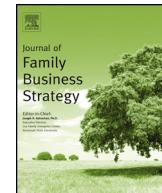




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Qualitative research practices and family business scholarship: A review and future research agenda

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ABSTRACT

In spite of various calls for a wider application of qualitative research in the family business field, it is our contention that the full potential of qualitative inquiry is not being fully realized. Part of the reason for this relates to the tendency to promote methods choice and diversity rather than addressing the foundational questions and processes which underlie qualitative research choices. These tendencies obscure attention to the reasons why researchers choose qualitative methods and the kinds of foundational issues about family businesses that are brought to light through qualitative research. To address this, we undertake an analysis of the most-cited articles using qualitative methods from an annotated bibliography of family business studies. From this, we identify the strengths and weaknesses of extant qualitative studies in family business research and argue for the need to re-orientate calls in family business research towards the foundational questions (rather than methods) that underline qualitative inquiry.

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1. Introduction

In spite of various calls for improvements in the use and communication of qualitative research approaches in family business research (Chenail, 2009; De Massis & Kotlar, 2014; Nordqvist, Hall, & Melin, 2009; Reay & Zhang, 2014), qualitative inquiry is still relatively under-realized in published research output. An analysis of the 215 most-cited family business studies from the annotated bibliography by De Massis, Sharma, Chua, & Chrisman (2012), for example, reveals that the majority of empirical studies are quantitative (87.3%), with only a minority of articles (18) relying on qualitative methods (8.4%). Also, in a literature review by Reay and Zhang (2014), the authors identified 78 articles from a possible 656 in their sample that used qualitative methods.

This under-utilization of qualitative methods is surprising for at least two reasons. First, the tradition of family business research has

strong roots in business history, economic sociology and social anthropology where a wide range of research tools often associated with qualitative research (such as ethnography, participant observation and family memoirs/archives/photographs/diaries), have been employed (Colli, 2012; Stewart, 2003, 2014). Second, the under-realization of qualitative methods is also surprising given the surge of interest in qualitative inquiry in other areas of organization studies (Buchanan & Bryman, 2009) including the general management field (Alvesson & Deetz, 2000; Corley, 2011; Pratt, 2009; Thorpe & Holt, 2008) and sub-fields such as entrepreneurship (Neergaard & Ulhøi, 2007) and strategy (Fenton & Langley, 2011). Such discussion, as noted by Alvesson & Sköldberg (2000, p.4) referring to Silverman (1985); Denzin and Lincoln (1994), means that qualitative methodological discussions are well developed in other areas of the social sciences to the point that they even predominate in some.

In the specific domain of family business research, however, the full potential of qualitative research practices is not yet fully being realized. Many authors refer to the aptness of qualitative methods for studying human behaviors, fine-grained processes and the complex and tacit processes that characterize family firms (Melin & Nordqvist, 2007; Nordqvist et al., 2009; Fletcher, 2014; Reay & Zhang, 2014; Zellweger, 2014). Some refer to traditions from sociology (Martinez & Aldrich, 2014), anthropology (Stewart, 2014), family science (Jennings, Breitkreuz, & Jones, 2014) and

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psychology (Von Schlippe & Schneewind, 2014) to raise new directions, theories and methods for family business research. But still we lack detailed understanding of what Miller et al. (2015) refer to as the 'Janus-faced' nature of family firms and their associated dualistic (Jackson, 1999) and paradoxical tendencies (Lewis, 2000; Smith & Lewis, 2011).

This lack of full realization of the potential of qualitative research practices can be partly explained by the tendency to refer to 'qualitative methods' as if there is a readily available repository of identifiable qualitative methods, tools and techniques that can be drawn upon to aid certain kinds of analysis. In family business research, for example, recent articles have called for improvements in the use, rigor and communication of qualitative methods (Chenail, 2009; Reay & Zhang, 2013; Reay, 2014). Reay and Zhang (2013, p. 28) encourage researchers to develop 'well designed and appropriately-implemented qualitative studies' for developing theory. Also, in Reay and Zhang (2014), seven strategies for getting qualitative research published are outlined. Such commentaries help to encourage more systematic usage and technical production of qualitative methods and better communication of qualitative research strategies. An issue that is somewhat overlooked, however, is why family business researchers choose to adopt qualitative methods and what kinds of issues and processes they are trying to uncover.

Using the term 'qualitative methods' appears to be useful for signaling the use of discursive and context sensitive fieldwork material as distinct from numerical data. It is clear that they offer a series of techniques or methods for examining discursivity, dynamic processes, complexity, contextualization, relationality and fine-grained detail. But to what extent do we fully extend the potential of research methods for examining the nuances of these processes in family business settings for examining paradox, contradictions and dualities? Also, it is reported that qualitative methods are 'powerful tools' for developing theory (Reay & Zhang, 2014, p.5) but in what ways can we engage more directly with qualitative methods to develop theory? Furthermore, in referring to the term 'qualitative methods', this tends to assume that there is 'a fixed battery of methods' (Stewart, 2014 p.77 referring to Malkki, 2007, p.180¹) that can be drawn upon to fill in gaps or explore unknown phenomena. In research practice, however, qualitative inquiry encapsulates 'multiple practices . . . and vocabularies . . . which acquire different meanings in their use' which means that they 'form something more like a constellation of contested practices' (Patton, 2002 p.76 referring to Schwandt, 1997 p.xiv) rather than a finite list of proven tools and techniques. This diversity and the lack of a fixed template or 'boilerplate' (Pratt, 2009) for undertaking qualitative research means that there is more emphasis on technical improvement of qualitative methods rather than the scholarship potential of qualitative inquiry.

