

JONATHAN Z. ZHANG

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(970) 491-2238

EDUCATION

The Graduate School of Business, Columbia University, New York, NY
Ph.D. in Quantitative Marketing, 2011

(Dissertation: “Dynamic Targeted Pricing in B2B Settings” Committee Members: Asim Ansari (co-chair), Oded Netzer (co-chair), Scott Neslin, Raghu Iyengar, Brett Gordon)

The Graduate School of Business, Columbia University, New York, NY
M. Phil in Marketing, 2007

Rutgers College, Rutgers University, New Brunswick, NJ
B.A. in Economics, B.S. in Mathematical Statistics (Summa Cum Laude), 2004

ACADEMIC APPOINTMENTS

2019 - Present **Assistant Professor of Marketing**
Colorado State University, Fort Collins, CO

2010-2019 **Assistant Professor of Marketing**,
Michael G. Foster School of Business, University of Washington, Seattle, WA

RESEARCH INTERESTS

- Quantitative models of customer relationship marketing in B2C and B2B
- E-commerce, mobile and multi-channel marketing
- Digital transformation of traditional businesses
- Machine learning and Bayesian methods in marketing
- Behavioral and dynamic pricing

SELECT HONORS AND AWARDS

- Excellence in Research Award, College of Business, Colorado State University, 2020
- Daniels Fellow, College of Business, Colorado State University, 2020
- Dean’s Scholar, College of Business, Colorado State University, 2019
- AMA-Sheth Consortium Faculty Fellow, 2012, 2018
- Finalist, Frank M. Bass Award, 2015
- Finalist, John D.C. Little Award, 2014 (best marketing paper published in an INFORMS journal)

- Finalist, Frank M. Bass Award, 2014 (best marketing paper derived from a Ph.D. thesis published in an INFORMS journal)
- Ron Crockett / Dean's Award for Excellence in Teaching, University of Washington, 2014.
- Invitee, Direct Marketing Education Foundation (DMEF) Professors' Institute, Dallas, TX, January 2012
- Winner, Shankar-Spiegel Dissertation Award (DMEF), 2009
- Luxury Education Foundation Fellowship, Columbia Business School, 2009
- Graduate Fellowship, Columbia University 2005-2010
- Highest Departmental Honors, Statistics Department, Rutgers University, 2004
- Highest Departmental Honors, Economics Department, Rutgers University, 2004
- Graduated Summa Cum Laude, Rutgers University (Top 1% of Class of 2180), 2004
- Class of 1945 Merit Scholarship, Rutgers University, 2004
- Sidney Simon's Award for Outstanding Business Applications of Economics, Rutgers University, 2004
- Bear Stearns and Co. Merit Scholarship, 2004
- Phi Beta Kappa, 2003
- Rutgers College Honors Program, 2001 - 2004

ACADEMIC PUBLICATIONS

1. Mummalaneni, Simha & **Jonathan Z. Zhang** (2020). Maximizing the Benefits of B2B Supplier Diversity. *MIT Sloan Management Review*. Jun.
 - SMR Editor's Choice. Featured on SMR's homepage
2. **Zhang, Jonathan Z.** & George Watson (2020). Marketing ecosystem: an outside-in view for sustainable advantage. *Industrial Marketing Management*. *Forthcoming*
 - Special issue on "Theory and Practice of Outside-in Marketing"
3. **Zhang, Jonathan Z.** & Hsiao-Wuen Hon (2020). Toward responsible digital transformation. *California Management Review*, Mar.
4. **Zhang, Jonathan Z.** & Hsiao-Wuen Hon (2020). Embracing digital transformation as a service. *California Management Review*, Feb.
5. **Zhang, Jonathan Z.** (2020). Why catalogs are making a comeback? *Harvard Business Review*, Feb.
 - HBR Editor's Choice. Featured on HBR's homepage
 - LinkedIn Editor's Pick
 - CSU college-level and university-level promotion

