“For years after Disney's death, executives second guessed every major decision, asking 'What would Walt have done?' It was almost as if Walt’s ghost stalked the halls of the studios in Burbank”

Dess, Picken, & Lyon, 1998

When we think about invocation, strong images quickly come to mind: poets invoking the Muses for inspiration, priests invoking God and his Word, magicians invoking supernatural powers through mysterious words and spells. But managers in organizational settings? This is not an association that we spontaneously make. After all, managers are (supposedly) the epitome of rationality, and the above examples of invocation come from realms quite removed from traditional organizational settings. Or are they? In organizational settings, how does invocation operate, and what and who can be invoked? Could there be parallels to be drawn between some organizational activities and these practices that rely on invocation? And could these activities, that are communicational in their essence, have a role to play in making organizations endure over time? These questions are at the heart of our study.

More specifically, our study focuses on the role that deceased founders play in organizational settings. As we show, although departed, some deceased founders remain quite present in their organizations, and not only in an anecdotal or ornamental way. In this study, we metaphorically identify these deceased founders as “organizational ghosts.” Mobilizing a communication-centered lens, we engage with the idea that an organization’s continuity cannot be taken for granted and needs to be produced, reproduced and maintained over time, a dynamic in which the presence, through communicative acts, of deceased founders may play a role. We show how the invocation of these organizational ghosts embeds a profound paradox between continuity and change. Drawing on vignettes of organizational ghosts from
five different organizations, we describe and illustrate the manifestations of this paradox and discuss some of its possible consequences.

**Theoretical Background**

Not all organizations invoke their deceased founders with words as strong as those in our opening quotation above about Disney, but some do. As illustrated in the present study and as noted by others (Maclean, Harvey, Sillince, & Golant, 2014; Paroutis, Mckeown, & Collinson, 2013), from time to time, certain organizations keep their deceased founder(s) ‘alive’ beyond their demise, by calling on their name(s) or on symbols associated with them in their various communications. It is these individuals invoked in discourse that we call ‘organizational ghosts’.

“A traditional scholar does not believe in ghosts”, ironically wrote Derrida (1994, p. 33). While social sciences such as sociology, psychology, philosophy or anthropology (e.g., Derrida, 1994; Gergen, 2009; Ladwig, 2013), have over time timidly engaged in studying ghosts and the spectral, we have seen a modest rise in interest for ghosts in cultural studies since the turn of the 90s (Blanco & Peeren, 2013). Indeed, as these authors highlight, ghosts and haunting have become “[...] influential conceptual metaphors permeating global (popular) culture and academia alike.” (2013, p. 1). As the authors highlight in their introduction to *The Spectralities Reader. Ghosts and Haunting in Contemporary Cultural Theory*, “In their new spectral guise, certain features of ghosts and haunting – such as their liminal position between visibility and invisibility, life and death, materiality and immateriality, and their association with powerful affects like fear and obsession – quickly came to be employed across the humanities and social sciences to theorize a variety of social, ethical, and political questions.” (Blanco & Peeren, 2013, p. 2)

Yet, as conceptual metaphors, ghosts, spectres and haunting mainly remain a blind spot in organization studies. Organization scholars have mostly explored the living (teams, coordination, emotions, human bodies, social structures) and the material worlds (bodies, artefacts, work spaces). Some rare recent studies mention or explore the notion of “ghosts” — or related notions such as “haunting”, “spectres”, “spirits” —, as a metaphor (Benoit-Barné & Cooren, 2009; Orr, 2014; Pors, 2016; Smith, 2006) more or less related to the literal idea of what a ghost is, i.e., “the soul of a deceased person, spoken of as appearing in a visible form,
or otherwise manifesting its presence, to the living” (Oxford English Dictionary). In most of these studies, these metaphors are used to discuss the organizational past and memories (“the ghosts of the past”, “being haunted by a past failed launch”), organizational culture (“the organizational spirit”), or leadership (“sharing a motivating spirit”). While remaining as a metaphor, more literal uses of ghosts, such as referring to deceased invididuals, are to this day still rare in our field.

Nonetheless, ghosts are not completely absent in studies of organizational phenomena. For instance, in his study of UK local government chief executives, Orr (2014) explores the resonance of ghosts as part of their everyday practice. These ghosts are alive and can be family members, departed colleagues, predecessors, role models, or a “lurking sense of spectralized authority” (p. 1057). They can play different roles such as friendly ghosts warning or giving advice, watchful ghosts judging and observing, or also walking ghosts (i.e., “They’re still alive, but many of them wish they were dead”, (Dudley, 2004, p. 1, cited in Orr, 2014)). His study shows that the local government is “filled with a multiplicity of ghosts” (p. 1056). It also sheds light on the discursive practices of telling ghost stories as “part of chief executive’s repertoire of political management skills” to act as a “conduit between the past and the present” (p. 1054). Orr’s study hence highlights that ghosts can play a variety of roles in organizational situations, and that they can be seen as rhetorical devices available to top managers.

Less metaphorically, in his study on strategies of avoidance of death in organizations, Smith (2006) explores death and haunting through the notion of remembrance, showing how deceased people are made present and absent. He gives an eloquent illustration of how remembrance can be organized through “memory absorption” in artefacts associated with the deceased’s life:

\[\text{Ghia Services} \text{ is a company that arranges ‘hauntings’ on behalf of its deceased clients. These usually involve the post-mortem delivery of various items, such as letters, greetings cards and flowers, to loved ones.} \text{ (p. 234)}\]

Following Orr’s (2014) suggestion to “[a]cknowledg[e] ghosts, learn to talk with them, to give them voice (...) to rethink our relations with others, with time and place” (p. 1055), our study is a renewed invitation to take ghosts and the “remembered persons” (Gergen, 2009) seriously in organizational life. We argue that given the roles founders have played in shaping their companies, invoking them after their death – by referring to who they were, their values or
their legacy – is not banal and can creates effects. Despite an increasing interest in uses of the past in organization studies (Suddaby, Foster, & Trank, 2010), few have considered the questions of how, why and with what consequences key figures like founders maintain their presence in organizations over time, despite their absence in the flesh (Rowlinson & Hassard, 1993; Schultz & Hernes, 2013). In this paper, we hence have a dual focus: ghosts of deceased founders that are still present, in one form or another, in their organization, and, more specifically, the communicational processes through which they come into play.

