



Guide to the Burton Grad Associates, Inc. records

Creator: Burt Grad

Dates: 1974-2007

Extent: 26.25 linear feet, 21 record cartons

Collection number: X7213.2014

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Collection processed by: Adrienne Harling, September 2016

Finding aid prepared by: Adrienne Harling and Sara Chabino Lott,
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Abstract

The Burton Grad Associates, Inc. records contain documentation from the consulting firm for software and services companies owned and operated by Burt Grad from 1978 through the early 2000s. Grad and his associates completed hundreds of short term projects for over 200 companies, including Sterling Software, Sterling Commerce, Informatics, and AGS Computers. Projects were focused on strategic and organizational planning, company valuations, due diligence studies, and some expert witness legal projects. The collection contains correspondence with clients, background information collected for the projects, and draft and final reports prepared for clients related to this work. Additionally, a small amount of material in the collection relates to other consulting firms Grad started including: Heights Information Technology Services which provided programming and related services from associates working from home; CustomerCare, Inc., a publishing company he owned and operated during the 1990s which produced a customer services newsletter; and Castle Data Systems, Inc. which developed computer based training courses for various clients. The collection also contains some correspondence from Grad while he was still at IBM between 1974 and 1978.

Administrative Information

Access Restrictions

The collection is open for research.

Publication Rights

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Languages

Collection materials entirely in English.

Preferred Citation

[Identification of Item], [Date], Burton Grad Associates, Inc. records, Lot X7213.2014, Box [#], Folder [#], Catalog [#], Computer History Museum.

Immediate Source of Acquisition

Gift of Burt Grad, 2014.

Processing Information

Burt Grad, Carol Anne Ances, Doug Jerger and the Software Industry Special Interest Group (SI SIG) inventoried this collection in December, 2008, as part of the donation process. This inventory was used during processing to restore original order and aid with description.

Repository

Computer History Museum
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Mountain View, CA 94043
USA
650-810-1010
research@computerhistory.org
www.computerhistory.org

Biographical/Historical Note

Burton (Burt) Grad was born in 1928 in Philadelphia, where his mother and her family had emigrated from the Ukraine in 1914. In 1932, Grad's family moved from Philadelphia to Washington, D.C., where he completed high school. He then received a Bachelor of Management Engineering degree from Rensselaer Polytechnic Institute in Troy, New York, in 1949.

Grad worked for General Electric (GE) from 1949 to 1960. At GE, Grad worked on factory automation and manufacturing control. Highlights of his work there include programming a Univac I computer for use at the Dishwasher and Disposal Department in Louisville, Kentucky, leading a factory simulation project, designing the Productron computer, conducting the

Integrated Systems Project (ISP) (aimed at automating the complete information flow in a factory), and developing the concept and use of decision tables (a method of documenting cause/effect logic).

In 1960, Grad left GE and went to work for IBM. Shortly after he started there, Grad started working on the Study Organization Plan (SOP) project. SOP was focused on a general approach to developing integrated information systems for any business. This led to the publication of *Management Systems* by Holt, Rinehart and Winston in 1968 (authors: Thomas B. Glans, Burton Grad, David Holstein, William E. Myers, and Richard N. Schmidt). Grad also participated as an IBM representative in the Unbundling Task Force, which was responsible for planning the announcement of separately priced software in 1969. He worked in software development until the mid-1970s, when he moved to IBM Research. Starting in the early 1970s, Grad served as a representative for IBM at ADAPSO, the computer software and services trade association; he was active within the Software Industry Association section. Grad remained active in ADAPSO throughout his career, including after he left IBM, and after ADAPSO transitioned into a new organization called the Information Technology Association of America (ITAA).

In 1978, Grad left IBM and started his own consulting firm, Burton Grad Associates, Inc. Leveraging the relationships with software and services companies that he had developed through ADAPSO, Grad helped clients with strategic and organizational planning, business analysis, product and market analysis, due diligence studies, company valuations, and some expert witness legal projects. While Grad preferred projects in strategic and organizational planning, the highest demand for projects were for due diligence and valuation studies for acquisition, financial, tax and capitalization purposes.

Grad and his associates provided services to over 200 clients with 700-800 projects in the approximately 30 years that the consulting firm was operating. Each project was typically under three months and was self-contained. Grad utilized third party consultants with different financial and computer industry specializations, including Sidney Dunayer, Carol Anne Ances, Elizabeth Virgo, Ed LaHay, Mike Marcus, Marty Silberberg, and others. These "virtual staff" members often worked remotely, with Grad managing each project and client relationship. Some of the most significant clients Grad and his team provided services to over the years included Sterling Software (and Sterling Commerce), Informatics, and AGS Computers. In addition to his United States clients, Grad provided services to international clients after consulting for the World Bank. For example, Grad provided services to a number of Israeli software companies directly and gave a proposal to the Israeli government about how to build their software industry (which did not lead to a project).

Grad started a second business in 1978 called Heights Information Technology Services (Heights). Co-founded with Luanne Johnson, Heights was modeled after a British business called F International. It provided professional services by primarily female programmers. The business model was structured such that professional women could work remotely, allowing them flexibility with their schedules and the ability to work at home while parenting children. The business did not thrive, and was eventually sold to F International and then closed. Burt was involved with Heights until 1983.

In 1992, Grad purchased a publishing business called CustomerCare, Inc. from Barbara Brizdle. The company published a newsletter multiple times per year as well as an annual survey. The content was focused on how to improve customer service within software companies. Grad eventually sold this business, though he never received payment for it.

