

Wei KE, PhD

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EDUCATION

Columbia University, Graduate School of Business (New York, NY) Ph.D. in Business (Decision, Risk & Operations) - <u>Thesis topic</u> : The Marketing Operations Interface in Consumer Retail - <u>Thesis advisor</u> : Garrett van Ryzin	9/2006 – 6/2008 <i>Ph.D. conferral: 10/2009</i>
Columbia University, Graduate School of Business (New York, NY) M.Phil. in Business (Decision, Risk & Operations)	9/2003 – 5/2006
Columbia University (New York, NY) B.S. <i>summa cum laude</i> in Electrical Engineering, minor in Applied Math	9/2000 – 5/2003

PROFESSIONAL EXPERIENCE

Managing Partner , Simon-Kucher & Partners (New York, NY and Toronto, ON) - Head of Financial Services Practice in North America - President of Simon-Kucher Canada	6/2011 – Present
Adjunct Assistant Prof. , Columbia Business School (New York, NY) - Quantitative Pricing and Revenue Analytics (Fall 2017)	7/2017 – Present
Adjunct Assistant Prof. , Queen's University Smith School of Business (Toronto, ON) - Analytical Decision Making (Spring 2017) - Marketing Analytics (Summer 2017)	2/2017 – Present
Manager , Novantas (New York, NY)	6/2008 – 6/2011
Consultant , Walt Disney Parks & Resorts (Lake Buena Vista, FL)	5/2006 – 3/2008
Consultant , Edison Properties (Newark, NJ)	8/2007 – 9/2007

SCHOLARSHIPS & AWARDS

Doctoral Fellowship (full tuition and stipend), Columbia Business School	2003 – 2007
Fu Foundation Scholarship (full tuition and stipend), Columbia University	2000 – 2003
William L. Everitt Award of Excellence , International Engineering Consortium	2003
Tau Beta Pi National Engineering Honor Society	2001
Golden Key International Honor Society	2001
DAAD Scholarship , Germany	2001
Zeidman Scholarship (full tuition and stipend), Sidwell Friends School	1998 – 1999

PUBLICATIONS

Publications

- Ke, W. 2017. Why Banks Are Unprepared to Tap the Profit Potential of Digital, *Forbes Financial Council*, Jul 20.
- Ke, W., et al. 2017. How to go from free to fee without a customer revolt, *American Banker BankThink*, Jul 18.
- Ke, W., et al. 2017. Bank Sales Practice Should Focus on Pulling Customers in, *Financial Brand*, forthcoming.
- Ke, W., et al. 2017. Take the Pokemon Go Approach to Bank Sales, *American Banker BankThink*, Feb 28.
- Ke, W., et al. 2017. Let the Customer Lead the Way in Cross-Selling, *American Banker BankThink*, Feb 15.
- Ke, W., et al. 2017. Getting Back in the Game – A Challenge to Banks Looking to Grow Customer Engagement, *Mortgage Finance Gazette*, Jan 3.
- Ke, W., et al. 2015. Monetizing Mobile for Small Business Customers, *Professional Pricing Society Journal*, 24(4), 20-36.
- Ke, W., et al. 2014. Ch 18. Price Bundling, *The Routledge Companion to Financial Services Marketing*.
- Ke, W., et al. 2012. Optimising Retail Deposit Pricing, *Risk Magazine*, Nov 6.
- Baumgarten, J., W. Ke, et al. 2012. Value-Based Innovation for Small Business Lending. *BAI Banking Strategies*, Oct 30.
- Snowman, B., W. Ke, et al. 2012. Primary Banking: The Solution to Low Pricing Power in Retail Banking. *The Pricing Advisor*, Aug.
- Snowman, B., W. Ke, et al. 2012. The Future of Savings. *The Financial Services Forum*, Jul 4.
- Baumgarten, J., W. Ke, & D. Chung. 2012. Three Revenue Models for Mobile. *BAI Banking Strategies*, Jul 2.
- Baumgarten, J., B. Snowman, & W. Ke. 2012. Rebuild Consumer Trust by Offering a Fair Deal. *American Banker BankThink Blog*, Jun 21.
- Snowman, B., W. Ke, et al. 2012. The Revenue Model for Mobile Banking and Payments. *The Financial Services Forum*, Apr 3.

