

Monte R. Swain
Deloitte Professor of Accountancy
Marriott School of Business
Brigham Young University

March 4, 2024

Personal:

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Research & Teaching Specialization:

Strategic performance measurements
Activity-based costing and activity-based management
Behavioral issues in decision support systems
Management accounting case research and pedagogical issues
Theory of constraints and throughput accounting

Education (Degrees and Certifications):

- 1992 Doctor of Philosophy, Accounting, Graduate School of Business Administration, Michigan State University. Minors: Information Systems, Statistics, and Economics
- 1987 Master of Accountancy (with distinction), Managerial Accounting, Graduate School of Management, Brigham Young University
- 1986 Bachelor of Science (cum laude with honors), Accounting, Brigham Young University. Minors: English, Business Economics
- 2016 Chartered Global Management Accountant, AICPA
- 1994 Certified Management Accountant, IMA
- 1987 Certified Public Accountant, Utah Licensed

Academic Recognitions:

- 2021 Certificate of Merit, *Management Accounting Quarterly* manuscript competition for “A Brief History of Management Accounting”
- 2021 BYU MBA Core Professor of the Year Award
- 2016 Silver Award, *IMA Educational Case Journal* case writing competition for “Pounds of Trouble: Analyzing Exchange Rate Variances”
- 2016 IMA Brummet Distinguished Award for Management Accounting Educators
- 2015 BYU Executive MBA Mentoring Award
- 2010 Merrill Bateman Student Choice Outstanding Faculty Member
- 2009 Outstanding Faculty Award, Brigham Young University Accessibility Center
- 2004 Certificate of Merit, *Strategic Finance* manuscript competition for “Ten Ways E-Business Can Help Reduce Costs”
- 2003 Deloitte Professor of Accountancy

2003 Ernst & Young Outstanding Educator Award
 2001 Warnick/Deloitte Research Fellowship
 1999 Marriott School of Management Outstanding Teacher
 1998 Teaching Excellence Award for Management Skills, BYU Marriott Alumni Board
 1997 Outstanding Faculty List in *Business Week's* "Guide to the Best Business Schools (5th ed.)
 1996 Teaching Excellence Award for Management Skills, BYU Marriott Alumni Board
 1995 Price Waterhouse Research Fellowship
 1995 Teaching Excellence Award for Management Skills, BYU Marriott Alumni Board
 1994 Teaching Excellence Award for Management Skills, BYU Marriott Alumni Board
 1993 Finalist, Behavioral Dissertation of the Year Award, American Accounting Association
 1991 Outstanding Doctoral Scholar, Department of Accounting, Michigan State University
 1991 Michigan State University Excellence-in-Teaching Citation
 1990 Big Ten Accounting Doctoral Consortium Fellow
 1987 American Accounting Association Fellowship
 1987 Outstanding Graduate, BYU School of Accountancy
 1986 Outstanding Participant, Touche Ross Utah Mini-Trueblood Seminar

Employment Experience:

2003–present Professor, Marriott School of Management, Brigham Young University

 2011–2013 Associate Director, MBA Program, Brigham Young University

 2002–2003 Associate Director, School of Accountancy and Information Systems, Brigham Young University

 1998–2003 Associate Professor, Marriott School of Management, Brigham Young University

 1999–2000 Chief Financial Officer, Authorize.Net, Inc. (subsidiary of Go2Net, Inc.), Provo, UT

 1992–1998 Assistant Professor, Marriott School of Management, Brigham Young University

 1991 Instructor, Marriott School of Management, Brigham Young University

 1987—1999 Instructor, Department of Accounting, Michigan State University

 1987 Instructor, School of Accountancy, Brigham Young University

 1986 Accounting Intern, Litigation support, KMG Main Hurdman, Salt Lake City

Scholarly Activities:

Refereed Publications

- 2024 Farrell, A., Shackell, M., and Swain, M., "Is the Sky the Limit for Mentee Studios?," *Accounting Perspectives* (forthcoming).
- 2017 Swain, M., Smith, S., and Tayler, W., "Williams & Jacobs, LLC – A Deposition on Business," *IMA Educational Case Journal* (vol. 10, no. 2, 2017, art. 1).
- 2016 Harris, M., Smith, S., Swain, M., and Tayler, W., "Pounds of Trouble: Analyzing Exchange Rate Variances," *IMA Educational Case Journal* (vol. 9, no. 4, 2016, art. 3). [IMA Educational Case Journal Case Writing Competition Silver Award, 2016.]
- 2013 Krumwiede, T., Swain, M., Thornock, T., and D. Egget., "The Effects of Task Outcome Feedback and Broad Domain Evaluation Experience on the Use of Unique Scorecard Measures," *Advances in Accounting* (vol. 29, no. 2, 2013, pp. 205-217).
- 2012 Swain, M., and Olsen K., "Student Personality Profiles and the Decision to Major in Accounting," *Issues in Accounting Education* (vol. 27, no. 1, 2012, pp. 17-52).
- 2010 Swain, M., Charles, S., Hobson, S., Stocks, K., and Pratt, C., "Managing the CPA Firm at Dodge Company," *Issues in Accounting Education* (vol. 25, no. 4, 2010, pp. 721-739).
- 2009 Blocher, E., Shashtri, K., Stout, D., and Swain, M., "Blue Ridge Revisited—Integrating ABC and OROS Quick® Software," *Journal of Accounting Education* (vol. 27, no. 2, 2009, pp. 85-103).
- 2008 Krumwiede, K., Eaton, T., Swain, M., and Eggett, D., "A Research Note on the Effects of Target Focus on the Use of Financial and Nonfinancial Measures in Balanced Scorecard Evaluations," *Advances in Accounting Behavioral Research* (vol. 11, 2008, pp. 155-177).
- 2002 Swain, M., Allen, R., Cottrell, D., and Pexton, K., "TechMall.com: Revenue Recognition in the Internet Economy," *Issues in Accounting Education* (vol. 17, no. 4, 2002, pp. 389-400).
- 2001 Swain, M., Krumwiede, K., Pexton, K., and Stocks, K., "TechMall.com's Revenue," *Professor/Practitioner Case Development Program*, (American Institute of Certified Public Accountants: New York, NY, 2001).
- 2000 Swain, M. and Stout, D., "Survey Evidence of Teacher Development Based on AECC Recommendations," *Journal of Accounting Education* (vol. 18, no. 1, 2000, pp. 99-113).
- 2000 Swain, M. and Haka, S., "Capital Budgeting Decisions: Information Load, Experience, and Carry-Over Effects," *Behavioral Research in Accounting* (vol. 12, no. 1, 2000, pp. 171-198).

- 1999 Benson, D. and Swain, M., "A Study of the Impact of TQM on the Financial Performance of Firms," *Academy of Accounting and Financial Studies Journal* (vol. 3, no. 1, 1999, pp. 145-159).
- 1998 Swain, M. and Denna, E., "Making New Wine: Useful Management Accounting Systems," *International Journal of Applied Quality Management* (vol. 1, no. 1, 1998, pp. 25-44).
- 1998 Swain, M. and Gladwin, B., "Activity-Based Costing and Simulation Modeling," *Journal of Bank Cost & Management Accounting* (vol. 11, no. 1, 1998, pp. 34-53).
- 1998 Allen, R., Swain, M., Sudweeks, R., and Schaalje, B., "The Impact of Recognition Opportunities and Examination Format on Students' Examination Performance in Introductory Accounting," *Advances in Accounting Education* (vol. 1, 1998, pp. 189-214).
- 1998 Swain, M. and Walker, B., "Star Video: A Case Study in Activity-Based Costing," *The Journal of Accounting Case Research* (vol. 4, no. 2, pp. 153-162, 1998).
- 1997 Stice, J., Swain, M., and Worshom, R., 1997. "The Effect of Performance on the Decision to Major in Accounting," *Journal of Education for Business* (vol. 73, no. 1, 1997, pp. 54-57).
- 1996 Perry, L., Swain, M., and Kovolenko, N., "Intel's Internet Entanglement," *Case Research Journal* (vol. 16, no. 1 & 2, 1996, pp. 69-83).
- 1995 Cottrell, D., Swain, M., and Stocks, K., "Continuous Improvement at Clorox," *The Internal Auditor* (vol 52, no. 1, 1995, pp. 38-44).
- 1993 Cook, G. and Swain, M., "A Computerized Approach to Decision Process Tracing for Decision Support System Design," *Decision Sciences* (vol. 24, no. 5, 1993, pp. 931-952).