In the 2000s, Grad's consulting work slowed down due to a shift in the software and services market away from mainframe and midrange computers and the dominance of software companies providing applications for microcomputers aimed at the personal rather than the business marketplace. With this market change shifting demand away from his specific expertise, Grad spent more time in collecting and preserving software industry historical records for the Software History Center, which Grad and Luanne Johnson had co-founded as a non-profit in 2000. Grad then served as co-chair with Johnson of the Software Industry Special Interest Group (SI SIG) at the Computer History Museum which was the successor to the Software History Center. He currently lives in Westport, Connecticut with his wife, Carol Anne Ances.

Scope and Content of the Collection

The Burton Grad Associates, Inc. records primarily consist of documentation of Burt Grad's consulting business from 1978 through the early 2000s. The records include correspondence with clients and third party consultants Grad worked with, background information provided by clients and researched by Grad, final reports provided to clients, and invoices provided to clients. Examples of background information include financial records, product information, presentation material about products or companies, and printouts from company or product websites. Also included in the collection is correspondence authored by Grad between 1974 and 1978, when he was still working for IBM, and newsletters and annual surveys from Grad's publishing company, CustomerCare, Inc.

Arrangement

The collection is arranged into 2 series:

- Series 1, Projects, 1978-2007, bulk 1994-2005
- Series 2, Chronological files, 1974-2003

Indexing Terms

Software Consulting Services
Computer Software Industry—United States—History
Burton Grad Associates, Inc.
Grad, Burton

Related Collections at CHM

Burt Grad General Electric and IBM records, Lot X6906.2014, Catalog number 102726885.

Grad, Burt (Burton) oral history: General Electric Years, Lot X4362.2008, Catalog number 102702248.

Grad, Burt (Burton) oral history: International Business Machines (IBM), Lot X4362.2008, Catalog number 102701925.

Grad, Burt (Burton) oral history: Burton Grad Associates, Inc., Lot X4362.2008, Catalog number 102746731.

Grad, Burt (Burton) oral history: history and education, ADAPSO, Heights Information Technology Services, and Customer Care, Inc., Lot X4362.2008, Catalog number 102701924.

Grad, Burton and Hugh Williams oral history, Lot X4562.2008, Catalog number 102658225.

Related Collections at Other Repositories

University of Minnesota, Charles Babbage Institute, Burt Grad IBM and ADAPSO materials. Unprocessed.

Collection Contents

Series 1, Projects, 1978-2007, bulk 1994-2005

This series contains material related to consulting projects of Burton Grad Associates, Inc., primarily from the later years of the business. The series also contains copies of newsletters and annual surveys from Grad's publishing company, CustomerCare Inc. This series is arranged into three subseries:

Subseries 1.1, Analyst reports, 1978-2007, bulk 1994-2005

Subseries 1.2, Invoices, 1994-2000

Subseries 1.3, CustomerCare publications, 1990-1995

Subseries 1.1, Analyst reports, 1978-2007, bulk 1994-2005

Organized by project, the folders in this subseries contain background information gathered (such as company financial records and technical and promotional product information), draft and final reports provided to clients, correspondence with clients, and invoices and financial records for projects. Folder titles are primarily direct transcriptions of Grad's, reflecting the companies and products relevant to each project. Significant clients include but are not limited to Sterling Software and Sterling Commerce, Elron, Summit Partners, First Dallas Ltd., and Synhrgy HR Technologies. Included in many of the folders are invoices related to the projects, with unique project numbers Grad assigned. These numbers are included in the catalog records and can be cross referenced throughout the collection to find related material specific to each project. Grad organized these records by company and/or product name, in roughly alphabetical order. This subseries is in its original order, and is arranged by catalog number.

Subseries 1.2, Invoices, 1994-2000

This subseries includes invoices and related receipts for consulting projects of Burton Grad Associates, Inc. between the years 1994 and 2000. Each folder has a unique project number created by Grad, and catalog numbers were assigned to reflect their original order of ascending project number. This subseries is in its original order, and is arranged by catalog number.

Subseries 1.3, CustomerCare publications, 1990-1995

This subseries contains copies of newsletters published by CustomerCare, Inc., a company purchased by Grad in 1992. This subseries also has a small run of Realistic Software Services newsletter. This subseries is arranged by catalog number, with issues of each publication in chronological order within folders.

Series 2, Chronological files, 1974-2003

This series reflects a range of Grad's professional work that he maintained documentation of in chronological order. The vast majority of this series relates to Burton Grad Associates, Inc., including correspondence as well as project material. However, it also includes correspondence by Grad from when he was employed at IBM in the mid 1970s, correspondence related to one of the businesses he started in 1978 called Heights Information Technology Services, and other miscellaneous correspondence. There is some crossover with "Subseries 1.1, Projects: Analyst

Reports,” as some companies and projects are represented in both series. However, Series 2 is more comprehensive across Grad’s entire career as a consultant, and includes documentation of projects not represented in “Series 1: Projects.” Folders representing the earlier dates contain more correspondence, and as the chronology progresses a broader range of material is included in the folders such as financial records, background information collected for projects, and copies of final reports prepared for clients. Folder titles are directly transcribed from Grad’s, reflecting the dates the material was created. Select subjects, including companies and clients, are listed in the description field of folder records to assist researchers looking for specific topics within this series. This series is arranged in its original chronological order.