6. **Zhang, Jonathan Z.** & C.W. Chang (2020). Consumer dynamics: theories, methods, and emerging directions. *Journal of the Academy of Marketing Science*, Forthcoming
7. **Zhang, Jonathan Z.**, Jifeng Mu, & David Gilliland (2019). How to harness AI technology for marketing success. *California Management Review*, Nov.
8. **Zhang, Jonathan Z.** (2019). Group marketing strategies - design, implementation, and measurement. *Rutgers Business Review*, 4(1). 61-72
9. **Zhang, Jonathan Z.** (2019). Dynamic customer interdependence. *Journal of the Academy of Marketing Science*, 47(4), 723-746.
10. Ansari, Asim., Li Yang, & **Zhang, Jonathan Z.** (2018). Probabilistic topic model for hybrid recommender systems: a stochastic variational Bayesian approach. *Marketing Science*, 37(6), 987-1008.
 - Featured in UW's *Foster Business*
11. **Zhang, Jonathan Z.**, George Watson, Robert Palmatier, (2018). Customer relationships evolve - so must your CRM strategy. *MIT Sloan Management Review*. 59(3), 1-7
12. Caldieraro, Fabio., **Zhang, Jonathan Z.**, Cunha Jr, Marcus, & Shulman, Jeff D. (2018). Strategic information transmission in peer-to-peer lending markets. *Journal of Marketing*, 82(2), 42-63. (equal authorship)
13. **Zhang, Jonathan Z.**, Watson Iv, George. F., Palmatier, Robert W., & Dant, Rajiv. P. (2016). Dynamic relationship marketing. *Journal of Marketing*, 80(5), 53-75.
14. Chang, C. W., & **Zhang, Jonathan. Z.** (2016). The effects of channel experiences and direct marketing on customer retention in multichannel settings. *Journal of Interactive Marketing*, 36, 77-90.
15. **Zhang, Jonathan Z.**, Netzer, O., & Ansari, A. (2014). Dynamic targeted pricing in B2B relationships. *Marketing Science*, 33(3), 317-337.
 - Lead Article
 - 2014 Finalist, John D.C. Little Award
 - 2014, 2015 Finalist, Frank Bass Award
 - Winner, Shankar-Spiegel Dissertation Award (Direct Marketing Education Foundation).

OTHER ACADEMIC PUBLICATIONS (MSI Reports, International Scholarly Advising)

16. Mu, Jifeng, **Jonathan Z. Zhang**, David Gilliland (2020). No Silver Bullet with AI: Blending in Firm Culture and Capabilities with AI Marketing Investment for Enhancing Firm Performance. *Marketing Science Institute Report*. April
17. Li, Jie, Shuojia Guo, **Jonathan Z. Zhang**, Sun Liben (2020). When others show off my brand: self-brand association and conspicuous consumption. *Asia Pacific Journal of Marketing and Logistics*, *Forthcoming*.
18. Sun, Yi, Li Jie, **Jonathan Z. Zhang**, Sun Liben (2017) “The Relationship Between Social Classes and Conspicuous Consumption Behaviors in Luxury Product Markets” – *Luojia Management Review* (In Chinese) (a premier Chinese management journal). April, 13-1
19. Chang, Chun-wei, **Jonathan Z. Zhang**, Scott Neslin (2016). The Role of Product Fit on Customer Development, Channel Choice, and Profitability. *Marketing Science Institute Report*. May.
 - Featured in *MSI Insights*.
20. **Zhang, Jonathan Z.**, George Watson, Robert Palmatier, Rajiv Dant (2013). Integrating Relationship Marketing and Lifecycle Perspectives: Strategies for Effective Relationship Migrations. *Marketing Science Institute Report*. October.

SELECT WORKING PAPERS

21. Uncovering substitution and complement effects in massive online text reviews – a machine learning approach. **R&R at *Management Science***
22. Blending in the analog with the digital – the role of catalogs in reviving customers in modern e-commerce **R&R at *Journal of Management Information Systems***
23. How FGC message types affect consumer behaviors. **R&R at *Information Systems Research***
24. Large-scale investigations of AI marketing investment and firm performance. **R&R at *Journal of Marketing***.
25. Experiential multichannel retail: enhancing customer value through “deep product” in the physical store. **R&R at *Journal of Marketing***

26. Realistic and robust customer portfolio management. **Under review at *Marketing Science***
27. Price contagion in multichannel B2B. **R&R at *Journal of Marketing***
28. Turning visitors into buyers: how advertisement designs affect shopping behaviors. **Under review at *IEEE***
29. Crowdfunding for microfinance success. **Under review at *MIS Quarterly***
30. Large scale product classification of high-construal attributes – a machine learning approach. **Under review, *Marketing Science***
31. Influencer marketing. **Under review, *Journal of Marketing***
32. New CMO appointments, digital transformation, and firm performance. **R&R, *Journal of Marketing Research***
33. Improving the welfare of the “base of pyramid” consumers through digital technologies: current state and future research agenda. **Working paper**
34. Preference reversal with UGC and FGC. **Working paper**

