

Lukas GORETZKI

Professor of Management Accounting & Control

Department of Accounting

Stockholm School of Economics

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ACADEMIC EXPERIENCE

- Full Professor, Stockholm School of Economics (since 03/2022)
- Visiting Professor, University of Turku (since 01/2023)
- Visiting Professor, WHU – Otto Beisheim School of Management (10/2022 – 09/2023)
- Associate Professor (tenured), Stockholm School of Economics (since 02/2018 – 02/2022)
- Visiting Professor, University of Sydney (09/2018)
- Visiting Professor, University of Innsbruck (02/2018 – 01/2019)
- Adjunct Associate Professor, University of Luxembourg (12/2017-10/2020)
- Visiting scholar, Turku School of Economics (04/2014; 05/2015; 05/2016)
- Assistant Professor, University of Innsbruck (10/2014 – 01/2018)
- Postdoc, University of Innsbruck (09/2012 – 09/2014)
- Postdoc, WHU – Otto Beisheim School of Management (01/2012 – 08/2012)
- Research Assistant and PhD student, WHU – Otto Beisheim School of Management (08/2008 – 12/2011)

OTHER ACADEMIC ACTIVITIES

- *Associate Editor of European Accounting Review (since 01/2024)*
- *Associate Editor of The British Accounting Review (since 06/2023)*
- *Editor of Qualitative Research in Accounting & Management (since 04/2018)*
- *Editorial board member of Accounting and Business Research (since 06/2020)*
- *Editorial board member of Journal of Management Accounting Research (since 01/2022)*
- *Editorial board member of Management Accounting Research (since 02/2022)*
- *Member of the Editorial Advisory Board of Qualitative Research in Accounting & Management (02/2014 – 03/2018)*
- *Member of the International Committee of the Management Accounting Section of the American Accounting Association (since 10/2015)*
- *Member of the Scientific Committee of the EAA Annual Congress (2019 – 2021)*
- *Member of the APIRA2019 Review Committee*
- *Member of the AAA 2020 MAS Midyear Meeting Review Committee*
- *Initiator and co-organizer of the Qualitative Management Accounting Research Group (QMARG) paper development workshop (since 05/2020)*
- *Faculty at the Emerging Scholars Colloquium of the Interdisciplinary Perspectives on Accounting conference (07/2021)*

EDUCATION

- International Teachers Program (ITP) at INSEAD(2022)
- Dr. rer pol [PhD]; summa cum laude (12/2011)
- MSc in Business Management; graduated with honors (07/2008)