In this article, our concern is to re-orientate family business research interests towards the foundational questions (rather than methods) that underline qualitative inquiry. We argue that in addressing these foundational questions through qualitative research certain issues about family businesses are brought to light. Moreover, not only does this encourage a qualitatively oriented social science that is 'methodologically sound' but it also moves us in the direction of realizing methods that 'are [well] suited to family business studies' (Stewart, 1998, 2014, p.67).

In what is to follow, we undertake an analysis of the most-cited articles from an annotated bibliography of family business studies that have adopted a qualitative method or mode of inquiry. In Section 2, we outline the significance and meaning of qualitative

research. Then, we review the kinds of research questions and topics being investigated with the use of qualitative methods, identifying their strengths and limitations. Finally, we provide a framework for re-orientating family business researchers to the foundational questions underlying qualitative methods choices. We conclude with suggestions for new and fruitful lines of inquiry for family business research with a view to fully extending the potential of qualitative research for addressing issues of contradiction and paradox in family business.

2. What is the challenge and why do we need more scrutiny about qualitative research practice in family business research?

Two decades ago, Levin (1993) argued for the significance of moving from close and non-problematized views of family to perspectives and approaches which try to accommodate the complex issues drawn from the everyday experience and interpretations of family business members and employees. Since then various efforts to address the nuanced and complex social realities of family firms have been made. These include: work on notions of 'familiness' or family influence to highlight the special cultures, values, orientations, 'living moments', emotions and particular ways of organizing (De Massis & Kotlar, 2014; Melin & Nordqvist, 2007; Brundin & Nordqvist, 2008; Helin, 2011); efforts to stress the specificity and complexity of family businesses (Fletcher, 2004; Nordqvist et al., 2009, p. 294) using, for example, concepts of 'collective mindfulness' (Zellweger, 2014), as well as studies on the social relations or kinship patterns in groups, communities and societies (Stewart, 2003).

Such inquiries are distinctive because they tend to be less driven by empiricist techniques searching for 'data' and linear causal explanations that enable prediction. Instead, they are more concerned with understanding and reconstructing activities as they occur in practice in a particular socio-cultural-political context. For example, in making a plea for 'an imagined ideal' Stewart (2014, p.66) orientates researchers towards the kinship (rather than business) side of family business matters in order to give 'attention to the sources of solidarity and conflict, to cultural variation and to the lived experience of kinship' (p.66). A further example is Ainsworth and Cox, (2003) where the authors encourage us to examine issues of resistance, control, consensus, dissensus, subordination and asymmetrical relations as they shape family firm activity or behaviors. Zellweger (2014) also advances our thinking to go beyond the dualism perspective of family firms by drawing attention to the 'power of anomalies and paradoxes' (p.653). Conceptually, he introduces family businesses researchers to the notion of 'collective mindfulness' as a means to understand how families manage and negotiate synergies between family and firm dualities. A paradox or duality perspective is relevant for family business research because it simultaneously considers two opposite principles which might form an entity without becoming a unity (Jackson, 1999; Lewis, 2000). Examples of paradoxes from the family business literature are: family and enterprise (Fletcher, 2000), or 'family and business', 'private and public', and 'informality and formality' (Nordqvist, 2012). Another example is the ability and willingness paradox in family firm innovation (Chrisman, Chua, De Massis, Frattini, & Wright, 2015). These perspectives imply that analyzing just one pole of the duality or paradox does not capture its underlying logic. Moreover, these research efforts signify a demand in family business research to understand complexity and to give 'voice and legitimacy to those tacit and oftentimes unrepresentable forms of knowledge that modern epistemology inevitably depends upon, yet conveniently overlooks or glosses over' (Chia, 2008, p.162).

Qualitative inquiry is particularly appropriate for understanding contradictions, tensions, paradoxes and dualities in family

¹ These authors are both referring to ethnography but the same argument applies to qualitative methods.

businesses because they endeavor to capture the individualized, relational, processual and contextual nature of a phenomenon. Over time, therefore, the term 'qualitative research' has become a familiar and useful shorthand term for signifying research tools and techniques that privilege family business processes that cannot easily be quantified or codified using numerical classifications (i.e. interpretation processes, sense-making, meaning-making, situated actions, discursive constructions, processes, contextual factors, interactions or inter-personal dynamics). When we engage in research qualitatively, therefore, our aspiration is to emphasize discursive, as well as numerical data, in order to understand the socially experienced meanings, understandings and sense making processes of social actors and 'to get at the exceptions, [and] the outliers (Thorpe & Holt, 2008, p.4). To use Miles & Huberman (1994, p.6) wording, qualitative research practices strive, therefore, to 'represent and order the logic, arrangement and structuring of relationships, patterns and rules in relation to context'. They also bring to the surface the various contexts of our research practice whether ethical, institutional or political (Buchanan & Bryman, 2009).

In view of this range of interests, qualitative modes of inquiry offer a wide range of research tools, methods and theoretical orientations. Researchers can choose from an array of naturalistic methods (i.e., ethnography, participant observation, grounded theory, ethnomethodology), to participative methods for engaging in research (i.e., collaborative research, social construction) or methods that focus on understanding, interpretation and sense-making (i.e. hermeneutics, phenomenology). Each method and theoretical orientation brings different nuances and can help to explore, examine or be alert to interpretations, relationships, conversations, interactions, situated meanings, sensemaking processes as they occur in situ or context.