Theoretically speaking, our study builds on the CCO (Communication as Constitutive of Organization) approach (Putnam & Nicotera, 2009), which proposes that communication processes have organizing properties and that organizational phenomena of all kinds emerge from these organizing properties. Organizational stabilization, or how organizations endure over time, has been an important concern of CCO scholarship. One key theoretical proposition related to this issue, mainly developed by Cooren (2010), has been that it is by decentering agency from human actors and extending it “to non-humans, such as tools, documents, settings, bodies, numbers, and even more ‘abstract’ elements such as emotions and values, what [Cooren] calls ‘figures’ – that we can shed light on how organization, through communication, achieves stabilization” (Sergi & Bonneau, 2016, p. 382).

Despite this interest in the discursive and material processes by which organizations endure over time, many CCO-based studies have tended to focus on the minutiae of interpersonal interactions, influenced by conversation analysis. Yet, studies in this communication-centered perspective are not restricted, empirically and analytically, to this micro level. Indeed, the conceptual apparatus of CCO is also meant to reflect how organizations are created, maintained and transformed on a larger scale and on a longer temporal spectrum. Although, as it will appear later in this paper, our study builds on micro-instances where the ghosts of deceased founders appear (brief mentions in texts or in speeches), and our main interest lies in the effects of invoking such ghosts, especially in terms of organizational endurance in and over time. By suggesting that it is through communication that organizations are sustained, the CCO approach opens the door to studies on how the past (represented here by deceased founders) can continue to be made present and even influence future organizational action.
This approach also allows for a novel investigation of organizational identity as emerging from communicative practices (e.g., Dobusch & Schoeneborn, 2015; Taylor, 2011). Thus, while our study builds on the insights of a communication-centered approach, we also aim to contribute to this scholarship by specifically adopting a longer term perspective, considering processes that happen in interactions but that extend out of them, and by exploring their relationship with organizational identity. In other words, by focussing on organizational ghosts, we propose to shed light on communicational processes that carry with them historical elements, and that by doing so, play a role in making organizations go on and endure over time.

We contend that focusing on endurance, as an active process of organization maintenance and transformation, allows us to document in a novel and nuanced way how historical matters are not simply a question of the past, but also one of the present and the future, thus linking in a more explicit and dynamic fashion historicity, temporality and communicative phenomena. Indeed, many scholars tend to see historical matters as solely located in the past of organizations, even to see them as ‘dead’ matters. On the contrary, we argue that an organization’s past may be more alive than we usually think, and that it might even be quite relevant and useful to make it and keep it present, at specific times, in the life of organizations. Could such matters be strategic and rhetorical assets for organizational processes, made present and used in ways to orient future action, especially at organizational turning points?

The CCO approach offers a framework that reveals how the presence of the past in present issues is rhetorically achieved through discursive and material communicational processes. While building on the main tenets of CCO, our study also mobilizes specifically the concept of presentification, defined as “those ways of speaking and acting that are involved in making present things and beings that, although not physically present, can influence the unfolding of a situation” (Benoit-Barné & Cooren, 2009, p. 10). The concept of presentification serves to identify the variety of ways founder figures can be mobilized. Paying attention to these ways, and, more generally, to how ghosts appear in organizations can lead us to understand in finer terms one way through which organizational endurance is discursively performed.

**Methods**

For the purposes of this paper, we searched for organizations known for their attachment to their founding figures. The initial impetus for this study came from a historical exploration of
the case of one organization, the Mouvement Desjardins, a financial services cooperative which revealed the role played by its founder, Alphonse Desjardins as an identity marker in organizational communications with employees and officers over a period of 80 years (Basque & Langley, 2018). Building on a recognition that some deceased founders are far from being forgotten or confined to organizational archives, we searched for other organizations that appeared to make significant use of founder figures in their communications. Although many organizations keep their founders present by, for example, documenting their life and legacy on their websites, not all have open archives that we could easily explore in depth. We therefore chose to focus on cases for which public data were available. We developed three criteria for selecting a case: (1) the organization had to have a deceased founder (or group of founders) or significant leaders, (2) we had to be able to find apparent traces of invocations in various sources and on multiple occasions, and (3) the selected organizations had to be still in existence. Each case was constructed with different kinds of archival material. Depending on what we could access, cases mobilize internal bulletins, journalistic interviews, public speeches, books and company websites. We also paid attention to visual material we could find related to each case.

This work has led us to construct five very different cases based on data in which deceased founder(s) are invoked (see details in table 1). The five companies represent a variety of industries and situations. They are: Apple, Delta Airlines, Relais Bernard Loiseau, Hewlett-Packard, and the Mouvement Desjardins. Before delving into a detailed analysis of these ghosts and their invocation, we briefly present each of these cases.

