

Daniela Montemerlo

Affiliate Professor



Knowledge Group: Strategy and Operations

Research Domains: Entrepreneurship & Family Business

Teaching Domains: Family Business, Corporate Governance, Growth Strategy, Strategic & Business Planning

daniela.montemerlo@sdabocconi.it

Biography

Daniela Montemerlo is an Affiliate Professor of Strategy and Entrepreneurship at SDA Bocconi School of Management. She is a Full Professor of Management and Family Business at the Università dell'Insubria and Professor of Strategic Management in Family Businesses at Università Bocconi.

At SDA Bocconi, she teaches Corporate Governance in Executive MBA programs as well as in executive education programs; she also teaches family business in executive programs for family business owners and boards of directors of medium and large companies as well as for financial institutions. She has been the Director of several courses, both for the open market and on a custom basis.

Her research activities, both national and international, focus on family business and corporate governance. In the family business area, her main interests concern family and corporate governance, family and ownership agreements, next generation development, intra and inter-generational dynamics, co-leadership models, strategic management, organizational change, managerialization processes, women's leadership. In the corporate governance area her topics are: governance design (ownership agreements, structures, functioning rules); selection, the role and special challenges of various types of board members and top managers; special challenges of diversity.

She is the author and co-author of many books and articles. Her books include: "Continuità generazionale e accordi familiari", EGEA 2009; "The Family Constitution. Agreements to Secure and Perpetuate Your Family and Your Business", Palgrave MacMillan 2011, with John Ward; "Fratelli e sorelle in azienda", EGEA 2013; "Le scelte improrogabili delle imprese familiari", EGEA 2019. Her articles have been published in journals like the Journal of Small Business Management (Governance systems in family SMEs: the substitution effect of family councils on official mechanisms, 2013, with L. Gnan and M. Huse), Family Business Review (Ownership, governance and management issues in small and medium-size family businesses: a comparison of Italy and US, 1999, with G. Corbetta), Economia & Management (family business articles). She is an advisor to family businesses and entrepreneurial families in Italy and the USA, supporting leading generation, next

generation, inter-generational groups of family owners and executives as well as non-family managers and the whole ownership-management system. She has served as an independent director and Internal Control and Risk committee member of the listed banks Credito Bergamasco and Banco Popolare as well as the non-executive Director of Aletti GestielleSGR. She is currently a non-executive board member of Rubelli Spa and In.Pro.Di Spa. She chairs the Supervisory Body of lesBiogas srl and Cubogas srl (Snam Group). She is a Fellow and Founding board member of IFERA (International Family Enterprise Research Academy), the world association of family business scholars. She is a member of the Editorial Board of the Entrepreneurship Research Journal, of the Scientific Committee of the Italian Institute for Corporate Values (Istituto per i Valori d'Impresa) as well as of the Extended Editorial Committee of Economia & Management.

Daniela earned a degree and a Ph.D. in Business Administration from Università Bocconi.

Articles in Scholarly Journals

La letteratura di family business sui sistemi di governance: una riflessione su progressi e sfide

MONTEMERLO, D., "La letteratura di family business sui sistemi di governance: una riflessione su progressi e sfide", *Economia Aziendale Online*, 2024, vol. 15, no. 4, pp. 891-909

Effetti positivi sulle performance sia diretti sia indiretti

MINICHILLI, A., D. MONTEMERLO, V. D'ANGELO, J. P. BASTOS CASTILHO, M. DI FRANCESCO, G. DI CAPRIO, "Effetti positivi sulle performance sia diretti sia indiretti", *Economia & Management*, 2023, no. 2, pp. 68-76

Successione e governance dell'impresa: il ruolo speciale della famiglia proprietaria

MONTEMERLO, D., "Successione e governance dell'impresa: il ruolo speciale della famiglia proprietaria", *Trust, Impresa e Famiglia*, February 2023, vol. Numero Speciale, pp. 41-45

Family business e nuove leadership - Family Business and New Leadership

MONTEMERLO, D., A. MINICHILLI, "Family business e nuove leadership - Family Business and New Leadership", *Economia & Management*, 2020, no. 1, pp. 65-69

