

MENGZE SHI
Professor of Marketing
Rotman School of Management
University of Toronto

ACADEMIC POSITIONS

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| Since July 2001 | Assistant, Associate, and Full Professor of Marketing
Rotman School of Management,
University of Toronto |
| July 1997 ~ 2001 | Assistant Professor of Marketing
Wei Lun Senior Fellow
Hong Kong University of Science & Technology |

VISITING APPOINTMENTS

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|-------------|---|
| Fall 2015 | Visiting Scholar, Sloan School of Management, MIT |
| Summer 2015 | Research Fellow, Contemporary Marketing Center,
Hong Kong University |
| Spring 2015 | Visiting Scholar, CEIBS, Shanghai, China |
| Summer 2014 | Visiting Scholar, University of Sydney, Australia |
| Spring 2008 | Visiting Scholar, Cheung Kung School of Business, China. |
| Fall 2007 | Visiting Scholar, Carnegie Mellon University |

EDUCATION

- | | |
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| 1997 | Ph.D. in Marketing |
| 1994 | M.S. in Industrial Administration,
William Larimer Mellon Doctoral Fellowship
Carnegie Mellon University |
| 1992 | M.A. in Business Administration
University of International Business & Economics, China |
| 1989 | B.S. in Operations Research
Fudan University, Shanghai, China. |

RESEARCH

AWARD

Roger Martin and Nancy Lang Awards for Excellence in Research,
Rotman School of Management, University of Toronto

REFERRED JOURNAL PUBLICATIONS

- 1) Gonul, F. and M. Shi. 1998. Optimal Mailing of Catalogs: A New Methodology Using Estimable Structural Dynamic Programming Models. *Management Science*, Vol. 44, No. 9, 1249-1262.
- 2) Gonul, F., B. Kim, and M. Shi. 2000. Mailing Smarter to Catalog Customers. *Journal of Interactive Marketing*, Vol. 14, No. 2, 2-16.
- 3) Kalra, A. and M. Shi. 2001. Designing Optimal Sales Contest: A Theoretical Perspective. *Marketing Science*, Vol. 20, No.2, 170-193.
- 4) Kim, B., M. Shi, and K. Srinivasan. 2001. Reward Programs and Tacit Price Collusion. *Marketing Science*, Vol. 20, No.2, 99-120.
- 5) Kalra, A., M. Shi, and K. Srinivasan. 2003. Salesforce Compensation Scheme and Consumer Inference. *Management Science*, Vol. 49, No. 5, 655-672.
- 6) Soman, D. and M. Shi. 2003. Virtual Progress: The Effect of Path Characteristics on Perceptions of Progress and Choice Behavior. *Management Science*, Vol. 49, No. 9, 1229-1251.
- 7) Shi, M. 2003. Social Network-based Discriminatory Pricing. *Marketing Letters*, Vol. 14, No. 4, 239-256.
- 8) Kim, B., M. Shi, and K. Srinivasan. 2004. Managing Capacity through Reward Programs. *Management Science*, Vol. 50, No. 4, 503-520.
- 9) Soman, D., M. Shi, and X. Li, 2005. Multi-medium Reward Programs, *Advances in Consumer Research*, 2005.
- 10) Shi, M. with D. Godes and others. 2005. Firm's management of social effect. *Marketing Letters*, December, 415-428.
- 11) Fruchter, G., Ram Rao, and M. Shi. 2006. Dynamic Network-based Pricing Strategies. *Journal of Optimization Theory and Applications*, Vol. 128, March.
- 12) M. Shi, J. Chiang and B. Rhee. 2006. Price Competition with Reduced Consumer Switching Costs: The Case of Wireless Number Portability in the Cellular Phone Industry. *Management Science*, Vol. 52, No.1, 27-38.
- 13) Gurnani, H. and M. Shi. 2006. A B2B Bargaining Model for a First-time Interaction under Asymmetric Beliefs on Supply Reliability. June, *Management Science*.
- 14) Yang, Yupin, Mengze Shi, and Avi Goldfarb. 2009. Empirically Investigating the Value of a Brand Alliance in Professional Team Sports. November-December, *Marketing Science*.
- 15) Kalra, A. and M. Shi. 2010. Customer Value-maximizing Sweepstakes & Contests: A Theoretical and Experimental Investigation. *Journal of Marketing Research*, April.

