Executive Summary

Following the merger of Sprint and Nextel, the merged IT organization reduced costs by $424 million more than a year ahead of schedule. These cost savings stemmed from a reconfiguration of IT resources that reduced both annual IT operational expenditures and capital IT expenditures. To facilitate the reconfiguration, Sprint Nextel IT leaders applied new and proven practices—a program management office, application rationalization, insourcing, multichannel communications, and thoughtful human capital management.

The way in which Sprint Nextel IT achieved its IT merger goals adds significantly to our understanding of mergers. Even more importantly, though, it exemplifies how Sprint Nextel developed an IT resource reconfiguration capability. Sprint Nextel’s experience provides insights into how IT leaders can build such a capability, which is crucial for today’s turbulent business environments.

THE NEED TO RECONFIGURE IT RESOURCES

Today’s IT organizations must be able to respond to and support dynamic, fast-paced, and often aggressive business needs. To ensure their IT organizations are best placed to do this, effective IT leaders should periodically evaluate their organizations and then reconfigure them appropriately. The speed of reconfiguration impacts the business’s bottom line results and the attainment of strategic business imperatives.

Sprint Nextel was created by a merger of equals—Sprint and Nextel—and IT leaders committed to reducing the joint IT budget of their merged IT organization by $400 million. They planned to accomplish this reduction while the company was spinning off the local phone division of Sprint, integrating a series of smaller acquisitions into the merged company and reshaping the company’s sourcing portfolio.

Under CIO Dick LeFave (who was formerly Nextel’s CIO), the combined Sprint Nextel IT organization achieved $424 million in cost savings more than a year ahead of schedule. The savings stemmed from reductions in annual IT operational expenditures and in new capital IT expenditures for three major IT integration areas: IT operations, billing, and application rationalization.

But the IT organization achieved more than cost savings. In the same time period, IT staff morale improved significantly as an attitude of disheartenment was replaced by empowerment to make a difference; within 18 months of announcing the intended merger, more than 90% of all IT employees felt personally responsible for achieving synergies. IT leaders had eliminated almost all “shadow” IT groups from the business areas, and the CIO became actively engaged at the senior leadership table. Sprint Nextel’s IT leaders made this happen by applying new and proven practices—a program management office, application rationalization, insourcing, multichannel communications, and thoughtful human capital management.
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This article describes the evolution of Sprint Nextel’s IT, from pre-merger activities between Sprint and Nextel in early 2005 until the combined company realized its promised IT synergies in 2007. We focus on the best practices and lessons learned that we believe can help other IT leaders develop this type of IT resource reconfiguration capability.

**SPRINT AND NEXTEL BACKGROUNDS**

Sprint and Nextel entered their wireless communications merger with significantly different profiles. Sprint, the acquirer, was a 100-year-old Kansas-based communications company with about 60,000 employees, specializing in local, long-distance, Internet, and wireless services. After a long history without a CIO-level leader, “shadow” IT groups had emerged within Sprint, including a group within finance that had over 100 employees developing a data warehousing/business intelligence (BI) capability. More recently, a newly appointed CIO outsourced IT application development to IBM, although he kept computer operations in-house. Overall, the IT organization exhibited a strong engineering mindset with a predilection for systematic management by consensus. Even so, the business did not trust IT to deliver on demand.

In contrast, Nextel was a 15-year-old upstart with about 20,000 employees that, by 2003, had become one of the most profitable firms in the wireless communications industry. Based in the Reston-DC corridor, Nextel produced innovative push-to-talk products on a network (iDEN) that had reached capacity. Nextel’s IT management had recently made significant investments in an enterprise-wide IT architecture and an enterprise data warehousing/BI capability, and the CIO had outsourced computer operations for the production systems to EDS. The IT organization had strong technical development skills and a track record for delivering complex projects, including a billing system that received national recognition. Overall, Nextel had an entrepreneurial mindset and a predilection for seat-of-the-pants decision-making; it had done enough things right to be favored by Wall Street at the time of the merger.