Non-Refereed Publications

- 2023 Swain, M., "A Business Case for Investing in a Better Management Accounting System," *FP&A Trends* (Online: <https://fpa-trends.com/article/business-case-investing-better-management-accounting-system>, 13 December 2023).
- 2021 Harrison, J., Ng, F., Rouse, P., and Swain, M., "The Four Levers of Revenue Management," *Strategic Finance* (Montvale, NJ, Institute of Management Accountants, November 2021).
- 2021 Swain, M., "A Brief History of Management Accounting," *Management Accounting Quarterly* (Montvale, NJ, Institute of Management Accountants, Winter 2021). [IMA Certificate of Merit]

- 2020 Lawson, R., Cokins, G., Hicks, D., Swain, M., and White, L., “The Profitability Analytics Framework,” *IMA Statement of Management Accounting* (Montvale, NJ, Institute of Management Accountants, November 2020).
- 2020 Harrison, J., Ng, F., Rouse, P., and, Swain, M., “Revenue Management Fundamentals,” *IMA Statement of Management Accounting* (Montvale, NJ, Institute of Management Accountants, October 2020).
- 2019 Lawson, R., Cokins, G., Hicks, D., Krumwiede, K., Swain, M., and White, L., “Costing System Attributes That Support Good Decision-Making,” *IMA Statement of Management Accounting* (Montvale, NJ, Institute of Management Accountants, October 2019).
- 2019 Lawson, R., Cokins, G., Hicks, D., Krumwiede, K., Swain, M., and White, L., “Developing an Effective Managerial Costing Model for Any Organization,” *IMA Statement of Management Accounting* (Montvale, NJ, Institute of Management Accountants, April 2019).
- 2017 Smith, S., Swain, M., and Tayler, W., “Starting from Scratch,” *Strategic Finance* (August, 2017, pp. 57-61).
- 2016 Bolt-Lee, C. and Swain, M., “Highlights of Management Accounting Research,” *Journal of Accountancy* (December 2016, pp. 50-54).
- 2016 Smith, S., Swain, M., and Tayler, W., “Profits on Trial at Darby and Larkin, LLC,” *Strategic Finance* (August 2016, pp. 70-77). [Selected for the 2017 IMA International Student Case Competition]
- 2014 Swain, M., Sawyer, C, and Shepherd, S., “Managing Strategy in the Captive Insurance Market,” *The Examiner* (Spring 2014, pp. 14-29). [Honorable Mention SOFE Editor’s Choice Award]
- 2003 Krumwiede, K., Swain, M., and Stocks, K., “Ten Ways eBusiness Can Help Reduce Costs (cover story),” *Strategic Finance* (July 2003, pp. 24-29). [2004 Manuscript Competition Certificate of Merit]
- 2001 Swain, M., “Assessing the Quality of Publication Outlets,” *AAA New Faculty Handbook* (Spring, 2001, pp. 41-59).
- 2001 Krumwiede, K., Swain, M., and Stocks, K., “2000 Cost Management Survey: Eight Ways Companies are using E-Business to Manage Costs,” *Cost Management Update* (April 2001, no. 116, pp. 1-3).
- 2001 Krumwiede, K., Swain, M., and Stocks, K., “2000 Cost Management Survey: Cost Management Practices in the E-Business World,” *Cost Management Update* (Dec. 2000/Jan. 2001, no. 113, 1998, pp. 1-3).

- 1998 Krumwiede, K and Swain, M., “To Ph.D. or Not to Ph.D.?” *The New Accountant* (vol. 14, no. 2, 1998, pp. 21-25).
- 1997 Swain, M., “Paper Airplanes and Process Costing,” *Accounting Instructors Report* (vol. 19, 1997, pp. 3-4).
- 1996 Swain, M., Review of *The Theory of Constraints and its Implications for Management Accounting* by E. Norren et al. (Institute of Management Accountants). Published in *American Accounting Association News and Views* (vol. 14, no. 1, 1996, pp. 9-11).
- 1993 Denna, E., Klienberger, H., Roth, R., and Swain, M., “Architecture of the 90's and Beyond,” white paper published by Price Waterhouse (October, 1993).

