

MENGZE SHI (石孟泽)

Yuk-Shee Chan Professor of Business (陈玉树商学教授), Professor of Marketing
Department of Marketing, HKUST
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ACADEMIC POSITIONS

From July 2022	Yuk-Shee Chan Professor of Business Department of Marketing, HKUST
July 2001 ~ 2022	Assistant Professor, Associate Professor, Professor of Marketing, Ellison Professor of Marketing Rotman School of Management, University of Toronto, Canada
July 1997 ~ 2001	Assistant Professor of Marketing Wei Lun Senior Fellow Hong Kong University of Science & Technology

VISITING APPOINTMENTS

March/June 2022	Visiting Chair Professor, HK PolyU
Fall 2015	Visiting Scholar, Sloan School of Management, MIT
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

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, Beijing, China
1989	B.S. in Operations Research Fudan University, Shanghai, China

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*. June. 216-231.
- 28) Hossain, T., Shi, M., and R. Waiser. 2019. Measuring Rank-based Utility in Contest: The effect of disclosure schemes. *Journal of Marketing Research*. December. 981-994.
- 29) Y. Bao, Mengze Shi, and A. Kalra. 2022. Designing Product Development Contracts in the Presence of Managerial Lobbying. September. *Management Science*.
- 30) P. Landry and Mengze Shi. 2023. The Implications of Behavior-based Servicing on Competition. January. *Quarterly Journal of Economics and Management*. January.

UNPUBLISHED WORKING PAPERS

- 1) “Data-Driven Decision-Making in Sales: Can Marketing Analytics Enhance Sales Performance?” with M. Sun and A. Goldfarb.
- 2) “Dependence of Mere-measurement Effects on Past Performance,” with M. Sun, Y. Yang, and X. Zhang.
- 3) “Incentivizing Mass Creativity: An Empirical Study of the Online Publishing Market,” with X. Li and C. Zhao.
- 4) “The Consumption of Serial Media Products and Optimal Release Strategies,” with Clarice Zhao and Nitin Mehta.
- 5) “Consumer inattention and consumption tracking,” with Y. Bao and P. Landry.
- 6) “Paying Consumers for Attention,” with Mohsen Foroughifar and Michelle Lu.
- 7) “Can A Traditional Automaker Accelerate EV Sales Through Company-Owned Stores?” with J. Shi, X. Zhang, T. Zhu.
- 8) “Sales Compensation and Reference-dependent Preference,” with T. Cui and R. Raju.
- 9) “Product Relevance, Consumer Search, and Competition,” with B. Jing.
- 10) “Price Discrimination and Switching Costs: An Event Study,” with M. Sun.
- 11) “Strategic Feedback Control during Sales Contests,” with Y. Yang.

- 12) “Psychological Risk Aggregation: Selling Risky Products with Probabilistic Promotions,” with A. Xu.
- 13) “Polygamous Loyalty in Frequent Flier Programs,” with C. Lin and J. Chiang.

BOOK CHAPTERS

- 1) “Manage customer value through incentives,” Chapter 11, in book “Flux”, edited by Soman and Soberman, University of Toronto Press, 2013.
- 2) “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

PH.D. STUDENT SUPERVISION:

Thesis Committee Chair/Co-chair:

- Yupin Yang (Chair, Simon Fraser University)
- Jaewoo Joo (Co-chair, Kookmin University)
- Robert Waiser (Chair, London Business School, 2016)
- Xi Li (Chair, City University of Hong Kong, 2017)
- Ying Bao (Chair, University of Illinois Urbana Champaign, 2020)
- Minjee Sun (Co-chair, University of Iowa, 2021)

Thesis Committee Member:

- Clarice Zhao (McGill University)
- Jiahua Wu (Imperial College)
- Botao Yang (University of Southern California)
- Xiupin Li (National University of Singapore)
- Steven Lu (University of Sydney)
- Xubin Zhang (Hong Kong Polytech University)
- Jin Gyo Kim (MIT)