In family business research, however, although we can observe a range of methods in use, we rarely see attention to, or discussion of, the foundational questions shaping qualitative research choices. Being explicit about the foundational questions underlying our research choices helps a reconnection to the fundamental meanings and purpose of qualitative research. Such scrutiny would also enable examination of the 'micro-foundations' (Gagné, Sharma, & De Massis, 2014; Zahra, Wright, & Abdelgawad, 2014) of family

Table 1
Key features of qualitative research and distinctive traits in the family business field.

Interests and preoccupations*	Strengths/limitations in qualitative family business research**
i. To explicate the ways in which people come to understand, account for, take action and manage their day-to-day situations from the inside.	Some attention to individual perspective but insufficient detailed attention to the daily life of social actors and detailed understanding of their sense-making or interpretations. Lack of explicit attention to contextual factors in shaping insights. Context assumed to be embedded in insights and not used to explain outcomes. Tendency to aggregate and reify personal accounts to organizational or firm level to explain outcomes. Lack of close study of group interactions and relational dynamics. A concern for holistic perspectives to account for dynamics. Strong use of case studies to work out arrangements and inter-relationships between factors. Recurring use of multiple sources of data to understand complexity. Limited use of methods to undertake repeated interactions in fieldwork studies over time. Tendency to reduce complexity and dynamics to a simple set of causal relationships devoid of context. Lack of use of process modes of inquiry to observe flux, change, movement and flow of organizational life. Use of direct quotations from respondents to show authentic experience. Examples of displaying and reducing extensive amounts of data. Linguistic phrases are presented as objectified collections of words devoid of contextual explanation. Overlooks the role of language and discourse in constituting meaning. Opportunities to 'go deeper' to examine subtle cultural, political or structural issues are overlooked. Lack of transparency and detailed discussion of audit trails showing analytical processes and theory development. Lack of reflexivity and transparency on the role of the qualitative inquirer in gaining access to fieldwork, building rapport, and undertaking analysis. Absence of sharing fieldwork findings with respondents. Efforts to report new theory through qualitative methods – i.e. describing and exploring what is not usually seen. Use of theoretical propositions to extend existing theory. Efforts to introduce new concepts and conceptualizations. Lacking detail on what it means to develop theory through iterative processes. Difficult for reviewers to assess how theoretical insights or new theories are claimed. Too much effort to trace specific outcome variables to preselected predicted correlations. Tendencies to over-simplify complexity and dynamics to a set of simple causal relationships devoid of context. Too much effort attached searching for a single truth or explanation (rather than emphasizing multiple truths). Philosophical roots seldom made explicit.
ii. To see things in context and gain a holistic overview of the context under study. And to work out the logic, arrangement and structuring of relationships, patterns and rules (whether explicit or implicit) in relation to context.	
iii. To elucidate the sense-making accounts, behaviors, interactions, relationship patterns and structures reported during fieldwork. And to maintain field work accounts in their original forms throughout the study.	
iv. To acknowledge the role that the researcher has in the research process.	
v. Theory development is iterative rather than sequential and many interpretations are possible but some are more compelling for theoretical reasons or on grounds of internal consistency.	

* Categories adapted from Miles and Huberman (1994, pp.6-7).

** As emerged from our review of the most cited qualitative studies.

Table 2
The family business qualitative studies articles evaluated in our study.

Study	Research question	Study subject	Site selection	Qualitative method chosen	Theoretical purpose and rationale	Source of data collection	Analysis & interpretation	Presentation of results	Development of propositions
Bagwell (2008)	How do Vietnamese businesses in the nail-shop sector make use of their networks? What role might these networks play in facilitating or hindering diversification?	Vietnamese transnational family networks in the nail-shop sector.	Eight nail-shop owner-managers, a former nail-shop owner running a Japanese restaurant when the study was conducted, and the main Vietnamese nail-shop supplier in London. Interviews were also held with a Vietnamese business advisor and three key informants from the Vietnamese community in order to obtain an overview of the Vietnamese business community as a whole and the key issues (cultural and structural) facing it.	Multiple case study.	Theory building – Exploratory (need for understanding HOW)	Direct interviews (semi-structured, face-to-face interviews with owner-managers) Observations	Analysis of the interview transcripts with the help of NVivo software to identify emergent themes.	Quotes	No
Chirico, F. & Nordqvist (2010)	Not specified	Organizational culture and transgenerational value creation in family firms.	Two family firms from Italy and two from Switzerland, all operating in the beverage industry.	Multiple case study.	Theory building – Exploratory (need for understanding HOW)	Multiple direct interviews (with two respondents from different generations in each firm) Observations Secondary sources (newspapers and magazine articles, internal documents, slide presentations, press releases, websites and balance sheets) Direct Interviews	Creation of a database with interview and secondary sources data; Writing of case descriptions; Within case and cross case analyses (coding and analysis of ach case description individually and then in comparison)	Quotes Figures/ frameworks	No
Cole (1997)	How do gender-related issues affect family members' work?	The experiences of women in family firms.	23 family members (12 females and 11 males) across 9 US firms.	Naturalistic/constructivistic research	Theory building – Exploratory (need for understanding HOW)	Constant comparative method	Quotes Tables	No	
De Massis, Frattini, Pizzurno, & Cassia (2013)	Not specified	Product innovation management in family versus nonfamily firms.	Ten Italian small firms operating in different industries that are well respected for their prowess and success in the area of product innovation (five of which are family and five non-family businesses).	Multiple case study.	Theory building – Exploratory and explanatory (need for understanding HOW and WHY)	Multiple direct interviews (more than 35 h of semi-structured interviews with at least two informants for ach firm) Secondary sources (company documents, catalogues, project documentation, family information)	Data categorization and contextualization techniques; Within-case analysis; Explanation-building investigation; Cross-case analysis	Quotes Tables Figures/ frameworks	No
DeAngelo & DeAngelo (2000)	Do the payout policy and the pressure for dividends of main block stockholders influence corporate governance?	The role of payout policy and dividend pressure made by stockholders on corporate governance of a family-owned public family firm.	The Times Mirror Company, a NYSE-listed Fortune 500 family firm controlled for 100 years by the Chandler family.	Single case study.	Theory building - Descriptive	Secondary sources	Not explicitly specified	Quotes Tables	Yes

