

**CARRIE M. HEILMAN**  
**Associate Professor of Marketing**

University of Virginia  
McIntire School of Commerce  
Rouss & Robertson Halls  
P.O. Box 400173  
Charlottesville, VA 22904-4173

Phone: 434 243-8738  
Email: [heilman@virginia.edu](mailto:heilman@virginia.edu)  
URL: [www.comm.virginia.edu](http://www.comm.virginia.edu)

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**ACADEMIC DEGREES RECEIVED**

**Ph.D. in Management**, *Krannert Graduate School of Management, Purdue University*, 1997

**B.A. in Mathematics**, *The College of the Holy Cross*, Worcester, MA, 1993

**ACADEMIC EMPLOYMENT**

**A. University Positions**

Associate Professor of Commerce, *McIntire School of Commerce, University of Virginia*, Charlottesville, VA, August 2006 – present

Assistant Professor of Commerce, *McIntire School of Commerce, University of Virginia*, Charlottesville, VA, July 2003- July 2006

Assistant Professor of Marketing, *John M. Olin School of Business, Washington University*, St. Louis, MO, July 1997- June 2003

Lecturer in Management Science, *Krannert School of Management, Purdue University*, West Lafayette, IN, August 1993-December 1994

**B. Courses Taught (total number of sections ever taught in parentheses)**

- Advertising Campaigns (spring), *University of Virginia* undergraduate course (6), 2013-2018
- Advertising & Promotions (fall), *University of Virginia* undergraduate course (7), 2012-2018
- Brand Management, *University of Virginia* graduate course (9), 2009 – 2013, 2016-2018
- Brand Management, *University of Virginia* undergraduate course (11), 2003- 2012
- Introduction to Marketing, *McIntire Integrative Core Experience Program, University of Virginia* undergraduate course (12), 2003-2009
- Introduction to Marketing, *McIntire Business Institute Program, University of Virginia*, (7), 2014-2018
- Marketing Analysis and Policy, *Washington University* MBA graduate course (5), 2000-2003
- Principles of Marketing, *Washington University* undergraduate course (10), 1998-2002
- Ethics in Business – Marketing Module, *Washington University* MBA graduate course (4), 1998-2001
- Empirical Models in Marketing, *Washington University* Ph.D. seminar (1), 1999
- Business Statistics, *Purdue University* undergraduate course (3), 1993-1994

**GRANTS, HONORS, AND AWARDS**

**Research Awards**

***Winner of the Paul E. Green Award, 2001***

Carrie M. Heilman, Douglas Bowman and Gordon P. Wright (2000), “The Evolution of Brand Preferences and Choice Behaviors of Consumers New to a Market,” *Journal of Marketing Research*, 37 (May),

139-155. This award recognizes the best article in the *Journal of Marketing Research* in the previous year that demonstrates the greatest potential to contribute significantly to the practice of marketing research.

***Finalist, Best Paper Award, International Journal of Research in Marketing, 2003 (One of Four Finalists)***

Carrie M. Heilman and Douglas Bowman (2002), "Segmenting Consumers Using Multiple-Category Purchase Data," *International Journal of Research in Marketing*, 19 (3), 225-252. This award recognized the best paper to appear in the *International Journal of Research in Marketing* in 2002.

***Finalist, O'Dell Award, 2005 (One of Six Finalists)***

Carrie M. Heilman, Douglas Bowman and Gordon P. Wright (2000), "The Evolution of Brand Preferences and Choice Behaviors of Consumers New to a Market," *Journal of Marketing Research*, 37 (May), 139-155. This award recognizes the article appearing in the *Journal of Marketing Research* in 2000 that has made the most significant long-term contribution to marketing theory, methodology and/or practice.

**Teaching & Service Awards**

***Advertising Education Foundation (AEF) Visiting Professor Program (VPP) Award, June 2012.***

This selective award places faculty members in advertising agencies for a two-week summer internship

***University of Virginia Teaching Award Nominee, 2005***

***Jack Lindgren Mead Endowment Award (2014-2015)***, recognizing faculty who uphold the Jeffersonian ideas of faculty/student development.