- 16) Yang, Y. and M. Shi. 2011. Rise and Fall of Superstars: Investigating the Evolution of Athlete Brands in NBA. *International Journal of Research in Marketing*, September.
- 17) Hu, M., Pavlin, M., and M. Shi. 2013. Channel Management with Gray Markets. *Manufacturing & Service Operational Management*, 15 (2), 250-262.
- 18) Shi, M. 2013. Strategic Relationship between Endogenous and Exogenous Switching Costs. *Quantitative Marketing and Economics*, Vol. 11, Issue 2, 205-320.
- 19) Hu, M., Shi, M., and J. Wu. 2013. Sequential and Simultaneous Group Buying Mechanism. *Management Science*, December.
- 20) Shi, M. and A. C. Wojnicki. 2014. Money Talks: Intrinsic and Extrinsic Incentives for WOM referrals. *Journal of Advertising Research*, March.
- 21) Wu, J., Shi, M., and M. Hu. 2015. Threshold Effects in Online Group-buying Diffusion. *Management Science*, September, 61 (9), 2025-2040.
- 22) Hu, M., Li, X., and M. Shi. 2015. Product and Pricing Decisions for Crowdfunding. *Marketing Science*, 34 (3), 331-345.
- 23) Lu, S., Pattnaik, C., and M. Shi. 2016. Spillover Effects of Marketing Expertise on Market Performance of Domestic Firms and MNEs in Emerging Markets. *Managerial Decision*.
- 24) Shi, M., B. Yang, and J. Chiang. 2018. The Impact of Tie Strength Dynamics on Dyad Calling Behavior. *Journal of Interactive Marketing*, May, 2018.
- 25) Agarwal, P. and M. Shi. 2018. Is a Monogamous Relationship always Better? Loyalty Programs and Consumer Responses to Demotion from Elite Memberships. *Journal of Association for Consumer Research*, 3(2), April.
- 26) Li, Xi, Li, Y. and M. Shi. 2019. Managing Consumer Deliberations in Decentralized Distribution Channel. *Marketing Science*. Jan-Feb.
- 27) Li, X., Shi, M., and X. Wang. 2019. Video Mining: Measuring Visual Information Using Automatic Methods. *International Journal of Research in Marketing*.
- 28) Hossain, T., Shi, M., and R. Waiser. 2019. Measuring Rank-based Utility in Contest: The effect of disclosure schemes. *Journal of Marketing Research*.

PAPERS UNDER REVIEW PROCESS and WORKING PAPERS

- 29) Bao, Y., Shi, M., and A. Kalra. Project selection and contract design.
- 30) Landry, Peter and Mengze Shi. Behavior-based Servicing.
- 31) Jing, B. and M. Shi. Product Relevance, Consumer Search, and Competition.
- 32) Cui, T., R. Raju, and M. Shi. Sales Compensation and Reference-dependent Preference.
- 33) Shi, M. and M. Sun, Price Discrimination and Switching Costs: An Event Study.
- 34) Shi, M. and Y. Yang. Strategic Feedback Control during Sales Contests.
- 35) Shi, M. and A. Xu. Psychological Risk Aggregation: Selling Risky Products with Probabilistic Promotions.

- 36) Chen, Y. and M. Shi. A Theoretical Analysis of Customer Recommendation Programs.
37) Shi, M. and J. Chiang. Investigating the Economic Impact of an Airline Frequent Flier Program.

