in ways that are challenging on us (legal and economics)

i.e. Szechuan Gardens -- there is a standard that he's been an advocate for – Ben is on top of that – and he does not see the gray area.

- He doesn't cut corners at all
- My big message to him is to "pick your battles"

\* It is easy to frame his behavior as not cooperating with us, holding us to our own standards

-His capacity for work is extraordinary

- I see why people react to him in different ways the more you know him, the more clearly you see intent, initiatives and standards.

**Awareness**

- Heard about him as an expert witness initially
- He was an opposing expert while in doctoral program (Berkman Center)
- In early stages not a lot of contact but our interests are close

**Exec Ed**

- Invitation to Digital Marketing Exec Ed Program
- Who reached out to who (-not clear)
- Brought a new topic – affiliate marketing, invited him to teach a class
- Had him do it over 3 years
- We diverged and the topic became less relevant to the program

**Reunions**

- Ben raised the idea of a joint session as we were both invited (there was topic overlap)
- I did the positives and he said the internet was poisonous
- More dueling lectures than a debate
- I see what's good – he sees what's bad and we're both right
- He goes for the difficulties and potential abuses
  - o His position on Google for example
- An early run in with Google, wanted to hear views on privacy, etc.
- Law School and HBS
  - o I offered up Ben and they turned it down. So they moved the entire session to the Law School
  - o Falling out between him and the Berkman Center. Makes his presence there difficult

**Intersections**

- No writing together
- Have lunch occasionally – he knows what I do. No question his take is quite different

**Teaching**

- I viewed his teaching [REDACTED] – he has been difficult to coach
- We use him because “people rave about him”
- Marstin Sorrell came to campus to see him and he was prosecutor like in is teaching.
- Taught Trip Advisor in MBA class when Google was scraping arranged for him to see Ben
  - Lots of reasons to use him in:
    - o Classroom
    - o But some people wonder why, seems indicative of his polarizing approach
    - o He doesn't write on the board

- Pre section \_\_\_\_ the tech → this is how I work
  - Seems a bit of an automaton and pre-staged
- He is a mixed bag = with respect to content → he has definitely heard (he lectures like a lawyer and did not allow for the class to reach a conclusion)
- New case Skinny Wallet that he taught
  - Now up to 2 sessions because he wants to get his stuff out and can't get enough personal perspective time in a single class.
- Ratings were polarized

#### Interactions with others

- Hangs on every word anybody uses
- So strong in his critiques it generates discomfort among exec ed. students
- He is interested in problems that have a flavor of injustice (unfairness)

#### Community Standards - Respect has always been shown

- He has to be careful he is given his POV
- He's less respectful (lacking charm) than virtually all of us faculty are
- Goes beyond the norm and sets up a luncheon
- Less than evenhanded with Google – I don't think that is his job – that is why we debate
- Always there to help
- \*has lunches every summer at Digital Initiative
- Goes beyond it and sets up a luncheon

#### Summary

My Debriefs after Exec Ed – some love you, but some are frightened of you

\*He is fundamentally disrespectful to institutions -- truly believes that large organizations like Google (not individuals) are bad.

He has worked on being less harsh but his views are still quite clear to those who hear him.

- Never met Ben outside of 1<sup>st</sup> LCA teaching group
- Saw him on a weekly basis (vast majority of interactions) in LCA group.
- Electronic communication on teaching group plans towards back half of the course
- Taught next door to me as well

