

# Marco Lam, PhD

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Accounting  
319 Forsyth  
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## EDUCATION

Ph.D. – Operations Management (2008) Minors: Accounting and Statistics	The University of Alabama
M.A. – Management Science (2005)	The University of Alabama
M.Acc. – Accountancy (2002)	Western Carolina University
B.Ed. – Business Economics (1997)	Hogeschool van Utrecht

## CERTIFICATION & LICENSURE

Certified Public Accountant (# 22715)	Colorado
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## ACADEMIC EXPERIENCE

Western Carolina University, USA, *Associate Professor (2014 - present)*  
Nordakademie, Elmshorn, Germany, *Affiliated Faculty (Summer 2019 - present)*  
Fachhochschule Dortmund, Germany, *Visiting Professor (Summer 2018)*  
Nordakademie, Elmshorn, Germany, *Visiting Professor (Summer 2017)*  
York College of Pennsylvania, USA, *Assistant Professor (2008 – 2014)*  
ICN Business School, Nancy, France, *Visiting Research Professor (Summer 2012)*  
Shanghai Normal University, Shanghai, China, *Visiting Professor (Summer 2010)*  
The University of Alabama, USA, *Graduate Student Instructor (2003 - 2006)*  
Hogeschool van Utrecht, The Netherlands, *Adjunct Faculty (1997)*

## RESEARCH INTERESTS

Influence Tactics, Management Decision Making, Control Systems, and Capital Markets.

## REFEREED PUBLICATIONS

23. **Lam, M.** and T.P Dangelo. 2020. “Sticky Expenditures in North Carolina Counties” Political Economics in the Carolinas (forthcoming)
22. **Lam, M.** and T. D’Angelo. 2019. “Creating a Performance Dashboard for Buncombe County Tourism Authority: A Teaching Exercise” *Global Perspectives on Accounting Education* (Forthcoming)
21. **Lam, M.**, M. Raja, K. Finstad-Milion, and B. Desilus. 2017. “Getting Things Done: Effectiveness of Influence Tactics in Mexico and the United States” *Global Journal of Management and Marketing* Vol. 1(2) 46-62

20. **Lam, M.**, S. Swanger, and J. Azriel. 2017. "The Role of Entrepreneurial Intent and Need for Achievement in Accounting Students' Career Aspirations" *Journal of Higher Education Theory and Practice* Vol. 17(5): 70-82
19. Andre, S.M., **M. Lam**, and M. O'Donnell. 2016. "The Effect of Type and Direction of Influence Tactic on Managers' Willingness to Add Budgetary Slack" *Academy of Accounting and Finance Studies Journal* Vol. 20(3):147-166
18. Madhogarhia, P. And **M. Lam**, 2015 "Dynamic Asset Allocation" *Journal of Asset Management* Vol. 16 (5): 293-302.
17. **Lam, M.**, M. O'Donnell, and D. Robertson. 2015. "Achieving Employee Commitment in Continuous Improvement Initiatives" *International Journal of Operations and Production Management* Vol. 35 (2): 201-215.
16. Trinkle, B.S. and **M. Lam**. 2014. "The Effectiveness of Organizational Appeal to Elicit Accountants' Task Commitment" *Advances in Accounting Behavioral Research* Vol. 17: 183-211.
15. **Lam, M.** and B. Trinkle, 2014. "Using Prediction Intervals to Improve Information Quality of Bankruptcy Prediction Models" *Advances in Business and Management Forecasting* Vol. 10: 37-52.
14. Hill, S. and **M. Lam**. 2014. "Delivery Driver for a Day: A Teaching Case for the Traveling Salesman Problem and Heuristic Development" *International Journal of Information and Operations Management Education* 5(4): 363-375.
13. **Lam, M.** and B. Adams. 2014. "Utilizing Industry Contacts to Enhance Student Learning in the Core Operations Management Course: A Mentor Network Approach" *Academy of Educational Leadership Journal* 18(1):
12. **Lam, M.** and J. Mittenthal, 2013. "Capacitated Hierarchical Clustering Heuristic for Multi Depot Location Routing Problems" *International Journal of Logistics: Research and Applications* Vol. 16 (5): 433-444.
11. Tabatabaei, M and **M. Lam**. 2013. "Awareness and Usage of Collaboration and Communication Technologies in Student Teamwork" *Journal of International Technology and Information Management* Vol. 22 (2): 71-84.
10. **Lam, M.** and D. Robertson, 2012. "Organizational Culture, Tenure, and Willingness to Participate in Continuous Improvement Projects in Healthcare" *Quality Management Journal* Vol. 19 (3): 7-15.
9. Ligon, M., E.A. Welleford, J.J. Cotter and **M. Lam.**, 2012, "Oral History: A Pragmatic Approach to Improving Life Satisfaction of Elders" *Journal of Intergenerational Relationships* Vol. 10 (2): 147-159.

