

From ‘matters of concern’ to ‘matters of authority’: Studying the performativity of strategy from a communicative constitution of organization (CCO) approach

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### **Abstract**

Anchored in a ‘communication as constitutive of organization’ approach, this article aims to develop a theoretical framework for understanding the performativity of strategy through an organizational lens. We define the performativity of any form of knowledge as a communicational praxis, involving theories or ideas, actors and texts, through which *matter of concerns* become *matters of authority*. More specifically, our framework shows that for *matters of concern* to become *matters of authority* the three following communicational practices have to be articulated: (1) voicing and collectively negotiating matters of concern, (2) transporting and materializing matters of concern through texts, and (3) recognizing matters of concern as legitimate (i.e. authorized and authored). In order to illustrate these practices we draw on the empirical material taken from a strategic planning process in a community-based organization. Through these illustrations we show that strategy, as a particular and situated form of knowledge, can act as a matter of concern (it can be voiced, negotiated, transported and recognized as legitimate, or not) and as a matter of authority; thus authorizing and authoring actors, their tools and statements. It is also through these practices that strategy gains authority and is granted social reality.

*Keywords: performativity, strategy, communicative constitution of organization (CCO) approach, matters of concerns, matters of authority.*

**From ‘matters of concern’ to ‘matters of authority’:****Studying the performativity of strategy from a communicative constitution of organization (CCO) approach**

The seemingly paradoxical idea that sciences contribute to the enactment of the realities they describe has been at the heart of the so-called performativity program, developed mainly in economic sociology over the past twenty years by Callon and colleagues (Callon 1998; MacKenzie et al., 2007; see also Muniesa, 2014). At the heart of this program lies the proposal that “economic relations are not to be taken as given, but as performed by economic practices” and “that economics brings into being the relationships it describes” (MacKenzie 2004: 303; see also Cabantous & Gond, 2011: 578). In past years, the notion of performativity has moved from the sociology of finance to organization studies (e.g., D’Adderio, 2008; Doganova & Eyquem-Renault, 2009; Cabantous, Gond, & Johnson-Cramer, 2010). Yet, despite the growing adoption of a performative lens, this field of study has not fully benefited from the heuristic value of performativity. Indeed, as Gond et al., (2015) noted, the current lack of distinctive organizational conceptualizations of performativity hinders attempts to develop a rich explanation of the ways organizational knowledge and knowhow performs organizations.

This under-theorizing of performativity from an organizational standpoint is particularly salient in the field of strategy (Guérard et al., 2013). While recent decades have witnessed a growing interest in defining strategy as a performance, i.e., as something people *do* – leading to what is now known as the strategy-as-practice perspective (hereafter SAP; for an overview, see Vaara & Whittington, 2012) –, the idea that strategy as a form of knowledge performs the practices that, in turn, enact strategy has, surprisingly, not been investigated by these scholars (a notable exception is Kornberger and Clegg’s, 2011 study of strategizing as a performative

practice<sup>i</sup>). Yet, we believe much can be gained by looking at the practice of strategy through a performativity lens.

First, performativity has proven to generate long-standing ideas and breakthrough contributions in other fields, such as philosophy, sociology and gender studies, prompting some scholars to call for a “performative turn” in organization studies (Gond et al., 2015: 2). Second, some of key assumptions of the performativity program align well with those of SAP, setting bases for a fruitful dialogue: the non-representational view of discourse, the pragmatic understanding of action, and the recognition of both social and material dimensions of practices (Gond et al., 2015; Vaara & Whittington, 2012). Finally, the main heuristic value of the concept of performativity is that it directs attention towards both the practices that constitute a particular form of knowledge (e.g., strategy), and the latter’s effects on practices (Kornberger & Clegg, 2011). If the SAP literature has, to this day, mainly focused on describing and theorizing practices, understanding the recursive relation between strategy (as a body of knowledge) and practices of strategizing is a key step for developing cumulative knowledge in SAP (Langley, 2015).

Taking these considerations into account, we propose to study the performativity of strategy by adopting a communicative constitution of organization approach (hereafter CCO; for an overview, see Brummans et al., 2014), and more specifically, that of the Montreal School of organizational communication (hereafter TMS; see, e.g., Cooren et al., 2006; Robichaud & Cooren, 2013). Influenced by Austin’s (1962) and Searle’s (1969) speech-act theory, Latour’s (2005) sociology of translation and Derrida’s (1988) post-structural philosophy, the main premise driving TMS investigations is that communication has organizing properties and that these properties are the basis of its constitutive force (Cooren, 2000).

Building on this assumption, the proponents of TMS argue that organizations are performed in and through communication. In other words, communication is the means by which organizations are talked, written, and acted into existence (Cooren, 2006). Applied to the study of the performativity of strategy, this performative view of (organizational) communication invites scholars to inquire as to the ways strategy knowledge and strategy practices are recursively at play in communication (Cooren et al., 2015). Also, this communicational lens emphasizes the empirical study of communication events<sup>ii</sup> by focusing on what the actors perform when communicating, how they perform it, and the consequences of those performances (c.f., Cooren et al., 2011; see also Schoeneborn & Vásquez, forthcoming).

Building on these standpoints, this article aims to develop a theoretical framework for understanding how the performativity of strategy plays out in and through communication. We suggest that the performativity of strategy (and, by extension, that any other form of organizational knowledge) stands to be understood as a communicational praxis through which *matters of concern* become *matters of authority*. We define *matters of concern* as what drive participants to defend or evaluate a position, account for or disalign with an action, or justify or oppose an objective (Cooren et al., 2015). *Matters of authority*, in turn, express the extent to which what is being voiced and negotiated as matters of concern come to legitimize (i.e., authorize/author) certain courses of actions to the detriment of others. More precisely, we reveal the mechanisms by which matters of concern become matters of authority, that is, the way by which a matter of concern raised by someone at some point ends up co-authoring or co-dictating what the whole group will propose.

As Cabantous and Gond (2011) discussed, any performative praxis involves theories, ideas, actors, and tools that are progressively linked together to bring into being and maintain the

given praxis. As we will show in the following sections, by approaching performativity from a CCO approach, our theoretical framework specifies, and therefore extends, Cabantous and Gond's (2011) general definition of performative praxis in two ways: First, by delving into the communication events through which ideas, actors and tools (and more specifically texts) constitute this praxis and, second, by focusing on the transformation of *matters of concern* into *matters of authority* as one of its central drivers.

Moreover, our framework shows that for *matters of concern* to become *matters of authority* the three following communicational practices have to occur: (1) voicing and collectively negotiating matters of concern, (2) transporting and materializing matters of concern through texts, and (3) recognizing matters of concern as legitimate (i.e. authorized and authored). In these practices, strategy, as a particular and situated form of knowledge, can act as a matter of concern (it can be voiced, negotiated, transported and recognized as legitimate, or not) and as a matter of authority, thus authorizing and authoring actors, their tools and their statements. It is also through these practices that strategy gains authority and is granted social reality.

In what follows, we will first discuss the notions of communication, matters of concern and matters of authority, which are at the heart of the CCO approach to performativity we propose. Second, we will review the SAP and (emergent) performativity literature in organization studies to outline the key elements of strategy as a communicational praxis: (strategy) actors, (strategy) theories and (strategy) texts. Third, we will specify the three communicational practices that characterize the performativity of strategy and illustrate them with empirical material taken from a strategic planning process in a community-based organization. Finally, we will discuss the main findings of our study and conclude with the contributions of our theoretical framework.

### **Performativity understood from a CCO approach**

While performativity can be conceptualized in a variety of ways (see Gond et al., 2015), organization studies scholars have mainly borrowed definitions from foundational perspectives on performativity (e.g., Austin, 1962; Butler, 1999; or Lyotard, 1984 [1979]). The CCO approach we adopt in this article is one of the few to have contributed to generating a specific organizational perspective on performativity by considering the constitutive force of (organizational) communication (Cooren et al., 2006; see also, Gond et al., 2015).

In a chapter recently published in the second edition of the *Cambridge Handbook of Strategy-as-Practice*, Cooren et al. (2015) developed a CCO framework to study strategy-making. Viewing strategy as a communicative accomplishment, the authors laid out three propositions that summarize CCO scholarship: (1) always start from communication as the motto of every inquiry; (2) take a relational definition of communication that accounts for the embodied nature of practices; and (3) acknowledge the different modes of communication, besides writing and speaking, that constitute strategy and strategy-making (p. 365).

Following these guidelines, Cooren and his colleagues (2015) defined communication as “*the establishment of a link, connection or relationship through something*” (Cooren, 2000, p. 367, emphasis in the original). By focusing on the connection or relationship, this definition allows broadening the range of actors that partake in communication processes. Hence, communication is not only about human beings conversing with each other, it is *also*, for instance, about documents or situations telling people what to do (Cooren, 2004; Kuhn, 2008; Sergi, 2013), architectural elements conveying a specific feeling, order or identity (Kuhn & Burk, 2014), principles, values or norms dictating specific courses of action (Cooren, 2010), or even organizations making, through their spokespersons or spokesobjects, various forms of declaration (Taylor & Van Every, 2000; Vasquez & Cooren, 2011). In other words, all kind of things –

feelings, concerns, principles, collectives, texts, interests, artefacts, etc. – can be said to *literally* and *figuratively* participate in communication events.