Dyck, Mauws, Starke, & Mischke (2002)	What factors influence successful successions in family firms?	Executive succession considered as a process similar to "passing the baton" in a relay race.	Real-time analysis of a failed executive succession in a privately-held family firm operating in the manufacturing industry.	Single case study.	Theory building – Exploratory and Explanatory (need for understanding HOW and WHY)	Direct interviews (ten in-depth interviews about 1–2 h each with incumbent and successor CEOs)	Inductive data analysis by carefully working through the interview transcripts numerous times (cf. Handler, 1990, 1992), followed by data categorization and identification of common themes.	Quotes Table Figures/ frameworks	Yes
Fletcher (2010)	Not specified.	Co-habiting couples developing family business start-ups (co-preneurship).	Twenty-six couple in the North Nottinghamshire, in UK. Each couple was at the centre of the business venture.	Fieldwork study based on interview data.	Theory building – Exploratory (need for understanding HOW)	Direct and telephone interviews (with 26 couples involved in business ventures)	Identification of themes through conceptual coding of the interview transcripts; Assessment of the relevance of the types of co-prenurial categories in the typology; Identification of key characteristics of the firm	Tables Figures/ frameworks	No (but the author proposes a reformulated conceptualization of co-prenurship)
Graves & Thomas (2008)	What are the key determinants that influence the pathways to internationalization taken by small to medium-sized family enterprises and in what ways does the family unit influence these determinants?	Internationalization in family firms.	Eight internationally-active Australian small and medium family enterprises from manufacturing industries.	Multiple case study.	Theory building – Exploratory (need for understanding HOW)	Multiple direct interviews (34 interviews with senior managers in each firm) Observations Notes from field visits Questionnaires, Firm documents and other archival records	NVivo software was employed to store and manage data, particularly to link data with emerging concepts and themes, exploring linkages between concepts within each case, across cases, and in developing the overall conclusions	Quotes Tables Figures/ frameworks	No
Hall & Nordqvist (2008)	How can professional management in family businesses be understood by explicitly recognizing the unique characteristics of these firms, originating in the influence of family on the business?	Professional management in family business.	Five Swedish family firms.	Multiple case study.	Theory building – Exploratory (need for understanding HOW)	Multiple direct interviews (with CEOs, former CEOs, top managers, and board members) Observation of meetings Informal interactions with family and firm-related individuals during site visits	Reading and successive interpretation of transcribed interviews and observation notes, grouping into empirical categories of the patterns of reoccurring aspects in the cases, clustering of these categories into themes and final reinterpretation of the cases	Quotes	No (the authors formalize a definition of professional management in the family firm)
Hall, Melin, & Nordqvist (2001)	Not specified.	The relationship between organizational culture and the entrepreneurial process in family firms.	Two longitudinal and in-depth case studies of medium-sized Swedish family firms operating in the manufacturing industries. Both family businesses faced radical strategic change during the three years before the study and had strong business cultures influenced by family members.	Multiple case study.	Theory building – Exploratory (need for understanding HOW)	Multiple direct interviews Participant and nonparticipant observations Documents	Not explicitly specified	Quotes Figures/ frameworks	No

Table 2 (Continued)

Study	Research question	Study subject	Site selection	Qualitative method chosen	Theoretical purpose and rationale	Source of data collection	Analysis & interpretation	Presentation of results	Development of propositions
Howorth, Westhead & Wright (2004)	What impact do information asymmetries have on the ownership transfer process when an MBO or MBI team acquires a private family firm? Which aspects of the ownership transfer process impact satisfaction with the outcome for the vendor and MBO or MBI team? Which aspects of the ownership transfer process impact the knowledge transfer between former family owners and the MBO or MBI team?	Succession issues of family firms who have selected a Management Buy-out (MBO)/Management Buy-in (MBI).	Multiple case studies involving eight privately-held family firms in the UK. The average firm had 109 employees and was 34 years old. The sample was drawn from the Centre for Management Buyout Research database.	Multiple case study.	Theory building – Exploratory and explanatory (need for understanding HOW and WHY)	Direct interviews (multiple-respondent interviews with former family owners and current members of the MBO/MBI Teams).	Not explicitly specified	Quotes Tables Figures/ frameworks	YES
Irava & Moore (2010)	Not specified.	Familiness and the unique resources of family firms.	Four family-owned businesses ranging in size from 15 to more than 800 employees and belonging to four different industries. All four firms were of Australian heritage, multigenerational, private firms with 100% family ownership, and had shown significant growth since their establishment.	Multiple case study.	Theory building – Exploratory (need for understanding HOW)	Multiple direct interviews (16 open-ended, semi-structured interviews Observations Secondary sources (correspondence, documents and company published material)	Within-case analysis (using techniques such as constructing information arrays, matrix of categories, creating flowcharts, and data displays); Cross-case analysis; NVivo software used for coding and for exploring patterns across cases	Quotes Tables Figures/ frameworks	No
Johannesson & Huse (2000)	How do different ideologies in the small family business influence the selection of outside directors?	The appointment of outside board members in family businesses.	Twelve Swedish privately-held small family businesses and a longitudinal, in-depth case study of two family businesses (one traditional and one entrepreneurial).	Multiple case study.	Theory building – Exploratory (need for understanding HOW)	Multiple direct interviews (with CEOs, family members, firm partners, and external board members)	Not explicitly specified	Quotes Tables	No
Karra, Tracey, & Phillips (2006)	What is the relationship between altruism and agency costs in family businesses? Does this relationship vary over time?	The role of altruism over time in explaining a growing family firm's agency costs.	Neroli, a successful international family business founded in Turkey. The authors studied the period of rapid growth experienced by the firm since the late 1990s. During this period, Neroli successfully penetrated markets across Eastern Europe. By the end of the study, the firm employed about 750 people and had 87 retail outlets across the former Soviet republics and Eastern Europe.	Single case study.	Theory building - Descriptive	Direct and telephone interviews (with key members of the firm and its partners) Archival data	I stage: Organization of case data into an "event history database" by chronologically ordering descriptions of events taken from the raw data—interview transcripts, interview and field notes, and secondary sources—and by juxtaposing multiple accounts against each other to ascertain the degree of convergence. This allowed the development of a narrative. II stage: documenting and tracking the emerged evidence,	Quotes	No