Folder List

Burton Grad Associates, Inc. records

X7213.2014

	<u>Catalog Number</u>	<u>Title</u>	<u>Date</u>
		Projects: Analyst Reports	
Box 1	102726647	Artesyn / Spider Software due diligence	2000
Box 1	102726648	Boole & Babbage management system report	1978-04-27
Box 1	102726649	Budgeting Technology Inc. sale of company	1997; 1998
Box 1	102726650	Computer Associates International / Sterling Software / Texas Instruments Software IRS questions and valuation	1997; 1999; 2001-2002
Box 1	102726651	Elron stock option valuation	1999
Box 1	102726652	Elron / NCC valuation report	1998-1999
Box 1	102726653	Elron / Level 8 board membership	2000-2001
Box 1	102726654	Elron / Liraz / Level 8 due diligence	2001
Box 1	102726655	DIC / Elron / Level 8 due diligence of HPS business	1999-2001
Box 1	102726656	Elron / Level 8 Geneva Application Builder support materials	1999-2001
Box 1	102726657	DIC / Level 8 valuation	1999
Box 2	102726658	Elron / NCC / Hyperbranch valuation	1995-1996; 1998
Box 2	102726659	Elron / NCC / Hyperbranch presentation	1998
Box 2	102726660	Elron / NCC / STAR acquisition valuation	1998-09-11
Box 2	102726661	Elron / NCC	1998
Box 2	102726662	Elron / NCC / Intertools	1998
Box 2	102726663	Elron / Telesoft	2000

	<u>Catalog Number</u>	<u>Title</u>	<u>Date</u>
		Projects: Analyst Reports	
Box 2	102726664	Elron / Telesoft valuation	1998; 2000
Box 2	102726665	Elron / TTI Telecom due diligence	1999-2000
Box 2	102726666	Elron / Secure due diligence	1997-1999
Box 2	102726667	Expert Software IRS review & audit	1992; 1996
Box 2	102726668	Expert Software securities information	1995-1996
Box 2	102726669	Essentium business plan review	1998-1999
Box 2	102726670	Future 3 product development report	2000
Box 2	102726671	Summit Partners / Future 3 R&D business review	1994; 1998; 2000
Box 2	102726672	Future 3 support materials book 1	1999-2000
Box 2	102726673	Future 3 support materials book 2	1998-2000
Box 2	102726674	Future 3 support materials book 3	2000
Box 2	102726675	First Dallas Ltd / Coolinks / Data Foundation due diligence	2000
Box 2	102726676	First Dallas Ltd. / Coolinks.com due diligence	1999-2000
Box 2	102726677	First Dallas Ltd. / Antenna Software due diligence	1998; 2000
Box 3	102726678	First Dallas Ltd. / Critical Devices Inc. due diligence	1999-2001
Box 3	102726679	First Dallas Ltd. / Integrated Concepts Inc. due diligence	1998-2003
Box 3	102726680	First Dallas Ltd. / Nescrow due diligence	2000-2001
Box 3	102726681	First Dallas Ltd. / RocketLogix due diligence	1996; 2000

	<u>Catalog Number</u>	<u>Title</u>	<u>Date</u>
		Projects: Analyst Reports	
Box 3	102726682	First Dallas Ltd. / Transfinity due diligence	1997; 1999-2000
Box 3	102726683	First Dallas Ltd. / VE Group LLC due diligence	2000
Box 3	102726684	Graphic Enterprises Inc expert witness vs. JBA International	2001
Box 3	102726685	Mediware Information Systems / Pharmakon Division valuation study	1994-1996
Box 3	102726686	Mediware Information Systems / Informedics valuation study	1998-1999
Box 3	102726687	Michael's Stores / Full Vision Software applicability and acquisition valuation	1998-1999
Box 3	102726688	Michael's Stores / Barewalls due diligence	1999
Box 3	102726689	Liraz Systems / Seer Technologies due diligence	1997-1999
Box 3	102726690	Summit Partners / Allpoint Systems due diligence	1998-2000
Box 3	102726691	Summit Partners / Blackbaud due diligence	1999
Box 4	102726692	Summit Partners / Blue Ocean Software due diligence	2001
Box 4	102726693	Summit Partners / Burst!Media due diligence	2000
Box 4	102726694	Summit Partners / Eliance due diligence	1998
Box 4	102726695	Summit Partners / eXtream Software due diligence	2002
Box 4	102726696	Summit Partners / Future 3 due diligence	1993-1994; 1997-2000

	<u>Catalog Number</u>	<u>Title</u>	<u>Date</u>
		Projects: Analyst Reports	
Box 4	102726697	Summit Partners / MoreDirect.com due diligence	2000-2001
Box 4	102726698	Summit Partners / Sybari Software due diligence	1997-1998; 2001
Box 4	102726699	Summit Partners / UNICA due diligence	1999-2000
Box 4	102726700	Synergy HR Technologies - Merrill Lynch health and welfare business acquisition assessment	2001
Box 4	102726701	Synhrgy HR Technologies common stock valuation	2000
Box 4	102726702	Synhrgy (ACC)	1999-2000
Box 4	102726703	Synhrgy report	2000-2001
Box 4, 5	102726704	Synhrgy valuation	2000-2001
Box 5	102726705	Synhrgy report / valuation	2001
Box 5	102726706	Synhrgy valuation report	2001-2002
Box 5	102726707	Synhrgy valuation 1Q02	2002
Box 5	102726708	Synhrgy 3Q02, 4Q02	2002-2003
Box 5	102726709	Synhrgy 1Q03, 2Q03	2003
Box 5	102726710	Synhrgy valuation 3Q03	2003-2004
Box 5	102726711	AAC group stock valuation report	1999-2000
Box 5	102726712	Tangent International / Planetworks valuation study	1996; 1999
Box 5	102726713	Tangent International / Planetworks financials	1996-1997
Box 5	102726714	Sterling Software strategic analysis	1982-1987; 1991-1992

