|  | Robert D. Kugel, CFA  Executive Director, Business Research, ISG Software Research  Phone: +1 650 730 9715  E-Mail: robert.kugel@isg-one.com |
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| Signature Traits | Finance Leader. Enterprise Software Expert. Integrated Business Planning Innovator. |
| What he does  at ISG | Robert leads ISG’s business software research and advisory team, focusing on the critical intersection of information technology and enterprise applications. He directs research in the Office of Finance and Supply Chain and Operations, as well as oversees ISG’s AI for Business initiatives. As a recognized thought leader, Robert brings deep expertise in guiding organizations on the practical uses of IT to transform departmental and cross-functional operations across the front- and back-offices. |
| Past achievements  for clients | Robert has more than three decades of experience advising global enterprises on finance and technology. Before his leadership roles at ISG and Ventana Research, he served as an equity research analyst at top financial firms, including Credit Suisse, Morgan Stanley, and Drexel Burnham Lambert. He was a consultant with McKinsey & Company. His insights have consistently helped organizations align technology adoption with financial and operational excellence. |
| Career highlights | * Two decades of leadership at Ventana Research as SVP and Research Director. * Equity research analyst at Credit Suisse, Morgan Stanley, and Drexel Burnham. * Consultant with McKinsey & Company. * Named to the Institutional Investor All-American Team and the Wall Street Journal All-Star list. * Author and recognized thought leader on integrated business planning (IBP) and continuous accounting. |
| Education & credentials | B.A. in Economics/Finance, Hampshire College  M.B.A. in Finance/Accounting, Columbia University  Chartered Financial Analyst (CFA) charter holder |
| What you will appreciate working with him | Robert combines deep financial expertise with practical knowledge of enterprise software and business applications. His experience advising both financial markets and enterprises enables him to deliver sharp, actionable insights that help clients strengthen their finance capabilities and technology strategies. |