Governance systems in family SMEs: the substitution effects between family councils and corporate governance mechanisms

GNAN, L., D. MONTEMERLO, M. HUSE, "Governance systems in family SMEs: the substitution effects between family councils and corporate governance mechanisms", *Journal of Small Business Management*, 2015, vol. 53, no. 2, pp. 355-381

La gender diversity nelle aziende familiari italiane. Una risorsa da valorizzare

MONTEMERLO, D., P. PROFETA, "La gender diversity nelle aziende familiari italiane. Una risorsa da valorizzare", *Economia & Management*, 2009, no. 6, pp. 83-96

Ownership, Governance, and Management Issues in Small and Medium-Size Family Businesses: A Comparison of Italy and the United States

CORBETTA, G., D. MONTEMERLO, "Ownership, Governance, and Management Issues in Small and Medium-Size Family Businesses: A Comparison of Italy and the United States", *Family Business Review*, 1999, vol. 12, no. 4, pp. 361-374

Il processo di successione nelle imprese familiari di piccole e medie dimensioni. Alcuni confronti fra Italia e Stati Uniti

MONTEMERLO, D., L. GNAN, "Il processo di successione nelle imprese familiari di piccole e medie dimensioni. Alcuni confronti fra Italia e Stati Uniti", *Economia & Management*, 1999, no. 2, pp. 15-23

Quando i concorrenti si associano

MONTEMERLO, D., "Quando i concorrenti si associano", *Economia & Management*, 1991, no. 21

Practice-Oriented Books

La Buona Governance: Scelte e Strumenti per le Imprese non Quotate

MONTEMERLO, D., A. MINICHILLI, V. D'ANGELO - "La Buona Governance: Scelte e Strumenti per le Imprese non Quotate" - 2023, Egea, Milano, Italy

Contribution to Chapters, Books or Research Monographs

Relazioni familiari

FUMAGALLI ROMARIO, A., D. MONTEMERLO, "Relazioni familiari" in *Family business: Costruire un futuro sostenibile. Dialoghi fra imprenditori e accademici.*, Paolo Morosetti (Ed.), Rubettino Editore, chap. 2, 2023

Governance efficace

ZAMBON, E., D. MONTEMERLO, "Governance efficace" in *Family business: Costruire un futuro sostenibile. Dialoghi fra imprenditori e accademici.*, Paolo Morosetti (Ed.), Rubettino Editore, chap. 18, 2023

I pilastri del buon governo delle imprese

MONTEMERLO, D., "I pilastri del buon governo delle imprese" in *Il buon governo. Insegnamenti dalle storie di imprese, istituzioni e realta' locali.*, M. Minoja (Ed.), Egea, pp. 69-90, 2016

The determinants of women's involvement in top management teams: Opportunities or obstacles for family-controlled firms?

MONTEMERLO, D., A. MINICHILLI, G. CORBETTA, "The determinants of women's involvement in top management teams: Opportunities or obstacles for family-controlled firms?" in *Handbook of Research on Family Business, Second Edition.*, Smyrniotou K.X., Poutziouris P.Z., Goel S. (Eds.), Edward Elgar Publishing, pp. 301-322, 2013

La transmision del patrimonio como responsabilidad

MONTEMERLO, D., "La transmision del patrimonio como responsabilidad" in La empresa familiar multigeneracional., M. Gallo, S. Klein, D. Montemerlo, S. Tomaselli, K. Cappuyns (Eds.), Eunsa Astrolabio, pp. 119-132, 2009

Quando il futuro imprenditore è donna: come valorizzare le peculiarità di genere

MONTEMERLO, D., "Quando il futuro imprenditore è donna: come valorizzare le peculiarità di genere" in Manuale di gestione delle PMI., M. Puricelli, P. Preti (Eds.), Il Sole 24 Ore, pp. 131-138, 2008

Quando il futuro imprenditore è un gruppo: come progettare e gestire i vertici collegiali

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Governance Structures in Italian Family SMEs

MONTEMERLO, D., L. GNAN, W. SHULTZE, G. CORBETTA, "Governance Structures in Italian Family SMEs" in L'organizzazione fa la differenza., Comacchio A., Pontiggia A. (Eds.), Carocci Editore, pp. 201-227, 2008

Family-Firm Relations in Italian SMEs: Ownership and Governance Issues in a Double-fold Theoretical Perspective

GNAN, L., D. MONTEMERLO, "Family-Firm Relations in Italian SMEs: Ownership and Governance Issues in a Double-fold Theoretical Perspective" in Handbook of Research on Family Business., P. Poutziouris, K. Smyrnios, S. Klein (Eds.), Edward Elgar Publishing, pp. 501-516, 2006

La proprietà familiare: motore per la crescita o impianto frenante?

