**Robert D. Kugel, CFA**

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**Short Bio Description:** Over three decades of experience and expertise in the Office of Finance and manages the overall business software research and advisory efforts at ISG Software Research.

**Full Bio:** Rob leads and manages the business software research and advisory team focusing on the intersection of information technology and applications across the front- and back-office areas of enterprises. Rob leads the Office of Finance practice and the AI for Business efforts and is a book author and thought leader on integrated business planning (IBP). Before ISG and two decades at Ventana Research, he was an equity research analyst at several firms including Credit Suisse, Morgan Stanley and Drexel Burnham, and a consultant with McKinsey and Company. Rob was an Institutional Investor All-American Team member and on the Wall Street Journal All-Star list. Rob earned his BA in Economics/Finance at Hampshire College, an MBA in Finance/Accounting at Columbia University and is a CFA charter holder.

**Summary:** Robert Kugel leads business software research for ISG Software Research. His team covers technology and applications spanning front- and back-office enterprise functions, and he runs the Office of Finance area of expertise. Rob is a CFA charter holder and a published author and a thought leader in integrated business planning (IBP).