	<u>Catalog Number</u>	<u>Title</u>	<u>Date</u>
		Projects: Analyst Reports	
Box 5	102726715	Sterling Software business valuation for Dylakor, Directions Inc., Software Labs Inc., Software Modules Marketing	1983
Box 5	102726716	Sterling Software stock presentation road show	1981; 1983
Box 6	102726717	Sterling Software	1985
Box 6	102726718	Sterling Software FASB 86 software capitalization guidelines	1986
Box 6	102726719	Sterling Software Cayenne Software valuation	1998-1999
Box 6	102726720	Sterling Software Cayenne Software review	1998-1999
Box 6	102726721	Sterling Commerce CEDEX Services International due diligence	1999
Box 6	102726722	Sterling Software Core Data valuation	1998-1999
Box 6	102726723	Sterling Software Core Data valuation report	1999
Box 6	102726724	Sterling Software Core Data due diligence	1999
Box 6	102726725	Sterling Software customer service projects	1995-1996
Box 6	102726726	Sterling Software emerging business investment opportunities	1992-1993
Box 6	102726727	Sterling Software EDI market opportunity : integrated messaging project for electronic commerce group	1993-1994
Box 6	102726728	Sterling Software Informatics valuation studies	1985-1986
Box 6	102726729	Sterling Software Information Advantage Inc. valuation	1999

	<u>Catalog Number</u>	<u>Title</u>	<u>Date</u>
	Projects: Analyst Reports		
Box 6	102726730	Sterling Software Information Advantage Inc due diligence	1999
Box 6	102726731	Interlink valuation	1998-1999
Box 6	102726732	Sterling Software Mercury Computer Systems due diligence	1999
Box 6	102726733	Sterling Software consulting on Progressive Casualty lawsuit	2000
Box 6, 7	102726734	Sterling Software Retrieve Inc. valuation study	2000
Box 7	102726735	Sterling Software Retrieve Inc. due diligence	2000
Box 7	102726736	Sterling Software Spectra Logic valuation study	1999
Box 7	102726737	Sterling Software Spectra Logic due diligence and valuation	1999
Box 7	102726738	Sterling Software valuation procedures	1999-2000
Box 7	102726739	Sterling Commerce technology write-off of acquisitions general valuation	1996
Box 7	102726740	Sterling Software - tax related - TIS valuation	1997-1999
Box 7	102726741	Sterling Software tax-related assessment for international marketing rights	1997-1998
Box 7	102726742	Sterling Software (TIS acquisition)	1997
Box 7	102726743	Sterling Software Texas Instruments software re-evaluation	1997; 1999
Box 7	102726744	Sterling Software review of IP R&D valuations	1999
Box 7	102726745	Sterling Software / Software Life	1987-1992

	<u>Catalog Number</u>	<u>Title</u>	<u>Date</u>
	Projects: Analyst Reports		
Box 7	102726746	Sterling Software Volcano technical due diligence	1998
Box 7	102726747	Sterling Commerce Cottage due diligence and customer survey	1998
Box 7	102726748	Sterling Commerce Cottage due diligence	1998
Box 7	102726749	Sterling Commerce Cornfield due diligence	1999
Box 7	102726750	Sterling Commerce Cornfield valuation	1999
Box 7	102726751	Sterling Commerce EC Group valuation report	1999
Box 7	102726752	Sterling Commerce Roger due diligence	1996; 1998
Box 7	102726753	Sterling Commerce Roger o.tel.o valuation study	1997-1999
Box 7	102726754	Sterling Commerce Timbuktu due diligence	1998
Box 7	102726755	Sterling Commerce Timbuktu initial due diligence support materials for tech dd	1997-1998
Box 8	102726756	Sterling Commerce XcelleNet technologic valuation tables	1998
Box 8	102726757	Sterling Commerce XcelleNet final valuation report	1998
Box 8	102726758	Sterling Commerce XcelleNet valuation report	1998
Box 8	102726759	Sterling Commerce XcelleNet valuations general information	1998
Box 8	102726760	Sterling Commerce XcelleNet CSG new projects, tech / forecasts	1998

	<u>Catalog Number</u>	<u>Title</u>	<u>Date</u>
		Projects: Analyst Reports	
Box 8	102726761	Sterling Commerce XcelleNet CVG new offerings	1998
Box 8	102726762	Sterling Commerce XcelleNet ISG new products	1998
Box 8	102726763	Sterling Commerce XcelleNet products valuation	1998-1999
Box 8	102726764	Sterling Commerce XcelleNet MSD new products	1998
Box 8	102726765	Motive impairment analysis, audit review	2003; 2006
Box 8	102726766	Motive valuation of Broadjump acquisition and valuation of performance cost of deferred revenue	2002
Box 8	102726767	Motive impairment analysis	2005-2006
Box 8	102726768	Motive BroadJump materials provided	2002
Box 8	102726769	Motive BroadJump acquisition final report	2002-2003
Box 8	102726770	Motive BroadJump acquisition valuation of intangible assets	2001-2003
Box 8	102726771	Global 360 purchase price allocation and general information	2006
Box 8, 9	102726772	Global 360 impairment analysis	2005; 2007
Box 9	102726773	Global 360 allocations and support materials	2004-2006
Box 9	102726774	Global 360 EY responses	2006
Box 9	102726775	Global 360 allocation report	2007
Box 9	102726776	Softbrands Infra	2005-2006
Box 9	102726777	Softbrands impairment analysis	2005-2008