Kotlar, & De Massis (2013)	Central research question: How do the individual goals of organizational members influence the organizational goals pursued by family firms? Theory questions: What goals do family firm organizational members pursue? How do such goals relate to the individual characteristics of the informants? How do these relationships change across family firms? How do the individual goals of family firm organizational members affect the decision-making processes in family firms?	Goal setting processes in family firms.	76 organizational members across 19 Italian small and medium family firms operating in different industries.	Theory-building qualitative study based on interviews and observations data.	Exploratory (need for understanding HOW)	Multiple direct interviews (semi-structured interviews with CEOs, professional nonfamily top executives, young generation family members, family CEO spouses, and old generation family members) Observation during family and business meetings (e.g., meetings of the board of directors, family meetings, and casual meetings) Secondary sources (contracts, historical books about the organization and the family, corporate websites, news articles about the firm and the family, and firm pamphlets)	and moving back and forth between data and theory until theoretical saturation The two authors independently read interviews, observations and archival data; NVivo software used for coding; Iteratively analysis of the qualitative data by moving back and forth between the data and an emerging structure of theoretical arguments that responded to the theory questions, according to three key steps: (i) creating provisional categories and first-order codes; (ii) integrating first-order codes and creating second-order Themes; and (iii) delimiting the theory by aggregating theoretical dimensions	Quotes Tables Figures/ frameworks	Yes (the authors develop 7 propositions)
Lambrecht (2005)	How is it that one family succeeds in passing the business down to following generations while another family fails?	Succession and succession planning in family firms.	Multiple case studies involving eight family firms. The cases were chosen from scientific and popular articles.	Multiple case study.	Theory building – Explanatory (need for understanding WHY)	Direct interviews (19 interviews with multiple members of the current and future generation of family owners and managers) Biographies of business families Observations Popular articles Scientific articles	Not specified (four researchers shared their insights, an advisory committee was used to give feedback to interim reports and multiple sources were used to triangulate information)	Figures/ frameworks	No
Miller, Steier, & Le Breton-Miller (2003)	What are the core problems and their organizational implications in failing intergenerational successions?	Problems and common patterns in failing intergenerational successions.	Multiple case studies involving 16 family-owned businesses where a succession process failed (either successor dismissal or bankruptcy).	Multiple case study.	Theory building – Exploratory (need for understanding HOW)	Case and historical book accounts, as well as newspapers and journal articles on the strategy and organization of the 16 firms during the 5–10 years following succession	Two raters read materials on each firm and performed a double-blind scoring of the variables and symptoms classified by the authors	Quotes Tables	The authors developed hypotheses rather than propositions.
Murray (2003)	What determines whether a generational transition happens as a relatively smooth process or as a revolutionary change?	The succession transition process.	Drawing from the 1994 survey of Scotland and Northern Ireland's family enterprises, the authors selected five firms that had achieved at least 5 percent per year increase in sales over a 5-year period prior to the analysis and that agree that succession will occur within the next 5 years.	Multiple case study.	Theory building – Explanatory (need for understanding WHY)	Direct interviews (with the key individuals, dyads and families between 1994 and 1999) Secondary data (company accounts, consultants' reports, media coverage and marketing material)	Collation of primary and secondary information to create a narrative account (comparative case study method); analysis of the narratives as well as the individual accounts, and plotting of individual constituents, their families and their businesses along a time line for each family business.	Figures/ frameworks	No

Table 2 (Continued)