Chapters in Books

- 2002 Krumwiede, K, Swain, M., and Eggett, D., “The Effects of Feedback, Experience, and Division Similarity on the Utilization of Unique Performance Measures in Multi-Division Evaluations,” *Performance Measurement and Management 2002: Research and Action (Conference Proceedings)*, edited by A. Neely and A. Walters (Bedfordshire, UK: Cranfield University, 2002, pp. 291-298).
- 2002 Swain, M. and Fawcett, S., “Chapter 31 – Activity-Based Costing,” *Innovations in Competitive Manufacturing*, edited by P. M. Swamidass (New York: American Management Association, 2002, pp. 385-398).
- 2000 Swain, M. and Fawcett, S., “Accounting Systems Implications of TOC,” *Encyclopedia of Production and Manufacturing* 2nd edition, by P. M. Swamidass (Norwell, MA: Kluwer Academic Publishers, 2000, pp. 3-9).
- 2000 Swain, M. and Fawcett, S., “Activity-Based Costing,” *Encyclopedia of Production and Manufacturing* 2nd edition, by P. M. Swamidass (Norwell, MA: Kluwer Academic Publishers, 2000, pp. 10-19).
- 2000 Swain, M. and Fawcett, S., “Theory of Constraints in Manufacturing Management,” *Encyclopedia of Production and Manufacturing* 2nd edition, by P. M. Swamidass (Norwell, MA: Kluwer Academic Publishers, 2000, pp. 782-788).
- 1998 Perry, L., Swain, M., and Kovolenko, N., “Intel’s Internet Entanglement,” published in *Strategic Management* 3rd ed., authored by Alex Miller, (New York: McGraw-Hill, 1998, pp. 214-220).

Textbooks Published

- 2021 Swain, M., Budd, C., Holderness, K., Olsen, K., and Yuschak, M., *Wiley Efficient Learning CMA*. (Hoboken, NJ: John Wiley & Sons, 2021).

- 2010 Albrecht, S., Stice, J., Stice, E., and Swain, M., *Accounting: Concepts and Applications*, 11th ed. (Cincinnati, OH: South-Western Cengage Learning, 2011).
- 2007 Albrecht, S., Stice, J., Stice, E., and Swain, M., *Accounting: Concepts and Applications*, 10th ed. (Cincinnati, OH: South-Western, 2008).
- 2004 Swain, M., Albrecht, S., Stice, J., and Stice, E., *Management Accounting*, 3rd ed. (Cincinnati, OH: South-Western, 2005).
- 2004 Albrecht, S., Stice, J., Stice, E., and Swain, M., *Accounting: Concepts and Applications*, 9th ed. (Cincinnati, OH: South-Western, 2005).
- 2003 Swain, M and Bell, J., *The Theory of Constraints and Throughput Accounting* separately published in Japanese (Taiwan: McGraw-Hill International Enterprises, 2003).
- 2002 Swain, M and Bell, J., *The Theory of Constraints and Throughput Accounting* separately published in Chinese (Taiwan: McGraw-Hill International Enterprises, 2002).
- 1998 Swain, M., *TOC, Throughput Accounting & ABC* (Englewood, CO: MicroMash, 1998).
- 1998 Swain, M and Bell, J., *The Theory of Constraints and Throughput Accounting*, included in *A Modular Series in Management Accounting: A Strategic Focus*. (Chicago: McGraw-Hill, 1998).
- 1993 Swain, M., *Activity-Based Costing* (Carrollton, TX: Thomson Reuters, 1993).

Research in Progress

“Revenue Management at Mountain Base Golf Club,” with A. Sergeant, J. Sterns, F. Ng, and R. Venkatesh (teaching case targeted to *Issues in Accounting Education*).

“Evaluating the ROI of Managerial Costing System Investment,” with K. Krumwiede (practitioner paper targeted to *Strategic Finance*).

“The Profitability Analytics Framework for Investment Management,” with L. White, D. Hicks, R. Lawson, and G. Cokins (White Paper disseminated by the Profitability Analytics Center for Excellence).

Presentations

- 2024 “Teaching Your Students How to Measure Anything by Managing with Uncertainty,” Presenter, AAA Management Accounting Section Mid-Year Meeting (Orlando, FL: January 2024)
- 2024 “The Next Normal: Now – The Future Ready Accounting Professional,” Panelist, AAA Management Accounting Section Mid-Year Meeting (Orlando, FL: January 2024)