	<u>Catalog Number</u>	<u>Title</u>	<u>Date</u>
	Projects: Analyst Reports		
Box 9	102726778	Softbrands	2005-2006
Box 9	102726779	Sterling Commerce Velosel (Rembrandt)	2004-2005
Box 9	102726780	Sterling Commerce Yantra (Greylock) due diligence	2004
Box 9	102726781	Sterling Commerce acquisition plans and administrative material	2004
Box 9	102726782	Sterling Commerce Yantra Greylock / GIS	2004
Box 9	102726783	IHMA Technologies valuation	2005
Box 9	102726784	Ardsley Partners GoldPocket.com valuation	2001-2002
Box 10	102726785	Ardsley Partners Zenimak and Goldpocket.com	2001
Box 10	102726786	Ardsley Partners Zenimax valuation	2001-2002
Box 10	102726787	Ardsley Partners Zenimax Media Inc.	2001
Box 10	102726788	Crawford v SAP	2003-2004
Box 10	102726789	Crawford v. SAP work papers	1997-1998; 2002-2003
Box 10	102726790	Crawford v SAP final report	1990; 1996-1997
Box 10	102726791	Crawford v SAP reports	2003
Box 10	102726792	Crawford v SAP deposition preparations	2003

	<u>Catalog Number</u>	<u>Title</u>	<u>Date</u>
Projects: Invoices			
Box 10	102726793	Sterling Software Knowledgware 133-54	1994-1995
Box 10	102726794	Sterling / VMSD Syncsort due diligence 133-58	1995
Box 10	102726795	Sterling / Shipnet due diligence 133-59	1995
Box 10	102726796	Sterling Tecsec due diligence 133-59	1995
Box 10	102726797	Sterling Relay VM due diligence 133-60	1997
Box 10	102726798	Sterling Software TI valuation 133-61	1997
Box 10	102726799	Sterling Software KWI revaluation 133-62	1997
Box 10	102726800	Sterling Software IMG valuation 133-63	1997
Box 10	102726801	Sterling Software Phoenix due diligence 133-64	1997
Box 10	102726802	Sterling Software ISS due diligence review 133-66	1998
Box 10	102726803	Sterling Software Volcano due diligence 133-67	1998-1999
Box 10	102726804	Sterling Software / ADD Cayenne Software valuation 133-68	1998-1999
Box 10	102726805	SSW / IMD (Anik & Heiberg) Quikjob infringement 133-70	1998
Box 10	102726806	Sterling Software tax-related studies 133-71	1998-1999
Box 10	102726807	SSI / Spectra Logic Alexandria 133-72	1999
Box 10	102726808	SSI Interlink valuation 133-74	1999

	<u>Catalog Number</u>	<u>Title</u>	<u>Date</u>
	Projects: Invoices		
Box 10	102726809	SSI / IMG Information Advantage Inc. due diligence 133-75	1999
Box 10	102726810	SSI / SMD Core Data due diligence 133-76	1999
Box 10	102726811	SSI / SMD Mercury Computer due diligence 133-77	1999
Box 10	102726812	Sterling Software Information Advantage acquisition 133-78	1999
Box 10	102726813	Sterling Software Core Data acquisition 133-79	1999
Box 10	102726814	SSI IPR&D review of SSI 133-80	1999
Box 10	102726815	SSI Cayenne review 133-81	1999
Box 10	102726816	SSI Retrieve, Inc. due diligence 133-82	2000
Box 10	102726817	Sterling Software Progressive due diligence 133-83	2000
Box 10	102726818	Sterling Software Retrieve valuation 133-84	2000
Box 10	102726819	Vanguard Atlantic 173-2	1997
Box 10	102726820	Culpepper 194-6, 194-7, 194-9	1994-1999
Box 10	102726821	Elron Software Star strategic planning NCC valuation 217-5	1998-1999
Box 10	102726822	Elron stock option valuation	1999
Box 10	102726823	Elron Telesoft valuation 217-8	2000
Box 10	102726824	Future Three business review 237-3	2000
Box 10	102726825	DA International update 251-4, 251-5, 251-6	1996-1998
Box 10	102726826	DA Consulting DACG / France 251-6	1998

	<u>Catalog Number</u>	<u>Title</u>	<u>Date</u>
	Projects: Invoices		
Box 10	102726827	INSLAW expert witness 255-1	1996-1997
Box 10	102726828	Mediware, Inc. 257-1	1996
Box 10	102726829	Mediware, Inc. 257-2	1998
Box 10	102726830	Pivotpoint Co. valuation 259-1	1996-1997
Box 10	102726831	Budget Technology 261-1	1996-1997
Box 10	102726832	Budgeting Technology Co. sale 261-2	1997-1998
Box 10	102726833	Prodea valuation 262-1	1996-1997
Box 10	102726834	Sterling Commerce Comfirst due diligence 263-1	1997
Box 10	102726835	Sterling Commerce Comfirst valuation 263-2	1997
Box 10	102726836	Sterling Commerce Newton due diligence 263-3	1997-1998
Box 10	102726837	Sterling Commerce Technical due diligence (Einstein) 263-4	1997
Box 10	102726838	Sterling Commerce Newton valuation 263-5	1997
Box 10	102726839	Sterling Commerce Roger due diligence 263-6	1998
Box 10	102726840	Sterling Commerce Roger valuation 263-7	1998-1999
Box 11	102726841	Sterling Commerce Meadow due diligence 263-8	1998
Box 11	102726842	Sterling Commerce Timbuktu due diligence 263-9	1998
Box 11	102726843	Sterling Commerce Cottage due diligence 263-10	1998