### Reflections

- o + really smart in a narrow bend
- o Intellectually understands online markets in a way that knows his bounds
- o A lawyer (3 in the room); quite likely the weakest in the room on the topic – some question re: teaching
- Very quick to be modest about his teaching ability (happened so frequently it became disingenuous)
- Believe he is on the spectrum more than personality ... he sometimes does not understand how he would be viewed
- Example- Session at Law School [REDACTED] missed session due to AA discussion – BE says out loud upon my return, hope you didn't let him drink at lunch – why say that?
- A micro example
  - o Throughout course – always taking about his other roles – “I could sue, wonder should I sue,” almost that he had a business on the side
  - o A most disruptive element of teaching group (despite the fact that he is brand new)
  - o Always troubled by his teaching plans – last 15 minutes for him to discuss his views on similar issues
  - o Have no idea whether he actually discussed it in class
- His use of computer raises a more theater like approach than a classroom
- Grandstanding
- Can you have an engaging conversation while at the keyboard?
- Note: \* [REDACTED] surprised at how well it went and BE will teach 2 sections next year

### Summary

- I have been in 5 teaching groups – he is 2 standard deviations different from the mean – with an orientation toward self and unique view
- Often less focused on the learning vs. his skill set
- Gave him a lot of forgiveness because I thought he has an affliction
  - o I would be warned by others
- He went out of his way to be the IT nerdy guy in the teaching group
- Started to get better food that costs less for teaching group
- Addressed all of our video problems

- I would not be proud to know that he was a senior faculty member interacting with the business community → I have my doubts about his ability to resolve his behavioral issues



[REDACTED]

Known him since we hired him. Not active in decision to hire him, but I interact with him a lot. Less in past two years bc of office move.

Haven't coauthored, but have watched him teach, and know him well.

Ben is the most ethical person I know on the faculty. I completely mean that. Focuses on making the world a better place more than anyone else I know. Surpasses even me and my high standards.

Any negatives? No doubt that he didn't do a good cost benefit analysis on Chinese restaurant situation. Blinkx – I believe our COI standards are too weak, but he acted within them. I would want something different than that. I don't think he was after the money.

I think FRB got the internal stuff wrong. He stands up for people who need others to stand up for him.

NOM unit is Psych and Behavioral Economics really. Ben and I clash on what we should be recruiting for.... I remember saying to him in a recruiting meeting, have you ever voted for one of the behavioral candidates. He said that is a good question, I need to think about that. He has rigid views of things, fact based, but he argues back sometimes and sometimes rethinks things.

In past two years? He's been pretty remarkable in moving to the LCA course and working with people who have different styles than his own, and he's adapted reasonably well. Would be delighted to work with him on an ethics types course.

Given him Feedback? Yes. On research, teaching, the ethical issues.

Among the most respectful people I know in terms of staff interactions.

He does speak up when faculty do things that are bad, so people might not like him. But I find I am either on his side, or neutral.

Green book: phenomenally well. He contributes in more unique ways. e.g. Doesn't like the recruiting process in first round for economics, so he doesn't particulate by way of mutual agreement, but he provides software for someone with handicap so he is phenomenal. Given his productivity and doing things to make the world a better place, his quirks are minor issues to deal with.

Anything else? Two years ago he should have simply been promoted. I can't imagine him meeting the 2 year trial better than he has in these two years. No decision is more important to the NOM unit than this one over the next 6 months.

[REDACTED] July 27

- 1) I knew him first through his research – his seminal paper on google auction... I knew of his work on policy (ads) related to google before I knew him.
  - a. Seemed like he has an obsessive personality.
  - b. I came to visit and I wanted to know what he's like. I went out of my way to get to know him. Decided he wasn't a problem... Good member of the Digital initiative.
  - c. Abrasive isn't the right word. Just direct, I guess. Poor bedside manner, but students like it because it's authoritative. I have no problem dealing with it (I am married to a physician)
- 2) He's abrupt. He lacks grace. He's more apt to pressure others – he asks questions the way you might in a seminar. But he's intellectually sharp. Asks great questions. Accepting of an alternative argument. He agrees to disagree. He's been open that he dislikes the screen size but has decided not to push it.
- 3) We argued a little about google. He argues like a lawyer – I'm used to it because of my policy background. He does things for the DI.  
He has a sense of duty and obligation that I can tap.  
He has a Self-centered personality

We might still collaborate on research; I can put up with his cynical side because he has good judgement.