We propose to extend this line of thinking to consider how strategy (as one of those ‘things’) literally and figuratively *invites itself* into a particular situation through communication. Echoing the key principle of the performativity program – i.e., any form of knowledge, such as strategy, circulates through the sociomaterial assemblages that compose it (Muniesa, 2014) –, we posit that elements of this assemblage (e.g., practitioners, principles, documents or renown authors) make a difference in a given action or conversation to the extent that they appear to also *express themselves* in what is happening. From this perspective, analyzing the performativity of strategy amounts to showing how it embodies or expresses itself in many ways, but also how these various forms of embodiment display performativity in a given situation. As a form of knowledge, strategy can be considered to be performative to the extent that some of its elements will, for instance, be invoked, convoked or evoked – that is, literally *given a voice* in a discussion or conversation.

As mentioned, we contend that a productive way to show this communicative dynamic consists in exploring the passage from *matters of concern* to *matters of authority*. By definition, matters of concern convey the idea that there are *things* that matter to or interest people (Cooren et al., 2012; Latour, 2014). If they matter to or interest them, it also means that they are the objects of a specific attachment on their part (Gomart & Hennion, 1999); attachments that can be heard and felt when people communicate with each other. Hence, following Cooren et al. (2015), we define *matters of concern* as what drive participants to defend or evaluate a position, account for or disalign from an action, or justify or oppose an objective.

To illustrate what we mean here, imagine a scene where managers are brainstorming the elements of a strategic plan. One of them, Sandy, says, “I believe it’s key we develop this new

line of products if we want to enter Southeast Asian markets.” A way to analyze this turn of talk from a CCO viewpoint would consist of noticing that a specific matter of concern expresses itself when Sandy voices this opinion: she is voicing a concern – entering Southeast Asian markets – that, according to her, will have some bearing on the success of their strategic plan, and ultimately on their company.

This example shows that a matter of concern always is *both* a matter *and* a concern. It is a *matter* because Sandy is explicitly referring to a concrete action – entering new markets – and it is a *concern* (for her) because this specific action has, according to her, to be attended to. But what is even more noteworthy is that Sandy presents this matter of concern as *dictating* a specific course of action, namely the development of a new line of products, for the organization. In her opinion, the success of her company thus literally *calls for* the acknowledgment of this category of potential consumers.

When people communicate with each other, we can thus analyze their discussions by noticing that *it is also matters of concern that express themselves* through them. In other words, human participants are not only actors of their own talk, but also *passers* (Cooren, 2010; Cooren & Sanders, 2014), that is, intermediaries, media, or in-betweens, through whom specific matters of concern (or interest) express themselves. During a strategy meeting, we will not only hear what participants have to say, we will also hear and even feel what appears to *matter to each of these people*, that is, what (they believe) their team needs to take into account when collectively deciding on courses of action. Said differently, participants need to show that *their matters matter* not only for them, but also for their interlocutors and their organization.

However, only some matters of concern end up mattering more, as certain matters become privileged over others that become inevitably marginalized. These former matters become what we call *matters of authority*, as they end up authoring or dictating the course of action that will

eventually be followed by the organization. It is in this passage from *matters of concern* to *matters of authority* that, we argue, the link with performativity is operationalized. For instance, going back to our example, other top managers could question Sandy's concern by arguing that what matters to the company at this point is to consolidate what has been achieved so far. Others could, on the contrary, side with her viewpoint, *making her concern, theirs* for various reasons. What we then see as analysts is a discussion where specific concerns or interests end up *speaking or not* to other concerns or interests and, by doing so, *gaining authority*.

Moreover, when *matters of concerns* become *matters of authority*, they also become *matters of authoring*. As noted by Taylor and Van Every (2000, 2011, 2014), the words authority and authoring share the same Latin root: *auctor*. Being authorized by someone or something means that we share a form of *authorship* with this person or thing. These persons or things – and this is a central point in our argument about performativity – become *co-authors* of our actions and decisions, since they also express themselves through what we communicate. This idea also comes from the etymology of the word *auctor*, which itself comes from the Latin word *augere*, which means to augment (Cooren, 2010). Multiplying the numbers or strength of authors, which is what we do when we invoke sources of authority, consists of augmenting the authorship (and therefore the authority) of what we say or do. In the same way, augmenting the authorship/authority of some matters of concern creates what Kuhn (2008) calls an *authoritative text*, a text that can develop a 'dominant reading' shaping future conversations, orienting and disciplining organizational members actions, as well as creating the conditions of collective agency (see also Koschmann, 2012; Koschmann et al., 2012).

In our example, entering Southeast Asian markets thus becomes a matter of authority if this concern ends up being implicitly or explicitly positioned as what *authors* or *dictates*, among other things, the course of action that will be proposed in and by the strategic plan. It is indeed *in*

*the name* of this objective that several decisions will then be justified and therefore authorized.

What interest us are precisely the mechanisms by which this selection of specific matters of concern takes place, that is, the way by which a matter of concern raised by someone at some point ends up co-authoring or co-dictating what the whole group will propose.

Table 1 summarizes the key concepts of our CCO perspective to performativity.

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Insert Table 1 about here

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Following this conceptual foundation, we will now engage more specifically with the idea of the performativity of strategy as a communicational praxis. To do so, in the next section we put in dialogue Gond and Cabantous' (2011) performative praxis model with two frameworks stemming from the SAP literature: Whittington's (2006) three P's model (practitioner, practices and praxis), and Langley and Lusiani's (2015) strategic planning model. This will allow us to put forth what we consider to be the three key elements for studying the performativity of strategy from a CCO standpoint: (strategy) actors, (strategy) theories and (strategy) texts.

### **Strategy as a communicational praxis**

Cabantous and Gond (2011) developed a model for understanding the performative dimension of theories by proposing the term 'performative praxis'. Their model articulated three elements: theory, actors and tools, which they identified as the building blocks of any performative praxis. Cabantous and Gond's model places theory as a key element of actors' practices, which in turn express themselves through actors' activities and tools. For Cabantous and Gond, it is via three processes – conventionalizing, engineering and commodifying – that praxis contributes to making 'real' a theory, a 'realization' that is supported by material tools and embodied

knowledge. While they developed this model to understand rational decision-making, the parallels and complementarity with the SAP literature open an interesting avenue to explore the performativity of strategy.

Indeed, Cabantous and Gond's (2011) model shares various similarities with Whittington's (2003, 2006) tripartite framework of SAP. In this framework, Whittington (2006) highlighted and articulated three key elements for understanding strategy as a performance: what people do in practice (*praxis*), shared routines of behaviour that guide the activity (*practices*), and organizational actors that execute these activities (*practitioners*). Without developing *in extenso* this framework (for a critical overview see, Jarzabkowski et al, 2007), we would like to highlight one main idea: its emphasis on practitioners as the nexus through which strategy is performed.

As Whittington (2006) argued, by engaging in praxis – all the various activities involved in the deliberate formulation and implementation of strategy – practitioners draw on shared practices and, in doing so, they enact them. In other words, “[practitioners] shape strategic activities through *who* they are, *how* they act, *what* practices they draw upon in that action.” (Jarzabkowski et al., 2007: 10, emphasis in the original). However, we must note that this same emphasis on practitioners has led SAP scholarship to privilege the study of *who* the practitioners are and *what* they do, and to overlook the contribution of key strategic elements, including texts and other strategic tools, that nonetheless actively take part in these activities.

Langley and Lusiani (2015) proposed a step in documenting this contribution by defining strategy planning as an archetypal strategy tool, mainly consisting of the production of a series of texts that orient strategic intent. Their model distinguished three practices: textual, production and consumption. Briefly put, the first concerns the textual expression of strategic planning: strategy texts are seen as constituting a particular ‘genre’ of communication that has central, recognizable and institutionalized characteristics as well as a recurrent patterns of usage (see also,

Cornut et al., 2012; Pälli et al., 2009). In a similar vein, Vaara et al. (2010) outlined five defining characteristics of the strategy genre: self-authorization (the emphasis on strategy's importance), the use of a special terminology (the strategy concepts), the presence of discursive innovation (statements that identify priorities), forced consensus (the need for unanimity and alignment) and deonticity (the presence of statements that create actions as necessary and obligatory for the future). For Vaara et al., these characteristics and the fact that strategy texts permeate the work of strategy explains the agency of texts in the practice of strategizing.

Production practices concern the practices through which textual expressions of strategy are created. They highlight the collective nature of writing strategy texts and invite attention to the negotiations it entails – who gets to participate, what to include, what form the text should have, etc. (Mantere & Vaara, 2008). Focusing on production practices also allows for considering the power issues related to the writing of strategy. For example, Eriksson and Lehtimäki (2001) showed the rhetorical and political dimensions involved in the production of strategy texts and how these are manifested through the use of language practices of dominant strategy models. Strategy rhetoric is, as they argued, a key resource that strategy practitioners draw on to convince and persuade their audience of the strategy-ness of their arguments and actions.

As for consumption practices, they refer to *how* strategy texts are mobilized, potentially influencing organizational action. These practices focus on the affordances and ambiguity of strategy texts, and on their modes of appropriation and interpretation (c.f., Abdallah & Langley, 2014). Lundgren and Blom (2015) suggest the term 'strategic recursiveness' to explore the role of texts as influential objects in strategizing. Similar to the idea we put forth concerning the dynamic of authority/authorization/authoring that is at work in the passage of matters of concerns to matters of authority, the authors argue that, when mobilised in practice, texts legitimate certain courses of action and delimit future action and avenues for strategic change. Over time, these

effects become recursive as the text is reproduced in other documents and further consumed.