**ORCHESTRATING PRE-MERGER ACTIVITIES WITH AN ADOPT-AND-GO PHILOSOPHY**

Sprint and Nextel announced their intention to merge in December 2004. During the first weeks after the announcement, the management teams focused on legal and regulatory teamwork to understand the likelihood of the merger not being approved, to avoid the recent disappointment of an unsuccessful MCI/Sprint deal. By mid-January 2005, this groundwork, and the timely FCC approval of the Cingular/AT&T wireless merger, had created enough confidence to enable pairs of Sprint and Nextel managers to begin sharing high-level data. These exchanges took place in a “clean room” environment under consultant oversight to ensure Department of Justice compliance.

A chief transition officer from each company orchestrated the pre-merger integration activities using an “adopt-and-go” philosophy. Deloitte consultants recommended this approach, which had been a key principle for the successful Compaq/Hewlett-Packard merger. Given the short timeframe and the need to move forward quickly, the companies did not have time to craft new processes using best-of-breed solutions. Instead, they needed a process to swiftly assess the current state of each company, adopt the best capabilities that existed, and go forward with those capabilities.

IT management grappled with the idea of rationalizing hundreds of applications in the combined portfolio. The former IT Integration VP for Nextel characterized it this way: “A one-to-one comparison of applications would have meant doing a system comparison until year 2009.” To decrease complexity, the IT integration team grouped like applications into functional domains, which reduced 760 discrete applications into a problem set of 32 domains.

Leadership pairings representing both companies took charge of each functional domain to inventory and ultimately lead the adopt-and-go process for their set of applications. The top management teams of Sprint and Nextel emphasized the equality of

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4 The academic co-authors of this article gratefully acknowledge the opportunity to conduct face-to-face and telephone interviews with more than a dozen IT and business leaders during the first two years of the Sprint Nextel merger.

5 The importance of reconfiguring both business and IT resource capabilities in response to changing business environments has been conceptualized by other IS academics. See, for example, El Sawy, O. A., and Pavlou, P. A. “IT-Enabled Business Capabilities for Turbulent Environments,” *MIS Quarterly Executive* (7:3), 2008, pp. 139-150.


the merger through corporate communications and through example. Consistent with this theme, top IT management encouraged the paired domain leads to work together amicably and to select an application end state that would be best for the merged company, without political considerations.

The IT integration team recognized that it needed an adopt-and-go process that addressed small group behavior and decision theory as much as technical expertise. The resulting application rationalization process (App Rat) used a multicriteria decision making tool to create a rational, academic approach to eliminate emotion and bias from the process as much as possible.

During March and April 2005, the IT integration team and the 32 application domain teams identified a set of underlying decision criteria (e.g., stability, cost, flexibility) and determined weightings. A senior management steering committee validated and approved the criteria. Next, the integration team analyzed survey data from users and subject matter experts about the various applications to identify which company’s applications to adopt.

The results of the data analyses were communicated objectively and transparently to members of each domain team in a workshop setting. App Rat outcomes had significant impacts on the careers of IT and business participants as well as other employees, so several techniques were developed to minimize emotional responses during the App Rat workshops. For example, when the workshop leaders presented the results for the aggregate scorings, they used labels of “A” and “B” rather than identifying the specific company. The leaders presented sensitivity analyses for different criteria to show the effects (or lack of effects) on the “A” vs. “B” decisions. Significantly, they postponed application domain decisions that would likely be the most contentious so that the meeting facilitators could hone their techniques during the initial, more straightforward sessions. As word spread about the process and its credibility grew, the later team meetings actually took less time than the first ones.

In the end, the IT integration team developed business cases for each application migration so that IT and business leaders could generate a cost savings commitment and create road maps for implementation. The team identified the “low-hanging fruit” from the business cases—migrations that could yield cost savings within the first year—as well as a few high-priority projects (called “the big rocks”) that were critical for the business going forward but would need to be funded from a separate cost-to-achieve merger budget.

In total, the App Rat process eliminated 165 applications by Year 2, resulting in savings of $115 million, which exceeded the initial commitment.

