DUNCAN 3/12/01

CARL

— NOT DUNCAN DRIVEN

SOME PUSH CARL OUT of engagement team
(by client to get

- CAUSEY
- ECHOLS — STRONG FEELINGS

NEGATIVE VIEW of CARL
- CONSISTENCY of ADVICE
- THE FURTHER AWAY, more convenient

WIN/WIN TO GO TO PSG

CARL NOT MUCH INTERACTION directly WITH CLIENT
DISappointment (MATTERS IN THEORY VS. TRANSACTIONS)

Y-E issues/LAST 6 MONTHS ⟹ CAME TO HEAD

CAUSEY = ROST POLITICAL capital internally

LONDON problems

need more leverage in HOUSTON
on engagement team

TOM BAKER – 8 million suspended fees

JFS – NTF, DIG

CLIENT SEFS need to replace carl /

CARL – move to CHICAGO
good solution,
but doesn't want to
come

PULL / PUSH

TIM too young
JR

Documentation – weakest point

professional
[illegible]
personal

I WHY

II P, P, P – CONSEQUENCES

III WAY FORWARD

CHICAGO
HOUSTON

✓ 1. FILTER — CARL IN TRANSITION

✓ 2. writing
- NOT YEAR SAFE
- AWAY

✓ 3. TALKING
- DUNCAN
- ANONYMOUS
- NO MEETINGS
- "BRAIN STORMING"

✓ 4. NO GRAD ⇒ NEED MORE

– consuming ptv
new engagement ptvs