Spee and Jarzabkowski (2011) also account for the circulation of texts, by drawing on the Montreal School's CCO approach and more specifically on the recursive dynamic between talk and text. They focus specifically on the ways that texts are constructed and mobilised through interaction, and how the strategic plan is created through this recursive process of decontextualization and recontextualization.

The different studies on the textual production and consumption practices outlined above offer an interesting avenue for understanding strategy (and more specifically strategic planning) as a practice that is guided, shaped and transformed by the production of texts. They all share an interest for language (in its textual or conversational form) and highlight different dimensions (rhetorical, metaphorical, genre) in order to explain the performative role of texts. However, none of these studies explicitly address the performativity of strategy, understood as a body of knowledge. In this sense, and as most of the SAP literature, these studies focus more on the performance of strategy through practices (in this case related to texts) than on its performativity. Moreover, and even if these studies take a communicational lens by focusing on texts, the definition of communication that underlines these studies seems to be reduced to language and human interaction. It is on these understudied elements that our study sheds light.

By combining the two major orientations in the SAP literature that engage with practitioners, their activities and their practices (Whittington, 2006), as well as texts – considered here as an archetypal tool in the practice of strategy (Langley and Lusiani, 2015) – with Cabantous and Gond's (2011) 'performative praxis' model, we propose the following key elements and ideas (see Table 2) for understanding strategy as a communicational praxis.

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Insert Table 2 about here

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To summarize, in the previous sections we have outlined the main premises and concepts of a CCO approach to performativity. We also have identified three key elements for studying the performativity of strategy (actors, theories and texts). In what follows, we will further refine our theoretical framework by applying it to the analysis of a strategic planning process of a non-profit community organization. To do so, we will first briefly present the empirical setting and the research methods used for this case study. We will then present and illustrate the three communicational practices that emerged from this analysis and that, we argue, are key practices for understanding the performativity of strategy from a CCO approach.

### **Empirical setting and methods**

#### ***Empirical setting***

This article focuses on the strategic planning process of a non-profit community organization, the Housing Education and Information Association (hereafter HEIA<sup>iii</sup>), whose mission is to defend the rights of tenants in a multicultural, underprivileged and densely-populated neighbourhood of Montreal. HEIA is a small organization that counts no more than four full-time employees, along with a handful of law and social work interns and volunteers of all backgrounds, with a total budget of just over \$150,000. Its main funder is the Gauthier Foundation, a Montréal-based philanthropic organization.

Responding to the organization's invitation, three of the authors of this article (Nicolas, Consuelo and Viviane) participated both as facilitators and researchers in this strategic planning process. The three researchers and HEIA's assistant director (Diane) formed the strategic team in charge of guiding the process and ultimately writing the strategic plan. It should be noted that

none of the members of the team had been trained in strategy, the researchers expertise is related to organizational communication and organization studies, while HEIA's assistant director was trained as a journalist. This endeavour was funded by a small grant from a government agency responsible for community organizations, the Agency for Community Action (ACA). Figure 1 presents the timeline of the process, and summarizes its key moments.

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Insert Figure 1 about here

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Despite the fact that HEIA can be seen as an unusual setting to study strategy, it presents a number of characteristics that could be found in more traditional organizational settings involved in strategic planning. In particular, as we will see in the vignettes, in this context we found the same taken-for-granted assumptions of the dominant strategic management discourses that permeate for-profit and large-scale organizational settings and that come from a traditional top-down approach to strategy-making (Eriksson & Lehtimäki, 2001). Accompanying these discourses we also found the genre, metaphors and vocabulary of strategy, which are now pervasive throughout all organizations, having “stretched” (Greckhamer, 2010) out of their original context. Moreover, we should note, and this was especially salient in the case we studied, the increasing pressure for engaging in strategic planning that is exerted today on organizations of all kinds, including community-based groups such as HEIA. The pressure to develop strategic plans has important but largely understudied consequences in the case of non-profits, given that in many cases the request comes from funders, who tie their donations to the successful production of strategic documents.

These general trends coupled with the privileged access we had to the empirical setting (which can be explained by the small size of the organization and our active role in the strategic planning initiative) enabled us to literately ‘see’ and ‘experience’ how strategy (as a body of knowledge) shaped the practices in which we were engaged, the tools and texts we mobilized, as well as the relations between us. This in-depth and close observant participation gave us insider knowledge of strategy-making that might have been difficult to obtain in a large-scale organization. This, in turn, allowed us to pay attention to the (micro) processes through which strategy performed reality and was performed by it, which is at the basis of the three communicational practices that constitute our theoretical framework.

### ***Methods***

*Approach.* The methodological approach mobilized for this case was mainly inspired by action research (Brydon-Miller et al., 2003). As Eden and Huxham (1996: 76) define it, action research consists in “an involvement with members of an organization over a matter that is of genuine concern to them.” We<sup>iv</sup> worked alongside the organization, without receiving any remuneration, from the initial steps of this strategic planning process, up to its completion, until a strategic plan in due form was written. This process unfolded over the course of two years, and both facilitation and research objectives were clear from the start: guiding the organization in its strategic planning process, and documenting our work throughout the different steps of the strategic planning process so as to develop a case study on strategy-making in a community organization.

*Data collection.* We collected a variety of empirical material throughout the strategic planning process. We kept copies of all versions of all the documents that were produced, including our profuse email exchanges. We also video-recorded our meetings with the organization’s assistant director, all the interviews as well as the different components of the one-day workshop we

organized. We took pictures, prepared slide shows for various occasions, used many flip charts, etc. We ended up with a total of 6 hours and 45 minutes of interview recordings, 7 hours and 15 minutes of other videos, 33 documents, 49 email conversations (each comprising several messages), and countless photographs. Appendix 1 presents the main sources of the empirical material in this study.

*Analysis.* The analysis was driven by an abductive reasoning, which consisted of examining a mass of facts and allowing them to suggest a theory (Peirce, 1905, ca.; see also, Vasquez et al., 2016). Abduction is thus based on back-and-forth movements between a form of knowledge and an observed phenomenon. Following this reasoning, as well as Anteby's (2013: 1277) advice to "rela[x] the taboo of telling our own stories," the first step of the analysis was to write down and share with each other the accounts of our respective experience of HEIA's strategic planning process. This collaborative storytelling (Mahoney, 2007) allowed us to give some room to our interpretations of the process, our hesitations, the issues we perceived as key, and other less 'factual' aspects.

However, in an attempt to maintain what Anteby (2013: 1277) calls "professional distance," we also combined our interpretations by including a fourth 'external' co-author, by analyzing artefacts such as the documents we mobilized and produced, and by engaging in conversations with other colleagues and students during data session analysis and workshops. The outcome of this first analytical step was the identification of three key moments of HEAI's strategic planning process. The choice of these moments corresponds to narrative and temporal strategies, as described by Langley (1999). They are: (1) the preparation of the ACA grant application, (2) the first team meeting, and (3) the preparation of the final document: the strategic plan.

Keeping with our theoretical framework, the second step of our analysis was to systematically identify the matters of concern that could be felt and heard in what was said and written throughout the strategic planning process. To achieve this, we used a method, presented by Cooren (2010, 2015) that consists of determining *in the name of what or whom* some ideas, principles, statements, and other things are invoked. Said otherwise, we singled out what or who expressed himself, herself or itself through what was discussed and written. In doing so, we identified the co-authors of the respective statements and positions that were voiced during the strategic planning process.

This method revealed those matters of concern that ‘came across’ recurrently and that had concrete manifestations both in the process of strategic planning and in its result, the strategic plan. The result of this second analytical step was the characterization of three communicational practices through which matters of concerns are transformed into matters of authority. These three practices, which we will develop next, consist in 1) voicing and negotiating matters of concern; (2) transporting and materializing matters of concern through texts, and (3) recognizing matters of concern as legitimate (i.e. authorized and authored).

### **The performativity of strategy: From matters of concern to matters of authority**

*Voicing and negotiating matters of concern.* Matters of concern animate individuals and lead them to say what they say, and to do what they do. However, they also need to be made present so that they can matter in interactions. That is why human beings, documents and the many other things that make up the interactional scene may play the role of passers (Cooren & Sandler, 2014), which consists of voicing matters of concern and allowing them to potentially make a difference in the situation at hand. While matters of concern may be voiced by a single person,

their negotiation implies a collective activity. This negotiation is necessary for selecting and stabilizing those matters of concern that are collectively considered to be significant and consequential for the organization. As we will see next, the voicing and negotiation of matters of concern is achieved through a variety of ways: a turn of talk, a document, a diagram, a conversation, etc.

To illustrate this first practice, we will focus on the writing of the grant proposal that HEIA's assistant director (Diane) and the three researchers (Nicolas, Consuelo and Viviane) sent to ACA in order to get funds to carry out HEIA's strategic planning process (see Figure 1, March 2012). The writing of the grant proposal was an occasion for them to voice their various concerns about HEIA's need for engaging in a strategic reflection and collectively negotiating in order to respond to the Gauthier Foundation's requirement (which, as mentioned, is HEIA's main funder). The writing of the grant proposal was also a key moment in the production of what would become the strategic plan. As the first of a series of texts, it framed the courses of action that the three researchers and HEIA's assistant director would follow. As we will see, the matters of concern that ultimately were inscribed in the grant proposal would be later reiterated and mobilized in future communication events. Most of the discussion and writing of the grant proposal was carried out by email (see summary of the email interaction in Appendix 2).