WORK IN PROGRESS

Philanthropic spillover – a marketing communication perspective. ***Work in progress***

From topic models to natural language processing - the evolution of unstructured textual analysis for market research. ***Work in progress***

How do analog marketing communications enhance e-commerce? – evidence from field experiments. ***Work in progress***

Quantifying the performance of analog and digital products. ***Work in progress***

Price-fixing and consumer purchase spillover in CPG. ***Work in progress***

Brand switching during product unavailability. *Work in progress*

Assortment sizes in multichannel. *Work in progress*

Haptic experiences in digital marketing. *Work in progress*

Improving customer metrics with AI – a field experimental approach. *Work in progress*

How products' cultural values will drive retail's uneven transformation. *Work in progress*

Globalizing AI – comparing China's and Silicon Valley's approaches to industrializing innovations *Work in progress*

Optimizing social and work-force structure in the AI-era *Work in progress*

Explainable and transparent AI *Work in progress*

HI+AI in digital transformation. *Work in progress*

Experiential connection as a modern competitive advantage. *Work in progress*

CMO traits and the modern firm. *Work in progress*

AIM's differential impact on diverse customer segments. *Work in progress*

REFEREEING

Editorial Review Board

- *Journal of the Academy of Marketing Science*

Reviewer

Management Science, Marketing Science, Journal of Marketing, Journal of Marketing Research, International Journal of Research in Marketing, Journal of Advertising, IEEE Access, PLOS One, MSI Alden G. Clayton Doctoral Dissertation Competition

TEACHING EXPERIENCES

Marketing Strategy and Management (Undergraduate Capstone Class)

Executive Education – “Disruptive Global Marketing Strategy”, “Customer-Centric Marketing Strategy”. Taught in both English and Mandarin Chinese.

Strategic Marketing Management – Quant. Focus (Global Executive MBA).

Entrepreneurial Marketing (Full Time MBA, Evening MBA)

Marketing Concepts (Undergraduate)

Empirical Marketing Models (Ph.D. Seminar)

INVITED TALKS

- Southern Methodist University 2019
- Colorado State University 2018
- Kelly School of Business, Indiana University (Bloomington), 2018
- Purdue University, 2018
- Baruch College, City University of New York, 2018
- Darden School of Business, University of Virginia, 2018
- Kelly School of Business, Indiana University (IUPUI), 2018
- Renmin University, Beijing. 2017
- University of South Carolina, 2017
- George Washington University, 2017
- Boston College, 2017
- National Taiwan University, 2016
- Tsinghua University, 2016
- Shanghai Jiaotong University, 2015
- University of Zurich, 2011
- University of Washington, 2009
- Ohio State University, 2009
- Rutgers University, 2009
- Washington University St. Louis, 2009
- Purdue University, 2009
- Georgia State University, 2009
- Emory University, 2009
- Hong Kong University of Science and Technology, 2009
- Fordham University, 2009

CONFERENCE PRESENTATIONS & PROCEEDINGS

- AMA Winter Conference, San Diego, February, 2020
- AMA Summer Conference, Chicago, August 2019
- INFORMS Marketing Science Conference, Rome, June 2019
- AMA Winter Conference, New Orleans, Feb 2018
- JAMS Thought Leaders Conference (Invited), Beijing, June 2017
- INFORMS Marketing Science Conference. Shanghai. June 2016
- University of Chicago Big Data Conference. Oct 2016
- INFORMS Marketing Science Conference. Johns Hopkins University, Baltimore, June 2015
- UW/UBC Marketing Conference, Seattle, May 2015
- Conference on Big Data Analytics, University of Chicago. October 2014
- Invited Session. INFORMS Conference, Minneapolis, October 2013
- Invited Session. INFORMS Conference, Beijing, June 2012
- UW/UBC Marketing Conference, Seattle, June 2012

- Theory and Practice in Marketing (TPM) Conference, Harvard University, Boston, MA. April 2012
- INFORMS Marketing Science Conference, Boston University, Boston, MA, June 2012.
- INFORMS Marketing Science Conference, Rice University, Houston, TX, June 2011.
- INFORMS Marketing Science Conference, University of Cologne, Cologne, Germany, June 2010
- INFORMS Marketing Science Conference 2008, University of British Columbia, Vancouver Canada, June 2008
- INFORMS Marketing Science Conference 2007, Singapore Management University, Singapore, June 2007