8. **Lam, M.** 2011, “The Joint Effect of Performance Evaluation Windows and Project Risk on Continuous Improvement Initiatives: Evidence from the Balanced Scorecard” *Journal of Organizational Culture, Communications and Conflict* Vol. 15 (1): 132-151.
7. Gagnon, R. and **M. Lam.** 2011. “The Mattsaka Koi and Exotic Fish Farm Company Case.” *Journal of the International Academy for Case Studies* Vol. 17 (1): 17-24.
6. **Lam, M.**, B. Neve, and R. Gagnon. 2010. “Bama Drinks Company: An Inventory Case Portfolio.” *Journal of the International Academy for Case Studies* Vol. 16 (7): 67- 74.
5. **Lam, M.**, J. Mittenthal, and B. Gray. 2009. “Impact of Stopping Rules on Hierarchical Capacitated Clustering in Multiple Depot Location Routing Problems.” *Academy of Information and Management Sciences Journal* Vol. 12 (1): 13-28.
4. **Lam, M.**, M. Carver, and D. Miller. 2008. “Implementing a Target Budget at Fountain City.” *Strategic Finance* (October): 38-43.
3. Trinkle, B., P. Bayes, and **M. Lam.** 2007. “Humble Paper Products, Inc. – A Case on Acquisition and Valuation” *Journal of Accounting Case Research* Vol. 9 (2): 30-36.
2. Albright, T. and **M. Lam.** 2006. “Managerial Accounting and Continuous Improvement Initiatives: A Retrospective and Framework”. *Journal of Managerial Issues* Vol. 18 (2): 157-174.
1. **Lam, M.** and W. Samson. 2005. “Support for Accounting Ethics comes from Historical Roots of the Profession”. *The Accounting Educator* Vol. 14 (3): 6-9

## UNDER REVIEW

- D’Angelo, T., S. El-Gazzar, R.A. Jacob, and **M. Lam.** 2020. “Concurrent Disclosure of GAAP-Compliant Financial Statements with Earnings Announcements: Does the Market Care?” Under Review at *Advances in Accounting*
- Parrish, C. and **M. Lam.** 2020. “Impact of the COVID-19 pandemic on a grassroots soccer organization in the United States: The case of Asheville City Soccer Club” Under Review at *Soccer & Society*

## IN PROGRESS

**Lam, M.**, M. Kißler and T.P. Dangelo “The Impact of Relational Demography on the Effectiveness of Influence Tactics: A comparative study”