RATIONALIZING IT OPERATIONS POST-MERGER

Unlike the rationalization of applications, technology rationalization began after the merger closed, once the companies could freely share vendor contracts, pricing, and metrics. A veteran IT operations VP from Nextel drove one third of the IT merger synergies within IT operations, and technology rationalization was a major component of his efforts.

The operations lead had a deep understanding of industry benchmarks, such as desktop visits, help desk tickets, and average servers per system administrator, and he had initial estimates from the due diligence process about how each IT organization compared against the metrics. From these estimates, he had anticipated that he would outsource Sprint Nextel operations to gain cost reductions in the merged IT operations. However, once he learned the actual pricing and metrics, he found that Sprint’s internal operations were superior to what an external provider could achieve.

Sprint’s IT operations budget had been decreasing over the past years as its internal capabilities grew. Instead of renegotiating an outsourcing contract with IBM, all IT infrastructure work was brought in-house, including the former Sprint employees who had been transferred to IBM less than two years earlier. Sprint Nextel’s operations group then built an inventory structure based on the Information Technology Infrastructure Library (ITIL) standards to assess and compare the licensing and pricing for the technologies in place.

The inventory process identified about a dozen common technologies that had the largest cost savings potential. The technology rationalization process was much less political than App Rat. Without day-to-day impacts on business operations, the operations group was able to swiftly “bake off”8 vendors and leverage economies of scale to achieve lower maintenance costs with higher service levels, sometimes with new technology replacements. The group maximized

8 In a vendor bake-off, vendors are pitted against each other to get the most benefits for the least cost to the client.
economies by involving other groups—legal, supply chain, and network—in the negotiations. The operations group renegotiated the remaining technology contracts as they expired.

In addition to vendor contract renegotiation, the technology rationalization process involved several major projects. IT management dedicated one data center to support the application needs of the local phone division being spun off, and it consolidated the other six to two by the end of Year 2. As these migrations took place, IT operations launched new initiatives concerned with technology standards and currency, as well as data retention volumes, to maximize the overall technology rationalization synergies.

The original plan was for cost savings in IT operations to account for 35% of the total IT savings. At the end of Year 2, the savings of $165 million exceeded that target.

FOCUSBING THE IT ORGANIZATION WITH AN IT INTEGRATION MANAGEMENT OFFICE

From the pre-merger stage onwards, the chief transition officer appointed by Sprint led an Integration Management Office (IMO), which directed all merger activities across Sprint. Consultants had advised that a key to successful mergers is to maintain an integration office for up to two years after a merger transaction closes. Thus Sprint operated a temporary integration structure outside the line management channels to ensure diligence in executing the synergy commitments to Wall Street.

Each Sprint business function appointed someone to act in a liaison role with the corporate IMO structure. The IT organization appointed a veteran Sprint IT VP, Bill Branch, to lead the IT-specific integration efforts. But Branch went even further by creating an IT IMO structure with three main components—integration planning, synergy attainment, and transformation management. Together, these components focused holistically on technology, process, and people to achieve the desired savings.

To fill the director roles in this temporary organization, Branch recruited Nextel and Sprint employees who wanted to take a rotation out of their current jobs and weren’t worried about making another job move within a few years. He selected individuals who shared his zeal for methodical program management approaches and his passion for human issues—to ensure IT employee satisfaction and loyalty. The IT IMO initially started with about 20 staff members, but as the IT organization achieved integration goals, that number decreased accordingly over time.

Integration Planning

The Integration Planning Director managed the portfolio of adopted applications and ensured that the newly integrated IT organization reached its targeted application end states. Until the adopted applications were in place, development managers and business owners worked in a highly volatile environment, so the director’s role was critical for keeping projects on track. He managed plans and dependencies across adopted applications and orchestrated the sequencing of projects as internal customers (business units) re-engineered their business processes and consolidated their own organizational operations.