**Apple.** Apple is a well-known technology company that designs, develops, and sells consumer electronics, computer software, and online services. The company is well-known in part for one of its iconic co-founders, Steve Jobs. Steve Jobs has been the focus of numerous press articles, books and a movie were even made of this life and role with Apple. Steve Jobs was known for his focus on design and innovation, and also for his buoyant personality. While he could be a charismatic speaker, he was also known for his moments of anger inside Apple. He left the company in 1985 to found the animation studio Pixar. He came back to Apple in 1997, at a time when the company, which had pioneered personal computers in the 1980s, was in a very difficult financial position. Under his vision and leadership, the company turned around its situation, bringing to market a series of innovations that have changed our relationship to
technology, such as the iPod, the iPhone and the iPad – hence making Apple one of the largest technology companies today. Steve Jobs passed away on October 5th, 2011 and Tim Cook was appointed CEO on August 24th, 2011, six weeks before Jobs’ death. Steve Jobs and Apple have in the last two decades been the topic of many heated debates and discussions, among devoted enthusiasts of the company’s products and from detractors. Since Jobs’ death, one heated recurring topics of discussion, outside of the company, has revolved around whether Apple without Steve Jobs remains the same innovative company, or if it has lost something that can never be replaced. In this context, Tim Cook’s leadership and the company’s results are often discussed in relation to Steve Jobs. Our case with Apple builds on emails that Tim Cook sends to all Apple employees on the anniversary of Steve Jobs’ death, as they directly mobilize Steve Jobs in relation to Apple.

Relais Bernard Loiseau. On February 2003, 24th, Bernard Loiseau, the famous French chef and founder of the gastronomic restaurant La Côte d’Or in Saulieu (Bourgogne, France), killed himself. This was a huge shock in the French haute cuisine world. Coming from a modest family, he embodied the figure of a successful self-made man still close to his roots. He was known for his peculiar personality: passionate, loud-speaking, impulsive, generous, a country and no-frills man. He was also known to be obsessed with gaining (and never losing) Michelin stars. In fact, his suicide has for a long time been attributed to the possibility of losing a star. The day after his suicide, his wife Dominique Loiseau, his exact opposite in terms of character and for a long time in his shadow, decided to continue the life work of her husband, not without contestation regarding her legitimacy to do so nor without questions regarding her ability to position herself in a masculine environment. At the time of Bernard Loiseau’s death, everyone believed that La Côte d’Or was over without him. However, Dominique Loiseau has saved the restaurant by reorganizing it. Indeed, during Loiseau’s lifetime, it was financially disorganized, somewhat subject to Loiseau’s spontaneous whims and passions. In 15 years, Dominique Loiseau has succeeded in renewing La Côte d’Or (now called Le Relais Bernard Loiseau) while keeping her husband’s heritage. She opened two other restaurants (Tante Louise and Tante Marguerite, renamed Loiseau Rive Droite and Loiseau Rive Gauche), which are currently directed by her daughters. As can be seen, Loiseau’s name is invoked within the material reality of the business itself, but our corpus also consists here of many press interviews with his wife and other successors. Bernard Loiseau is a haunting ghost, and his
presence may reassure clients regarding the quality of the menu. However, as we have noted in our analysis of the material we have collected, recent invocations of Bernard Loiseau seem to be an attempt to let Bernard go to progressively create more space for the current chef (Bertron), and also to leave Bernard Loiseau out of the recent loss of a Michelin star.

**Delta Airlines.** Delta Airlines, a major American airline, was founded in 1924 by Collett E. Woolman. Woolman died in 1966. The period following September 11 was fraught with difficulties for airline companies and in 2004, Delta was literally near bankruptcy. Yet the company succeeded in overturning this dire situation. Ed Bastian, the current CEO, as well as some observers (i.e. Fortune reporter Jeff John Roberts) attribute its revival and current success in part to an initiative of the leadership team who mobilized employees by revisiting the writings of its founder. They created a document called “Rules of the Road” relying on the founder’s mission statement and employee handbook. This document outlines a set of basic principles and reminds employees of the founder’s philosophy of taking care of the customer by always putting themselves in their shoes (one of the famous quote from C. E. Woolman is “put yourself on the other side of the counter”). This document was distributed to all employees in 2007 and has been given to every new employee ever since. In parallel, the company began sharing profits with employees and enacting the founder’s vision of being an “employee-driven enterprise” (Bastian: Delta’s heritage sets it apart, Banstetter, T., Company’s News Hub, October 2015) as put by the current CEO. He has frequently cited C.E. Woolman in his communications including in Sky Magazine (offered to all travellers on the airline), in employee communications and in public speeches including one given in February 2018 when he was named a Georgia Trustee: “[CE. Woolman] had a saying, ’If you take care of your employees, your employees will take care of your customers.’ We follow that to this day. It’s very common for companies to be obsessed with customer service. At Delta, we’re obsessed with our employees. And so those employees can then in turn be obsessed with customers.” Our study focuses on the 2013-2018 period, from which we found the most various and significant quotes about the founder into the company’s News Hub and Delta Airlines Magazine.

**Hewlett-Packard.** HP is a global provider of computer and printing products, technologies, software, solutions and services to individual consumers, small and medium-sized businesses as well as large enterprises, founded in 1939 by William R. Hewlett and David Packard (and
incorporated in 1947). Our analysis focuses on the term of Carly Fiorina, first CEO to be hired from outside the company. We also consider recent invocations by current leaders such as CEO Dion Weisler, who systematically links founders to the theme of innovation, as an attempt to legitimize recent decisions. Carly Fiorina was hired in 1999 and fired in 2004, following the mixed results of the merger with Compaq she convinced the Board to endorse, against the will of the founders’ sons, Walter Hewlett and David Packard. In this ‘battle’, the founders’ sons had publicly attacked her decision before the deal was closed, saying that “getting big by buying a rival is not the “HP way”; the company should expand through innovation and organic growth, rather than acquisition” (Carly vs Walter, Article in The Economist, January 2002), and that their fathers “never developed a premeditated business strategy that treated HP employees as expendable” (Packard son joins opposition to HP/Compaq merger, Article on ComputerWorld, Cowley, S. November 2001), in response to the anticipated layoffs that would follow the merger. Fiorina, who never knew the founders personally, but had the habit of referring to them regularly in her speeches as an inspiration and was positioning herself as leading the company according to their vision, had a hard time convincing the Board to vote for the merger against the founders’ sons opinion. This case shows that founders are regularly invoked as an inspiration by leaders, but also as authority source in times of conflicts. It also illustrates that invoking ghosts can be dangerous and even backfire, especially if more ‘entitled invokers’ get involved into the discussion.