PUBLICATIONS IN PEER-REVIEWED ACADEMIC JOURNALS

- Wiegmann, L., Petrikowski, L. & Goretzki, L.: Business unit controllers' credibility and the hardening of local forecasts; forthcoming in: *Contemporary Accounting Research* (ABS:4; FT50)
- Goretzki, L., Messner, M. & Wurm, M. (2023): Magicians, unicorns or data cleaners? Exploring the identity narratives and work experiences of data scientists, in: *Accounting, Auditing and Accountability Journal*, 36(9), 253-280. (ABS: 3)
- Goretzki, L. & Pfister, J. (2023): The productive accountant as (un-)wanted self: Realizing the ambivalent role of productivity measures in accountants' identity work; forthcoming in: *Critical Perspectives on Accounting* (ABS: 3)
- Carlsson-Wall, M.; Goretzki, L.; Hofstedt, J.; Kraus, K. & Nilsson, C.-J. (2022): Exploring the implications of cloud-based enterprise resource planning systems for public sector management accountants; in: *Financial Accountability & Management*, 38(2), 177-201. (ABS: 3)
- Goretzki, L.; Reuter, M.; Sandberg, J. & Thulin, G. (2022): Making sense of employee satisfaction measurement – A technological frames of reference perspective; in: *The British Accounting Review*, 54(1), 101032. (ABS: 3)
- Goretzki, L.; Löhlein, L.; Schäffer, U.; Schmidt, A. & Strauss, E. (2022): Exploring the role of metaphors in the construction of a social-identity: The case of the German controller, in: *European Accounting Review*, 31(4), 877-903. (ABS: 3)
- Carlsson-Wall, M., Goretzki, L., Kraus, K., Lind, J. (2021): Exploring the role of management control anchor practices in new product development, in: *European Accounting Review*, 30(2), 251-276 (ABS: 3)
- Goretzki, L. & Messner, M. (2019): Backstage and frontstage interactions in management accountants' identity work, in: *Accounting, Organizations and Society*, 74, 1-20. (ABS: 4*/FT 50)
- Goretzki, L., Strauss, E. & Wiegmann, L. (2018): Exploring the roles of vernacular accounting systems in the development of "enabling" global accounting and control systems, in: *Contemporary Accounting Research*, 35(4), 1888-1916. (ABS: 4/FT 50)
- Goretzki, L.; Lukka, K. & Messner, M. (2018): Controllers' use of informational tactics, in: *Accounting and Business Research*, 48(6), 700-726. (ABS: 3)
- Goretzki, L., Mack, S., Messner, M., & Weber, J. (2018). Exploring the persuasiveness of accounting numbers in the framing of 'performance'—a micro-level analysis of performance review meetings, in: *European Accounting Review*, 27(3), 495-525. (ABS: 3)
- Mack, S. & Goretzki, L. (2017): How management accountants exert influence on managers – A micro-level analysis of management accountants' influence tactics in budgetary control meetings, in: *Qualitative Research in Accounting & Management*, 14(3), 328-362. [Outstanding paper award] (ABS: 2; ABDC: A)
- Goretzki, L. & Messner, M. (2016): Coordination under uncertainty: A sensemaking perspective on cross-functional planning meetings, in: *Qualitative Research in Accounting & Management*, 13(1), 92-126. [Highly commended paper award] (ABS: 2; ABDC: A)
- Goretzki, L., Strauss, E. & Weber, J. (2013): An institutional perspective on the changes in management accountants' professional role, in: *Management Accounting Research*, 24(1), 41-63. (ABS: 3)
- Goretzki, L. (2013): Management accounting and the construction of the legitimate manager, in: *Journal of Management Control*, 23(4), 319-344. (ABDC: A)

EDITED BOOKS

- Goretzki, L. & Strauss, E. (Eds.): The role of the management accountant – Local variations and global influences, Routledge, 2017

BOOKS

- Weber, J., Schäffer, U., Goretzki, L & Strauß, E. (2012): Zukunftsthemen des Controllings, Schriftenreihe Advanced Controlling Band 82

BOOK CHAPTERS

- Goretzki, L., Messner, M. & Strauss, E. (2017): Every light has its shadow: Some reflections on the 'business partner' role, in: Goretzki, L. & Strauss, E.: The Role of the Management Accountant: Local Variations and Global Influences, Routledge, pp. 262 - 273
- Goretzki, L. (2015): Controllings in der Unternehmenspraxis, in: Becker, Wolfgang / Ulrich, Patrick: Praxishandbuch Controlling, 79-95, Springer