MONTEMERLO, D., "La proprietà familiare: motore per la crescita o impianto frenante?" in Capaci di crescere., G. Corbetta (Ed.), Egea, pp. 31-55, 2005

Structure and Dynamics of Ownership, Governance and Strategy: Role of Family and Impact on Performance in Italian SMEs

MONTEMERLO, D., L. GNAN, "Structure and Dynamics of Ownership, Governance and Strategy: Role of Family and Impact on Performance in Italian SMEs" in The role of family in family business., Corbetta G., Montemerlo D. (Eds.), Egea, pp. 224-244, 2001

Strutture proprietarie, complessità gestionale e sistemi di governance nelle piccole e medie imprese

AIROLDI, G., L. GNAN, D. MONTEMERLO, "Strutture proprietarie, complessità gestionale e sistemi di governance nelle piccole e medie imprese" in Corporate Governance. Analisi e prospettive del caso italiano., G. Airoldi, G. Forestieri (Eds.), Etas Libri, 1998

Assetti istituzionali e gestione strategica nello sviluppo delle imprese familiari

MONTEMERLO, D., G. COLOMBO, "Assetti istituzionali e gestione strategica nello sviluppo delle imprese familiari" in I processi di transizione delle imprese familiari., C. Demattè, G. Corbetta (Eds.), Mediocredito Lombardo, 1993

Research Monographs

Innovazione Culturale, Innovazione Tecnologica e Successo dell'Impresa

CODA, V., D. MONTEMERLO, A. ZATTONI - "Innovazione Culturale, Innovazione Tecnologica e Successo dell'Impresa" - 2022, Egea, Milano, Italy

Le scelte improrogabili delle Imprese Familiari. Come affrontare le sfide della governance di aziende e famiglie proprietarie in un mondo cambiato

MONTEMERLO, D. - "Le scelte improrogabili delle Imprese Familiari. Come affrontare le sfide della governance di aziende e famiglie proprietarie in un mondo cambiato" - 2020, Egea, Milano, Italy

Fratelli e sorelle in azienda. Come fare della relazione più lunga della vita un punto di forza dell'impresa e della famiglia proprietaria

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The Family Constitution: Agreements to Secure and Perpetuate Your Family and Your Business

MONTEMERLO, D., J. L. WARD - "The Family Constitution: Agreements to Secure and Perpetuate Your Family and Your Business" - 2011, Palgrave Macmillan, United States of America

Continuità generazionale e accordi familiari. Principi e regole per l'impresa, la proprietà e la famiglia

MONTEMERLO, D. - "Continuità generazionale e accordi familiari. Principi e regole per l'impresa, la proprietà e la famiglia" - 2009, Egea, Milano, Italy

Le PMI familiari tra tradizione e novità. I risultati di una ricerca

GNAN, L., D. MONTEMERLO - "Le PMI familiari tra tradizione e novità. I risultati di una ricerca" - 2008, Egea, Milano, Italy

Il governo delle imprese familiari. Modelli e strumenti per gestire i rapporti tra proprietà e impresa

MONTEMERLO, D. - "Il governo delle imprese familiari. Modelli e strumenti per gestire i rapporti tra proprietà e impresa" - 2000, Egea, Milano, Italy

Other in Journals

Come estrarre valore dalla governance

MONTEMERLO, D., A. MINICHILLI, "Come estrarre valore dalla governance", *Economia & Management*, 2022, no. 3, pp. 52-53

Edited Books

The Role of family in Family Business

CORBETTA, G., D. MONTEMERLO (Eds.), "The Role of family in Family Business" - 2001, Egea, Milano, Italy