## INVITED PUBLICATIONS

**Lam, M.** and B. Adams 2013. “Lean Certification Follow Through” *Target Magazine/AME* 29(1)

**Lam, M.** and B. Adams 2012. "Starting the Lean Journey Early" Target Magazine/AME 28(4)

**Lam, M.** and B. Adams 2012. "Beyond Manufacturing: Lean in Health Care" Target Magazine/AME 28(3)

**Lam, M.** and B. Adams. 2012. "The Lean Certification Exam Provides Real-World Experience" Target Magazine/AME 28(2)

**Lam, M.** 2012. "Student Learning Assessment Tools" Target Magazine/AME 28(1)

## CONFERENCE PRESENTATIONS

24. "Budget Variances and Priority Revision in County Government Budgets"  
American Accounting Association, Annual Conference, Washington, DC, 2018
23. "The Role of Entrepreneurial Intent and Need for Achievement in Accounting Students' Career Aspirations: Some Preliminary Data"  
South East American Accounting Association Annual Conference, Atlanta, GA, 2016  
American Accounting Association, Annual Conference, New York, NY, 2016
22. "Cultural Differences in Leadership Behaviors: Evidence from India, Mexico, and the United States"  
Appalachian Research in Business Symposium (ARBS), ECU, 2016
21. "Dynamic Asset Allocation"  
NABET Annual Conference, State College, PA, 2014
20. "The Effect of Type and Direction of Influence Tactic on Managers' Willingness to Add Budgetary Slack"  
NABET Annual Conference, State College, PA, 2014
19. "Teaching and Developing Business Cases: A Focus on Student Learning Outcomes"  
Northeast Decision Sciences Institute Annual Conference, Brooklyn, NY, 2013
18. "Is the Malcolm Baldrige National Quality Award Still Relevant?"  
Northeast Decision Sciences Institute Annual Conference, Brooklyn, NY, 2013
17. "Teaching the Traveling Salesman Problem: A Parcel Delivery Service Teaching Case"  
Decision Sciences Institute Annual Conference, San Francisco, CA, 2012
16. "Utilizing Industry Contacts to Enhance Student Learning in the Core Operations Management Course: A Mentor Network Approach"  
Northeast Decision Sciences Institute Annual Conference, Newport, RI, 2012
15. "Achieving employee commitment for continuous improvement initiatives"  
Academy of Management Annual Meeting, Boston, MA, 2012.
14. "Prediction Intervals for Bankruptcy Prediction Models"  
Decision Sciences Institute Annual Conference, Boston, MA, 2011
13. "Organizational Culture, Tenure, and Willingness to Participate in Continuous Improvement Projects in Healthcare"  
Northeast Decision Sciences Institute Annual Conference, Montreal, CA, 2011
12. "Capacitated Hierarchical Clustering Heuristic for Multi Depot Location Routing Problems"  
Northeast Decision Sciences Institute Annual Conference, Montreal, CA, 2011
11. "The Joint Effect of Performance Evaluation Windows and Project Risk on Continuous Improvement Initiatives: Evidence from the Balanced Scorecard"  
Allied Academies 2010 Spring International Conference in New Orleans, LA, 2010

10. "The Joint Effect of Organizational Culture and Tenure on Employee Attitude towards Change."  
Allied Academies 2010 Spring International Conference in New Orleans, LA, 2010
9. "The Mattsaka Koi and Exotic Fish Farm Company Case."  
Allied Academies 2010 Spring International Conference, in New Orleans, 2010.
8. "Inventory Management at Bama Drinks Company: Four Progressive Cases."  
Academy of Business Education Annual Meeting in Ft Lauderdale, FL, 2009.
7. "Impact of Stopping Rules on Hierarchical Capacitated Clustering in Multiple Depot Location Routing Problems."  
Allied Academies 2009 Summer International Internet Conference, July 2009.
- 6 "Are All Customers Created Equal? A Multiple Demand Classes Inventory Case"  
Academy of Business Education Annual Meeting in Hilton Head, SC, 2008.  
DSI Annual Meeting in Baltimore, MD, 2008
5. "A Constrained Hierarchical Clustering Heuristic for the Location Routing Problem"  
INFORMS Annual Meeting in Washington, DC, 2008
4. "Heuristics for the Multi-Period Location Routing Problem"  
DSI Annual Meeting in Phoenix, AZ, 2007  
INFORMS Annual Meeting in Seattle, WA 2007
3. "The Joint Effect of Balanced Scorecard Evaluation Windows and Project Risk on Resource Allocation Decisions."  
AAA Southeast Regional Meeting in Charlotte, NC, 2005
2. "When the US Profession's Founders Spoke About Accounting Ethics"  
Tenth World Congress of Accounting Historians in St. Louis, MO/Oxford, MS, 2004.
1. "The Value Relevance of R&D and Goodwill for Firm Valuation: A Tobin q Approach."  
Tenth Annual Graduate Research Symposium at WCU, Cullowhee, NC, 2002.

## **INVITED PRESENTATIONS**

10. "Building Performance Dashboards" ICN Business School, Nancy, France, 2020 (forthcoming)
9. "Business Valuation" presented at ICN Business School, Nancy, France, 2014
8. "Business Dynamics" presented at ICN Business School, Nancy, France, 2014
7. "Problem Solving" presented at ICN Business School, Nancy, France, 2013
6. "Lean Systems" presented at ICN Business School, Nancy, France, 2013
5. "Teaching with Cases" presented at York College of Pennsylvania, York, PA, 2013
4. "Case Writing" presented at ICN Business School, Nancy, France, 2012
3. "MBA Curriculum Alignment: Employers, Students and Faculty" (with D. Greisler and B. Adams) Presented at York College of Pennsylvania, York, PA, 2012
2. "Lean in Practice" Presented to INFORMS student chapter at The University of Alabama, Tuscaloosa, AL, 2008
1. "Six Sigma and CI" Presented to Society of Hispanic Professional Engineers, Tuscaloosa, AL, 2008