***National Student Advertising Competition (NSAC) 2016 National Champions (\$5,000 cash prize)***

Taught and mentored 30 students to a national championship in the American Advertising Federation's (AAF) National Student Advertising Competition (NSAC).

***McIntire William Stamps Farish Professor in Free Enterprise Emerging Scholars Professorship (2018-21)***

***National Student Advertising Competition (NSAC) 2018 2<sup>nd</sup> Place (\$2,500 cash prize)***

Taught and mentored 30 students to a 2<sup>nd</sup> place finish in the national competition of the American Advertising Federation's (AAF) National Student Advertising Competition (NSAC).

***Poet & Quants Top 50 Undergraduate Professors (2018)***

***Jefferson Scholars Foundation Teaching Award, Nominee (2019)***

***Washington University***

- Finalist for the *Marcile and James Reid Chair Teaching Award*, 2000-2001
- *The Women's Panhellenic Outstanding Faculty Award*, 1998, 1999
- *Delta Sigma Pi International Business Fraternity*, Honorary Faculty Award and Membership, 1998

***Purdue University***

- *Purdue Research Foundation Grant*, 1996-1997
- Finalist for the *Outstanding Graduate Student Teaching Award*, 1994

***The College of the Holy Cross***

- *NCAA Division I Four-Year Basketball Scholarship*, 1989-1993
- *All-Patriot League, First Team*, 1993

## RESEARCH

### A. Research Interests

Theme #1: Dynamic Choice Modeling: Modeling consumers' dynamic brand choices and decision making processes in order to develop more effective marketing mix strategies

Theme #2: Marketing Mix Strategy: Explaining and measuring the effects of marketing mix variables, with a special interest in in-store promotions

Theme #3: Customer Loyalty Management: Empirically investigating observed customer purchasing behavior in order to better manage customers over their lifetime in a category

### B. Publications and Conditional Acceptances in Refereed Journals

Netemeyer, Richard G., Carrie M. Heilman and James G. Maxham, (2012) "The Impact of a New Retail Brand In-Store Boutique and its Perceived Fit with the Parent Retail Brand on Store Performance and Customer Spending," *Journal of Retailing*, 88 (4), pg. 462-475. (Theme #3)

Netemeyer, Richard G., Carrie M. Heilman and James G. Maxham, (2012) "Identification with the Retail Organization and Customer-Perceived Employee Similarity: Effects on Customer Spending," *Journal of Applied Psychology*, 97 (5), pg. 1049-1058. (Theme #3)

Heilman, Carrie M., Frederick Kaefer, and Samuel D. Ramenofsky, (2012) "Differences in the Spending of Husbands and Wives on Products Used by Only One Spouse," *Journal of Marketing Theory and Practice*, 20 (3), pg. 307-318.

Kaefer, Frederick, Carrie M. Heilman and Samuel D. Ramenofsky, (2012), "The Impact of a Wife's Attitudes about Personal Luxury Goods on the Amount She and Her Husband Spend on Such Goods," *Journal of Retailing and Consumer Services*, 19, pg. 297-303.

- Selected for inclusion in 'The Science of Christmas' – a special edition of Elsevier's Monthly Research Selection for science journalists and reporters.
- Findings covered in, "Because You're Worth it! Don't be shy! You'll Get a Better Gift if You Make a Fuss," by Roger Dobson, *The Independent*, December 23, 2012, and then re-posted on at least ten other websites.

Heilman, Carrie, Kyril Lakishyk and Sonja Radas (2011), "An Empirical Investigation of In-Store Sampling Promotions," *British Food Journal*, 113 (10), pg. 1252-1266.

- Findings covered in *Consumer Reports Shop Smart Magazine*, January 2015.