	<u>Catalog Number</u>	<u>Title</u>	<u>Date</u>
	Projects: Invoices		
Box 11	102726844	Sterling Commerce Meadow valuation 263-11	1998
Box 11	102726845	Sterling Commerce XcelleNet valuation 263-12	1998
Box 11	102726846	Sterling Commerce NIS 263-14	1998
Box 11	102726847	Sterling Commerce Bantam technical due diligence 263-16	1998
Box 11	102726848	SCI Cornfield due diligence 263-17	1999
Box 11	102726849	SCI / CVG EG Group Cornfield valuation 263-18	1999
Box 11	102726850	Sterling Software Cedex "Discovery" 263-19	1999
Box 11	102726851	Grace Consulting damages consulting and industry expert 264-1	1997-2000
Box 11	102726852	Grace Consulting strategy 264-2	1997-1999
Box 11	102726853	Software History 265-1	1997-1998
Box 11	102726854	Platinum tech. infringement 266-1	1997
Box 11	102726855	Infosafe tech. valuation 267-1	1997
Box 11	102726856	Infosafe Technology valuation 267-2	1997
Box 11	102726857	USA Systems Group valuation 268-1	1997
Box 11	102726858	Decision Consultants valuation 269-1	1997-1998
Box 11	102726859	i2 Technologies, Inc. valuation 270-1	1998
Box 11	102726860	Discount Investment Corp. 272-1	1998-1999
Box 11	102726861	DIC Finance Level 8 valuation 272-2	1999
Box 11	102726862	Liraz-Seer due diligence 273-1	1998-1999

	<u>Catalog Number</u>	<u>Title</u>	<u>Date</u>
	Projects: Invoices		
Box 11	102726863	Summit Partners Future 3 due diligence 274-1	1998-1999
Box 11	102726864	Summit Partners (Eliance) 274-2	1998
Box 11	102726865	Summit Partners (Blackbaud) 274-3	1999
Box 11	102726866	Summit Partners Unica due diligence 274-4	1999
Box 11	102726867	Summit Partners Burst!Media due diligence 274-5	2000
Box 11	102726868	Essentium, Inc. 275-1	1999
Box 11	102726869	Michaels Stores 276-1	1999
Box 11	102726870	Michaels Stores Barewalls.com 276-2	1999
Box 11	102726871	Tangent asset valuation 277-1	1999
Box 11	102726872	First Dallas due diligence / Critical Devices 278-1	1999
Box 11	102726873	First Dallas Ltd. Integrated Concepts due diligence 278-2	2000
Box 11	102726874	First Dallas Ltd. Coollink due diligence 278-3	2000
Box 11	102726875	First Dallas Nescrow due diligence 278-4	2000
Box 11	102726876	FDL RocketLogix due diligence 278-5	2000
Box 11	102726877	First Dallas Antenna Software due diligence 278-6	2000
Box 11	102726878	FDL VE Group (Transfinity) 278-7	2000
Box 11	102726879	AAC Group, Inc. stock valuation studies 279-1	2000

	<u>Catalog Number</u>	<u>Title</u>	<u>Date</u>
		Projects: Invoices	
Box 11	102726880	Artesyn Technologies Spider due diligence 280-1	2000

	<u>Catalog Number</u>	<u>Title</u>	<u>Date</u>
	Projects: CustomerCare publications		
Box 11	102726881	Realistic software services newsletter	1990
Box 11	102726882	CustomerCare survey : service & support practices in the software industry	1991; 1993-1996
Box 11	102726883	CustomerCare newsletter	1991-1997
Box 11	102726884	Support automation systems	1995

	<u>Catalog Number</u>	<u>Title</u>	<u>Date</u>
Chronological Files			
Box 11	102761910	January 1974-June 1974	1974-01-01-1974-06-30
Box 11	102761911	July 1974-December 1974	1974-07-01-1974-12-31
Box 12	102761912	January 1975-June 1975	1975-01-01-1975-06-30
Box 12	102761913	July 1975-December 1975	1975-07-01-1975-12-31
Box 12	102761914	January 1976-June 1976	1976-01-01-1976-06-30
Box 12	102761915	July 1976-December 1976	1976-07-01-1976-12-31
Box 12	102761916	January 1977-March 1977	1977-01-01-1977-03-31
Box 12	102761917	April 1977-June 1977	1977-04-01-1977-06-31
Box 12	102761918	July 1977-December 1977	1977-07-01-1977-12-31
Box 12	102761919	January 1978	1978-01
Box 12	102761920	February 1978-April 1978	1978-02-01-1978-04-30
Box 12	102761921	May 1978-August 1978	1978-05-01-1978-08-31
Box 13	102761922	September 1978-December 1978	1978-09-01-1978-12-31
Box 13	102761923	January 1979	1979-01
Box 13	102761924	May 1979-July 1979	1979-05-01-1979-07-31
Box 13	102761925	August 1979-October 1979	1979-08-01-1979-10-31
Box 13	102761926	November 1979-December 1979	1979-11-01-1979-12-31
Box 13	102761927	November 1979-January 1980	1979-11-01-1980-01-31
Box 13	102761928	May 1981-July 1981	1981-05-01-1981-07-31
Box 13	102761929	October 1981	1981-10
Box 13	102761930	November 1981	1981-11
Box 13	102761931	December 1981	1981-12