Ph.D. STUDENT ADVISING

- Chun-Wei Chang (2012, Amazon, committee member)
- Ju-Yeon Lee (2013, Iowa State University, committee member)
- George Watson (2016, Portland State University, committee member)
- Jinyang Zheng (Information Systems 2017, Purdue University, committee member)
- Jisu Kim (expected 2022, co-chair)

PROFESSIONAL EXPERIENCE

- **ZS Associates, Princeton, New Jersey, 2004-2005**
Associate – Management consulting (pharmaceutical industry)
- **Chubb, Warren, New Jersey, 2002**
Actuarial analyst, loss reserve division (passed Society of Actuary exams 1 & 2)

MEDIA COVERAGE & INDUSTRY PANEL PARTICIPATIONS

2018 November (Currency Research's Americas Cash Cycle Summit) - Invited keynote speaker on cashless retail and retail innovations.

2018 November (Columbia Business School Ideas and Insights) - "Rebirth of Retail"

2018 October (Yakima Herald) – “Valley Businesses are Hoping for Happy Holidays”

2018 June (NZZ am Sonntag) - “Amazon plans six new fully-automated stores in the US”

2018 May (Forbes) – “Data Management Platforms: Selecting the Best DMP”

2018 January (Seattle Times) – Starbucks Tests No-cash Policy at Downtown Seattle Store”

2016 November (Seattle Times) – “Your Grocery Bill May Help King County Track Unlicensed Pets”

2016 May (Associated Press) –Video Interview on Dynamic Pricing, “Businesses Quickly Change Prices Based on Demand”

2015 March – Interview - “Niche Size and Creative Independence as Competitive Advantages in the Watch Industry” - 2015 BaselWorld, Basel, Switzerland

2014 December (Associated Press) – Video Interview, “Chinese Consumers’ Rising Buying Powers in the U.S”

2012 January – Invited Panel Discussion - “Return to Timelessness: Watch Design DNA and Consumer Value Perceptions in Recessionary Periods” - 2012 SIHH (Salon International de la Haute Horlogerie), Geneva, Switzerland

2010 January – Invited Panel Discussion – “Is E-commerce a Sustainable Luxury Channel?”
2010 SIHH (Salon International de la Haute Horlogerie), Geneva, Switzerland

2009 January – Interview – “Bold Watch Designs that Reflect Contemporary Aesthetic Sensibilities” - 2009 SIHH (Salon International de la Haute Horlogerie), Geneva, Switzerland

SERVICE

University Level

Steering Committee, Data Science Research Institute, Colorado State University, 2020

Business School Dean’s search committee, resulted in the appointment of Dean Frank Hodge (2018-2019), University of Washington

College Level

College of Business graduate program innovation committee (2019-2020), Colorado State University

- Subcommittee on reimagining and relaunching executive MBA programs
- Subcommittee on stakeholder engagement

Founded the college-level entrepreneurial marketing program (full-time MBA and evening MBA) (2015- 2019).

MBA consulting program faculty advisor (2014-2019)

Undergraduate program committee (2016- 2019)

Department Level

Recruiting committee (2012-2019)

Visiting scholars and speakers committee (2011-2019)

Marketing research camp committee (2015-2018)

PROFESSIONAL AFFILIATIONS

Institute for Operations Research and the Management Sciences (INFORMS),
American Marketing Association (AMA)

PERSONAL DETAILS

U.S. Citizen
Native Proficiency in English and Mandarin Chinese

Interests: literature and movies on surrealism, dark humor, and human relationships. Illiteracy and poverty alleviation.

REFERENCES

Asim Ansari

William T. Dillard Professor of Marketing
Columbia Business School
Email: maa48@gsb.columbia.edu
Phone: 212-854-3476

Scott A. Neslin

Albert Wesley Frey Professor of Marketing
Tuck School of Business, Dartmouth College
Email: scott.a.neslin@tuck.dartmouth.edu
Phone: 603-646-2841

Oded Netzer

Professor of Business
Columbia Business School
Email: onetzer@gsb.columbia.edu
Phone: 212-854-9024

Robert Palmatier

Professor of Marketing & John C. Narver Chair in Business Administration
Foster School of Business, University of Washington
Research Director of the Center of Sales and Marketing Strategy
Email: Palmatrw@uw.edu,
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Jeffrey D. Shulman

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Foster School of Business, University of Washington
Email: jshulman@uw.edu

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