Tsiros, Michael and Carrie M. Heilman (2005), "The Effect of Expiration Dates and Perceived Risks on Purchasing Behavior in Grocery Store Perishable Categories," *Journal of Marketing*, 69 (2), pg. 114-129. (Theme #2)

- Findings covered in, "The Psychology Behind Costco's Free Samples: Mini Pizza Bagels? Now We're Talking.," *The Atlantic*, Oct. 1, 2014
- Findings covered in, *Women's World Magazine*, June 24, 2019

Kaefer, Frederick, Carrie M. Heilman, and Samuel D. Ramenofsky (2005), "A Neural Network Application to Consumer Classification in Direct Marketing: An Incremental Approach," *Computers and Operations Research*, 32 (10), 2595-2615. (Theme #3)

Bowman, Douglas, Carrie M. Heilman and P.B. Seetharaman (2004), "Determinants of Product Use Compliance Behavior," *Journal of Marketing Research*, 41(3), 324-328. (Themes #2, #3)

- **Results presented by Ipsos Health at the 2004 *Pharmaceutical Management Science Association (PMSA) Conference, San Francisco, April 25-28, 2004.***

Heilman, Carrie M., Frederick Kaefer and Samuel D. Ramenofsky (2003), "Determining the Appropriate Amount of Data for Classifying Consumers for Direct Marketing Purposes," *Journal of Interactive Marketing*, 17 (3), 5-28 (**lead article**). (Theme #3)

Heilman, Carrie M., and Douglas Bowman (2002), "Segmenting Consumers Using Multiple-Category Purchase Data," *International Journal of Research in Marketing*, 19 (3), 225-252. (Theme #1)

- **Finalist, 2002 *International Journal of Research in Marketing Best Paper Award***

Heilman, Carrie M., Kent Nakamoto and Ambar Rao (2002), "Pleasant Surprises: Consumer Response to Unexpected In-store Promotions," *Journal of Marketing Research*, 39 (May), 242-251. (Theme #2)

Heilman, Carrie M., Douglas Bowman and Gordon P. Wright (2000), "The Evolution of Brand Preferences and Choice Behaviors of Consumers New to a Market," *Journal of Marketing Research*, 37 (May), 139-155 (**lead article**). (Themes #1&3)

- **Winner, 2001 *Paul E. Green Award*** that recognizes the best article in the *Journal of Marketing Research* in the previous year that demonstrates the greatest potential to contribute significantly to the practice of marketing research.
- **Finalist, 2005 *William F. O'Dell Award*** that recognizes the article appearing in the *Journal of Marketing Research* in 2000 that has made the most significant long-term contribution to marketing theory, methodology and/or practice.
- Summarized as "Develop Buyer Profile for Consumers," *Marketing News*, April 24, 2000, 57-58
- Featured in "First-cut: Consumer Markets Newsletter," (2002), *KPMG review of cutting edge research* (Issue 7)

### C. Working Papers & Research in Progress

"The Effect of Savings Attitudes and Spending Attitudes on Well-Being: The Moderating Role of Materialism and Financial Security," with Amar Cheema and Rick Netemeyer. Under Review: *Journal of Consumer Psychology*. Under Review: *Journal of Economic Psychology*

"Measuring the Effects of Customized Targeted Promotions on Retailer Profits: A Basket-Level Econometric Analysis," with Alex Chaudhry and Seethu Seetharaman. Under Review: *Journal of Marketing Research* (Themes #2, #3)

"Distinguishing Household Response to Mass and Customized Retail Promotions Using Spending Paths: A Two-Stage Functional Data Approach," with Utkarsh Shrivastava, Daniel Zantedeschi and Wolfgang Jank. Target: *Marketing Science* or *International Journal of Marketing Research (IJRM)* (Themes #2, #3)

"The Effects of Social Media Strategy on Brand Equity: A Co-Brand, Brand Personality Congruency Approach," with Amar Cheema. Target: *Journal of Marketing* or *Journal of Marketing Research* (Themes #2)