- 2024 “Critical Thinking in Our Classrooms,” Presenter, AAA Management Accounting Section Mid-Year Meeting (Orlando, FL: January 2024)
- 2023 “Building the Management Accounting Pipeline,” Panelist, AAA Management Accounting Section Mid-Year Meeting (Atlanta, GA: January 2023)
- 2022 “Revenue Management Finance Levers,” Presenter, AICAP Future of Finance Summit 2022 (Austin, TX: December 2022)
- 2022 “Revenue Management Fundamentals,” Co-presenter, AAA weARE Webinar Series (Live webinar: May 2022)
- 2022 “Do You Know Enough About Revenue Management?,” Presenter, San Antonio IMA Chapter (Live webinar and in-person event, January 2022).
- 2022 "The Future of Management Accounting," Panelist, AAA Management Accounting Section Mid-Year Meeting (Live webinar: January 2022)
- 2022 "Essential Management Accounting Competencies for All Entry-Level Accountants," Panelist, AAA Management Accounting Section Mid-Year Meeting (Live webinar: January 2022)
- 2021 “Introducing the Profitability Analytics Framework,” Presenter, AAA weARE Webinar Series (Live webinar: November 2021)
- 2021 “Revenue Management: Methods to Drive the Top Line,” Presenter, IMA Strategic Management Series (Live webinar: November 2021)
- 2021 “The COVID-19 Pandemic: What Has Changed? What Have We Learned?,” Panelist, BYU School of Accountancy Conference (Provo, UT: November 2021)
- 2021 “Finance Transformation – The Human Perspective,” Panelist, BYU School of Accountancy CFO Roundtable Series (Live webinar: October 2021)
- 2021 “Managing Profitability in Uncertain Times,” Panelist, FP&A Trends Webinar Series (Live webinar: September 2021)
- 2021 “Lessons They Never Taught You in School: Revenue Management for Management Accountants,” Presenter, IMA Annual Conference (Live webinar: June 2021)
- 2021 “Revenue Management Fundamentals,” Presenter, Profitability Analytics Center of Excellence (Live webinar, January 2021). Attended by 251 international professionals and academics.

- 2021 “Current Developments in Revenue and Profitability Analytics,” Panelist, AAA Management Accounting Section Mid-Year Meeting (Live webinar: January 2021)
- 2020 “Management Accounting Research Relevance: Increasing Impact, Expanding Influence,” panelist, Panelist, AAA Management Accounting Section Mid-Year Meeting (Houston, TX: January 2020)
- 2019 “Critical Thinking in the Classroom,” Panelist, AAA Teaching, Learning and Curriculum Section Mid-Year Meeting (Tampa, FL: November 2019)
- 2019 “Profitability Analytics – The IMA Model,” Plenary speaker, AAA Management Accounting Section Teaching Case Conference (Salt Lake City, UT: November 2019)
- 2017 “Am I Actually a Strategic Partner in my Organization: Management Accountant Evolved!” Presenter, IMA Annual Conference (Denver, CO: June 2017)
- 2017 “Paradigmatic Diversity in Management Accounting Research: What, Why, and How,” Panelist, AAA Management Accounting Section Mid-Year Meeting (San Juan, Puerto Rico: January, 2017)
- 2017 “Writing and Using Cases,” panelist, AAA Management Accounting Section Mid-Year Meeting (San Juan, Puerto Rico: January 2017)
- 2016 “The Strategy of Performance Measurement,” CEO Forum (Salt Lake City, UT: May 2016)
- 2016 “Performance Measurement and The Balanced Scorecard,” Beta Alpha Psi Regional Meeting (Salt Lake City, UT: April 2016)
- 2016 “An Experiential Learning Exercise in Cost Accounting,” AAA Management Accounting Section Mid-Year Meeting (Dallas, TX: January 2016)
- 2015 “Management Accounting Education in the United States,” Chinese Management Accounting Delegation, Triway International Group (Newark, NJ: November 2015)
- 2015 “Management Accounting Practice in the United States,” Chinese Management Accounting Delegation, Triway International Group (San Francisco, CA: October 2015)
- 2015 “Business Models in Professional Practice,” CIMA President’s Conference (Edinburgh, Scotland: October 2015)
- 2015 “Writing and Grading Assessment Materials,” AAA Western Region Meeting (Coronado, CA: April 2015)
- 2013 “Linking Performance Measurement to Strategy,” Utah Chapter Meeting of the Insurance Accounting & Systems Association (Salt Lake City, UT: October 2013)