PUBLICATIONS IN PRACTICE-ORIENTED JOURNALS

- Goretzki, L., & Pfister, J. A. (2023). Productivity measures in performance evaluations.. *Strategic Finance*, 104(12), 17-18.
- Goretzki, L. & Wiegmann, L. (2022): Glaubwürdigkeit signalisieren, in: *Zeitschrift für Controlling*, 34 (4), 4-10. [Best Paper Award 2022 in the Category "Research"]
- Goretzki, L. & Kalle, K. (2020): Balancing diagnostic and interactive control systems; in: Carlsson-Wall, Martin et al. Sweden through the Crisis. First edition. Stockholm: Stockholm School of Economics Institute for Research, 2020
- Becker, S. & Goretzki, L. (2015): Unsicherheiten effizient managen, in: *Controlling & Management Review*, Sonderheft 1, 32-37
- Goretzki, L. & Messner, M. (2014): Business Partnering in der Praxis umsetzen, in: *Controlling & Management Review*, 58(2), 8-15
- Schäffer, U., Goretzki, L. & Meyer, T. (2012): Beteiligung des Controllings an der strategischen Planung – Ergebnisse der WHU-Zukunftsstudie, in: *Zeitschrift für Controlling & Management*, 55(4), 312-318
- Weber, J., Goretzki, L. & Meyer, T. (2012): Nachhaltigkeit als neues Aufgabenfeld für Controller – Ergebnisse der WHU-Zukunftsstudie, in: *Zeitschrift für Controlling & Management*, 55(3), 242-248
- Goretzki, L. (2012): Rollenwandel der Controller zum Business Partner – Erkenntnisse aus der qualitativen Controllerforschung, in: *Zeitschrift für Controlling & Management*, 55(1), 64-66
- Goretzki, L., Weber, J. (2012): Die Zukunft des Business Partners – Ergebnisse einer empirischen Studie zur Zukunft des Controllings, in: *Zeitschrift für Controlling & Management*, 55(1), 22-29
- Goretzki, L., Weber, J. (2010): Der Wandel der Controller – Eine rollentheoretische Betrachtung am Beispiel der Hansgrohe AG, in: *Zeitschrift für Controlling & Management*, 54(3), 163-169
- Goretzki, L., Weber, J. & Zubler, S. (2010): Die Rollen der Controller, in: *Controller Magazin*, Heft 2, 56-62
- Weber, J., Goretzki, L. & Zubler, S. (2010): Welche Erkenntnisse kann die empirische Controllingforschung zum Erfolg des Controllings beitragen? In: *Controlling – Zeitschrift für erfolgsorientierte Unternehmenssteuerung*, 22, 322-329

- Eitelwein, O. & Goretzki, L. (2010): Carbon Controlling und Accounting erfolgreich implementieren – Status Quo und Ausblick, in: Zeitschrift für Controlling & Management, 54(1), 23-31
- Nevries, P., Strauß, E. & Goretzki, L. (2009): Zentrale Gestaltungsgrößen der operativen Planung, in: Zeitschrift für Controlling & Management, 53, 237-241

PLENARY SPEECHES AND PANEL SESSIONS AT CONFERENCES AND WORKSHOPS

- Keynote and editors' panel at the Irish Accounting and Finance Association Conference, Galway (06/2023)
- Keynote at Monforma conference, Monash University (11/2022)
- Editors' panel at the AFAANZ QualRAN workshop (07/2021)
- Keynote at the MARG Conference, Birmingham (11/2018)
- Plenary presentation at the CEROC Research Day, University of Örebro (04/2018)

PRESENTATIONS AT RESEARCH COLLOQUIA, INTERNATIONAL CONFERENCES (WITHOUT PRESENTATIONS BY CO-AUTHORS) AND INVITED SEMINAR PRESENTATIONS

- HEC Paris, invited research seminar at the Department of Accounting & Control (10/2023)
- Concordia University, invited research seminar at the Department of Accountancy (05/2023)
- ESSEC Business School, Paris, invited research seminar at the Accounting & Management Control Department (03/2023)
- Kristianstad University, invited research seminar of the GRIP research environment (10/2022)
- HEC Montréal, invited research seminar at the Department of Accounting (12/2021)
- Royal Melbourne Institute of Technology (RMIT), invited research seminar at the Department of Accounting (10/2021)
- Kristianstad University, invited research seminar of the GRIP research environment (10/2021)
- 13th Interdisciplinary Perspectives on Accounting Conference 2021, University of Innsbruck (07/2021)
- University of Innsbruck, invited research seminar presentation at the Centre for Accounting Theory and Research at Faculty of Business and Management (06/2021)
- Nord University, invited research seminar presentation at HybridArt & MACE (02/2021)
- ESCP Paris, invited research seminar presentation at the Department of Accounting (11/2020)
- Cardiff University, invited research seminar presentation at the Department of Accounting and Finance (05/2020)
- University of Bristol, invited research seminar presentation at the Department of Accounting and Finance (05/2020)
- Turku School of Economics, invited research seminar presentation at the Department of Accounting and Finance (11/2019)
- The University of Sydney, invited research seminar presentation and workshop at the Discipline of Accounting (09/2019)
- 11th Conference on New Directions in Management Accounting, Brussels (12/2018)
- Copenhagen Business School (CBS), invited research seminar presentation at the Department of Accounting (09/2018)
- 41st European Accounting Association (EAA) Annual Congress, Milan (05/2018)
- 11th Workshop on Management Accounting as Social and Organizational Practice (MASOP), Copenhagen (04/2018)