BOOK CHAPTER

- 38) "Manage customer value through incentives," Chapter 11, in book "Flux", edited by Soman and Soberman, University of Toronto Press, 2013.
39) "Online group buying and crowdfunding: Two cases of all-or-nothing mechanisms," with Ming Hu and Jiahua Wu. 2019. Springer Series in Supply Chain Management

RESEARCH PRESENTATIONS/DISCUSSIONS

- "Project selection and contract design," University of Texas at Dallas, Research seminar, April 2019.
- "Paying consumers for Attention," 2018 Conference on Digital Marketing and Machine Learning, Carnegie Mellon University.
- Yale University, Marketing-Industrial Organization Conference, Discussant for "Shared Knowledge and Competition for Attention", April 2018.
- University of Texas at Dallas, Frontiers of Marketing Conference, Discussant for "Retail Sales", March 2018.
- "Marketing research in crowdfunding," invited speaker for doctoral consortium, China Marketing Research Conference, Beijing, July 2017
- "Measuring psychological motivations in contests: An experimental study," Invited speaker, Research Camp @ CKGSB, Beijing, July 2017
- "Making mystery shoppers counts: An empirical study," Marketing Science Conference, University of Southern California, June 2017.
- "New Horizons in Sales Force Compensation", Session Moderator and Discussant, Sales Thought Leadership Conference, HEC Paris, May 2017.
- University of Texas at Dallas, Frontiers of Marketing Conference, Discussant, March 2017.
- "Getting ahead or getting along? Evidence from a sales contest," China-India Conference at London Business School, July 2016.
- "Measuring psychological motivations," Research seminar, University of British Columbia, March 2016.
- "Psychological motivations in sales management," Invited Speaker for Annual Research Camp, Hong Kong Polytechnic University, Dec 2015.
- "Managing psychological motivations in sales contests," SICS, UC Berkeley, July 2015.

- “Product and pricing decisions in crowdfunding,” Research Seminar, China Europe International Business School, Shanghai, March 2015.
- “Intrinsic Motivations and Economic Incentives,” Research Seminar, University of Sydney, Australia, August 2014.
- “Marketing and Behavioral Economics,” Research Seminar, Jinan University, China, July 2014.
- Canadian Marketing Strategy Symposium, Discussant, June 2014.
- “Intrinsic Motivation and Economic Incentives,” BCCRST conference, University of Buffalo, April 26, 2014.
- “Intrinsic Motivation and Extrinsic Incentives,” Research Seminar, Rice University, April 4, 2014.
- “Product and Pricing Decisions in Crowdfunding,” Research Seminar, McMaster University, March 28, 2014.
- University of Texas at Dallas, Frontiers of Marketing Conference, Discussant, (“Anticipated Regret and Product Innovation”), Feb 2014.
- “Marketing and Behavioral Economics,” Research Seminar, Fudan University, Shanghai, China, July 2013.
- “Marketing and Behavioral Economics,” Research Seminar, Jiaotong University, Beijing, July 2013
- University of Texas at Dallas, Frontiers of Marketing Conference, Discussant, Feb 2013.
- “Social tie dynamics,” Research Seminar, University of Wilfrid Laurier, Canada, March, 2013.
- “Joint decision making,” Research Seminar, University of Guelph, Canada, September 2012.
- “Sales incentive design and inter-personal comparison,” Harvard Business School, Sales Leadership Conference, Invited Speaker, June 2012.
- “Simultaneous vs. sequential group buying mechanisms,” Frontiers of Marketing Conference, University of Texas at Dallas, Feb 2012.
- Quantitative Marketing & Economics conference, Discussant, University of Rochester, September 2011.
- “Simultaneous vs. Sequential Group buying mechanism,” SICS (Summer Institute of Competitive Strategies), University of California at Berkeley, July 2011.
- “Polygamous Loyalty,” INSEAD, Conference on Strategies for Sustainable Growth, June 2011.
- “S-shaped Incentive Schemes and Pay Cap,” Research Seminar, Stanford University, April 2011,
- “A Dyad Model of Calling Behavior with Tie Strength Dynamics,” Research Seminar, University of Houston, October 2010