**Mouvement Desjardins.** The Mouvement Desjardins is a cooperative financial services organization founded by Alphonse Desjardins, a journalist and stenographer in the Canadian Parliament who had become very concerned about loan-sharking practices and sought ways to help rural communities within Quebec develop. He was inspired by cooperative banking practices in Europe and opened the first “Caisse populaire” as an autonomous cooperative savings and loans organization in Lévis in 1900, and founded over 150 other Caisses on the same model during his lifetime. After he died in 1920, a Federation and Regional Unions were created by his successors to better control and coordinate the network of Caisses. As it grew over subsequent decades, the network acquired insurance and trust companies, and began to invest in other businesses. It was forced to develop its service offerings, technologies and cost structures to maintain its competitiveness, but it maintains a cooperative and democratic governance structure to this day. In 2018, it has over 7 million members and clients and over
47,000 employees. The cooperative nature of the organization has always been strongly associated with the name of Alphonse Desjardins, who continues to be invoked in public communications by top executives. We have access to an 80 years corpus of employee magazines as well as press reports, books and government documents that reveal the continued longevity of Alphonse Desjardins as an organizational ghost, cited even 90 years after his demise. For the current paper, we focus on records from 2008 onwards during the tenure of Monique Leroux and Guy Cormier as the most recent elected Presidents.

Table 1. Data sources

<table>
<thead>
<tr>
<th>Company and sector</th>
<th>Apple Technology</th>
<th>Delta Airlines Airlines</th>
<th>Le Relais Bernard Loiseau Michelin-starred restaurant</th>
<th>Hewlett-Packard Technology</th>
<th>Mouvement Desjardins Cooperative banking</th>
</tr>
</thead>
</table>

For the analysis, in each case we performed an initial document screening in order to identify references to the founder in the data, and to assess what was happening around the mention of their name – in other words, how was their invocation by present-day top executives, performed communicatively speaking. After exploring what was happening in each case and identifying key analytical dimensions related to founder invocations, we conducted a comparison between the five organizations based on these dimensions. Table 2 presents the main ideas from our analysis and their comparison. This comparison helped us detect
similarities and differences in the use and invocation of the founder figures in the discourse of top executives (e.g., distancing themselves from the ghosts or by mobilizing them to show that their decisions perpetuate continuity in the organization’s traditions and identity) at crucial moments (such as major strategic decisions) or simply to justify the organization’s current state of affairs.

In what follows, we present some initial insights of this ongoing analysis. As will become apparent in the coming sections, the tension between continuity and change emerged from our analysis as a strong commonality across the cases, in spite of the wide differences between them. This points to an important dynamic underlying the presence and invocation of organizational ghosts, in relation to organizational endurance.

Insert Table 2 here

Preliminary Findings: Ghosts at the Heart of a Continuity-Change Paradox

Ghost invocations and their media

Who invokes ghosts and how?

As Table 2 shows, there are differences between the five cases of founder invocation, but also some clear similarities. One of these is the way current CEOs explicitly invoke the founders, by using directly their names. Tim Cook, current CEO of Apple and friend of Steve Jobs, explicitly invokes Steve Jobs in his emails as an inspiration, a role model and a visionary. Steve Jobs is identified as a presence that will (even should) remain with Apple, and as a legacy to be preserved. In the words of Tim Cook, Steve Jobs embodies what Apple was, is and should always be. In the same vein, Ed Bastian, current CEO of Delta Airlines, also explicitly invokes Woolman on cover and inside a travel magazine in the seat pocket on Delta Airlines (two articles, one by the CEO). On the cover, Woolman is shown as a visionary (associated with the words ‘The Spirit of Innovation’). Carly Fiorina, former CEO at HP, the founders’ sons, as well as current leaders also explicitly invoke “Bill and Dave” in speeches. Carly Fiorina also sometimes referred to their legacy as “the rules of the garage” (Allocation at the MIT graduation ceremony, June 2000), the founder’s garage where they made their first inventions.
being seen as the origin of the company. Here the reference to the founders is more subtle and indirect. In a similar vein, while Dominique Loiseau (Bernard Loiseau’s widow and new boss of the Relais Bernard Loiseau), Eric Rousseau (director) and Chef Bertron explicitly invoke Bernard Loiseau by using his name in their speeches and interviews, or pictures of him in the restaurant, they also invoke him implicitly (i.e., without using his name) through the creation of a Menu Hommage and the use of a repertoire of words that he used to say (e.g., “starting block”; director Eric Rousseau in Dessons, 2016). Alphonse Desjardins is again referred to explicitly in employee magazines both by name and visually. For example, within the Revue Desjardins, the founder appears not only in the form of original portraits (of which only a few were ever made), but variously as a photo-mosaic, as a statue, as a character in a comic book, and as a character in a theatrical performance. Nonetheless, as our five cases attest, deceased founders are invoked very directly, and most of the time spoken of in the past tense.