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- Baumgarten, J., B. Snowman, & **W. Ke**. 2012. M-banking: to Charge or Not to Charge. *Retail Banker International*, Feb 29.
- Cortez, A. & **W. Ke**. 2010. The Portfolio Approach to Asset Allocation. *Bank Accounting & Finance*, **23**(6), 28-34.
- **Ke, W.** 2009. The Marketing Operations Interface in Consumer Retail: Theory and Practical Approach. *Columbia University*.
- **Ke, W.**, G. van Ryzin, & C. Maglaras. 2007. Markdown Pricing Optimization at Bloomingdale's (#070203A/B). *Columbia Business School*.

Work in progress

- **Ke, W.**, et al. Price Management in Financial Services (2nd edition).

Podcast

- Why Consumers Make Irrational Financial Decisions Sometimes. *American Banker*, Nov 14, 2016.

Quoted in the press

- Teach customers to save and maybe they'll stick around, *American Banker*, Feb 10, 2017
- A Digital Conscience that Pushes Savers to Build Lasting Nest Egg, *American Banker*, Dec 6, 2016
- Contactless Payment Gets a Boost from Barclays wristband. *SNL*, Jun 12, 2014.
- Rising rate CDs: Less risk, more return? *BankRate*, Dec 2014.
- CD ladder: Is it worth the climb? *BankRate*, Dec 2014.
- CD ladder: Worth the climb? *Fox Business*, Dec 2014.

PROFESSIONAL ACTIVITIES

Conference Speaker , ABA Bank Marketing Conference (New Orleans, LA)	2017
Conference Speaker , ABA CFO Exchange (Orlando, FL)	2017
Guest Lecturer , GFMI Retail Deposit Conference (Vancouver, BC)	2017
Conference Speaker , Banking Growth Forum (Chicago, IL)	2017
Conference Speaker , Simon-Kucher Financial Services Strategy Forum (Toronto, ON)	2017
Conference Speaker , American Banker Banking Analytics Symposium (New Orleans, LA)	2016
Guest Lecturer , GFMI Retail Deposit Conference (New York, NY)	2016
Guest Lecturer , GFMI Retail Deposit Conference (Toronto, ON)	2016
Conference Speaker , Simon-Kucher Financial Services Strategy Forum (Toronto, ON)	2016
Guest Lecturer , GFMI Retail Deposit Conference (New York, NY)	2015
Guest Lecturer , GFMI Retail Deposit Conference (Toronto, ON)	2015
Conference Speaker , Financial Services Forum (London, UK)	2015
Guest Lecturer , Revenue Management, NYU Stern School of Business (New York, NY)	2015
Guest Lecturer , Professional Pricing Society Conference (Dallas, TX)	2015
Conference Speaker , Simon-Kucher Financial Services Strategy Forum (New York, NY)	2015
Conference Speaker , Simon-Kucher Financial Services Strategy Forum (Toronto, ON)	2015
Conference Speaker , American Banker Banking Analytics Symposium (New Orleans, LA)	2014
Guest Lecturer , Revenue Management, NYU Stern School of Business (New York, NY)	2014
Conference Speaker , Professional Pricing Society (Las Vegas, NV)	2014
Conference Speaker , Simon-Kucher Financial Services Strategy Forum (Toronto, ON)	2014
Conference Speaker , Simon-Kucher Financial Services Strategy Forum (New York, NY)	2013
Session Chair , INFORMS Annual Meeting (Charlotte, NC)	2011
Revenue Management & Pricing Cluster Chair , INFORMS Annual Meeting (Austin, TX)	2010
Conference Speaker , ALIO-INFORMS Conference (Buenos Aires, Argentina)	2010
Conference Speaker , INFORMS Revenue Management & Pricing Conference (Ithaca, NY)	2010
Session Chair , INFORMS Annual Meeting (San Diego, CA)	2009
Conference Speaker , INFORMS Annual Meeting (Seattle, WA)	2007
Conference Speaker , INFORMS Annual Meeting (Pittsburgh, PA)	2006
Conference Speaker , INFORMS MSOM (Atlanta, GA)	2006
Journal Referee , Journal of Revenue Management & Pricing	2010
Journal Referee , Wiley Encyclopedia of Operations Research and Management Science	2009
Journal Referee , Naval Research Logistics	2006
Journal Referee , Manufacturing & Services Operations Management	2005