Integration planning activities also included the integration of acquisitions from Nextel’s partners and former Sprint affiliates. As these entities legally became a part of Sprint Nextel, the director managed the migration of their IT capabilities to Sprint Nextel’s adopted platforms—and tried to minimize the impact on the larger integration efforts. Having a single contact managing this process helped develop repeatable acquisition processes; IT leadership viewed these processes as highly valuable capabilities for the future.

Synergy Attainment

The Synergy Attainment group used the adopt-and-go application commitments and operating budgets to allocate specific synergy targets to five application development VPs in the new IT organization. The Synergy Attainment directors worked with the application development leads and corresponding business owners—many of whom were new to their positions and had not participated on the App Rat teams—to map the intended synergy targets to a timeline. The team tracked synergy achievements on a weekly and monthly basis, and included hard numbers in reports that were shared with the entire IT organization.

Transformation Management

The Transformation Management group in the IT IMO was unique in Sprint Nextel’s IT integration strategy. The group was headed by a former newspaper executive with journalism and e-business expertise.
She developed a creative communications program, change-readiness assessments (for both individuals and units), and other internal IT initiatives to increase buy-in and active engagement with integration goals.

The collage in Figure 1 shows the newsletters, synergy thermometers, town hall meetings, and road shows that provided consistent messages about IT synergy. Bi-annual employee surveys revealed that 90% of Sprint Nextel IT employees felt personal ownership for synergy attainment by June of the first year.

**MELDING HUMAN CAPITAL INTO A SINGLE COHESIVE WORKFORCE**

As the technology merger initiatives unfolded, Sprint Nextel’s IT leaders tackled significant people challenges. These challenges stemmed from major differences in the legacy Sprint and Nextel cultures, a lack of IT credibility within former Sprint business functions, and a workforce split between Kansas City and legacy Nextel (Reston) sites. The IT leadership team simultaneously conducted four separate human capital initiatives and actually improved the morale of the IT staff who chose to stay.

The first initiative was to re-employ about 700 previous Sprint employees who had been transferred to outsourcers. Initially, IT employees had expected cost-saving efforts to drive headcount reduction, so this initiative reinforced the perception of an IT leadership team that was innovative and appreciative of the value of human capital.

Second, to the surprise of the other business leaders, the IT organization offered an “open-door, open-window” voluntary separation plan for every IT worker about six months after the merger closed. Some ex-Nextel employees had potentially large severance pay-outs that would vest after the first year if key conditions were met. The IT leadership team therefore decided to act from a position of strength by openly offering voluntary separation months ahead of the expiration date to gain personal commitments and reach a steady state as quickly as possible. In the end, the IT organization achieved a headcount reduction of about 530 associates by employee choice.

Third, IT management also empowered employees in less dramatic ways. For example, a formalized program called “IT shooters” was introduced, in which employees could earn rewards for identifying additional applications for extinction.

**Figure 1: Examples of IT Synergy Messages Provided by the IT Transformation Management Group**

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Fourth, Sprint Nextel IT leaders critically examined the use of contractors within the IT organization. They aggressively worked to eliminate contractors or convert them to employees, which resulted in a reduction of about 1,000 contractor personnel. IT management also leveraged Sprint Nextel employees whose home country was offshore to take advantage of offshore outsourcing opportunities.

All of these highly visible initiatives to leverage internal talent quickly created an IT workforce committed to achieving the synergy goals set by the business.

**BUILDING IT CREDIBILITY THROUGH DELIVERY**

Sprint entered the merger with a demoralized IT organization that lacked credibility from the business areas. The IT function had existed for years as a back-office order-taker, and the extended absence of a CIO position had led to shadow IT groups, including billing capabilities and data warehousing under Sprint’s CFO. When Nextel’s CIO (Dick LeFave) took over the IT reins to manage integration goals, he had to gain the confidence of his peers in Sprint.

From the start, the newly formed Sprint Nextel IT organization made every effort to prove that it could deliver, and seasoned IT veterans played key roles. Billing is the most system-intensive function in the telecom business—typically close to 40% or 50% of total IT spend—and one of the most experienced billing experts in the industry headed up this project in the merged organization.