## **SERVICE**

### **WESTERN CAROLINA UNIVERSITY**

#### University

Faculty Senate, 2020 - present  
QEP Committee, 2015 - 2016  
Program Review Team, Political Science, 2017  
2015 One Book Committee  
2014 One Book Committee

#### College

Dean Search Committee, 2020  
Dean's Advisory Committee, 2017

#### School

AFIB, Curriculum Committee, 2015 – 2020

#### Department

Faculty Search committee, 2019  
Internship Coordinator, 2015 - 2020  
Organizer, Accounting Interview Day, 2015 - 2020  
WebMaster for School of Acc., Fin., Inf. Sys., and Bus. Law 2015-present

#### Other

Faculty Advisor Women's Soccer Club, 2014 - 2020  
Coach Women's Soccer Club, 2014 - 2015

### **YORK COLLEGE OF PA**

#### University Committees

Chair of Faculty Development Committee – Funding Sub Committee 2012 - 2013  
Faculty Development Committee Member 2009-present

#### Department Committees

Faculty Search Committee 2008-2009, 2009-2010, 2011-2012, 2013-2014

#### Service Courses / Projects

Continuous Improvement Projects Supervised at:  
Architectural Testing, BAE (3), Gettysburg Hospital (2), Harley Davidson (4), Industrial  
Distribution Group, Perform Group, Shire Pharmaceuticals, Top Flight, WellSpan Health, York  
Corrugating, and York Hospital (5)

#### Directed Studies

Fall 2013: MBA 598 Mergers & Acquisitions  
Spring 2012: MBA 538 Controllership (1 student)  
Fall 2011: MBA 538 Controllership (2 students)  
Spring 2011: BUS 498 Lean Supply Chains (1 student)  
Spring 2010: BUS 498 Green Supply Chain Management (1 student)  
Fall 2009: MBA 598 Design of Experiments (1 student)  
Fall 2009: IBS 361 Supply Chain Management (1 student)  
Spring 2009: BUS 498 Lean Manufacturing (2 students)  
Fall 2008: MBA 598 Lean Supply Chains (1 student)

## **EXTERNAL**

Editor, Global Perspectives on Accounting Education, 2017 - present  
Reviewer, SEAAA, 2015, 2016  
Reviewer, International Conference on Information Systems, 2016  
Ad-Hoc Reviewer, Intelligent Systems in Accounting, Finance and Management, 2015  
Track-Chair for Quality Management and Lean Operations, NEDSI conference, 2012  
Ad-Hoc Reviewer, European Journal of Operational Research, 2011  
Reviewer, Decision Sciences Annual Conference, 2008, 2011  
INFORMS Best Case Studies Award Competition Committee member, 2008  
Examiner, Malcolm Baldrige National Quality Award, 2010  
Leadership York Advisory Committee, 2009 – present  
Examiner, Alabama Quality Award, 2007

## **HONORS AND AWARDS**

Graduate Faculty Teaching Award, WCU, 2017  
BB&T Faculty Research Award for the Study of Leadership, Ethics, and Capitalism, WCU, 2017  
Online Teaching and Learning Academy, WCU, 2016  
Professional Development Grant, WCU, 2015  
Research Grant, WCU Business School, 2015  
Research Grant, ICN Business School, 2012  
Research Fellowship, York College, 2012  
Research Grant, York College, 2012  
Travel Grant, WCU Business School, 2014, 2015, 2016  
Travel Grant, ICN Business School, 2013, 2014  
Travel Grant, York College, 2009, 2010, 2011, 2012, 2013, 2014  
Travel Grant, MBA Program, York College, 2013  
Distinguished Research Award, Academy of Health Care Management, 2011  
Distinguished Research Award, Academy of Org. Culture, Communications, and Conflict, 2010  
Distinguished Research Award, Academy of Information and Management Sciences, 2009  
Outstanding Ph.D. Graduate Research Assistant, UA, 2007  
Outstanding Project Award for Prattville, AL projects, 2007  
INFORMS Teaching Effectiveness Colloquium, Seattle, WA, 2007  
Outstanding Graduate Student Instructor, UA, 2006  
INFORMS Future Academician Colloquium, Pittsburg, PA 2006  
Outstanding Master of Management Science Student, 2005  
Beta Gamma Sigma Member, 2004  
AAA Doctoral Consortium Fellow, Lake Tahoe, CA, 2004  
First Place, WCU Graduate Research Symposium, Cullowhee, NC, 2002