**Spirits from the past revived or materially embodied in the present**

Although invocations of founders mention the past, such as when these founders made a key choice, promoted important values or adopted innovative practices, this does not mean that invocations are simply nostalgic of a long-gone era. Rather, a defining characteristic of invocations is their temporal combination of past, present and future. Invocations, performed in the present, use the past, as attached and embodied by the founder, and fill various roles (such as a reminder, a validation or source of inspiration; more on this later) in relation to future action. Contrary to what might be expected, founders are invoked not just as disincarnated memories, but also at times in an embodied fashion, attached to important objects and locations, or even associated to the whole organization.

One illustration of these two characteristics, the temporal combination and the embodied nature of some of these invocations can be seen in pictures, images or portraits of founders, and how they are used. Founders who have left a lasting mark on their organization seem often to be associated to ‘strong’ elements, in terms of an organization’s identity: its commitment to innovation (e.g., Steve Jobs, Bill Hewlett and David Packard), its dedication to quality, excellence and craft (e.g. C.E. Woolman, Bernard Loiseau) or its specific mission (e.g. Desjardins). Visual representations of them (sometimes combined with the founder’s words) are used in invocation to repeat and remind of the visionary qualities that these founders were
attributed with and also to signal the visionary future-oriented nature of these organizations. The past – which could be closed, with the death of the founder – is hence drawn upon to reaffirm what is important or what should continue to be made present. The visionary aspect of founder invocation is illustrated by the two portraits presented in Figure 1: one of C.E. Woolman (Delta Airlines) on the cover of Delta Sky Magazine (August 2017), and the other of Steve Jobs (Apple) from Tim Cook’s 2017 twitter feed.

Figure 1: Woolman and Jobs: Visionaries from the Past Speaking in the Present

C.E. Woolman

Steve Jobs

As it is quite obvious, both images emphasize vision and innovation. Woolman’s portrait shows him looking skyward as if he could see ahead, with the caption: “Spirit of Innovation.” Jobs is shown in a thinking pose with the caption (based on his own words): “Make something wonderful and put it out there.” The notion of “presentification” is particularly poignant here, as Jobs seems to still be leading today’s employees. Yet in both cases, there is no doubt that the visions come from the past. For Apple, Steve is said to be “Still with us, still inspiring us.” For Woolman, the title of CEO Ed Bastian’s article inside the Delta Sky magazine is “A lasting legacy” clearly expressing embeddedness in the past. Similarly, Bernard Loiseau was the first chef to engage in an IPO and was known for his vision. This is what led him to hit the headlines of the New York Times, still proudly displayed at the entrance of the Relais Bernard Loiseau. This article expresses more than Loiseau’s success; it expresses his boldness, his conquering temper and his entrepreneurial style, also illustrated in other pictures of him in the restaurant.
The reference to visionaries from the past reflects in itself the paradoxical character of founder invocation. These visionaries are gone and their visions referred to a future that itself may well be long past (particularly so in the case of more ancient ghosts such as Collett E. Woolman and Alphonse Desjardins). And yet they are still mobilized as enduring and inspiring symbols for the future of today, even though their visions were embedded in the past.

Beyond images, the embodied materialization of the founder’s spirit is also expressed in words and artefacts. In some cases, we could even say that, it is the whole organization that is inhabited, almost haunted, by the founder. At Relais Bernard Loiseau, the name of the original restaurant “La Côte d’Or” was changed to include Loiseau’s name after his death; his name is also engraved on the glasses, and his initials appear on the napkins. His heritage is also manifested in chef Bertron’s cuisine which continues to “make Bernard’s dishes come alive” (interview, Dominique Loiseau, 2016; in Pinay-Rabaroust, 2016). Bernard Loiseau’s spirit is everywhere. Similarly, Apple’s CEO Tim Cook’s anniversary messages invoke Jobs’ ongoing presence at Apple almost as if Jobs’ spirit and Apple were one and the same: “Steve’s spirit and timeless philosophy on life will always be the DNA of Apple. His greatest gift, his greatest expression of his appreciation for humanity, would not be a single product. Rather, it would be Apple itself.” (from Tim Cook 2017’s tribute, when opening the Steve Jobs Theater). At Hewlett-Packard, Cathie Lesjak, current CFO, is situating the CEO’s team work as consequent with the founder’s spirit: “Dion [Weisler] and the team are embracing the entrepreneurial spirit that Bill and Dave created, and that has long been a part of the HP fabric.” (HP Securities Analyst Meeting, January 2015). Even Delta Airlines’ Ed Bastian (speaking about a person who died when he was 9 years old and whom he most certainly never met), notes, “I still stop every day to consider the lessons of Mr. Woolman as I work to serve Delta’s customers and employees.” (Delta Sky magazine, August 2017, p.12)

Stretching a metaphor, there is a sense in which Bertron, Cook, Weisler and Bastian, even their organizations themselves are “possessed” by the spirits of their founders. However, possession creates a puzzle. For example, as hinted in a 2016 interview after the restaurant lost a Michelin star, Dominique Loiseau explains how the spirit of Bernard Loiseau must continue to inhabit the organization, and yet she recognizes in the same breath the need for change: “Everyone knew or has heard of Bernard. Our clients want to find Loiseau’s spirit here. My task is huge: to continue to keep the ship afloat while respecting Loiseau’s spirit. To make
it evolve, without betraying it.” (Pinay-Rabaroust, 2016). While the material on Steve Jobs and Apple we selected and analysed for this paper does not allow us to draw conclusions on this, this tension between continuity (in the form of pursuing the founder’s vision) and change (in the form of changing the organization’s orientation) can also be suspected, given business press articles that dissect Tim Cook’s every strategic move, comparing it to what Steve Jobs would have supposedly preferred. In many instances, Tim Cook’s or Apple’s current choices are deemed in rupture with Steve Jobs’ orientation, a rupture positively viewed by some, while negatively criticized by others. Steve Jobs can be seen as literally haunting Apple, placing the current executives of the company in the midst of opposing goals, to preserve his legacy or to branch out of the territory associated with Jobs’ strong vision. Herein lies another dimension of the continuity-change paradox, which can also be seen as sharply brought to the fore in the case of Carly Fiorina at Hewlett-Packard, as we see later.