	<u>Catalog Number</u>	<u>Title</u>	<u>Date</u>
Chronological Files			
Box 13	102761932	January 1982-March 1982	1982-01-01-1982-03-30
Box 13	102761933	April 1982-June 1982	1982-04-01-1982-06-31
Box 13	102761934	July 1982-September 1982	1982-07-01-1982-09-30
Box 13	102761935	October 1982-December 1982	1982-10-01-1982-12-31
Box 13	102761936	March 1983-July 1983	1983-03-01-1983-07-30
Box 13	102761937	August 1983-September 1983	1983-08-01-1983-09-30
Box 13	102761938	November 1983	1983-11
Box 13	102761939	December 1983	1983-12
Box 13	102761940	January 1984-February 1984	1984-01-01-1984-02-28
Box 13	102761941	February 1984-March 1984	1984-02-01-1984-03-30
Box 13	102761942	April 1984	1984-04
Box 13	102761943	May 1984-June 1984	1984-05-01-1984-06-31
Box 13	102761944	June 1984-October 1984	1984-06-01-1984-10-31
Box 13, 14	102761945	December 1984	1984-12
Box 14	102761946	February 1985	1985-02
Box 14	102761947	March 1985	1985-03
Box 14	102761948	May 1985	1985-05
Box 14	102761949	June 1985	1985-06
Box 14	102761950	July 1985-August 1985	1985-07-01-1985-08-31
Box 14	102761951	September 1985	1985-09
Box 14	102761952	October 1985	1985-10
Box 14	102761953	November 1985	1985-11

	<u>Catalog Number</u>	<u>Title</u>	<u>Date</u>
Chronological Files			
Box 14	102761954	December 1985	1985-12
Box 14	102761955	January 1986	1986-01
Box 14	102761956	February 1986	1986-02
Box 14	102761957	March 1986	1986-03
Box 14	102761958	April 1986	1986-04
Box 14	102761959	May 1986	1986-05
Box 14	102761960	June 1986	1986-06
Box 14	102761961	January 1987-February 1987	1987-01-01-1987-02-28
Box 14	102761962	March 1987	1987-03
Box 14	102761963	April 1987	1987-04
Box 14	102761964	May 1987	1987-05
Box 14	102761965	June 1987	1987-06
Box 15	102761966	July 1987-October 1987	1987-07-01-1987-10-31
Box 15	102761967	November 1987-December 1987	1987-11-01-1987-12-31
Box 15	102761968	January 1988	1988-01
Box 15	102761969	February 1988	1988-02
Box 15	102761970	March 1988	1988-03
Box 15	102761971	April 1988	1988-04
Box 15	102761972	May 1988	1988-05
Box 15	102761973	June 1988	1988-06
Box 15	102761974	July 1988	1988-07
Box 15	102761975	September 1988	1988-09

	<u>Catalog Number</u>	<u>Title</u>	<u>Date</u>
Chronological Files			
Box 15	102761976	October 1988	1988-10
Box 15	102761977	November 1988	1988-11
Box 15	102761978	December 1988	1988-12
Box 15	102761979	February 1989	1989-02
Box 15	102761980	June 1989	1989-06
Box 15	102761981	August 1989	1989-08
Box 15	102761982	September 1989-October 1989	1989-09-01-1989-10-31
Box 15	102761983	November 1989-December 1989	1989-11-01-1990-12-31
Box 15	102761984	January 1990	1990-01
Box 15	102761985	February 1990	1990-02
Box 15	102761986	April 1990	1990-04
Box 15	102761987	May 1990	1990-05
Box 15	102761988	June 1990	1990-06
Box 15	102761989	July 1990	1990-07
Box 15	102761990	August 1990-September 1990	1990-07-01-1990-09-30
Box 15	102761991	October 1990-November 1990	1990-10-01-1990-11-30
Box 16	102761992	January 1991-February 1991	1991-01-01-1991-02-28
Box 16	102761993	March 1991-April 1991	1991-03-01-1991-04-30
Box 16	102761994	May 1991	1991-05
Box 16	102761995	June 1991-July 1991	1991-06-01-1991-07-31
Box 16	102761996	August 1991-September 1991	1989-1991
Box 16	102761997	October 1991	1991-10

	<u>Catalog Number</u>	<u>Title</u>	<u>Date</u>
Chronological Files			
Box 16	102761998	November 1991	1991-11
Box 16	102761999	December 1991	1991-12
Box 16	102762000	January 1992	1992-01
Box 16	102762001	February 1992	1992-02
Box 16	102762002	March 1992	1992-03
Box 16	102762003	April 1992-July 1992	1992-04-01-1992-07-31
Box 16	102762004	August 1992	1992-08
Box 16	102762005	September 1992	1992-09
Box 16	102762006	November 1992	1992-11
Box 16	102762007	December 1992	1992-12
Box 16	102762008	January 1993	1993-01
Box 17	102762009	February 1993	1993-02
Box 17	102762010	March 1993	1993-03
Box 17	102762011	April 1993	1993-04
Box 17	102762012	May 1993	1993-05
Box 17	102762013	June 1993	1993-06
Box 17	102762014	July 1993	1993-07
Box 17	102762015	August 1993	1993-08
Box 17	102762016	September 1993	1993-09
Box 17	102762017	October 1993	1993-10
Box 17	102762018	November 1993	1993-11
Box 17	102762019	December 1993	1993-12