- 15th Annual Conference for Management Accounting Research (ACMAR), Vallendar (03/2018)
- University of Groningen, invited research seminar presentation at the Department of Accounting (09/2017)
- WHU – Otto Beisheim School of Management, research seminar at the Institute of Management Accounting & Control (09/2017)
- 11th European Network for Research on Organisational and Accounting Change (ENROAC) Conference, Naples (06/2017)
- Stockholm School of Economics, invited research seminar presentation at the Department of Accounting (04/2017)
- 10th Conference on New Directions in Management Accounting, Brussels (12/2016)
- 32nd EGOS Colloquium, Naples (07/2016)
- Turku School of Economics, invited research seminar presentation at the Department of Accounting and Finance (05/2016)
- Workshop on Institutions & Conventions, Innsbruck (04/2016)
- 9th Workshop on Management Accounting as Social and Organizational Practice (MASOP), Innsbruck (04/2016)
- 13th Annual Conference for Management Accounting Research (ACMAR), Vallendar (03/2016)
- 10th European Network for Research on Organisational and Accounting Change (ENROAC) Conference, Galway (06/2015)
- 7th Workshop on Management Accounting as Social and Organizational Practice (MASOP), Paris (05/2015)
- NHH Bergen, invited research seminar presentation at the Department of Accounting, Auditing and Law (06/2014)
- 11th Annual Conference for Management Accounting Research (ACMAR), Vallendar (03/2013)
- 7th Workshop on Management Accounting as Social and Organizational Practice (MASOP), Paris (05/2015)
- 6th Workshop on Management Accounting as Social and Organizational Practice (MASOP), Copenhagen (04/2013)
- 10th Annual Conference for Management Accounting Research (ACMAR), Vallendar (03/2013)
- HEC Lausanne, invited research seminar at the department of accounting (02/2013)
- 8th European Network for Research on Organisational and Accounting Change (ENROAC) Conference, Lisbon (06/2011)
- 26th European Accounting Association (EAA) Doctoral Colloquium, Istanbul (05/2011)
- 5th European Network for Research on Organisational and Accounting Change (ENROAC) Doctoral Summer School, Siena (06/2010)
- 3rd Workshop on Management Accounting as Social and Organizational Practice (MASOP), Copenhagen (04/2010)
- 7th Annual Conference for Management Accounting Research (ACMAR), Vallendar (03/2010)

AWARDS / RECOGNITIONS

- Best Paper Award 2022 in the category “research” of the *Zeitschrift für Controlling* for the practitioner-oriented article “Glaubwürdigkeit signalisieren” (*Zeitschrift für Controlling*, 34 (4), 4-10), together with Leona Wiegmann
- Best Reviewer Award 2015, *Journal of Management Control*
- Certificate for the paper entitled “An institutional perspective on the changes in management accountants' professional role” (2013) for being one of the 5 most highly cited papers in the journal *Management Accounting Research (MAR)* during 2014, 2015 and up until June 2016
- Highly commended paper award for: Goretzki, L. & Messner, M. (2016): Coordination under uncertainty: A sensemaking perspective on cross-functional planning meetings, in: *Qualitative Research in Accounting & Management*, Vol. 13, Issue 1, 92 – 126.
- Outstanding paper award for: Mack, S. & Goretzki, L. (2017): How management accountants exert influence on managers – A micro-level analysis of management accountants' influence tactics in budgetary control meetings, in: *Qualitative Research in Accounting & Management*, Vol. 14, Issue 3, pp. 328-362. [Outstanding paper award]
- Recognition by the University of Innsbruck Vice-Rector for Student Affairs and Teaching for teaching quality (based on student evaluations) in the summer term 2018 and winter term 2018/2019
- Outstanding Reviewer Award, 2020 Management Accounting Section Midyear Meeting of the American Accounting Association
- MSc Teacher of the Year 2020 at the Stockholm School of Economics
- Excellence in Reviewing Recognition by the journal *European Accounting Review (EAR)* in 2020