The roles ghosts play

A question remains: what roles do ghosts play? To answer this question, we have to look into the effects that ghosts can produce. For instance, with our case on Apple, invoking Steve Jobs in these commemorating emails keeps the best of Steve Jobs alive. Such a positive portrayal may help in inspiring innovation, fostering engagement and passion for the company. His figure also serves as a socializing mechanism (employees are invited to become ‘carriers’ of his legacy, hence serving a ‘higher’ purpose). At Delta, invoking Woolman contributes to motivate employees and socialize them into the customer-oriented culture of the company as well as inspire the confidence of travellers in the solidity, safety and service-orientation of the airline which are repeatedly lauded in the articles of the magazine provided in the airplanes. At Relais Bernard Loiseau, it is more about reassuring clients while letting Bernard (partially) go, leaving Bernard Loiseau out of the loss of the Michelin star as a way to respect his legacy, and progressively attributing more space to chef Bertron. For Carly Fiorina, it is more self-oriented. Invoking Bill and Dave is an attempt to gain legitimacy. In contrast, Bill and

1 See, for example, business press articles such as “5 things Steve Jobs said Apple would never do - and Apple is doing” (from 2015, [http://money.cnn.com/2015/01/19/technology/steve-jobs-apple/index.html](http://money.cnn.com/2015/01/19/technology/steve-jobs-apple/index.html)), “Steve Jobs’s worst decision was promoting Tim Cook” (from 2016, [https://qz.com/819739/why-tim-cook-is-steve-ballmer-and-why-he-still-has-his-job-at-apple/](https://qz.com/819739/why-tim-cook-is-steve-ballmer-and-why-he-still-has-his-job-at-apple/)) or “Tim Cook’s goals for his legacy are opposite what Steve Jobs’s were—and that’s a good thing” (from 2017, [https://qz.com/1083032/apple-ceo-tim-cook-has-different-views-on-legacy-than-steve-jobs-did/](https://qz.com/1083032/apple-ceo-tim-cook-has-different-views-on-legacy-than-steve-jobs-did/)).
Dave’s sons invoke HP’s founders and Fiorina’s wrongful invocation of their father’s management approach to contest Fiorina’s leadership and decisions while preserving their legacy. For Alphonse Desjardins, invocations long after his death serve as a reminder of the cooperative roots and values of the organization, a reminder that may be increasingly important as a source of distinction for an organization whose everyday practices increasingly resemble those of a bank. The social mission that Alphonse represented resonates well with contemporary institutional pressures promoting social responsibility.

Over and above what we have already noted, we also find that what is common to the effects of the ghosts Bernard Loiseau, Steve Jobs, “Bill and Dave,” Collett E. Woolman and even Alphonse Desjardins, in spite of the very different contexts in which they have been invoked, is their role as change agents, as we develop below.

**Ghosts as change agents? The challenge of authenticity**

Insubstantial as they are, it might seem that ghosts could be invoked in multiple ways to achieve various goals including those of change. However, our vignettes suggest that founders’ ghosts cannot be used in just any way: respecting who the founder was as seen by others is of prime importance in invoking him or her. Perceived violations of their personas and heritage are likely to be punished by “guardians of authenticity.”

A good example of this comes from the case of HP. At one point in her tenure at the helm of the company, Fiorina drew liberally on the names of Bill and Dave to justify some of her decisions. For example, in defending the controversial Compaq merger, she argued passionately that being faithful to HP’s past meant changing, presentifying Dave himself to support that point: “In an industry that is changing as rapidly and fundamentally as ours is, there is no future in the status quo. As Dave Packard once said, “Since we participate in fields of advanced and rapidly changing technologies, to remain static is to lose ground.” (...) To the skeptics who say it won’t work, it won’t sell, it won’t succeed, it’s not the HP way. I say, you don’t know the people of the new HP.” (Speech by Fiorina at the Consumer Electronics Show (CES), Las Vegas, 2002). This quote is interesting for two reasons. On the one hand, it shows how founders might be invoked to promote change despite their embeddedness in the past (and, more prosaically, without having initiated or even envisioned the change in question). But on the other hand, given subsequent events in which Fiorina was charged with violating
the HP Way and was ultimately fired partially due to pressures from Bill and Dave’s sons Walter and David, it shows the challenges associated with invocations that are perceived as inauthentic by legitimate custodians (in this case, the founders’ relatives). Marlene Somsak, a manager who knew the founders and left HP a year after Fiorina’s arrival noted in an interview: “The HP Way only lives in the hearts and the minds of employees who were there before Carly and those who remember the power and wisdom of Bill and Dave’s lessons” (Newspaper article, Abcaria, 2015). Being an outsider to the company, Fiorina could not match up to these standards.

In contrast, as Bernard Loiseau’s widow, Dominique Loiseau is a privileged and legitimate custodian of her deceased husband’s name and can invoke him more easily in times of change. For instance, after their recent loss of a Michelin star in 2016, she said: “The loss of that star does not jeopardize the development of customer retention we have been working on for years, our team, Chef Bertron and myself. (...) I am not the only one who does not understand the Michelin anymore, and I am not the only one. The myth is over. I believe that Bernard, who only swore by the Michelin, must be spinning in his grave. (...) I’ve never criticised the Michelin before. When my husband died, I did not want to keep the debate going, I did not say anything because, before, the Michelin worked with reliable methods. (...) Now, at Saulieu, we clearly say: “This is Patrick Bertron’s dishes” (Pinay-Rabaroust, 2016). In so doing, she involves Bernard Loiseau’s supposed judgment about the loss of the Michelin star, that would not be imputable to her nor her team, but to “le Michelin” which methods are not reliable anymore. And she also leaves Bernard out of this loss of the Michelin star by clarifying that from now on, the chef is not Bernard Loiseau anymore, but Patrick Bertron. However, Eric Rousseau (the director of the restaurant) and Chef Bertron, who have been working alongside Bernard Loiseau since 1982, only explicitly invoke him to praise him. They cannot themselves risk using his name to justify changes to come.