EDITORIAL SERVICE

Associate Editor: *Management Science* (Marketing Department)

Editorial Board Member: *Marketing Science*

Associate Editor (Marketing): *Quarterly Journal of Economics and Management* (《经济管理》)

RESEARCH/SERVICE AWARD

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

Meritorious Service Award (Associate Editor, 2021, 2022), *Management Science*

RESEARCH SEMINAR PRESENTATIONS

- Purdue University, 2022, “Consumer Inattention and Tracking Cost”
- University of Indiana, 2022, “Consumer Inattention and Tracking Cost”

- University of Florida, 2022, “Consumer Inattention and Tracking Cost”
- Peking University HSBC Business School, 2022, “Paying Consumers for Attention”
- Hong Kong Polytech University, 2022, “Paying Consumers for Attention”
- Chinese University of Hong Kong, 2022, “Consumer Inattention and Tracking Cost”
- Hong Kong University of Science & Technology, 2021, “Incentivizing Mass Creativity”
- University of Iowa, 2021, “Incentivizing Mass Creativity”
- University of Science & Technology (China), 2021, “Incentivizing Mass Creativity”
- Guelph University, 2021, “Incentivizing Mass Creativity”
- University of Pittsburgh Sheth Research Camp, 2020, “Consumer Inattention and tracking technology”
- University of Texas at Dallas, 2019, “Project selection and contract design”
- CKGSB Research Camp, Beijing, 2017, “Measuring psychological motivations in contests: An experimental study”
- University of British Columbia, 2016, “Measuring psychological motivations”
- Hong Kong PolyU, Research Camp 2015, “Psychological motivations in sales management”
- China Europe International Business School, Shanghai, 2015, “Product and pricing decisions in crowdfunding”
- University of Sydney, Australia, “Intrinsic Motivations and Economic Incentives”
- Jinan University, China, 2014, “Marketing and Behavioral Economics”
- Rice University, 2014, “Intrinsic Motivation and Extrinsic Incentives”
- McMaster University, 2014, “Product and Pricing Decisions in Crowdfunding”
- Fudan University, Shanghai, China, 2013, “Marketing and Behavioral Economics”
- Jiaotong University of Beijing, 2013, “Marketing and Behavioral Economics”
- University of Wilfrid Laurier, Canada, 2013, “Social tie dynamics”
- University of Guelph, 2012, “Joint decision making”
- Stanford University, 2011, “S-shaped Incentive Schemes and Pay Cap”
- University of Houston, 2010, “A Dyad Model of Calling Behavior with Tie Strength Dynamics”
- Carnegie Mellon University, 2010, “A Dyad Model of Calling Behaviour with Tie Strength Dynamics”
- University of Southern California, 2010, “Reward Programs in Asymmetric Duopoly: A Theoretical and Empirical Study”
- University of British Columbia, 2008, “Value-maximizing Sweepstakes”
- Univ. of Texas Dallas, 2007 “Ingredient Branding Strategy”

- Wharton School, University of Pennsylvania, 2005. “Managing Switching Costs through Loyalty Contracts”
- Syracuse University, 2004. “Managing Switching Costs through Loyalty Contracts”
- Sloan School of Management, MIT, 2003. “Managing Switching Costs through Loyalty Contracts”
- University of Chicago, 2003, “Price Competition with Reduced Consumer Switching Costs: The Case of Wireless Number Portability in the Cellular Phone Industry”
- National University of Singapore, 2001. “Strategic Design of Customer Recommendation Programs”
- University of Toronto, 2000. “Customer value-maximizing Sweepstakes”
- Hong Kong University of Science and Technology, 1996. “Reward Programs and Tacit Collusions”
- University of Texas at Dallas, 1996, “Reward Programs and Tacit Collusions”