	<u>Catalog Number</u>	<u>Title</u>	<u>Date</u>
	Chronological Files		
Box 17	102762020	January 1994	1994-01
Box 17	102762021	February 1994	1994-02
Box 17	102762022	March 1994	1994-03
Box 17	102762023	April 1994	1994-04
Box 17	102762024	May 1994	1994-05
Box 17	102762025	June 1994	1994-06
Box 17	102762026	July 1994	1994-07
Box 17	102762027	August 1994	1994-08
Box 17	102762028	September 1994	1994-09
Box 17	102762029	October 1994	1994, 10
Box 17	102762030	November 1994	1994-11
Box 17	102762031	December 1994	1994-12
Box 18	102762032	January 1995	1995-01
Box 18	102762033	February 1995	1995-02
Box 18	102762034	March 1995	1995-03
Box 18	102762035	April 1995	1995-04
Box 18	102762036	May 1995	1995-05
Box 18	102762037	June 1995	1995-06
Box 18	102762038	July 1995	1995-07
Box 18	102762039	August 1995	1995-08
Box 18	102762040	September 1995	1995-09
Box 18	102762041	October 1995	1995-10

	<u>Catalog Number</u>	<u>Title</u>	<u>Date</u>
	Chronological Files		
Box 18	102762042	November 1995	1995-11
Box 18	102762043	December 1995	1995-12
Box 18	102762044	January 1996	1996-01
Box 18	102762045	February 1996	1996-02
Box 18	102762046	March 1996	1996-03
Box 18	102762047	April 1996	1996-04
Box 18	102762048	May 1996	1996-05
Box 18	102762049	June 1996	1996-06
Box 18	102762050	July 1996	1996-07
Box 18	102762051	August 1996	1996-08
Box 18	102762052	September 1996	1996-09
Box 18	102762053	October 1996	1996-10
Box 19	102762054	November 1996	1996-11
Box 19	102762055	December 1996	1996-12
Box 19	102762056	January 1997	1997-01
Box 19	102762057	February 1997	1997-02
Box 19	102762058	March 1997	1997-03
Box 19	102762059	April 1997	1997-04
Box 19	102762060	May 1997	1997-05
Box 19	102762061	June 1997	1997-06
Box 19	102762062	July 1997	1997-07
Box 19	102762063	August 1997	1997-08

	<u>Catalog Number</u>	<u>Title</u>	<u>Date</u>
	Chronological Files		
Box 19	102762064	September 1997	1997-09
Box 19	102762065	October 1997	1997-10
Box 19	102762066	November 1997	1997-11
Box 19	102762067	December 1997	1997-12
Box 19	102762068	January 1998	1998-01
Box 19	102762069	February 1998	1998-02
Box 19	102762070	March 1998	1998-03
Box 20	102762071	April 1998	1998-04
Box 20	102762072	May 1998	1998-05
Box 20	102762073	June 1998	1998-06
Box 20	102762074	July 1998	1998-07
Box 20	102762075	August 1998	1998-08
Box 20	102762076	October 1998	1998-10
Box 20	102762077	November 1998	1998-11
Box 20	102762078	December 1998	1998-12
Box 20	102762079	January 1999	1999-01
Box 20	102762080	February 1999	1999-02
Box 20	102762081	March 1999	1999-03
Box 20	102762082	April 1999	1999-04
Box 20	102762083	May 1999	1999-05
Box 20	102762084	June 1999	1999-06
Box 20	102762085	July 1999	1999-07

	<u>Catalog Number</u>	<u>Title</u>	<u>Date</u>
Chronological Files			
Box 20	102762086	August 1999	1999-08
Box 20	102762087	September 1999	1999-09
Box 20	102762088	October 1999	1999-10
Box 20	102762089	November 1999	1999-11
Box 20	102762090	December 1999	1999-12
Box 20	102762091	January 2000	2000-01
Box 20	102762092	February 2000	2000-02
Box 20	102762093	March 2000	2000-03
Box 21	102762094	April 2000	2000-04
Box 21	102762095	May 2000	2000-05
Box 21	102762096	June 2000	2000-06
Box 21	102762097	July 2000-August 2000	2000-07-01-2000-08-31
Box 21	102762098	September 2000	2000-09
Box 21	102762099	October 2000	2000-10
Box 21	102762100	November 2000-December 2000	2000-11-01-2000-12-31
Box 21	102762101	January 2001-June 2001	2001-01-01-2001-06-30
Box 21	102762102	August 2001-November 2001	2001-08-01-2001-11-30
Box 21	102762103	December 2001	2001-12
Box 21	102762104	January 2002-March 2002	2002-01-01-2002-03-31
Box 21	102762105	April 2002-May 2002	2002-04-01-2002-05-31
Box 21	102762106	June 2002	2002-06
Box 21	102762107	June 2002-December 2002	2002-06-01-2002-12-31

	<u>Catalog Number</u>	<u>Title</u>	<u>Date</u>
	Chronological Files		
Box 21	102762108	January 2003-February 2003	2003-01-01-2003-02-28
Box 21	102762109	April 2003-May 2003	2003-04-01-2003-05-31
Box 21	102762110	June 2003-September 2003	2003-06-01-2003-09-30