The pre-merger planning process identified 50 projects that needed to be completed by the merger close. These projects, called “Asks,” ranged from e-mail consolidation to intranet redesign, and the development and implementation effort for each averaged 2,000 person-hours. Although the IT organization was unable to begin working on the Asks until after April 2005, it delivered every one by the August 2005 close. Sprint’s chief integration officer at the time did not expect this outcome. “I thought for certain that IT would be our failure point. We were waiting for IT to be the group that blew it, that couldn’t get it done, that over-promised and under-delivered. But they didn’t. They met all of their promises.”

This aggressive delivery did not come without pain—IT employees were challenged by the demands to get projects implemented. LeFave openly worked on morale by communicating often and regularly to his employee base to ensure that they heard one message, one story, one plan of action, and one version of any problems. He provided honest answers to hard questions during bi-weekly all-hands webcasts where 6,000 employees had equal access to an open microphone.

As the business functions within Sprint Nextel began to realize that the IT organization delivered on its promises, and as its credibility grew, shadow IT groups transitioned into the new IT organization.

**LESSONS LEARNED**

The Sprint Nextel IT story significantly adds to our understanding of effective post-merger roles and practices that are part of an effective IT resource reconfiguration capability. We have identified six lessons.

**Lesson 1**

Use a rationalization process based on clear criteria, quantitative evaluations, and participation by key users to make tough decisions about sets of applications.

Companies typically rationalize applications during a pre-merger phase that follows initial regulatory approvals. Within a merger-of-equals context, both companies assume that application rationalization will follow a rational decision-making approach. However, functional groups in the two firms tend to compete to retain their favored applications, making the rationalization process highly contentious and political. Sprint Nextel’s IT leaders crafted a decision-making process that relied on the stakeholders’ own criteria and data. They used decision-making software, statistics and what-if analyses to communicate unbiased results during meetings. IT leaders made decisions with few delays because the process was transparent and grounded in hard evidence.

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9 For an example of how senior management had to decide between two core applications after a contentious process, see Brown, C. V., Clancy, G., and Scholer, R. J. “A Post-Merger IT Integration Success Story: Sallie Mae,” *MIS Quarterly Executive* (2:1), 2003, pp. 15-27. See also Linder, J. C. “Mergers: The role of Information Technology,” Chapter 14, in *Information Management: The Organizational Dimension*, edited by Earl, J. J., Oxford University Press, 1996, which recommends decision-making “anchored in rationality” due to the highly political integration processes found in mergers in the banking industry.
Lesson 2

Identify the big rocks to invest in for long-term gains as well as the low-hanging fruit that will yield immediate cost savings.

Post-merger integrations are complex, and they require clear focus and strong execution. At Sprint Nextel, IT leaders focused and executed at two levels. Near-term, they concentrated on the low-hanging fruit—projects that would achieve immediate, significant cost savings—not only to rally the troops and increase internal morale, but also to improve credibility with the legacy Sprint business leaders. Concurrently, they identified the big rocks—a small number of new applications (e.g., a billing system, an enterprise resource planning [ERP] system) that required investment but that would support important business capabilities in the future and capture long-term gains. IT management rigorously tracked and promoted these short- and long-term projects to help ensure that both the big rocks and low-hanging fruit would bring significant value to the company’s bottom line.

Lesson 3

Leverage IT veterans with operations benchmarking and vendor management expertise, but don’t force them to act before they have the details.

A veteran Nextel VP with deep IT operations knowledge and prior merger experience was involved in the pre-merger discussions and then ran IT operations for Sprint Nextel. But he did not make decisions based only on pre-merger information sharing; instead, he allocated time post-merger for his team to review contracts and thoroughly inventory the hardware and software at each company. He then negotiated with vendors from a position of strength and made some sourcing and consolidation decisions that contradicted his pre-merger expectations. Achieving cost savings from expedient consolidation of IT operations is certainly not new, but it is important not to make premature decisions on how to achieve them.

Lesson 4

Dedicate managers to an integration management office that keeps the organization focused on the desired end state.