The major concern manifested during the writing of the grant proposal, intimately related with the task at hand, was *securing the funding*. This matter of concern may be understood as the organizing principle that guided the expression of the other matters of concerns voiced during this writing process, namely, *appearing competent* and *fitting with ACA's program*. As the following two examples show (Vignettes #1 and #2), those concerns led the researchers and HEIA's assistant director to pursue the following actions: (a) favour the use of "strategic" language in the grant application; (b) mention the creation of a strategic team, and later constitute

one; (c) emphasize the improvement of the organization's governance as an intended outcome (which is one of the aims of the ACA program); (d) promise a strategic plan as the concrete deliverable of the funding; and (e) adjust the budget to reconcile a strategic and a community-based approach.

***Vignette #1: Securing funding through strategic language and strategic outcomes***

*Most of our email conversations were concerned with getting funding from ACA. We were clearly aware that the grant proposal was a form of evaluation: we needed to offer the "proof" that HEIA deserved the money, and we, as researchers-facilitators, needed to showcase our competence. Also, and this was specially Nicolas's concern, even if securing funding was crucial, we needed to ensure the alignment of the grant proposal with HEIA's mission.*

*When reviewing Nicolas's draft of the proposal, Viviane suggested that we use the "standard" words of strategy: mission and vision, key values, analyzing the environment, objectives and means, and so forth. In suggesting adding these words to the grant proposal, Viviane was convoking the genre of strategic planning, as understood in its most commonplace form. Viviane can thus be seen as the passer of a traditional, mainstream understanding of strategy, which from this point on will be mobilized and remobilized by the others, as we will see later. It is through Viviane that this vocabulary of strategy materialized itself in the grant proposal and became available to be discussed and debated.*

*Viviane also mentioned that the project had to align with ACA's objectives. She suggested that we had to align the grant proposal with ACA's program, by including one of its categories in the proposal:*

*"[...] I see in the document describing [ACA's] program that they talk of projects aiming at improving the governance of organizations [...] Maybe a sentence of introduction, building on this theme, could be good, e.g. "Hence, aiming to improve its governance and to ensure both its sustainability and its action, HEIA wishes to engage in a formal strategic planning process"?" (Viviane, email dated 13 March 2012)*

*ACA's program only tangentially referred to strategic planning and did not include, as one of its category of possible projects, the development of a strategic plan. Viviane's suggestion to include a reference to one of ACA's sub-programs (governance), and our concern to succeed in getting funds from ACA, led us to exceed the program's expectations by adding (and therefore promising) the production of an actual strategic plan as another proof of the seriousness and the relevance of HEIA's approach.*

*Consuelo reinforced Viviane's propositions:*

*"Indeed, the steps that Viviane mentions on strategic planning should be clearer in the funding application, both as a 'proof of expertise' and also as the structure of the plan that will be written. I would add in the proposed agenda the constitution of a writing team for the strategic plan" (email dated 14 March 2012).*

*She also suggested including the constitution of a formal committee (what she called a "writing team"). In doing so, she added another concern to the list: showing the team's competence and knowledgeability.*

*Integrating Viviane and Consuelo's suggestions, Nicolas produced a new draft of the grant proposal, which was, after minor revisions, approved by all. The grant proposal, by incorporating the various concerns into a text, can be said to constitute a form of collective agreement on the relevance of these concerns for the authors of this proposal, and more generally for HEIA.*

***Vignette #2: Fine-tuning the 'correct' budget for a winning and inclusive strategic planning proposal***

*The grant proposal required a detailed budget. Once again, the work on the budget was organized in rounds, following an initial draft by Nicolas. The email discussion following the first version of the budget aimed at fine-tuning it to fairly represent the proposal, while corresponding to what we believed a 'correct' budget should be. This is particularly obvious in Nicolas's comment regarding the seriousness of the budget:*

*"I am uneasy that our main budget item is "food and beverages" – but I don't really see how we could not serve at least a coffee and offer a few things to eat to the people who will be participating to the different events... Yet, I may be too generous, it might be possible to make cuts there and to spend money on more "noble" tasks." (Nicolas, email dated on 15 March 2012).*

*This comment reflects Nicolas's concern for HEIA's inclusive approach. Indeed, as a community-based organization, HEIA seeks to include as many people in its various decision-making forums as possible. The "food and beverage" item in the budget was attached to some of the activities that would allow community members' involvement in the strategic planning process. As evoked by Nicolas, the strategic planning process had to respect HEIA's approach and mission, which implied inviting a number of people to participate in it – therefore inducing higher costs on items such as food and drinks. However, Nicolas realized that doing so might give the impression that the money would be spent on frivolous expenses, rather than on "noble" (and more "serious") tasks directly related to the writing of a strategic plan. Nicolas therefore suggested that the concern of inclusion might contradict that of appearing competent. Nicolas and the others tried to find a way of adjusting the budget so as to balance both. Diane's expertise with regards to HEIA's mission and to the organization of similar events helped in reworking the budget. More specifically, the workshop's organization was reconsidered, and the number of invited participants was slightly reduced.*

These two vignettes illustrate the importance of invoking matters of concerns for them to be explicitly discussed and thus collectively negotiated. While there was shared concern among the authors of the grant proposal (i.e., obtaining funding to engage in a strategic planning process), the way it materialized concretely was the object of negotiations. Interestingly, the discussions triggered by the writing of the grant proposal led to the production of a text that followed the canons of a traditional understanding of strategic planning. This was particularly salient when the participants in this discussion raised particular issues that they saw related to

strategy: looking competent, fitting with the ACA's program, and aligning the proposal with HEIA's mission.

In keeping with our CCO perspective, we note that theories, and their everyday understanding, are expressed when matters of concern literally pass through actors and materialize in particular textual practices. It is because they first express themselves as matters of concerns that theories can authorize other concerns, as well as actors and their practices. For instance, the changes made to the grant proposal were the result of the expression and negotiation of many concerns: the team members opted for the words of strategic planning, created a realistic roadmap of the proposed strategic planning process and backed these with a balanced budget, not because of some invisible effect of strategic theory, but because they identified these as ways to show to the funding agency that it could trust HEIA and, consequently, that it could allocate the funds. In other words, these concerns were all supposed to *speak to* the ones of the funding agency.

***Transporting and materializing matters of concern through texts.*** In order to make a difference beyond the situation of their invocation, matters of concern need to be provided with endurance, either through human memory or by their inscription in documents and other artefacts or bodies. This is instrumental to the extent that it means that they have already made a difference by leading human beings to inscribe them in their documents, and it is this very co-authoring of documents that allows them to travel through time and space, and to make another difference in the contexts where these documents will be read, discussed or transformed.

To illustrate this second practice, we focus on the first meeting of the (now official) strategic team (see Figure 1, July 2013). Quite some time had passed between the writing of the proposal and that meeting - much of it spent looking through the documents that had been

produced up to that point, in particular the grant proposal, as well as the Gauthier Foundation's correspondence, trying to define what exactly was expected from HEIA and from the strategic team. Here we pay particular attention to the role texts played in materializing and helping some matters of concern endure by orienting the strategic team's actions and decisions. In particular, the team's concerns had to do with clarifying the expectations of the Gauthier Foundation and the team's roles and actions to meet these expectations. These concerns led to a program of action for developing the strategic planning process that would combine the traditional and common understanding of strategy that resulted from ACA's grant proposal and the community-based approach dear to HEIA. (For more details on the following vignettes, see Appendix 3, excerpts 1 and 2 of the strategic team's first meeting).

***Vignette #3. Making matters of concern endure by reiterating them through documents***

*After fifteen months since submitting the grant proposal to ACA, we were finally meeting with Diane as the formal 'strategic team' in order to launch HEIA's strategic planning process. Diane had printed the Gauthier Foundation's letter as well as other documents such as the grant proposal. While looking at the documents, what caught our attention, in particular, was a vague sentence that could be read in both of the Gauthier Foundation's letters, which summarized its request for HEIA: "It would be important to undertake a reflection process to clarify your vision and strategies for change. This should position your role in complementarity with other actors related to housing issues."*

*Consuelo, with both the Foundation letters and the ACA grant proposal in front of her, was the first to break the ice:*

*"What exactly do you think they want, because according to this ((she points to the document)), that's what we need to deliver, in terms of the goods to be delivered. What do they want exactly? What did the [Gauthier Foundation] agent say?"*

*Two different views of the request were opposed. Diane picked up the term "reflection process" used in the Gauthier Foundation letters, which allowed her to offer a more flexible view of what was expected from them. However, the paragraph she quoted from could also be recognized as describing elements of strategic planning: it proposed to conduct a diagnosis of the environment and a positioning of the organization vis-à-vis its competitors. This led Consuelo to speak of the exercise using the words "strategic plan" and "strategic planning." To reconcile the two perspectives, once again we turned to the letters and retained two elements that were mentioned in the paragraph concerning the "reflection process" and that were, in fact, close to what may be recognized as strategic planning: first, the diagnostic or evaluation of the environment and second, the positioning of the organization vis-à-vis other competing organizations. Even though Diane suggested that we use these two elements to go*

*beyond what the Gauthier Foundation asked for and use the reflection process as a basis to look for more funding opportunities, the agreement on these two elements brought everyone on board.*

*Once the Gauthier Foundations' requirement was clarified, the question became: how to go about it? For Diane, the answer to this question had to be found in the grant proposal the committee had written collectively over a year earlier, and that was based on "a long discussion of what we wanted," as Diane reminded us. Diane read the goals that were presented in the grant proposal, which, as mentioned in vignette n° 1, followed a strategic language and a traditional road map to demonstrate that the process was serious and that we possessed the necessary knowledge and experience to conduct it. The repetition (actually, re-enactment) of these goals in this meeting reinforced the particular vision of strategy that we mobilized in the grant proposal. Interestingly, because this vision was inscribed in a document (and because of the important lapse of time between its writing and this meeting), we seemed not to recall that we had written it using these words and structured it in a very strategic way.*

This vignette illustrates the importance of reiterating matters of concern from one communication event to another. When the three researchers and HEIA's assistant director were writing the ACA grant application, they had already read the Gauthier Foundation's letters, and they had already come to the conclusion that they needed to position themselves as doing "strategic planning" in order to both respond to the Gauthier Foundation's request and to maximize their chances of getting ACA's funding. As can be seen here, more than a year later, this agreement still held, but it needed to be *made present* again and, literally, be transported into the current situation. Indeed, as the vignette shows, the transportation of the previous discussions and final agreement had two major consequences: it opened the negotiation of the matters of concern related to HEIA's strategic planning process and, by doing so, it reinforced the particular vision of strategy that was mobilized in the grant proposal (and reiterated in this meeting), which balanced a traditional and common understanding of strategy with an inclusive approach that is dear to HEIA. Indeed, from then on, the various elements contained in the grant proposal were not questioned again.