He made contributions to IT tools...

Airline mileage pool. He gets people (including [REDACTED] Free upgrades

He writes a lot of cases.

[REDACTED] 8-4-17

- 1) How long? Since 2010 when I joined NOM. Interaction? Changed over the years... used to be my neighbor – frequent interactions about research, office, teaching, etc. Really valued those interactions.
  - a. Since then I see him less often but email about a joint research project that is going slowly – maybe once a month
  - b. And I observed him teach a new case
- 2) Positives – never had a negative interaction with Ben. Loved being his office neighbor because we are so different. Which is one of the good things about HBS. How different we are. He is deep in topics I know nothing about. I'm working on a book and he comes over to celebrate – chapter on perspectives. He put me in touch with other accidents transcripts. You mention X and he somehow has deep knowledge and he connects you with people.

REDACTED PURSUANT TO  
PROTECTIVE ORDER

CONFIDENTIAL – IDENTITY NOT TO  
BE PUBLICLY DISCLOSED

HBS0020485

- 3) Feedback? Yes. In two different ways. Sometimes with other colleagues, on papers. But it's interesting that he reached out, even though I am not an economist. He's interested in how others see his work. Which is great. I also have given him feedback on his teaching. He sought it out. He also asked for advice, in terms of how I would teach a class, etc. With new teaching assignment, he asked me for help (bc of my expertise on ethics).
- a. This new course fits him well – totally unexpected. Students liked him and respected him. He talked about why he was teaching the course and what had happened to him, in the first session.
  - b. What surprised me – always been open to my feedback and sought it... but for classes I was surprised by his asking what was not good, what could I have improved or approached the problem differently
  - c. He was looking for ways he could approach a problem differently – perhaps as a result of this experience.
- 4) Interactions with others?
- a. Definitely with colleagues
  - b. Yes with staff, through NOM events
  - c. Seminars... always very polite and incredibly helpful
  - d. Strange people coming into his office, ie people from faculty commons... he has an innate desire to fix problems, to help
  - e. He is much more reflective... it's as if he pauses now. Decides whether to jump in or not
- 5) Meeting with myself, Brian, and Ben... about what is he learning from a personal standpoint... is there anywhere we can be helpful in thinking through your reflections.
- a. We all note that he exerts quick judgments. Now he thinks is this something I should get involved with or apply my energy elsewhere
  - b. Most of us see things that maybe bother us or don't work but we don't deal with it. Somehow Ben thinks if an issue deserves attention he just does it ... example of [REDACTED] in classroom....
  - c. Now he exerts judgment over whether to intervening ...
  - d. Criteria? Example? IT dept... decided to back off.... Impact would not be as important as helping [REDACTED]
- 6) I was Annoyed that I was losing my office neighbor, but I am impressed by what the last two years have done for Ben.
- a. by how his teaching assignment has helped him. He has become different quite remarkable to see...

[REDACTED] 8.14

REDACTED PURSUANT TO  
PROTECTIVE ORDER

CONFIDENTIAL – IDENTITY NOT TO  
BE PUBLICLY DISCLOSED

HBS0020486

Interactions? he's down the hall, I run into him casually... casual conversations about what he's up to. Research, things. We've also interacted on behalf of DI, seminars and projects. He's organizing summer lunches for the initiative.

Positives and negatives? Usually I interact with him on a one on one basis. He's always super nice and helpful. He goes out of his way to help me out. Looked at my computer set up. Wrote me a detailed memo to help me ergonomically, provided detailed links to accessories on Amazon that I can get. I didn't get any of those Ben emails he used to send. Always good behavior, very professional at all times. For the initiative... he didn't get blasted for doing anything wrong (which had happened in the past).

No negatives at all.

Feedback? Not in recent times.

He's been sweet and thoughtful.

Interact with others? ... he's been really kind

In the past, he was much harsher, in email. But I haven't seen that at all.