IMOs are associated with successful mergers, and empirical evidence supports the value of this merger practice. However, IMOs require funding so, post-merger, they can be hard to justify, particularly when the newly merged company moves quickly into cost-cutting mode. IT leaders at Sprint Nextel embraced the concept of an IMO, and they planned to retain the IT IMO in some form until they had achieved their merger targets. The office was organized to support the steps of a merger process—from planning to synergy attainment to organizational change. IT leaders also leveraged this structure to develop repeatable processes to execute post-merger acquisitions from legacy Nextel and legacy Sprint.

Lesson 5

Seek cost savings from optimizing, not just from reducing headcount.

A newly merged company typically looks to achieve synergies, at least in part, through employee downsizing. However, management teams need to retain key talent to integrate the merged companies. Other research has shown that retaining key executives from the acquired firm is crucial to post-merger success. Thus, management teams must carefully think through their retention strategies and sometimes grapple with influential factors that are outside their control. For the Sprint Nextel merger, geographic relocations and a large severance payout available to legacy Nextel managers before the end of the first year significantly influenced employee attitudes on leaving or staying with the merged company. In response, Sprint Nextel IT leaders proactively encouraged individuals to commit to the organization (or not) almost six months sooner, shortly after they

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10 Other researchers have made similar points. For example, see Hitt, M. A., Harrison, J. S. and Ireland, R. D. Mergers and Acquisitions: A Guide to Creating Value for Stakeholders, Oxford University Press, 2001. Chapter 6 of this book highlights the importance of an integration process characterized by deliberate commitments and quick actions. See also Uhlane, R. T. and West, A. S. “Running a Winning M&A Shop,” The McKinsey Quarterly, March 2008, which identifies strong execution and focused leadership as best practices for smaller acquisitions.


12 See the survey findings reported in a 2002 white paper by Accenture entitled “Keys to the Kingdom: How an Integrated IT Capability Can Increase Your Odds of M&A Success,” which build on the lessons from 57 post-M&A IT integration projects in the U.S. and Europe in the late 1990s.

13 See Graebner, M. E. “Momentum and Serendipity: How Acquired Leaders Create Value in the Integration of Technology Firms,” Strategic Management Journal (25), 2004, pp. 751-777. Graebner found that acquired managers who are given cross-organizational responsibilities can play a critical role in achieving both expected and unexpected synergies.
had re-employed previously outsourced employees. This move bolstered employee morale, and the IT leadership team gained much more control over its retention strategy.

Lesson 6
Ensure constant, consistent communications.

A transformation team within the IT IMO crafted internal communications and monitored their effectiveness. A manager with mass media and Web technology experience led communications efforts that informed the diverse IT employees about IT leadership views and initiatives, and that empowered workers to voice concerns and raise issues. Other research has emphasized the importance of communications for organizational restructurings, and Sprint Nextel’s approach to managing its IT people resources following the merger of the two companies provides an exemplary portfolio of communication mechanisms that others can emulate.

APPLYING THE LESSONS TO CREATE AN IT RESOURCE RECONFIGURATION CAPABILITY

Sprint Nextel’s IT leaders reconfigured their resources within a complex merger environment that involved:

- A merger of equals
- Multiple small acquisitions
- The spin-off of a major business unit
- Multiple sourcing arrangements.

Within just a few years, they had successfully reconfigured the Sprint Nextel IT resources. The keys to their success were:

- Staying focused on key initiatives
- Eliminating extraneous technology resources to create cost efficiencies
- Maximizing the return on human capital investments
- Building IT credibility while decreasing shadow IT organizations.

They accomplished the restructuring while delivering cost savings and other significant value to Sprint Nextel.

In today’s turbulent environment of increased business restructurings and global sourcing opportunities, an IT resource reconfiguration capability is a key success factor not only for growth and innovation, but also for survival. Such a capability is crucial if a business is to reconfigure itself quickly in response to changes in the business environment. We believe that the lessons learned from the merger between the Sprint and Nextel IT organizations provide insights into how IT leaders can build the IT organization of the future—one in which an IT resource reconfiguration capability will prove critical.

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