This vignette also illustrates the role of documents in providing endurance to matters of concern; moving them through time and space. As the vignette shows, not only human beings, but also texts, can act as passers of matters of concern. Therefore, texts are not only the products

of human authoring, i.e., what human actors write. They are also the means through which matters of concern express themselves. Moreover, because of their capacity to travel and their intended objectivity, texts act as legitimate spokesobjects of their authors. As the vignette shows, when Diane suggested that what needed to be done had already been inscribed in the ACA grant application, the team turned to this document without questioning it and from there decided the courses of action for developing the strategic planning process. Following Kuhn (2008) we can say that the ACA grant application and before, the Gauthier Foundation's letter, acted as authoritative texts, as they oriented the actions of the strategic team defining the activities, roles and schedule that ultimately led to the strategic plan.

***Recognizing matters of concern as legitimate (as authored and authorized by strategy).*** In order to have an effect in any particular situation, matters of concern must be recognized as such (as matters *and* concerns) again and again. Indeed, voicing them and transporting them through time and space thanks to documents is part of the process, but they must also be taken up in order to be able to make a difference 'for another next first time' (Garfinkel, 1992: 186). Yet, for a matter of concern to co-author actions (and thus become a matter of authority), it must be recognizable by those invoking it as something that does matter. It is here that strategy as a form of knowledge plays a particular role: that of authorizing some matters of concerns as its legitimate representatives.

As we saw in the previous vignette, matters that are not recognized as concerns may be debated, in which case they may fail to make a difference in the current situation. Recognisability was a particular issue in the case we studied, as the whole strategic planning process spanned over nearly two years, and therefore the team had to constantly recall what they had committed to, what they had agreed upon, what they cared about, and what was concerning them. To

illustrate this practice, we rely on two examples (see Vignettes #4 and #5). The first involves an episode where some elements of the ACA grant proposal, which the strategic team was reviewing during their first meeting (see Figure 1, July 2013), were recognized as “strategy” (for the complete transcription of this discussion see Appendix 3, excerpt 3). The other has to do with a document – a preliminary version of the strategic plan – where matters of concern were not recognized as ‘strategic’, meaning here as *related* or *speaking to* strategy (for more details see a summary of the email discussion in Appendix 4). This led to the production of two texts: an analytical report and the official strategic plan.

***Vignette #4: Recognizing strategy for a next first time***

*As we are all looking at the grant proposal, Nicolas expressed his surprise at how “strategic” the language of the proposal is, and asked “Did we copy-paste it from somewhere?” He did not recall that the words were, in fact, the team’s own, which underlines the importance of texts in allowing concerns to circulate from one moment to another. However, Nicolas’s surprise also shows that the sole transportation of these words and language in text is not enough. It is because he recognized those words as legitimately coming from strategy that the document gained in authority. Moreover, Nicolas’s surprise shows that the authors’ intention does not suffice: they had, as a team, to again recognize strategy in what they had written, and to acknowledge that that was what they meant to do.*

*Later, Diane proceeded to read from the grant proposal some of the elements the team committed to:*

*“An analysis of the environment in which the organization operates, in order to understand the characteristics of the neighbourhood; a reflection on the mission and vision of the organization for the future; an assessment of the core values of the organization (...). A definition of the main areas of intervention of the organism; a precision of the major strategic orientations, goals and means.”*

*Viviane and Consuelo both recognized in these statements as strategy:*

*Viviane: [This is the strategic version*

*Consuelo: [This is what we find, this is what we find in a strategic plan ((she looks at Viviane)).*

*Viviane: Exactly.*

*Viviane and Consuelo’s recognition of the strategy genre in the elements Diane read confirms Nicolas’s recognition of a strategic language used in this document. Recognisability allowed strategy to be brought back into the meeting, and ensured that the actions described in the grant proposal were still understood as being part of a strategic planning exercise.*

***Vignette #5: Failing to recognize a document as a strategic plan***

*After having concluded the whole process of consultation, Nicolas had the first pass at summarizing the results of their work into a draft of what was supposed to become the strategic plan. His document was very voluminous and detailed, and raised many questions regarding HEIA, its orientations and, more broadly, its future. However, Viviane and Consuelo did not recognize Nicolas's document as a strategic plan. As Viviane explained in an email:*

*“For me, a strategic plan is a ‘closed’ and smooth document that may circulate easily and represents the organization that wrote it and adopted it... A document that leaves open so many possibilities, like the one you wrote, Nicolas, is more an analytical report, or a report on an intervention...” (Viviane, email dated 26 June 2014)*

*As they edited the document, however, Viviane and Consuelo, and also Nicolas, made a series of comments and changes that brought the document closer to what they felt was expected of a strategic plan. This led to the creation of two distinct documents: the initial version became a detailed “analytical report,” and a second document was created that followed more closely the cannon of strategic planning. The split was a way of negotiating between the inclusive character of HEIA and the need for a “recognizable” strategic document.*

*The strategic genre appears as a concern that informs several aspects of the writing process: it simultaneously implies the actual content of the plan, the procedures by which it should be written, and editorial and formatting aspects. For instance, concerning the content of the strategic plan, Viviane mentioned the usefulness of including a SWOT analysis. She also questioned Nicolas's choice to describe the team's work in the third person. She stressed that the “voice” of the plan should be that of the organization. That is why the final strategic plan included a presentation text signed by the HEIA's chairman of the board.*

*Concerning the form of the strategic plan, Consuelo triggered a discussion on the visual appearance of the report, handing to the team a strategic plan of a comparable community-organization. With respect to editorial details, Diane mentioned, for instance, that the quotes that Nicolas had included in the report had to be contextualized (role of the person and relation with HEAI) – she pointed out that this would be important to show to funding agencies that the work had been done “seriously.”*

*Nicolas was concerned that such a strategic plan would be of little use to HEIA beyond pleasing the Gauthier Foundation, and that it would fail to represent the diversity of perspectives that were expressed by HEIA's partners. Finally, it was agreed that the current document, with minor modifications, would be kept as the analytical report of the whole process, while a different, shorter, and more visually appealing strategic plan would be prepared for the funding agency.*

As these vignettes show, the recognition (or not) of “strategy” in the grant proposal (Vignette #4) and the report (Vignette #5) makes a difference to the extent that it leads participants to either accept ideas, documents, a specific course or action, or other elements as valid and as contributing or not to a particular project. As illustrated in Vignette #4, when

Viviane and Consuelo recognize strategy in the various elements Diane is reading from the grant proposal, they implicitly acknowledge that these matters literally *speak to* questions of strategy, which is what mattered to them at this point.

As shown in Vignette #5, the opposite is also true. When Viviane realizes that Nicolas's initial document does not speak to matters of strategy, she invites her collaborators to edit it so that it can end up looking like what she considers to be a strategic plan. Interestingly, this second example highlights the importance of the strategic 'genre' as an institutionalized form through which strategy is made present. As mentioned by Langley and Lusiani (2015), strategy texts constitute a particular 'genre' of communication that has central, recognizable and institutionalized characteristics that determine their usage. In the example presented in Vignette #5, the genre of a 'strategic plan' conveyed a traditional and common idea of what strategy is and what it should look like, clearly influencing the decisions and choices of the team.

### **Discussion and Conclusion**

This article emerged from the idea that a communicative constitution of organization (CCO) approach can contribute to theorizing performativity in organization studies, and more particularly, in the field of strategy, in new and fertile ways. As mentioned, the current literature on SAP has not, up to now, seriously engaged with the idea that strategy, as a form of knowledge, can be performative. Inspired by the general performativity program, we thus developed an original theoretical framework to empirically study the performativity of strategy, by understanding how, through communication, strategy as a form of knowledge performs the practices that, in turn, enact it.

This communicational focus allowed us to conceptualize performativity as a communicational praxis through which matters of concern are transformed into matters of

authority. More specifically, the transformation of matters of concern into matters of authority can be described by three distinct practices: (1) voicing and negotiating matters of concern, (2) transporting and making them endure through time and space, and (3) recognizing them as legitimate, i.e., as authorized and authored by the form of knowledge they represent. Each of these practices reveals the importance of actors, theories and texts as key elements for understanding performativity from a CCO approach, and more specifically, the performativity of strategy. In what follows we will discuss each of these key elements in light of our findings.

Table 3 summarizes the elements of our conceptual framework.