- SICS (Summer Institute of Competitive Strategies), Invited Discussant, University of California at Berkeley, July 2010.
- “Gray Market and Channel Management,” Operations Research Conference (Management Science track), Lisbon, July 2010.
- “Intrinsic and Extrinsic Motivations for Customer Referrals,” Retailing and Service Research Conference, Istanbul, July 2010.
- “A Dyad Model of Calling Behavior with Tie Strength Dynamics,” Marketing Science Conference, University of Bonn, June 2010 (Session chair).
- “A Dyad Model of Calling Behaviour with Tie Strength Dynamics,” Research Seminar, Carnegie Mellon University, April 29, 2010.
- “Branded Ingredient Strategy, “Reward Programs in Asymmetric Duopoly: A Theoretical and Empirical Study,” Research Seminar, University of Southern California, February 18, 2010,
- “Value-maximizing Sweepstakes,” Research Seminar, University of British Columbia, March 2008.
- “Dyad Calling,” Social Network Conference, University of Toronto, Nov 2007.
- “Ingredient Branding Strategy,” Research Seminar, Univ. of Texas Dallas, March 30, 2007.
- “Network effect in loyalty programs: evidence from gasoline retail market,” Marketing Science Conference, June 2006, Pittsburgh PA.
- “Fairness and Sales force Compensation,” *Enhancing Sales Force Productivity* conference, University of Missouri, April 22-23, 2006.
- “Switching Costs and Loyalty Contracts,” Marketing Science Conference, Emory University, June 2005. (Session chair)
- “Strategic Design of Customer Recommendation Programs,” Choice Symposium, Boulder, Colorado, May 2005.
- “Managing Switching Costs through Loyalty Contracts,” Research Seminar, Wharton School, University of Pennsylvania, February 2005.
- “Managing Switching Costs through Loyalty Contracts,” Research Seminar, Syracuse University, November 2004.
- “Managing Switching Costs through Loyalty Contracts,” Research Seminar, Sloan School of Management, MIT, November 2003.
- “Customer Recommendation Programs,” Summer Conference of Competitive Strategies, University of California at Berkeley, June 2003.
- “Pricing under consumer switching costs,” Marketing Science Conference, University of Maryland, June 2003.
- “Price Competition with Reduced Consumer Switching Costs: The Case of Wireless Number Portability in the Cellular Phone Industry,” Research Seminar, University of Chicago, Feb 2003.

- “Strategic Information Management During Sales Contests,” BCRST Conference, University of Buffalo, May 2002.
- “Feedback Control during Sales Contests,” Marketing Science Conference, University of Alberta, July 2002.
- “Customer value-maximizing Sweepstakes,” Marketing Science Conference, Germany, June 2001.
- “Strategic Design of Customer Recommendation Programs,” Research Seminar, National University of Singapore, April 2001.
- “Customer value-maximizing Sweepstakes,” Research Seminar, University of Toronto, October 2000.
- “Wireless World after Year 2000: Impact of MNP on Competition in Mobile Phone Industry,” Marketing Science Conference, UCLA, June 2000.
- “Salesforce Compensation and Consumer Inference,” Research Seminar, Chinese University of Hong Kong, November 1999.
- “Competitive Implications of Customer Satisfaction Index,” Marketing Science Conference, Syracuse, New York, May 1999.
- “Salesforce Compensation and Consumer Inference,” Marketing Science Conference, Paris, July 1998.
- “Salesforce Compensation and Consumer Inference,” Informs, Dallas, October 1997.
- “Reward Programs and Tacit Collusions,” Research Seminar, Hong Kong University of Science and Technology, October 1996.
- “Reward Programs and Tacit Collusions,” Research Seminar, University of Texas at Dallas, September 1996.
- “What to Offer: Cigarette, T-shirts, or Cash?” Marketing Science Conference, University of Arizona, June 1996.

RESEARCH GRANTS

- Canadian SSHRC Standard Research Grant, Principal Investigator, 2016 ~2020.
- Canadian SSHRC Standard Research Grant, Principal Investigator, 2011 ~2015.
- Canadian SSHRC Standard Research Grant, Principal Investigator, 2005~2009.
- AIC Institute Grant, Rotman School of Management, Principal Investigator, 2010-11.
- NET Institute Summer Research Grant, co-investigator, 2009.
- Research Grant at CKGSB (Beijing), co-investigator, 2006-2009.
- Connaught New Staff Matching Grants, University of Toronto, 2002-2004.