Anything else? More sensitive to how he can be effective in this environment. He seems to have worked hard to change. He's changed the way he teaches... not doing computer notes anymore, but that is rumor ... talk to Len or someone... he's adapted a lot. He doesn't come across as arrogant or anything.... But maybe he just hasn't had a reason to...

8.14

Interactions: Co-taught FIELD 3 two years ago. 2015. He and I were both new to the TG so learning together. I found him to be a very thoughtful colleague in talking about teaching and technology, and was always good at suggesting things to make things better in the moment, and in the future. Phrased in a productive way. Not critiquing. I was delighted and kind of amazed. Because I hadn't had interactions with him before that except around research and things in the news. All very positive. All things I didn't expect.

Interactions with others? Similarly, my perception is that he was a valued member of the teaching group

additional examples? Yes, he was an early creator of the spread sheet for tracking ... I was an early user. A remarkable contribution to the school.

Calling patterns and bias reduction – I don't know as much about it, but I thought it was a good way of thinking about the school. He has a whole body of software freely available that can

REDACTED PURSUANT TO  
PROTECTIVE ORDER

CONFIDENTIAL – IDENTITY NOT TO  
BE PUBLICLY DISCLOSED

HBS0020487

make people better, and all is available to everyone. E.g., a countdown timer ... he provided me with a website link with tools

Anything else? Yes, Restaurant thing – on one hand, totally over the top in his escalation. But what got lost was that he doesn't need the 4 dollars. It was about people getting cheated.... His heart was in a generous place.

8.14

Tell me about the frequency and nature of your interactions with Ben Edelman. Would be interested in positive and negative interactions:

Our relationship was tighter a few years ago when he took over the elective I built and repurposed it and made it his own. We worked closely on the handoff. What I've done on platforms, etc. He came to me for help when writing cases and notes... ended up coaching him on career stuff too, and positioning for his packet.... Sort of a mentoring relationship.

I hadn't really spent time with him during the Chinese restaurant.... And I watched with interest as he got into deeper trouble with his response.

Protective Order

Did I recuse myself. I think I might have. I cant remember.

Thought the extra time and the move into LCA was a wonderful one. Being part of a teaching group would be a good thing. He had not had that before. ... subject matter good too, to get his wheels turning.

A lot of interactions with him around the DI. He's not a leader of the initiative formally but has been one of the most active non-tenured people. I would say over the years each time he gets himself into a kerfuffle over something at the school (case footers, projectors etc.). He comes to me and I try to help him understand how people might react the way the does.

He's always right but he's tone deaf in how persistent he is, etc.

My conclusion was that he learned an important lesson... I didn't think he would ever back pedal when he thinks he's got someone in his sites (ie Uber).... He knew how big companies responded... but not little companies

He wont stop going after the big guys. And we should not want him to....

Contrast to colleagues who get in trouble doing litigation consulting... conflicts not disclosed, or inconsistencies... I don't think that will happen to him. He isn't sloppy in that way. He wont tarnish the brand in that way.

REDACTED PURSUANT TO  
PROTECTIVE ORDER

CONFIDENTIAL – IDENTITY NOT TO  
BE PUBLICLY DISCLOSED

HBS0020488



My view 2 years ago is that he learned an important lesson, he will keep doing this, but we want him to, and he wont go after the little guys. We should have someone here who says Uber has broken a bunch of laws. It took incredible chutzpah to do that as his promotion packet was out... but it speaks volumes that he was willing to do that.

I haven't seen anything over the two years that persuades me that he hasn't become more cautious and thoughtful.

The academic work has always been amazing....

Every two years we will see something like going after some company... but there are worse things than that.

**REDACTED PURSUANT TO  
PROTECTIVE ORDER**

**CONFIDENTIAL – IDENTITY NOT TO  
BE PUBLICLY DISCLOSED**

**HBS0020489**