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Insert Table 3 about here

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Concerning *actors*, a CCO approach to performativity elucidates the contribution of practitioners to performativity by offering an ‘organizational communication’ understanding of how knowledge can move from the realm of ideas to that of concrete action. Let us recall that an actor is also a passer to the extent that, through her, him or it, it is also matters of concern that literally and figuratively express themselves: a letter from a funding agency, what members of the organization may think, a strategic plan, etc. As shown in the analysis, to make a difference (i.e., to matter), these matters must pass through the actor/passer: they need to be heard and felt through what she, he or it is saying and doing in order to be appropriated, discussed or contested by others. Importantly, our inquiry shows the importance human actors have in voicing and negotiating those matters that concern them: it is here that personal matters of concern can express themselves and thus become collective matters that can then become consequential for the group or organization.

Moreover, conceiving the role of actors as passers allows us to de-center the analysis from human practices and to open it to other actors by focusing on what and who speaks through these practitioners. As mentioned, our relational (and broader) definition of communication acknowledges that documents and situations, architectural elements, values, norms, and theories express themselves in talk and can therefore make a difference in the course of action. In agreement with Vaara and Whittington (2012), we argue that this broadening is much needed in the strategy literature, and more specifically in the SAP stream, which, as mentioned, has tended to mainly focus on human action. Moreover, and in order to fully understand the performativity of strategy, we believe that scholars must engage with a relational ontology, such as the one we adopt in this article, which is in line with the sociomaterial tradition of the performativity program (e.g., Callon 1998). Our notion of passers also offers a conceptual and analytical ground to study how, in practice, practitioners are driven, motivated, concerned (or not) by strategy – thus, as we contend, articulating empirically and theoretically in a much finer and explicit way the practitioners, praxis and practices dimensions of Whittington’s SAP framework (2003, 2006).

*Theory* is the second element of our framework. In line with the idea of performativity, theories contribute to the practices that perform them. Moreover, tools (such as texts) are key in this dynamic as they materialize theories in specific resources that actors will use and mobilize in practice (Cabantous & Gond, 2011). A CCO approach extends these ideas by considering theories as both matters of concern and matters of authority. As we saw from the analysis, theories can (or not) be invoked, convoked and negotiated in a particular act of communication, as an individual or collective concern (or interest). They also have the particularity of becoming sources of authority: they can authorize and legitimate those who invoke and convoke them, as well as their statements and actions, contributing to transforming matters of concerns into matters of authority.

We explained this passage from matters of concern to matters of authority as a dynamic of both authoring and authorizing to show that when a theory authorizes an actor, in a sense, we can say that it becomes a co-author of those statements and actions it legitimizes. This observation highlights the importance of recognisability in the performativity of any form of knowledge (such as strategy). The authoring/authorizing dynamic is key in understanding how theories help in recognizing actors, texts, and any token as their legitimate spokesperson or spokesobject (Vásquez & Cooren, 2011). Of importance here is the shaping effect of genre. Indeed, a genre, because of its structural features and the institutional practices that come with it, is an ideal tool for formalizing (i.e., giving a form to) organizational practices (Yates and Orlikowski, 1992), making them recognizable to others and thus legitimizing them (as well as those that are performing those practices). This legitimation can be explained because the ‘genre’ relies on conventions, which, we could say are sustained by a shared knowledge of what is considered to be ‘strategic’, ‘efficient’ or ‘rational’.

Finally, the third element of the performativity of strategy consists of **texts**. A CCO approach extends the orientations of the nature of strategy texts and their production and consumption, by considering them as key actors (and thus passers), along with human beings. Not only are they tools for practitioners to materialize theories, as Cabantous and Gond (2011) would argue, but they are also agents that can dictate, authorize, and prescribe actions (Cooren, 2004, see also Vaara et al., 2010). In other words, texts can be authoritative (Kuhn, 2008, see also Lundgren & Blom, 2015). This is particularly the case of strategy texts, whose explicit aim is to shape future organizational action.

More importantly, as our analysis showed, texts are key in materializing and transporting matters of concern, making them endure from one communication event to another. Because of their material and symbolic nature, and their recursive interplay with conversation (Taylor & Van

Every, 2000, see also Spee & Jarzabkowski, 2011), texts can open and close the meanings and values given to matters of concerns (Vásquez et al, 2016). Hence, their production and consumption call for constant negotiations. To some extent, we could say that these negotiations are privileged sites where different matters of concerns are voiced and others are made silent (Kornberger & Clegg, 2011). As mentioned by Langley and Lusiani (2015), the production of a strategic text generally implies the creation of a common voice while respecting the plurality and diversity of voices at stake. Our framework allows the exploration of this tension by focusing on how different matters of concerns – and not only the humans that express them – interact with each other (or speak to each other) in these writing practices. As our case showed, the discussion around the strategic plan (e.g., content, form, editorial details) was a privileged site for negotiating and stabilizing those matters of concern that would be consequential for the organization.

Explaining the performativity of strategy in communicational terms also has practical implications. First, by realizing that theories may be constraining but are also the outcome of their communicational activities, practitioners are freed from a conception of theory as being imposed upon them or as inevitable. Relatedly, this means that practitioners have the choice: they can be creative, they can do things differently, and therefore contribute, through their communicational practices, to different understandings of existing theories or, to changing theories, altogether.

Secondly, the enlarged definition of communication at the heart of our inquiry underlines the key role played by human actors, as well as reveals how other elements, such as texts and theories, express themselves in communication events and become authoritative – hence making a difference in the course of action. This means that the strategy knowledge they mobilize or the tools they bring into their organizational interventions are not mere vehicles, but rather actors

(and passers) in the shaping of strategy practice and theory. While practitioners have intuitively known this for a long time and have always been careful in the choice of their tools, the theoretical framework we propose can inform them as to the subtle yet significant implications of their actions, and specifically, of their choices in terms of strategy knowledge or tools they bring into their organizational interventions.

Finally, by highlighting the communicational practices through which matters of concern become matters of authority, our study invites practitioners to pay a different sort of attention to communication: indeed, it can contribute, over time, to confer a reality; a concrete presence to certain choices and courses of action that then may become more difficult to alter. In this light, we contend that being aware of these elements, and keeping them in mind, can contribute in enhancing practitioners' reflexivity (c.f., Barge, 2004).

We must also note the limitations of our study, which mainly stem from the characteristics of our empirical setting. As mentioned, HEIA is a small non-profit community organization. Therefore, the illustrations we have provided in this article need to be placed in this particular (and still rather unusual, for most traditional organization studies) setting. Yet, we should recall that the main goal of this article was to develop and apply a theoretical framework to shed light on the communicational practices involved in the performativity of strategy. Our inquiry was thus first and foremost theoretically rather than empirically driven. However, some issues that characterize more traditional and large-scale organizational settings, such as the ones related to the politics in strategy-making (e.g. Allison, 1971), did not feature in our illustrations, partly because only four actors were actively involved in strategy-making (of whom three were the researchers who knew each other); also, even on the occasions when more people were included, such as a day-long workshop we organized, the vast majority of participants were allies with whom HEIA was not competing. However, we strongly believe that our framework could be used

to reveal and analyze with finesse such political and power issues, particularly through the authority/authoring/authorization dynamic that we have described.

To conclude, we can affirm that strategy (as a theory, form of knowledge or know how) *takes form* in practice and *informs* these practices, in other words, i.e., performs them as it is performed through them, when it appears as or is associated to what *matters*. Our analysis revealed that the way strategy shaped the actions and decisions of those participating in the process of strategic planning was intrinsically related to what concerned or mattered to these practitioners: for strategy to be performative, it had to (literally and figuratively) pass through them, thus to become *a matter of concern that could speak to other matters concern*. This means that for strategy (or any other form of organizational knowledge) to act, it has to be embodied through actions, talk, words, and so forth.

As Jacobs (2008, p. 2) aptly mentioned: “In many situations, strategy is synonymous with ‘important’. If you want something to be taken seriously, label it ‘strategic’. Having an action plan is all well and good, but a ‘strategic’ plan really has an impact! [...] Actually, strategy is importance in practice”. As we have showed, this ‘importance’ of strategy (and therefore strategy as such) must be recognized, for strategy to be performative. In other words, strategy can only be performative if it is recognized in the matters of concern that make it present and allow it to make a difference in situated actions. Furthermore, strategy gains social reality when it authorizes and legitimates those concerns and those who voice, negotiate, transport and recognize them. It is exactly there that the strength of a CCO approach lies, as it allows, as we have done, the revelation of how performativity plays out and unfolds in communication.

## **Endnotes**

<sup>i</sup> In their study, Kornberger and Clegg (2011) develop the idea that strategizing, as a practice, has performative effects. The performativity of strategy is mainly understood in the relations between the strategic practice and the knowledge in which it is based, a relation the authors define as an aesthetic performance in which facts and values are being associated. While the starting point of this article is, to some extent, similar to ours – accounting for the performativity of strategy – Kornberger and Clegg’s study focuses more on the effects of the strategic performance than on describing the constitutive practices or processes that can explain it. This is where our article is complementary to their work, showing how through the passage from matters of concern to matters of authority, practices and knowledge are related through values and facts.

<sup>ii</sup> A communication event is “a sequence of instances of communication (i.e., texts and conversations) that are performed in a distinct space-time” (Vásquez, Schoeneborn & Sergi, forthcoming, no page).

<sup>iii</sup> All details relating to the identities of the organizations and organizational actors have been altered in order to preserve their anonymity.