"The Impact of Mere Exposure to Retailer Customized Direct Promotions on Consumers' Shopping Baskets." Target: *Journal of Marketing* or *Journal of Retailing*. (Themes #2 & #3)

### D. Papers Presented at Regional, National and International Society Meetings and/or Educational Institutions

- “Using Consumer Spending Paths to Predict Response to Mass and Customized Retailer Promotions: A Two Stage Functional Data Approach”
- Marketing EDGE Summit, Oct. 7-8, 2017, New Orleans, LA
  - *Winter Conference on Business Analytics (WCBA)*, March, 2017, Snowbird, UT
- “A Data Driven Framework for Early Prediction of Customer Response to Promotions”
- *Americas Conference on Information Systems (AMCIS)*, August, 2015, Puerto Rico
- “Investigating the Two-Stage Choice Process of In-Store Sampling: Trying and Buying”
- *AMA Summer Educators Conference*, August 2008, San Diego, CA
- “Luxury Good Expenditures of Husband and Wife Dyads Incorporating User Attitudes”
- *Association for Consumer Research (ACR)*, September 2006, Orlando, FL.
- “The Effectiveness of In-Store Free Samples on Samplers”
- *INFORMS Marketing Science Conference*, June 2006, Pittsburgh, PA.
  - *McIntire School of Commerce Brown Bag Seminar Series*, February 2006, Charlottesville, VA.
- “The Impact of In-Store Promotions on Consumer Shopping Behavior”
- *Institute for International Research (IIR) Return on Marketing Investment 2005: The New Era of Accountable Marketing*, January 2005, Miami, FL, (invited talk)
- “The Effect of Expiration Dates and Perceived Risks on Purchasing Behavior in Grocery Store Perishable Categories,” (with Michael Tsiros)
- *Association for Consumer Research (ACR) Conference*, October 2004, Portland, OR
- “Segmenting Consumers Using Multiple-Category Purchase Data,” (with Douglas Bowman)
- *INFORMS Marketing Science Conference*, June 2002, Edmonton, Alberta, Canada
- “The Effect of In-Store Sampling on Purchase Incidence, Repeat Purchase and Shopping Behavior,” (with Kyril Lakishyk, Sonja Radas and Kent Nakamoto)
- *INFORMS Marketing Science Conference*, June 2002, Edmonton, Alberta, Canada
- “Determinants of Product Compliance: An Application to Pharmaceutical Product Usage,” (with Douglas Bowman and Seethu Seetharaman)
- *AMA Advanced Research Techniques (ART) Forum Conference*, June 2003, Monterey, CA
  - *University of Texas, Austin*, December 6, 2002, Austin, TX (invited paper).
  - *University of Virginia*, November 18, 2002, Charlottesville, VA (invited paper).
  - *Boston University*, September 23, 2002, Boston, MA (invited paper).
  - *INFORMS Marketing Science Conference*, June 2002, Edmonton, Alberta, Canada
  - *Midwest Marketing Camp (MMC)*, June 2002, Champaign-Urbana, IL
- “Pleasant Surprises: Consumer Response to Unexpected In-store Promotions,” (with Kent Nakamoto and Ambar Rao)
- *Association for Consumer Research (ACR) Conference*, October 2001, Austin, TX (invited paper)
  - *INFORMS Marketing Science Conference*, June 2000, Los Angeles, CA
  - *American Marketing Association Summer Educators Conference*, Aug. 1999, San Francisco, CA
- “The Evolution of Preferences and Choice Behaviors of Consumers New to a Market,” (with Douglas Bowman and Gordon P. Wright)

- *AMA Advanced Research Techniques (ART) Forum Conference*, June 2001, Amelia Island, FL (invited paper)
- *AMA Winter Educators Conference*, February 2000, San Antonio, TX
- *INFORMS Fall Conference*, November 1999, Philadelphia, PA