CONFERENCE PRESENTATIONS/DISCUSSIONS

- “Paying for Consumer Attention”, Marketing Science Conference, 2021
- “Consumer inattention,” Marketing Science Conference, 2020
- Discussant for “Raising the Bar: Certification Thresholds and Market Outcomes”, University of Texas at Dallas, Frontiers of Marketing Conference, 2020
- "Paying consumers for Attention," Conference on Digital Marketing and Machine Learning, Carnegie Mellon University, 2018
- Discussant for “Shared Knowledge and Competition for Attention”, Yale University, Marketing-Industrial Organization Conference, 2018
- Discussant for “Retail Sales”, University of Texas at Dallas, Frontiers of Marketing Conference, 2018.
- “Marketing research in crowdfunding,” doctoral consortium, China Marketing Research Conference, Beijing, July 2017
- “Making mystery shoppers counts: An empirical study,” Marketing Science Conference, University of Southern California, 2017
- “New Horizons in Sales Force Compensation”, Session Moderator and Discussant, Sales Thought Leadership Conference, HEC Paris, 2017
- Discussant, University of Texas at Dallas, Frontiers of Marketing Conference, 2017
- “Getting ahead or getting along? Evidence from a sales contest,” China-India Conference at London Business School, 2016.
- “Managing psychological motivations in sales contests,” SICS, UC Berkeley, 2015.
- Canadian Marketing Strategy Symposium, Discussant, 2014.

- “Intrinsic Motivation and Economic Incentives,” BBCRST conference, University of Buffalo, 2014.
- University of Texas at Dallas, Frontiers of Marketing Conference, Discussant, (“Anticipated Regret and Product Innovation”), 2014.
- University of Texas at Dallas, Frontiers of Marketing Conference, Discussant, 2013.
- “Sales incentive design and inter-personal comparison,” Harvard Business School, Sales Leadership Conference, Invited Speaker, 2012.
- “Simultaneous vs. sequential group buying mechanisms,” Frontiers of Marketing Conference, University of Texas at Dallas, 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.
- 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).
- “Dyad Calling,” Social Network Conference, University of Toronto, Nov 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.
- “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.
- “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.
- “Wireless World after Year 2000: Impact of MNP on Competition in Mobile Phone Industry,” Marketing Science Conference, UCLA, June 2000.
- “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.
- “What to Offer: Cigarette, T-shirts, or Cash?” Marketing Science Conference, University of Arizona, June 1996.

RESEARCH GRANTS

- Hong Kong RGC Research Grant, co-investigator, 2022 ~ 2025.
- Canadian SSHRC Standard Research Grant, Principal Investigator, 2016 ~2022.
- China Research Grant, Rotman School of Management, 2019/2020.
- 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 (2022, 2013, 2012)
Rotman School of Management, University of Toronto

COURSES TAUGHT IN RECENT YEARS

- Marketing (EMBA, MBA, Undergraduate)
- Marketing Analytics (MBA Elective, Master of Management Analytics)
- Sales and Channel Distribution Strategy (Undergraduate, MBA)

GLOBLE EXPERIENCE COURSES

- Rotman China Study Tour (MBA, 3 YEARS)
- International Management: University of Toronto Summer Abroad Program @Hong Kong University (Undergraduate, 3 YEARS).

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

- Juniper Networks (*Marketing Analytics*)
- 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: Theories
- Marketing Models

COMMITTEE SERVICE EXPERIENCE

- Rotman PhD Program Committee, Chair
- Rotman PhD Program coordinator
- Faculty Recruiting Committees (Rotman, UTM)
- University of Toronto award committees (School of Graduate Studies SSHRC Award committee, University Scholarship Award committee)
- Rotman China Task Force
- Faculty advisor for Rotman Commerce Marketing Association
- Rotman School of Management Executive Committee
- Ad hoc tenure & renew committees (Rotman, UTM, and UTSC)
- Ad hoc research and teaching evaluation committees (Tenure and Full promotion, Rotman)
- Rotman MBA Exchange Program Committee
- Rotman Learning Resource Committee
- Rotman Complement Advisory Committee