Study	Research question	Study subject	Site selection	Qualitative method chosen	Theoretical purpose and rationale	Source of data collection	Analysis & interpretation	Presentation of results	Development of propositions
Nordqvist & Melin (2010)	Not specified.	Strategic planning in family business.	Three medium-sized and multigenerational family firms.	Multiple case study.	Theory building – Exploratory (need for understanding HOW)	Multiple direct interviews (98 interviews with key-actors, such as owners, managers, consultants, board members, family members, accountants, former managers) Observations of 10 meetings where strategic issues were treated (board meetings, top management team meetings, strategic planning meetings, strategy away days) Casual conversations Site visits Secondary sources	Writing of detailed and process-oriented case descriptions; Reinterpretation of the empirical material with focus on the character and meaning of the strategic planning processes; Iterative moving back and forth from data and literature to support emerging theory generation and refinement	Quotes Tables	No
Parada, Nordqvist, & Gimeno (2010)	Not specified.	Professional associations and change of family values.	Three Spanish family firms operating in three different industries (Pharmaceuticals, Tourism and Construction and energy).	Multiple case study.	Theory building – Exploratory (need for understanding HOW)	Multiple direct interviews (with 22 family and nonfamily members) Secondary data (newspapers, corporate brochures, Internet information, annual reports, organizational charts and family constitutions)	Within-case analysis; Cross-case analysis; Iterative process during which the researchers went back and forth between the data collected and their initial institutional theory framework, in an "abductive" manner	Quotes Tables Figures/ frameworks	No
Salvato, Chirico, & Sharma (2010)	What factors influence exit from the founder's business and subsequent entry into a growing industry, while retaining family control?	Entrepreneurship and firm renewal across generations in family firms.	The authors traced the development of the Italian Falck Group from its inception as a steel company in 1906, its ascension as the largest privately-owned steel producer in Italy, its losses in the 1970s and 1980s leading to business exit from the steel industry in the 1990s, and its successful entry into the renewable energy business.	Single case study.	Theory building – Exploratory (need for understanding HOW)	Multiple direct interviews (semi-structured, with family and nonfamily members who were directly involved in the exit and renewal process) Secondary sources (company websites, financial reports, magazines and newspaper articles, transcripts of the board of director meetings, research reports and books)	Inductive analysis of primary and secondary data by using techniques for the constant comparison of data and emerging data structure. QSR-N6 software used to manage and analyse empirical evidence. Techniques for open and axial coding used for data analysis.	Quotes Figures/ frameworks	No
Steier (2001a)	Not specified.	The dynamics of trust and its relationship to organizational governance within the family firm.	Three case studies based on qualitative data gathered via personal interviews, and library and internet-based research. All cases are well-established companies, making family dynamics in relation to company performance well observable.	Multiple case study.	Theory building – Exploratory (need for understanding HOW)	Direct interviews Site visits Library and Internet-based research	The author says: "The study followed procedures commonly recommended for conducting case study research" (p.357)	Case vignettes	Yes
Steier (2001b)	How can critical relationships realistically be managed during succession?	Management of social capital during generational transitions.	Eighteen next-generation entrepreneurs who inherited business assets from a previous generation. Firms are heterogeneous in terms of industry and size.	Qualitative study based on interviews (not specified whether it is a case study).	Theory building – Exploratory (need for understanding HOW)	Multiple direct interviews Information obtained from Ernst & Young reports, annual reports, and company publications	Open coding, category formation and theoretical coding	Quotes Figures/ frameworks	Yes

Steier & Miller (2010)	How do family firms transition from one generation to the next? What is the impact of next generation managers in this transition? Over time, what roles do family members play in the management, ownership and control of their business? What are the "rationals" or "drivers" of their decision making before and after succession?	Change in family business governance of entrepreneurial family firms before, during, and after succession.	Thirteen second or later generation CEOs of entrepreneurial family firms (entrepreneurial family firms defined as firms that had created something new and innovative and/or were growth oriented).	Multiple case study.	Theory building – Exploratory (need for understanding HOW)	Multiple direct interviews (three interviews with each of the CEOs of the family firms) Secondary sources (websites, annual reports, print material and news clipping)	Prior to interviews, secondary sources of data were analyzed to determine key events in the history of the firm; The authors say that they "followed procedures commonly recommended for developing grounded theory from case study research" (p.146); Both authors read and re-read the transcripts to discern emerging themes and patterns; To establish the robustness of the themes and tendencies being observed, they split the interview data into two random samples; The authors recruited a research assistant to read the secondary source materials and the interview transcripts to identify which changes, as well as which family priority and themes, were exhibited by which companies, and when	Quotes Tables	Yes
Tsang (2002)	What are the differences in foreign direct investment behaviors of the Chinese family and non-family businesses?	Foreign direct investment (FDI) behavior of Chinese family businesses.	Multiple case studies involving ten private Chinese firms operating in manufacturing industries in Singapore (three family, three semi-family, and four non-family businesses). The average firm had 410 employees in Singapore and 12 500 worldwide.	Multiple case study.	Theory building – Exploratory (need for understanding HOW)	Semi-structured interviews (60 interviews with managers in charge in the top management teams of their companies)	Not explicitly specified	Table	No
Vera & Dean (2005)	Not specified.	The difficulties faced by daughters taking over the family business.	The study considered ten daughters who had taken over their family businesses. The firms were all based in US, had on average 57 employees, and were 38 years old.	Qualitative study based on interviews (not specified whether it is a case study).	Descriptive (need for examining the issues identified by prior research on women in family business in a sample of female family business leaders)	Direct structured interviews (one-on-one interviews with female family business owners)	Interviews were transcribed and data were analysed for themes or patterns across women's experiences.	Quotes Tables	No

business structures and behaviors and to promote the scholarship of micro-level research.

To address this, the first step in our analytical process is to review the kinds of research questions and topics being addressed through extant studies using qualitative methods. To aid this, some analytical tools drawn from Miles and Huberman (1994) are applied. This framework is useful as they outline a set of key primary threads that generally characterize the interests and distinctiveness of qualitative research practices. These threads are also consistent with later texts on the features, or what Bryman and Bell (2007) refer to as the 'preoccupations', of qualitative research. However, in order to avoid repetition and overlap between the key features of qualitative research, we have merged some of the threads outlined in the original formulation (i.e. we have given more attention to the ways in which qualitative research helps to generate theory than is explicitly addressed in the original list). These interests and preoccupations, as adapted from Miles and Huberman (1994, p.6–7) are outlined in column one of Table 1.