<sup>iv</sup> In line with action-research, we have chosen to use a more personal tone for the method section as well as for the vignettes presented in the analysis in order to account for our active role in HEIA’s strategic planning process. The use of ‘we’ in the method section corresponds to the three authors involved in this process as researcher/facilitator: Nicolas, Consuelo and Viviane.

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**Table 1 – Key concepts of a CCO approach to performativity**

<b>Key concepts</b>	<b>Definition</b>	<b>Main ideas</b>
Communication	The establishment of a link, connection or relationship through something (Cooren, 2000; Cooren et al, 2015)	<ul style="list-style-type: none"> <li>- Communication is not only about human beings conversing with each other.</li> <li>- All kind of things – feelings, concerns, principles, collectives, texts, interests, artefacts, etc. – literally and figuratively participate in communication events.</li> <li>- Things make a difference in a given action or conversation to the extent that they appear to also express themselves in what is happening.</li> </ul>
Matters of concern	Matters that drive participants to defend or evaluate a position, account for or disalign with an action, or justify or oppose an objective (Cooren et al, 2015)	<ul style="list-style-type: none"> <li>- There are matters that matter to or interest people.</li> <li>- These matters are the objects of a specific attachment on the part of those who voice, invoke, or mobilize them.</li> </ul>
Matters of authority	Matters of concern that come to legitimize (i.e., authorize/author) certain courses of actions to the detriment of others.	<ul style="list-style-type: none"> <li>- Some matters of concern become collective concerns and gain authority.</li> <li>- Some matters of concern authorize and legitimate actors and their statements. They become sources of authority.</li> <li>- Some matters thus become co-authors of actions and decisions.</li> </ul>

**Table 2 – Unpacking the key elements of the performativity of strategy**

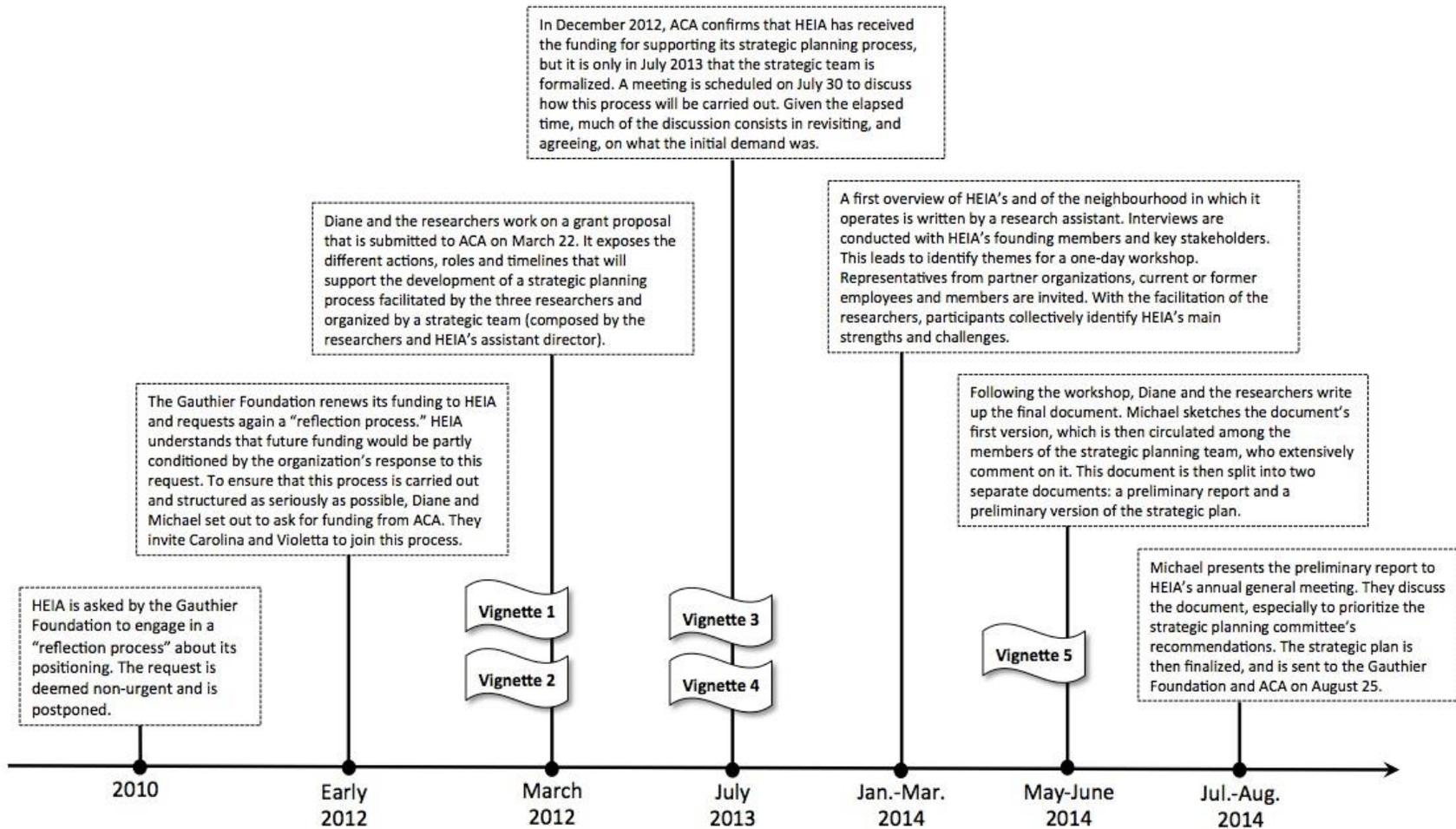
<b>Key elements</b>	<b>Main ideas</b>
Strategy actors	<ul style="list-style-type: none"> <li>- Actors shape the activities in which they are involved through who they are, how they act and what principles, routines, norms, procedures, know-how, and so forth, they draw upon.</li> </ul>
Strategic theories	<ul style="list-style-type: none"> <li>- Theories are both performed through practices and contribute to this performance.</li> <li>- Theories are materialized and embodied in tools (including texts).</li> </ul>
Strategy texts	<ul style="list-style-type: none"> <li>- Texts are significant tools in strategy-making, they materialize strategy theory through a specific ‘genre’, rhetoric, metaphors.</li> <li>- Texts guide the activities surrounding their production, as well as shape and legitimate the practitioner’s roles and courses of actions.</li> <li>- Texts can be interpreted in many ways, thus are considered to be ambiguous. Their circulation through other texts and conversations influences the processes and results of strategy-making.</li> </ul>

**Table 3 – A CCO framework of the performativity of strategy**

<b>Key elements</b>	<b>Driving communicational practice</b>	<b>Main ideas</b>
Actors	Voicing and negotiating matters of concerns	<ul style="list-style-type: none"> <li>- Actors shape the activities in which they are involved by voicing and negotiating matters of concerns.</li> </ul>

		<ul style="list-style-type: none"> <li>- Who they are and how they act is also the result of what animates/drives/motivates them (e.g., principles, routines, norms, theories and so forth).</li> <li>- Actors are also always already passers through which matters of concerns express themselves.</li> </ul>
Theories	Recognizing matters of concern as legitimate	<ul style="list-style-type: none"> <li>- The recursive relation between theory and practices can be understood by focusing on how theories are invoked, evoked and/or negotiated in communication.</li> <li>- Theories can be materialized in communication as matters of concern (i.e., they make a difference, count or matter in a given situation).</li> <li>- Theories authorize and legitimate other concerns, the actors who invoke them and their actions. They can be considered co-authors of specific decisions or courses of action.</li> <li>- Theories make themselves recognizable in matter of concerns</li> </ul>
Texts	Transporting and materializing matters of concern	<ul style="list-style-type: none"> <li>- Texts are not only tools for actors; they are elements that dictate, authorize and/or prescribe actions and theories.</li> <li>- Texts are key in making matters of concern endure over time.</li> <li>- The dynamic of authorization/authoring that is at play in the production of texts characterizes how strategy can be performative.</li> <li>- The negotiation surrounding the nature and production of texts is a privileged site for studying the performativity of strategy.</li> </ul>

**Figure 1 – Timeline of HEIA’s strategic planning process**



**Appendix 1. Main sources of data**

<b>Source</b>	<b>Material collected</b>
Material produced as part of the project	<ul style="list-style-type: none"> <li>- Versions of the initial diagnosis document, and the documents that were consulted during its preparation</li> <li>- Slides, participant's packet, photos of flip charts and facilitators' notes from the various events.</li> <li>- Versions and finals of the "preliminary report" and the strategic plan as such.</li> <li>- Recordings and notes from the one-on-one interviews with stakeholders.</li> </ul>
Internal communications and tools	<ul style="list-style-type: none"> <li>- Email conversations between team members (49 threads)</li> <li>- Articles referred to during the process.</li> </ul>
Communications with external partners (funding agencies)	<ul style="list-style-type: none"> <li>- Letters from the Gauthier Foundation</li> <li>- Drafts and final ACA application, along with budget and amendments.</li> </ul>
Material purposefully produced for research purposes	<ul style="list-style-type: none"> <li>- Personal narratives</li> <li>- Pictures, videos or audio recordings of the various events.</li> <li>- Recordings and notes from our own meetings</li> </ul>