The case of the Mouvement Desjardins raises similar legitimacy issues that may constrain the organization in unexpected ways. Indeed, the name of Alphonse Desjardins has recently been appropriated by activists in the press to protest decisions to remove automatic teller machines from rural communities, undermining the organization’s claims to cooperative values that imply proximity to members.
“The leaders of the Mouvement Desjardins are now proclaiming that local service and ATMs are on the way out, disappearing in favor of the internet, an initiative very far away from Alphonse Desjardins’ notion of proximity. Desjardins will centralize its operations just like all the other banks and its clients will be no closer to Desjardins than they are. In the Village of Petite Nation, they closed the ATM three days before the Christmas Market, where the sales of all the producers and local artisans are carried out in cash. Alphonse must be shuddering in his grave.” (Dorimène et Alphonse Desjardins doivent se retourner dans leurs tombes, Claude Bérubé, Huffington Post, https://quebec.huffingtonpost.ca/claude-berube/dorimene-et-alphonse-desjardins-doivent-se-retourner-dans-leurs-tombes_a_23379395/)

These examples demonstrate that, far from being benign mentions, founders’ figures invocations open up a web of complex issues, where legacy, memories and legitimacy are entangled. When the issue at stake is change, ghosts’ invokers may be caught between resisting change in order to preserve the founder’s legacy and spirit and embracing change to honor the visionary character of the founder. Overall effects of these invocations vary among various audience, based on the perceived legitimacy of the invokers.

Concluding remarks

“The ghost, even when turned into a conceptual metaphor, remains a figure of unruliness pointing to the tangibly ambiguous.”

Blanco and Peeren, 2013, p. 9

In this study, we have examined how deceased founders, that we have named organizational ghosts, intervene in their organization’s current communicational events (speeches or texts), often put out by top executives. Our preliminary findings reveal the paradoxical nature of their role in enabling continuity and change. On the one hand, founders are often lauded for their visionary capabilities oriented towards the future, projecting openness to change. On the other, they are at exactly the same time fading symbols of the past whose presentification (Benoit-Barné and Cooren, 2009) seems designed to project continuity. Ghosts can be used both to sustain the continuity with a certain past of the organization and they can also serve as prompts to catalyze or justify organizational transformation.

Taken together, our cases show that ghosts are not restricted to a specific temporality (that of the past) or tonality (that of nostalgia). They can embody both continuity and change; as figures, they thus present with a form of flexibility. Ghosts seem to ‘reconcile’ orientations
that contemporary and living founders might have had difficulty embracing simultaneously; but through their passing, they are released from their bounding earthly shell: what remains of them, in the form of ghosts, gains in fluidity. Would they all confirm how they are invoked, in the examples we have considered here? We, and nobody, will never know – and in that mystery, lies the beauty and the threat of organizational ghosts. The power of figures such as Bernard Loiseau, Steve Jobs, “Bill and Dave,” Collett E. Woolman and Alphonse Desjardins seems to be first that they can never come back to contradict the way their spirit is invoked. There will always be some ambiguity as to whether or not they would approve a decision or a new orientation.

Second, these figures are never frozen, as one can remodel them and confer them with agentic capacity by invoking them. However, as we saw with Fiorina, this flexibility is double-edged and the power to invoke ghosts can be dangerous, almost akin to a séance during which an underprepared medium summons spirits, without knowing what kind of spirit will appear or what may be the consequences of their presence. Just as in the case with ritualistic or magical invocations, the name of the spirit can be taken in vain and perceived as blasphemy. In less esoteric terms, alliances with ghosts in times of change are a risky undertaking, and not every CEO has the legitimacy to achieve this successfully. Hence, it is when they are actively mobilized, through invocation, that paradoxes manifest themselves, and that their most important effects materialize. The paradoxical tension between continuity and change in ghostly invocations is not merely a textually embedded phenomenon, or simply a rhetorical trick used to personalize official speeches. It may have highly material consequences for organizations and their leaders, even contributing to their demise.

Linking our analysis to the topic of endurance, enduring does not mean staying the same: to endure, an organization has to find a way to both stay the same and change. Hence, while our study highlights that ghosts are, when they are called up and invoked, often in tension between continuity and change, endurance is not solely related with continuity. In fact, endurance should not be confused with a static understanding of stability; it rather means “to remain in existence” (Oxford Dictionary Online). While our inquiry is not concerned with the actual intentions of actors when they invoke a founding figure, it is probable that these invocations are meant to provoke effects and to increase the rhetorical potency of a speech or a text. By invoking deceased founders, organizational members are presentifying these
absent leaders, materializing what remains of them and trying to create effects, like inspiring, reminding of the organization’s mission or highlighting key values – all elements that may gain in traction by being associated with and inscribed in a key historical figure. In so doing, we suggest that one of the roles of organizational ghosts may be to manifest and materialize the *raison d'être* (Cooren and Taylor, 1997) of the organization, by referring to the founder’s supposed thoughts and values. In this sense, the invocation of organizational ghosts may be an invitation to reflect collectively on this *raison d'être*, with the aims of making the organization endure by keeping links with the past while trying to influence the future. In other words, organizational ghosts can be seen as a way to signal a continuity with the past, a congruence with who the organization is, and changes that may be needed in the coming future of the organization. It is in this sense that organizational ghosts may contribute in making the organization endure.