The five characteristics outlined in column 1 exemplify the key interests of qualitative research. In short, these incorporate the main reasons why researchers choose to approach their research in a qualitative way. For this reason, they are used as analytical categories for evaluating the sample of qualitative family business articles that comprises the empirical material for this study. In column 2, we also outline some of the distinctive features (strengths and limitations) of qualitative research applications that have been identified from the sample of selected articles and are discussed in more detail later in the article. The categories are helpful for addressing the objectives of this research which are to: (1) examine the range of questions being addressed in cited publications of family business articles using qualitative research; (2) assess why and how inquirers are engaging with these qualitative methods (i.e. what are they trying to get at and how they are conducting their inquiry); and (3) identify possible gaps in qualitative family business research conducted to date. In the following section, we discuss the analytical method adopted and explain the strength and limitations identified in column 2.

3. Analytical method

We utilize the bibliographical database and methodology adopted by De Massis, Sharma, Chua and Chrisman (2012) who, in their review of family business research from 1996 to 2010, identify 734 articles that have been particularly influential for the development of the field. From this, a sample of 215 articles that according to Google Scholar in February 2011 received at least five citations per year since publication, were categorized. Eighteen of these 215 articles had been classified by De Massis et al. (2012) as qualitative studies and were included in our sample.

We updated the Google Scholar citation search again in November 2013 where we checked the qualitative studies reported in the fresh review by Reay and Zhang (2014). This search yielded two additional articles with more than five citations per year (Chirico & Nordqvist, 2010; Steier & Miller, 2010). In addition, we also updated the search to include other articles published in 2010 with more than 10 total citations. This criterion yielded four additional articles (Fletcher, 2010; Irlava & Moores, 2010; Nordqvist & Melin, 2010; Parada, Nordqvist, & Gimeno, 2010) creating a subsample of 24 qualitative family business articles for the period 1996 to 2010. Finally, two further qualitative articles were added that were published in 2013 and which received at least 10 citations in Google Scholar by November 2013 (De Massis, Frattini, Pizzurno, & Cassia, 2013; Kotlar & De Massis, 2013). This brought the number of family business articles conducted with qualitative methodologies over a 15-year period in eight academic journals², to a total of 26³. This number is consistent with the number

of articles included in other recent review articles in the family business field (e.g., De Massis, Frattini, Lichtenhaler, 2013).

In Table 2 we present the 26 qualitative studies according to several dimensions: research question, study subject, sample description, qualitative method chosen, theoretical purpose and rationale, role of theoretical concepts and theories (i.e. induced or deduced), data collection source, data analysis, presentation of results (i.e., quotations in text, figures or tables) and development of theoretical propositions.

We now discuss the articles presented in Table 2 with a view to discussing the range of interests pursued in family business research.

4. Evaluation and analysis of family business studies using qualitative methods

In what is to follow, we use the five sets of characteristics outlined earlier in column one of Table 1 to evaluate the kinds of research questions and topics being addressed in qualitative family business research. At the same time, at the end of each category we identify the gaps in extant family business qualitative research (these are also summarized in column two of Table 1).

4.1. Qualitative research category (i):

'Explicating the ways in which people in particular settings come to understand, account for, take action and otherwise manage their day-to-day situations'; 'suspending inquirer pre-conceptions in order to understand the accounts and intentions of local actors 'from the inside' (Miles & Huberman, 1994, p. 6–7).

The key objective of qualitative research is to attempt to understand things from the point of view of the people being studied (Gubrium & Holstein, 1997). This interest derives from the fact that in the social world it is social actors who attribute meaning either to inanimate objects around them in their environment, or experiences, events and practices. As a result, qualitative inquirers' efforts revolve around understanding the way in which social actors report their experiences, interactions and participation in the world (often in relation to contextual factors) (Denzin & Lincoln, 1994).

The majority of reviewed studies are using qualitative methods to access the intentions/viewpoints/perspectives of individuals within the family firm. For example, referring to columns 2 and 3 of Table 2 (research questions and the key subjects being investigated) it can be noted that the motivations for qualitative studies and the subjects of the study vary. They range from an interest in the perspectives of particular social actors, for example nail shop owners (Bagwell, 2008); the experiences of women who report feeling invisible in family businesses (Cole, 1997); daughters during succession (Vera & Dean, 2005) and the roles reported by couples in business (Fletcher, 2010), to the study of themes (i.e. executive succession (Dyck, Mauws, Starke, & Mischke, 2002); the extension of family logic to relationships with non-family

² We limited the review of the literature to influential articles published on established peer-reviewed journals as articles in academic journals can be regarded as validated knowledge and likely have an impact on the field (Ordanini, Rubera, & DeFillippi, 2008; Podsakoff, Mackenzie, Bachrach, & Podsakoff, 2005). Established influential journals are acknowledged to shape the research in a field by setting new horizons for investigation within their frame of reference (Furrer, Thomas, & Goussevskaia, 2008). We therefore feel that this approach provides an accurate and representative picture of relevant scholarly research.

³ It should be noticed that our review did not consider other potentially promising qualitative articles that have been recently published in *Journal of Family Business Strategy* but have not yet reached their potential in terms of number of citations (e.g., Camblanne, 2013; Hedberg & Danes, 2012; Meier & Schier, 2014; Murphy & Lambrechts, 2015; Schlepphorst & Moog, 2014; Welsh et al., 2013).

members (Karra, Tracey, & Phillips, 2006) and an interest in processes, relationships (i.e. how culture affects the relationship between knowledge and dynamic capabilities generations within the firm (Chirico & Nordqvist, 2010 or the processes/critical relationships involved in generational transition (Murray, 2003; Steier, 2001b). Study of social interactions are also evident (i.e. the role of social interactions in shaping congruence between individual and organizational goals, Kotlar & De Massis, 2013); factors influencing change in family-controlled organizations (Salvato, Chirico, & Sharma (2010); trust building activities (Steier, 2001a); key events in the history of the firm (Steier & Miller, 2010); cultural understandings involved in criteria for CEO selection (Hall & Nordqvist, 2008) and aspirations/attitudes towards international risk taking (Graves & Thomas, 2008).