“Private Brand Proneness in Frequently Purchased Goods Categories: Perceived Risk Explanations For: Across Time, Across Category, and Across Consumer Variation,” (with Douglas Bowman and Teresa Obis)

- *INFORMS Marketing Science Conference*, June 2000, Los Angeles, CA

“The Evolution of Consumer Choice Over the Lifetime in a Category,” (with Douglas Bowman and Gordon P. Wright)

- *Goizueta Business School Cross-Area Knowledge Seminar*, October 1999, Atlanta, GA
- *INFORMS Marketing Science Conference*, July 1998, Fontainebleau, France

“Attracting Valuable Customers and Keeping Them for a Lifetime”

- *National Association of Diaper Services (NADS) Annual Conference*, May 1998, St. Louis, MO

“Modeling Dynamic Brand Choice with Structural Shifts in Buying Behavior”

- *Washington University*, October 1996, St. Louis, MO (invited paper).
- *Yale University*, October 1996, New Haven, CT (invited paper).
- *INFORMS Marketing Science Conference*, March 1996, Gainesville, FL

## JOURNAL REVIEWING ACTIVITIES

*Ad Hoc Reviewer for: Marketing Science, Journal of Marketing, Journal of Marketing Research, Marketing Letters, Journal of Consumer Research, Journal of Consumer Psychology, Journal of Retailing, Journal of Advertising, Journal of Business Research, Journal of Interactive Marketing, Journal of Productions and Operations Management, Journal of Fashion Marketing*

## DISSERTATION & THESIS COMMITTEES

- Emily Jagdmann, BS COMM, *University of Virginia* (2013), Global Commerce Scholar Program Senior Thesis
- Jura Liaukonyte, Ph.D. in Economics, *University of Virginia* (2009), Initial Placement: Cornell University, Department of Applied Economics and Management.
- Jayani Jayawardhana, Ph.D. in Economics, *University of Virginia* (2008), Initial Placement: U. of South Carolina
- Andrei Strijnev, Ph.D. in Marketing, *Washington University* (2003), Initial Placement: U. of Buffalo
- Qin Zhang, Ph.D. in Marketing, *Washington University* (2002), Initial Placement: U. of Texas, Dallas

## PROFESSIONAL ACTIVITIES

### Professional Affiliations and Memberships

- *National Student Advertising Competition (NSAC) Faculty Advisor (AAF)*, 2013-present
- *American Advertising Federation (AAF)*, member, 2011-present
- *American Marketing Association (AMA)*, member, 1996-present
- *INFORMS*, College of Marketing, 1996-present
- *Association for Consumer Research (ACR)*, 1997-2006
- *Decision Science Institute (DSI)*, 1996-2004

## CONSULTING EXPERIENCE

**Areas of Expertise:** Statistical Analysis of Purchasing Data and Controlled Experimental Data, Promotion Strategy, Brand Management, Trademark Infringement.

### Consulting Clients:

- *dunnhumby USA* (United Kingdom-based company, with US headquarters in Cincinnati, that uses customer data analytics to help retailers and brands improve customer experiences and build loyalty)
- *Ipsos-NPD* (North American subsidiary of the \$304M French marketing research company *Ipsos Group*)
- *Dierbergs Markets*, St. Louis, MO (19 store, St. Louis-based grocery store chain).
- *Peters Marketing Research*, St. Louis, MO (marketing research company located in St. Louis, MO and Parsippany, NJ)
- *Williams Mullen Legal Services* (Charlottesville, VA)
- *Energizer Holdings, Inc.* (the world's largest manufacturer of dry cell batteries and flashlights)
- *National Association of Diaper Services (NADS)*