RESEARCH GRANTS

- Research funding for emerging scholars from the University of Innsbruck for the research project “Construction of professional roles as institutional work” (2013)
- Industry research funding for the research project “Innovation in the controller function” (2012)
- D. Swarovski KG research funding (via the University of Innsbruck) for the research project “The digitalization of management accounting and control” (2017)

AD-HOC REVIEWER FOR

- Accounting and Business Research
- Accounting Forum
- Accounting, Auditing & Accountability Journal
- Accounting, Organizations and Society
- British Accounting Review
- Contemporary Accounting Research
- Critical Perspectives on Accounting
- European Accounting Review
- Financial Accountability & Management Journal
- Journal of Applied Accounting Research
- Journal of Business Ethics
- Journal of Management Accounting Research
- Journal of Management Control
- Journal of Public Budgeting, Accounting & Financial Management
- Management Accounting Research

- Management Review Quarterly
- Qualitative Research in Accounting & Management
- Review of Managerial Science

CORPORATE ENGAGEMENT / PRESENTATIONS AT PRACTITIONER CONFERENCES

- Accountants Group in Germany Seminar, Frankfurt (05/2023)
- Dagens Industri Controller Konferens, Stockholm (03/2023)
- Initiator and co-organizer of the "Controlling Round Table" (annual workshop for finance and accounting professionals at the University of Innsbruck), 2013 – 2018 (together with Martin Messner)
- Co-organizer of the "Junior Controller Network" (workshop for junior controllers at the University of Innsbruck), January 2018 (together with Martin Messner)
- Agenda CFO, Stockholm (11/2018)
- Dagens Industri Controller Konferens, Stockholm (03/2019)
- Controllerdagen Luleå, Luleå (05/2019)
- Hypergene breakfast seminar, Stockholm (06/2019)
- Dagens Industri Redovisningsdagen, Stockholm (10/2019)
- ACE CFO Forum, SSE (11/2019)
- AI and Digitalization in Norrbotten, Luleå (11/2019)
- Hypergene breakfast seminar, Stockholm (09/2020)
- Controller 2020 Konferens, Stockholm (10/2020)
- ACE CFO Forum, SSE (11/2021)
- GIVA inspirational seminar, Stockholm (01/2022)
- Insamlingsforum, Stockholm (04/2022)

ADMINISTRATION, STOCKHOLM SCHOOL OF ECONOMICS

- Co-Program Director of the MSc in Accounting, Valuation & Financial Management (02/2018 – 01/2020)
- Director of Research (Management Accounting & Control), Department of Accounting, Stockholm School of Economics (since 09/2019)
- PhD student coordinator at the Department of Accounting (01/2020 – 12/2023)
- Research assistant coordinator at the Department of Accounting (since 08/2021)
- Director of FIRE (Research School in Accounting) (03/2022 – 05/2023)
- Member of the Tenure Review Committee (since 01/2023)
- Member of the Faculty and Program Board as faculty representative (since 03/2023)
- SSE PRME Director (since 01/2024)

ADMINISTRATION, UNIVERSITY OF INNSBRUCK

- Alternate member of the University of Innsbruck, School of Management Faculty Council (2014 – 2016)
- Member of the University of Innsbruck, School of Management Faculty Council (2016 – 2017)
- Alternate member of the University of Innsbruck, School of Management Faculty Council (02/ 2017 – 01/2018)
- Alternate member of the University of Innsbruck, School of Management Curriculum Development Committee (2014 - 2016)
- Member of the University of Innsbruck, School of Management Curriculum Development Committee (summer term 2016 – summer term 2017)
- Alternate member in a habilitation committee, University of Innsbruck, School of Management (2017)