- Connaught New Staff Starting Grants, University of Toronto, 2001 – 2003.
- Hong Kong RGC Research Grant, Principal Investigator, 2000 ~ 2002.
- Hong Kong RGC Research Grant, Principal Investigator, 1998 ~ 2001.

TEACHING

AWARDS

Excellence in Teaching Award
Rotman School of Management, University of Toronto

- Commerce Program; MBA Program

COURSES TAUGHT IN LAST 5 YEARS

- Marketing I and II (EMBA)
- Managing Customer Value (MBA Core)
- Marketing Analysis and Decision Making (MBA Elective)
- Marketing Research (Undergraduate Elective)
- Principles of Marketing (Undergraduate Core, Course Coordinator)
- Sales and Channel Distribution Strategy (Undergraduate, MBA)

FIELD COURSES TAUGHT in LAST 5 YEARS

- China Study Tour (MBA)
- International Management: Summer Abroad Program @Hong Kong (Undergraduate).

PROGRAM DEVELOPMENT

- Co-developed MBA Business Design major, served as the faculty advisor for the major and co-supervised the Independent Study projects.

TEACHING DEVELOPMENT

- Case Workshop – Teaching and Writing, Ivey School of Business, University of Western Ontario, Canada.

CASE DEVELOPMENT

- Lung Cheong Group (*International Management, China*)
- Mission Hills Golf Club: Bringing Golf to China (*International Management, China*)
- Lenbrook Canada (*Manage Distribution Business*)
- Melissa Beth Design (A) and (B) (*Distributing New Consumer Fashion Products*)
- Fire Fly (*Design Practicum, Qualitative Data Analysis*)

PH.D. PROGRAM: TEACHING

- Workshop in Marketing
- Marketing Strategy
- Marketing Models

PH.D. PROGRAM: DISSERTATION SUPERVISION

Thesis Committee Chair:

- Ying Bao (5th-year PhD student), Minjee Sun (4th-year PhD student)
- Xi Li (City University of Hong Kong, 2017): “Essays on Crowdfunding and Sharing Economy”
- Robert Waiser (London Business School, 2016): “Essays on Sales force Management”
- Yupin Yang (Simon Fraser University, 2007): “Marketing Issues for Professional Team Sports”

Thesis Committee Co-chair:

- Jaewoo Joo (Kookmin University, 2011): “Asking about and Predicting Consumer Preference”

Thesis Committee Member:

- Jiahua Wu (Imperial College, 2013)
- Botao Yang (University of Southern California, 2009)
- Xiupin Li (National University of Singapore, 2006)
- Steven Lu (University of Sydney, 2005)
- Xubin Zhang (Hong Kong Polytech University, 2004)
- Jin Gyo Kim (MIT, 2003)

PHD PROGRAM: EXTERNAL THESIS EVALUATOR

- Khalil Rohani (Guelph University, 2014)
- Yi Zhao (Hong Kong University of Science and Technology, 2009)
- Jing Li (University of Alberta, 2007)

SERVICES

ROTMAN PROGRAM SERVICE

Marketing Area PhD Program Coordinator

SERVICE AWARD

Management Science

Distinguished Service Award (2016)

Meritorious Service Award (in 2010, 2011, 2014, 2015, 2017)

EDITORIAL SERVICE

Associate Editor: *Management Science* (Marketing)

Editorial Board: *Marketing Science*

GOVERNMENT GRANT REVIEWER

Canada SSHRC
Hong Kong RGC

CONFERENCE

Organized BBCRST conference

COMMITTEE SERVICE EXPERIENCE

- Rotman PhD Program Committee
- Rotman China Task Force
- Faculty Recruiting Committees for Rotman Marketing Area
- Faculty Recruiting Committees for UTM
- PhD sub-committee at Marketing Area
- Commerce sub-committee at Marketing Area
- Faculty advisor for Rotman Commerce Marketing Association
- Executive Committee, Rotman School of Management
- Ad hoc tenure & renew committees (Rotman, UTM, and UTSC)
- MBA Exchange Program Committee
- Learning Resource Committee
- Complement Advisory Committee