- 2013 “Designing a Scorecard that is Actually Strategic,” IMA Annual Conference (New Orleans, LA: June 2013)
- 2010 “The Balanced Scorecard: Linking Performance Measures to Strategy,” IMA Salt Lake City Chapter Meeting (Salt Lake City, UT: October 2010)
- 2010 “Panel: Teaching to the Prevailing Business Practice,” AAA National Meeting (San Francisco, CA: August 2010)
- 2010 “Panel: Teaching to the Prevailing Business Practice,” AAA Western Region Meeting (Portland, OR: April 2010)
- 2009 “Why Accounting?,” Beta Alpha Psi Initiation Banquet (Provo, UT: December, 2009)
- 2009 “Workshop for New Teaching Faculty & Practitioners Interested in Teaching,” AAA Northeast Region Conference on Teaching and Learning in Accounting (Cambridge, MA: November 2009)
- 2009 “Great Works: Citizen Kane,” KBYU Classical 89 *ThinkingAloud* (Provo, UT: Originally airdate August 3, 2009)
- 2008 “Creating Space in the Classroom,” The AAA Conference on Teaching and Learning in Accounting—The Craft of Teaching Accounting (Anaheim, CA: August 2008).
- 2008 “Using Video Clips in the Classroom,” The AAA Conference on Teaching and Learning in Accounting—Effective Teaching Practices Forum (Anaheim, CA: August 2008).
- 2007 “A Tale of Two Cases,” The Colloquium for Change in Accounting Education (Scottsdale, AZ: October 2007).
- 2007 “The Use of Hedge Rates in Performance Evaluation of U.S.-Based Multinational Corporations,” American Accounting Association Annual Meeting (Chicago, IL: August 2007)
- 2006 “‘Business!’ cried the Ghost. ‘Mankind was my business,’” Brigham Young University Honors Seminar (Provo, UT: January 2006).
- 2004 “Leading Others to Accountability,” Brigham Young University Student Council Conference (Provo, UT: February 2004).
- 2003 “Adapting an ABC Case Study for a Large Service Organization into Your Classroom,” The Colloquium for Change in Accounting Education (Albuquerque, NM: October 2003).

- 2003 “The Balanced Scorecard: Linking Performance Measures to Strategy,” Institute of Management Accountants Technical Update—Salt Lake City Chapter (Salt Lake City, UT: September 2003).
- 2002 “The Effects of Feedback, Experience, and Division Similarity on the Utilization of Unique Performance Measures in Multi-Division Evaluations,” International Conference on Performance Measurement and Management (Boston, MA: July 2002).
- 2002 “How to use Unique Scorecard Measures in a Multi-Division Corporation,” with Kip R. Krumwiede (Live online seminar on BetterManagement.com: January 2002). Fifty-six executive attendees representing 16 international countries.
- 2001 “Using Scorecarding in Multi-Divisional Corporations,” with Kip R. Krumwiede (Live online seminar on BetterManagement.com: June 2001). Approximately 40 executive attendees representing approximately ten international countries.
- 2001 “The Emergence of the eBusiness CPA,” BYU Marriott School of Management Conference (Provo, UT: June 2001).
- 2000 Plenary Session – “eBusiness Principles and Strategies for Accountants,” Utah Association of CPAs Update Conference (Salt Lake City, UT: December 2000).
- 1999 “eCommerce” Utah Association of CPAs Update Conference (Salt Lake City, UT: December 1999).
- 1999 “The Balanced Scorecard,” Utah Association of CPAs Cache Valley Chapter Technical Meeting (Logan, UT: October 1999).
- 1999 “The Balanced Scorecard,” Brigham Young University’s National Accounting Conference (Provo, UT: September 1999).
- 1999 “The Theory of Constraints and Throughput Accounting,” CEO Education Association (Salt Lake City, UT: March 1999)
- 1998 “The Balanced Scorecard,” Utah Association of CPAs Update Conference (Salt Lake City, UT: June 1998).
- 1998 “The Impact of TQM on the Financial Performance of Firms,” with D Benson, Allied Academies National Meeting (Myrtle Beach, SC: April 1998).
- 1997 “Implementing a Balanced Scorecard Model of Performance Measures,” International Controllers Conference, Church of Jesus Christ of Latter-Day Saints (Salt Lake City: UT: October 1997).
- 1997 “The Balanced Scorecard and Performance Measures,” BYU School of Management Society, Eugene Chapter (Eugene, OR: October 1997).