Based on our material, we suggest that invocation can be understood as one modality of presentification, and one that is mainly concerned with endurance. The communicational act of invoking keeps the deceased founder ‘alive’ for his organization, albeit in a very different form, hence making him or her endure. But in doing so, invocation also contributes to authoring the organization. As Brummans, Hwang and Cheong (2013) have demonstrated, invoking an important figure *authors* its organization, as authoring done by organizational actors contributes in shaping their organization. While Brummans et al. (2013) have considered the role of an invoked figure who is alive, our study can be seen as pursuing their inquiry, but by considering the often overlooked role of figures of individuals who have passed away.
### Table 2: Five Ghosts and their Invocations

<table>
<thead>
<tr>
<th>Analytical dimensions</th>
<th>Steve Jobs &amp; Apple</th>
<th>Collett E. Woolman &amp; Delta Airlines</th>
<th>Bernard Loiseau &amp; Le Relais Bernard Loiseau</th>
<th>Bill Hewlett and Dave Packard &amp; Hewlett-Packard (HP)</th>
<th>Alphonse Desjardins Mouvement Desjardins</th>
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<tbody>
<tr>
<td>Organizational context in the vignette</td>
<td>Continuity</td>
<td>Continuity</td>
<td>Gradual (slow) transformation</td>
<td>Change</td>
<td>Incremental change</td>
</tr>
<tr>
<td>Who is making the founder speak?</td>
<td>Tim Cook, current CEO and friend of Steve Jobs</td>
<td>Ed Bastian, current CEO and journalist writing the article</td>
<td>Dominique Loiseau, his widow and new boss of the Relais Bernard Loiseau; Eric Rousseau (director) and Chef Bertron</td>
<td>Carly Fiorina, CEO at the time of events and the founders’ sons</td>
<td>Elected presidents: Monique F. Leroux, 2008-2016 Guy Cormier, 2016-</td>
</tr>
<tr>
<td>How is the founder invoked?</td>
<td>Explicitly invoked in the emails as inspiration, role model and visionary. Identified as a presence that will “always” be with the company and made into a legacy to preserve: embodying what Apple was, is and should always be.</td>
<td>Explicitly invoked on cover and inside a travel magazine in the seat pocket on Delta Airlines (two articles, one by CEO). On the cover, shown as a visionary (The Spirit of Innovation).</td>
<td>Invoked explicitly (using his name, pictures of him) and implicitly (Menu Hommage, vocabulary).</td>
<td>Explicitly invoked by Fiorina in speeches to justify her decisions, to cast herself as rightful successor. Founders’ sons invoke them to contest Fiorina’s leadership and decisions, positioning themselves as ‘authorities’ on what their fathers wanted.</td>
<td>Quoting Alphonse directly and interpreting his words for the actual context Making Alphonse and Dorimène speak by summing up their words Presenting Alphonse and Dorimène as role models to imitate</td>
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<tr>
<td>Recurring words</td>
<td>Legacy</td>
<td>Legacy</td>
<td>Spirit</td>
<td>The HP way</td>
<td>Cooperation</td>
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<td></td>
<td>Tribute</td>
<td>Customer service</td>
<td>Faithfulness</td>
<td>Leadership</td>
<td>Members</td>
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<td></td>
<td>Honoring his memory</td>
<td>People</td>
<td>Bernard’s death</td>
<td>Innovation</td>
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<tr>
<td></td>
<td>Inspiration</td>
<td>Values</td>
<td></td>
<td></td>
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<tr>
<td>Where is the founder?</td>
<td>Steve Jobs appears as a spirit, and fused with Apple – the company is presented as an extension of him. Hence, as written in the emails, Jobs is everywhere.</td>
<td>Woolman’s legacy is reflected in the corporate culture based on looking after employees and customers. “Mr Woolman pioneered that concept and it is integral to Delta’s success today as it ever was.”</td>
<td>Loiseau is materialized in several objects (glasses, napkins); in the Relais, pictures of him appear in several places; in the menus (implicitly: the “Menu Hommage”); in the brand (Le Relais Bernard Loiseau instead of La Côte d’Or); in employees’ shared vocabulary.</td>
<td>Described as in employee’s “hearts and minds” and in previous CEO’s “bones.” Giant photos hang in the lobby of HP corporate HQs. Bill and Dave also kept present in the myths told about them. Their spirit and management vision “the HP way” is materialized in a book by Dave Packard.</td>
<td>In the name of the company in the leaders’ discourses, written and oral (in the corporation magazine, in books, speeches) Photos of the founder always hang in the president office, over their heads, same with delegates at the convention Several monuments Their home as a museum</td>
</tr>
<tr>
<td>What are the overall effects produced?</td>
<td>Keeping the best of Steve Jobs alive. Positive portrayal may help in inspiring innovation, fostering engagement and passion for the company. Also as socializing mechanism (employees becoming “carriers” of his legacy, hence serving a “higher” purpose).</td>
<td>Inspiring confidence in travellers in the solidity, safety and service-orientation of the airline which are repeatedly lauded in the articles.</td>
<td>Reassuring clients while letting Bernard go. Leaving Bernard Loiseau out of the loss of the Michelin star as a way to respect his legacy. Progressively attributing more space to chef Bertron</td>
<td>For Fiorina, trying but failing to gain legitimacy; for Bill and Dave’s sons, contesting Fiorina’s leadership and decisions while preserving their legacy.</td>
<td>Creating the company’s identity and maintaining its distinction through time Creating authority in order to advocate in favor or against change Legitimizing the company’s orientations</td>
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References