**Appendix 2. Sequence of the email interactions about the grant proposal**

<b>Date</b>	<b>Who?</b>	<b>Key points</b>
March 10	Nicolas	<ul style="list-style-type: none"> <li>- Sends the first draft of the form and the program's requirement</li> </ul>
March 13	Viviane	<ul style="list-style-type: none"> <li>- Sends her comments and suggestions on the form. Most suggestions aim to mobilize more explicitly the "strategic planning language," with the explicit use of words like mission, strategic aims, objectives, environment analysis, values, timeline.</li> <li>- Voices some discomfort with the way Nicolas has presented her as specialist of strategic planning and organizational change.</li> <li>- Suggests to include a sentence that specifically echoes one of the category of projects that the ACA finances, those that improve governance (category b).</li> <li>- Mentions that she hopes that her comments are useful to HEIA, as this is the central motivation.</li> <li>- Includes a separate document in which she details her comments.</li> </ul>
March 14	Consuelo	<ul style="list-style-type: none"> <li>- Adds her comments. Starts by supporting Viviane's comments. Suggests creating a team in charge of writing the strategic plan. Echoes Viviane's discomfort with her presentation.</li> <li>- Make some remarks about the budget, on which Nicolas is working.</li> <li>- Suggests that Nicolas be designated as the official lead of the project.</li> </ul>
March 14	Nicolas	<ul style="list-style-type: none"> <li>- Thanks Viviane and Consuelo for their comments, and announces that he will be working with them to develop a second draft of the form.</li> </ul>
March 15	Nicolas	<ul style="list-style-type: none"> <li>- Virtually introduces Consuelo and Viviane to Diane, HEIA assistant director.</li> <li>- Sends a second draft of the form, and a first draft of the budget. Mentions clearly that he is slightly embarrassed that the most important expense of the project is food and drinks, and hopes that these can be cut and that some money could be allocated to "more noble" tasks.</li> </ul>
March 19	Viviane	<ul style="list-style-type: none"> <li>- Approves the funding application.</li> <li>- Writes that she thinks that the budget is fine, but is not fully comfortable to</li> </ul>

		evaluate it. Suggests that Diane might be in a better position to do so.
March 20	Nicolas	- Sends draft 3 of the form, and draft 2 of the budget. Details in his emails the changes made to the budget. Underlines that the form includes Consuelo's and Viviane's comments.
March 20	Consuelo	- Approves everything, while suggesting one last element to include in the budget.
March 21	Nicolas	- Approves all the documents.
March 22	Diane	- Thanks us for our help, and states that the documents have been submitted to the ACA
March 22	Nicolas	- Expresses happiness that the application has been submitted, and thanks everyone.

### Appendix 3. Excerpts of meeting of the strategic team (July 2013)

#### *Excerpt 1:*

- Consuelo: Diane, but just to have a little bit of context. This is a contract with ((she turns the sheets of the grant proposal, seeking information)) the ministry?
- Nicolas: No, with Gauthier.
- Consuelo: It's directly Gauthier=
- Diane : =No=
- Consuelo: =Who is your funding agency?
- Diane: That's with [ACA]
- Nicolas: [Yes, yes]=
- Consuelo: =That's with ACA=
- Diane: =But the Gauthier Foundation asked us. It's been several years that they are asking us to do ((she looks for the Gauthier foundation's letters finds them and places them on top of her pile of documents)) uh=
- Consuelo: =A **strategic plan**
- Diane: =A plan- ((she holds the letters in her hand)) it's not really it's a ((she points with her finger on the sheet and reads)) "**reflection process.**"
- Consuelo: Reflection process
- Viviane: Mmm ((nods))
- Diane: ((She reads. Nicolas and Viviane follow, looking at their documents. Consuelo looks for her copy of the letter, and when she finds it follows Diane's reading)). "To clarify your vision and strategies for change. This should position your role in complementarity with other actors and intervening in rental housing" ((Viviane nods)). It was a **little broader** than that when we talked with, to, uh
- Consuelo: Your board?
- Diane: Not the board. With?
- Consuelo: The department?
- Diane: What's the name, our agent at the Gauthier Foundation? ((asking Nicolas)) It was a **little broader**, it was not just the housing, but the neighbourhood. And since its been 40 - how many years? ((She looks at Nicolas)). 42 years, since 71, 42 years in June in housing, I thought we could do something like **where we were, where are we now and maybe where are we going?** Because there are still changes that are happening in the neighbourhood  
 ((She proceeds to give examples of the changes in the neighbourhood))

**Excerpt 2**

- Consuelo: Diane, but when the Gauthier Foundation says here “reflection.” What’s the word they use? ((She looks for the letters.))
- Viviane: Reflection process
- Consuelo: That's right! ((She reads)). “Reflection process to clarify your vision and strategies for change. This should position your role in complementarity with other actors and intervening in rental housing”. **What exactly do you think they want, because according to this ((she points to the document)), that’s what we need to deliver, in terms of the goods to be delivered. What do they want exactly? What did the agent say?**
- Diane: They were not very precise. That's pretty much what they said basically. For example, the [another housing association]. What makes us different from [another housing association]. What is our, our, our relationship to other community organizations? Uh, basically that’s it. Uh, and with respect to the developments, in fact, the changes in the neighborhood, what's our position.
- Consuelo: OK.
- Diane: ((mumbles))
- Consuelo: So actually, first a **kind of diagnosis of the current situation** (Diane nods) of the Gauth- [of your organization
- Diane: [The organization
- Consuelo: With respect to the [neighborhood
- Diane: [the neighborhood
- Consuelo: And other organizations=
- Diane: =Other organizations, as=
- Consuelo: =That would be linked with you
- Diane: But **we we wanted**, when we asked for funding to the ACA **we wanted to go beyond what the Gauthier foundation was asking us**
- Consuelo: OK
- Diane: Because it must also be possible to use what we will do **to go looking for other funds.**
- Consuelo: **Other funds elsewhere ((Viviane nods)).**

**Excerpt 3:**

- Diane: So, what did we summarize? ((She reads the grant proposal)) “An analysis of the environment in which the organization operates, in order to understand the characteristics of the neighbourhood; a reflection on the mission and vision of the organization for the future; an assessment of the core values of the organization”. This, I think, is important ((she draws a line on the sheet with a pencil and continues reading)). “A definition of the main areas of intervention of the organism; a precision of the major strategic orientations, goals and means.”
- Viviane: **[This is the strategic version**
- Consuelo: **[This is what we find this is what we find in a strategic plan** ((she looks at Viviane)).
- Viviane: **Exactly.**
- Nicolas: It would not surprise me if it was a copy/paste of something else ((he laughs))
- Diane: We had, we had a long discussion of what we wanted.
- Consuelo: No, no, no, but it's very=
- Nicolas: =No, but Consuelo helped us=
- Consuelo: =Very good
- Viviane: **It covers all elements of a strategic reflection**
- Consuelo: **Absolutely.**

**Appendix 4: Summary of email exchange regarding the ‘split’ in two documents**

June 23, 2014	- Nicolas sends the “strategic plan” he had been working on and asks other to take a look at it: “... and let me know if it looks more or less like an acceptable strategic plan.” He insists that they finish soon, as he is tired of working on this.
June 25, 2014	- Consuelo answers that she finds the elements very interesting and that she commented on the text. She also provides a link to the strategic plan of the Canadian Cancer Foundation, which, she suggests, could serve as a guide for the visual aspect. “It makes the text easier to broadcast to the organization partners.”
June 25, 2014	- Nicolas responds to the group, jokingly saying that Consuelo is setting the bar high in terms of visual presentation. He says he’ll do his best, but doubts he can do as well as the example she sent.
June 25, 2014	- Viviane says she’ll start working on the plan. In a postscriptum, she insists that strategic plans such as the one Consuelo sent a link to are usually made by professional graphic designers, and that we’ll do our best.
June 25, 2014	- Consuelo specifies that while it’s true we can’t do something as nice, “there is an effort to synthetically present ideas, which is interesting and that we can try to do as well, more than the aesthetics.”
June 25, 2014	- Nicolas writes back that he will be needing help, in that case, to decide what the key ideas are, because he’s too deeply involved to see the bigger picture. However, he says that he would prefer if they let the general meeting or the board of directors decide in their annual action plans: “Not only because I do not want to be the one deciding, but also because we need to respect the democratic character of the organization.”
June 26, 2014	- Viviane returns her work on the document, and says that she believes they need to meet, in order to identify the key ideas (following Nicolas’s request for help). She also says she has a “broader comment”: for her, she goes on explaining, a strategic plan is a “closed and smooth” document, which can circulate and represent the organization that prepared and adopted it. A document that leaves so many open options (such as the one written by Nicolas) is more of an “analysis or intervention report.” Viviane concludes by suggesting that we present the document to the general meeting or to the board of directors, to create a discussion regarding its content, and collectively prioritize its elements.
June 26, 2014	- Nicolas raises the problem that the general meeting is scheduled for the beginning of July, while he will be gone for a conference. He suggests, that 1) “We finish the document as it is, even if we have to call it some other way,” and 2) “We continue working on a cleaner version that we will circulate later.” He specifies that the “official” name for the current version will be “internal analysis report.”
June 27, 2014	- Viviane offers to take up the work on the document the following week, and to summarize the issues that need to be discussed.
June 27, 2014	- Nicolas comes back with the idea of making two documents: one “internal” that would simply be a cleaner version of what they’ve got (and he says he’ll send a new version in a few minutes) and another one that would be shorter and would summarize the direction the organization wants to take, and picking up on the style of the strategic plan Consuelo sent earlier. He insists that the first one will need to be ready soon so that it can be presented at the general meeting, while the second will only need to be sent to the Gauthier Foundation in August. He also mentions he met with the board of directors the previous evening and asked them to send their suggestions.