- 1997 "Combining Religious Faith and Academic Excellence," BYU Faculty Development Series Spring Seminar (Provo, UT: May 1997).
- 1996 "Capital Budgeting Decisions: Information Load, Experience, and Carry-Over Effects," Decision Sciences Institute Annual meeting (Orlando, FL: November 1996).
- 1996 "Free Agency and Graduate Education," BYU's School of Accountancy and Information Systems Research Workshop (Provo, UT: September 1996).
- 1996 "The Effect of Performance on the Decision to Major in Accounting," 1996 AAA Western Regional Meeting (Jackson, WY: May 1996).
- 1996 "The Scholarship of Teaching in Accounting Doctoral Programs," BYU's School of Accountancy and Information Systems Research Workshop (Provo, UT: February 1996).
- 1995 "Adding Value to Your Business: Activity-Based Management," Brigham Young University's National Accounting Conference (Provo, UT: September 1995).
- 1994 "Activity-Based Costing and Activity-Based Management," Utah Association of CPAs Update Conference (Salt Lake City, UT: December 1994).
- 1994 "Making Reengineering REAL," with E. Denna, The Genesis Executive Education Symposium, (Bogota, Colombia: November 1994).
- 1994 "InfoLab: A Computerized Instrument for Examining Self-Inflicted Information Overload," BYU's School of Accountancy and Information Systems Research Workshop (Provo, UT: September 1994).
- 1994 "Simulation Analysis and Activity-Based Costing," ProModel Users Conference (Park City, UT: August 1994).
- 1994 "Recognition Effects and Examination Format," with R. Allen, AAA 1994 National Meeting (New York, NY: August 1994).
- 1994 "The Introductory Accounting Class: Screening and Recruiting the Best Students," with J. Stice, AAA 1994 National Meeting (New York, NY: August 1994).
- 1994 "Recognition Effects and Examination Format," with R. Allen, AAA 1994 Western Regional Meeting (Portland, OR: May 1994).
- 1994 "The Introductory Accounting Class: Screening and Recruiting the Best Students," with J. Stice, AAA 1994 Western Regional Meeting (Portland, OR: May 1994).
- 1993 "Capital Budgeting: Expertise and Fixation," University of Utah's Price Waterhouse Accounting Colloquium (Salt Lake City, UT: February 1993).

1990 “An Experimental Examination of the Relationships Between Decision Task Complexity and Information Search Strategies,” AAA 1990 Midwest Regional Meeting (Chicago, IL: March 1990).

Professional Activities:

2021–2024	Member – Future of Finance Leadership Advisory Group – Association of International Certified Professional Accountants (AICPA).
2021–2023	Member – Future of Management Accounting Education Committee – AAA Management Accounting Section.
2017–present	Member – Research and Development Panel – Chartered Institute of Management Accountants.
2017–present	Member – Advisory Board – <i>IMA Educational Case Journal</i> .
2020–2023	Chair-Elect, Chair – Council – American Accounting Association.
2020–2023	Member – Americas Regional Engagement Group – Association of International Certified Professional Accountants (AICPA).
2020–2022	Member and Chairman – Impact on Management Accounting Practice Award Committee – AAA Management Accounting Section.
2018–2021	Member – Council – Representing Management Accounting Section – AAA.
2017–2018	Member – Notable and Distinguished Contributions to Accounting Literature Award Committee – American Accounting Association.
2016–2018	Member and Chairman – Lifetime Contribution to Management Accounting Award Committee – AAA Management Accounting Section.
2014–2017	President-Elect, President, Past President – AAA Management Accounting Section.
2015	Chairman – Teaching Symposium – AAA Management Accounting Section.
2013–2016	Member – External Advisory Board – Michigan State University Department of Accounting.
2013	Chairman – Outstanding Accounting Educator Award Committee – American Accounting Association.
2012–2017	Member – Strategy Advisory Board – AAA Management Accounting Section.

2010–2013	Associate Editor – <i>Issues in Accounting Education</i> .
2009–2014	Member – Strategy Task Force – AAA Teaching Curriculum and Learning Section.
2009–2016	Member – Board of Directors for the Alpine School District Foundation, American Fork, UT.
2009–2011	Secretary/Treasurer – AAA Management Accounting Section.
2009–2011	Chairman – Membership Committee – American Accounting Association.
2001–2010	Member – Board of Directors for QSI Corporation, Salt Lake City, UT.
2008–2010	Member – Strategy Task Force – American Accounting Association.
2009	Member – Nominations Committee—American Accounting Association.
2008–2009	Chairman – Innovations in Accounting Education – American Accounting Association.
1998–2009	Member – Editorial Board for Issues in Accounting Education.
2005–2008	Member – Finance Committee – American Accounting Association.
2004–2007	Member – Board of Directors for Kids on the Move, Orem, UT.
2005–2006	Member – Nominating Committee – AAA Management Accounting Section.
2002–2005	Website Coordinators Committee Chairperson – American Accounting Association.
2001–2005	Member – Board of Directors for e3vertical, Inc., Orem, UT.
1999–2004	Member – Editorial Board for Behavioral Research in Accounting.
1998–present	Member – American Association of Certified Public Accountants.
1998–2006	Member – CPA Education Advisory Committee, Utah Division of Professional Licensing.
1998–2004	Website Coordinator – AAA Management Accounting Section.
1998–2000	Member – New faculty development ad hoc committee, AAA Teaching and Curriculum Section.