## SERVICE RELATED ACTIVITIES

### A. McIntire School of Commerce, University of Virginia

- *McIntire AACSB Accreditation Coordinator*, 2008-present
- *McIntire Assessment Coordinator*, 2005-present
- *National Student Advertising Competition (NSAC)*, Faculty Advisor, 2013-present.
- *Advertising and Marketing Association (AMA)*, Faculty Advisor, 2005-present
- *McIntire Advertising and Digital Media Track*, Track Director, 2015-present
- *McIntire Director of Instructional Design Hiring Committee*, 2015
- Served on thirteen *Tenure and Promotion Sub-Committees*, 2007-2018
- Chaired one *Tenure and Promotion Sub-Committee*, 2011
- *Interdisciplinary Studies Faculty Advisor* for three students (2014-present)
- *Distinguished Majors Committee Member* for Noah Jones (2018)
- *YMA Fashion Scholarship Fund Selection Committee* and Educator Contact, 2010-2016
- *MS in Commerce Admissions Committee*, 2007-2009
- *Recruiting and Hiring Committee, Marketing Department*, 2007-2008, 2012-2013, 2015-2017
- *Undergraduate Program Committee (UPC)*, 2005-2007
- *Teaching Development Committee*, 2004-2005
- *New Building Classroom Subcommittee*, 2003-2005
- *Faculty Advisor, Coordinator or Participant, New York Marketing and Advertising Trek Student Trip*, 2008-present
- *Faculty Moderator*, "Careers in Marketing 101: Brand Management Panel", 2008-present
- *Faculty Moderator*, "Careers in Marketing" panel for *Commerce Career Day*, 2007, 2008, 2017
- *Faculty Advisor, L'Oreal Brandstorm Competition*, 2006-2007
- *Faculty Panelist, Pre-Comm Women's Forum Weekend*, 2003-2009

### B. University of Virginia

- *University of Virginia, Faculty Athletics Representative*, fall 2017-present
- *Chair, Athletic Advisory Council (AAC) Committee*, 2008-2011, 2017-present
- *ACC Student Athlete Advisory Committee (SAAC) Faculty Athletics Rep*, 2018-2021
- *Athletics Transfer Appeals Committee*, 2013-2014
- *Athletic Advisory Council (ACC) Committee Member*, 2005-2008
- *University Assessment Committee*, 2005-present
- *University Assessment Advisory Committee*, 2007-present

- Athletic Department *Faculty Partners Program*, 2010-2013
- Faculty Panelist on “Promotion and Tenure” for new university faculty hires, 2008

**C. Olin School of Business, Washington University**

- Dean’s Undergraduate Scholarship Selection Committee, 1999-2002
- Faculty Chair, Washington University’s Undergraduate Marketing Assoc. (WUMA), 1999-2002
- Outside Tenure Decision Committee Junior Faculty Observer, 2000, 2002
- Olin Disciplinary Committee, 2001-2002
- Mentored eleven undergraduate independent study projects between Fall 1998-Spring 2002
- Olin Spotlight Weekend, Faculty Participant (recruitment vehicle for high-potential, already accepted students), 1998-2001
- Assigned Mentor for New Faculty Hires in Marketing, 1998, 2001
- Interviewing Committee for New Faculty Hires, Washington University, 1997-2002
- BSBA Undergraduate Advisory Committee Member, 1998-1999
- Olin School of Business Affirmative Action Committee Member, 1998-1999
- Discovery Weekend Faculty Participant (presentation on Advertising for prospective students), 1999
- Search and Selection Committee for an Associate Dean of the MBA program, 1999
- New Faculty Orientation Participant, 1999
- “Climate Committee” (Dean’s advisory board to improve the atmosphere for junior faculty), 1999
- Research Budget Special Request Committee, 1998

**D. Washington University**

- NCAA Faculty Representative, 1998-2002
- Chairperson, Sports and Recreation Advisory Committee, 1998-2002
- Sports Gender Equity Committee, 2001-2002
- Visiting High School Counselors Weekend, School of Business Representative, 2000
- Orientation Weekend, School of Business Representative, 1999

**PERSONAL INFORMATION**

- Married with four children born between 2001 and 2010
- Outside Activities and Interests: sports, travel and coaching my kids’ sports teams