- Organization of the research colloquium, research centre “Accounting Theory and Research”, Innsbruck University (06/2017 – 01/2018)

COURSES TAUGHT

University of Innsbruck

- Functionalist and interpretive perspectives on accounting (Diploma); Winter term 2010 (course director)
- Management accounting (Master); Winter term 2012/2013, 2013/2014, 2014/15, 2015/2016, 2016/2017, 2017/2018 (course director)
- Management control across industries (Master); Summer term 2013 (course director), 2014 (course director), 2015 (course director), 2016 (course director), 2017 (course director), 2018 (course director), 2019 (course director)
- Qualitative research methods (Master); Winter term 2012/2013, 2013/2014, 2014/15, 2015/2016, 2016/2017, 2017/2018 (course director)
- Research colloquium for master thesis (Master); Summer term 2016 (course director), 2017 (course director)
- Understanding and designing management control systems (Master); Winter term 2012/2013, 2013/2014, 2014/15, 2015/2016, 2016/2017, 2017/2018 (course director)

University of Siegen

- Introduction to qualitative business and accounting research (PhD); Summer term 2015 (course director)

University of Luxembourg

- Introduction to qualitative accounting research (Master); Summer term 2017; Winter term 2017; Winter term 2018; Winter term 2019, Winter term 2020

WHU – Otto Beisheim School of Management

- Introduction to Qualitative Research in Accounting & Management (PhD), Spring 2023

Stockholm School of Economics

- Accounting and Financial Control for New Business Venture (Master program in Accounting, Valuation & Financial Management), 1317/1326 (Master); Fall 2018; Fall 2019; Fall 2020 (course director)
- Business Performance Diploma (ExEd); Module on controller roles, Fall 2020, 2022; Spring 2023
- AtlasCopco Grow (ExEd), Module on controller roles, Spring 2023
- CFO Challenges in Multinational Companies (Master program in Accounting, Valuation & Financial Management), 3306 (Master); Spring 2018, Spring 2019 (course director)
- Current Issues in Accounting & Financial Management (Master program in Accounting, Valuation & Financial Management), 3308 (Master); Spring 2020, Spring 2021
- Digitalization and Accounting (PhD); Spring 2020
- Strategic Management Control, 3302 (Master program in Accounting, Valuation & Financial Management); Fall 2019; Fall 2022; Fall 2023
- Management Accounting & Control, 1326 (Master program in Business & Management), Fall 2021, Fall 2022, Fall 2023

- Thesis in Accounting & Financial Management, 3350 (Master); Spring 2020 (course director), Fall 2020 (course director), Spring 2021 (course director), Fall 2021 (course director), Spring 2022 (course director), Fall 2022, Spring 2023, Fall 2023
- Fundamentals of Qualitative Research, PhD 309 (PhD); Fall 2022, Fall 2023 (course director)

PHD SUPERVISION

- Ongoing
 - Anastasiya Klyuchko, SSE (since 2019); Co-Supervisor
 - Isabella Nordlund, SSE (since 08/2021); Main supervisor
 - Yao Cai, SSE (since 08/2021); Main supervisor
 - Fanny Almersson, SSE (since 03/2023); Co-Supervisor
 - Oliver Parbratt Lindqvist, SSE (since 03/2023); Co-Supervisor
 - Saman Amir, SSE (since 02/2023); Co-Supervisor
 - Sharon Cotter, University of Galway (since 04/2023); Co-Supervisor
- Completed
 - Kai Krauss, SSE (2018 – 2021); Co-Supervisor
 - Ilenia Ascani, Università Politecnica delle Marche (2018 – 2020); Co-Supervisor

MEMBERSHIPS

- European Accounting Association (EAA)
- Member of the German Association of University Professors and Lecturers [*Verband der Hochschullehrer für Betriebswirtschaft e.V. (VHB)*]