1998–2001	Ad hoc reviewer for the Case Research Journal.
1998–1999	Member – Board of Directors for Authorize.net, Inc., Provo, UT.
1997–2004	Member – Executive Committee for the AAA Management Accounting Section.
1996	Discussant – Issues in Cost Accounting Systems (Decision Sciences Institute Annual Meeting (Orlando, FL: November 1996).
1996–present	Ad hoc reviewer for the AAA Annual Meeting Proceedings.
1996–present	Ad hoc reviewer for the AAA Western Regional Meeting Proceedings.
1995–1996	Treasurer, Habitat for Humanity of Utah County.
1995	Ad hoc reviewer for The Journal of Accounting Case Research.
1994	Discussant – Accounting Education & Technology, AAA Western Regional Meeting (Portland, OR: May 1994).
1992–present	Member – Institute of Management Accountants.
1990–present	Member – Decision Sciences Institute.
1989–present	Member – American Accounting Association.
1989–1991	Ad hoc reviewer for The Journal of Information Systems.

Organizations Served as Advisor, Consultant, or Director:

Alpine School District Foundation (Board of Directors)
 American Accounting Association (Board of Advisors)
 Authorize.Net, Inc. (Board of Directors)
 Church of Jesus Christ of Latter-day Saints (Consultant)
 CEO Education Group (Consultant)
 Cirris Systems (Consultant)
 e3vertical, Inc. (Consultant)
 Equine Health Sciences (Board of Advisors)
 Deloitte (Executive Education Consultant)
 Genesis – Bogota, Colombia (Executive Education Consultant)
 Habitat for Humanity (Board of Directors)
 IBM (Executive Education Consultant)
 Johnson & Johnson (Executive Education Consultant)

Kids on the Move (Board of Directors)
 Michigan State University Department of Accounting (Board of Advisors)
 Olson's Greenhouse Gardens (Consultant)
 QSI, Inc. (Board of Directors)
 Utah Valley University Department of Accounting (Board of Advisors)

School Administrative Assignments:

2019–present	Lead – Department Management Accounting Faculty Group
2019–present	Member – College Emotional Health Committee
2018–present	Member – Department Diversity, Inclusion and Belonging Committee
2016–2019	University Faculty Advisory Council
2008–2018	Chair and member – Executive MBA Operations Committee
2014–2015	Professional Group Leader – School of Accountancy
2011–2013	Associate Director – University MBA Program
2008–2015	Member – University Student Ratings Task Force
2007–2011	Faculty Advisor – Women of the School of Accountancy Committee
2005–2007	Chair – Department Faculty Promotion Evaluation Committee
2004–2007	Member – University Internship Office Faculty Committee
2004–2006	Director – Department Internship Program
2004–2010	Coordinator – Honors Program within the Marriott School of Management
2003–2010	Coordinator – Master of Accountancy First Semester Curriculum
2002–2003	Associate Director, School of Accountancy and Information Systems
2001–2002	Member – College Promotion and Tenure Committee
2000–2002	Member – Department Promotion and Tenure Committee
2000–2002	Member – Rollins Center for eBusiness Steering Committee
2000–2002	Member – International Business Center Steering Committee
1998–1999	Member – College Promotion and Tenure Committee
1997–2000	Faculty Advisor – Institute of Management Accountants BYU Student Club
1997–1999	Director – Department Faculty Recruiting
1997–1999	Member – MBA Policy Committee
1997–1999	Member – Executive MBA Admissions Committee
1997–1999	Member – College Student Placement Task Force
1996–1998	Member – Department Appropriations Committee
1995–1997	Member – Department Curriculum Committee
1994–1995	Administrator – Department Research Workshop
1992–1995	Member – Executive MBA Policy Committee
1991–1995	Member – First Year MBA Curriculum Committee