In some of the reviewed studies, scholars pay attention to contextual factors and the situatedness of social actors (i.e. a local and situationalized understanding of the processes and roles of strategic planning, Nordqvist & Melin, 2010). Another approach is to include and analyze the role of time and industrial context. One example is Salvato et al.'s (2010) longitudinal study of exit where a declining industry was an important reason for why the studied family business decided to leave their original industry (also, Murray, 2003). Another contextual factor related to time is the generation in charge of a family business. A few of the reviewed qualitative studies pay attention to inter-generational relations and dynamic, sometimes in combination with other contextual factors such as industry (e.g. Dyck et al., 2002), or ideology (Johannesson & Huse, 2000).

In many cases the individual experiences recounted are reported as 'firm level' representations. These are often aggregated into case studies or vignettes (i.e. Howorth, Westhead, & Wright, 2004; Irava & Moore, 2010; Karra et al., 2006; Lambrecht, 2005; Miller, Steier, & Le Breton-Miller, 2003; Chirico & Nordqvist, 2010; Salvato, Chirico, & Sharma, 2010; Steier, 2001a), although some case studies are drawn from grounded theory (Steier & Miller, 2010; Tsang, 2002) or are process oriented (Nordqvist & Melin, 2010). Aggregating the findings from the level of individuals to the firm or organizational level is understandable to the extent that it is necessary to capture 'apt illustrations' (Gluckman, 1961) at a particularized level in order to generalize analytically to the firm level. This does mean, however, that rather than exploring the daily lives and experiences of individual actors for their own sake, the outcomes of the research tend to reify single person accounts (rather than the social situation) in which the account is given. This can be noted in the reported findings of the articles where authors use interviews/observations to access the personal accounts of social actors but then reify these accounts as representations of firm level 'performance', 'culture', 'success', 'inertia', 'failure' or 'risk-taking'.

In part, this is an issue related to the level of analysis adopted where, as in the traditional case study approach described by Yin (1994) and Eisenhardt (1989), inquirers are directed to study firm and organizational processes as the 'sum' of the practices, relations, emotions and interactions of the social actors that comprise them. In general, therefore, with the exception of three studies in our sample where the authors privilege the individual level and personal experiences in their own right (e.g. Cole, 1997; Fletcher, 2010; Vera & Dean, 2005), the use of in-depth approaches to understand the "daily life of actors 'from the inside' through a process of deep attentiveness or empathetic understanding" (Miles & Huberman, 1994) is rare to see⁴.

There is also an absence of studies that investigate at close hand the interactions and relational dynamics that occur in organizational life. Often reference is made to the study of dynamics and processes but there is sometimes a tendency to base these processes on what people report during a one-to-one basis interview, rather than observing/reporting how people behave

during interactions, exchanges and conversations in the work place (i.e., whether formally in board rooms, or informally with other family or non-family members).

This leads us to draw three conclusions about the attention given to actions and understandings from the point of view of the reported accounts of individuals or groups of people (see column 2, Table 1). First, there is insufficient detailed research consideration given to the daily life of social actors, whether this is in terms of how they account for making sense of their experiences working in family firms, their situated actions and the relationality of family dynamics, or more particularly in their interactions/conversations with others. Second, with one or two exceptions, contextual factors are taken for granted or seen as embedded in the insights reported by respondents within the extant studies. Moreover, there is an absence of detailed attention to how contextual factors shape findings. Third, there is much evidence of firm level aggregations and the reification of personal accounts as representations of organizational outcomes (mostly in the form of case studies) that is based on a limited amount of interview material. A risk of reification is that it can 'guide the analysis towards unequivocal, logical results and interpretations . . . [rather than] . . . striv[ing] for multiplicity, variation, [and] the demonstration of inconsistencies and fragmentations' (Alvesson & Sköldberg, 2000, p. 152).

4.2. Qualitative research category (ii):

To see things in context and 'gain a holistic overview of the context under study [and] to work out the logic, arrangement and structuring of relationships, patterns and rules (whether explicit or implicit) in relation to context (adapted from Miles & Huberman, 1994, p. 6).

A key strength of qualitative research compared to quantitative approaches is that they offer the inquirer the possibility to build a holistic⁵ perspective of the phenomenon under study and to observe the development of a phenomenon over time. The purpose of holistic efforts is to avoid 'snap-shot' perspectives and to make it possible to link together multiple factors and levels of analysis. This is considered to be important given that inquirers now acknowledge that organizations 'move' more than they are still (Chia & Tsouskas, 2003).

Reviewing the articles presented in Table 2, we observe that several studies report an initial ambition to be holistic and to account for more complexity than has previously been done in their respective area of study. This is evident in the articles using a mix of data collection techniques as well as in studies that adopt an explicitly processual or longitudinal approach (Murray, 2003; Nordqvist et al., 2009) or studies concerned with dynamic capabilities (Chirico & Nordqvist, 2010). An exemplar illustration is the five-year, longitudinal, multiple case study analysis of five family enterprise systems undertaken by Murray (2003). In this study, she plots qualitative longitudinal data along a time line and illustrates the sequence of phases through which the family firms progress over time, providing specific figures to visualize three different types of succession journeys.

Another observation is that the predominant approach used in family business qualitative research is the case study. In our sample, we observe that no less than seventeen of the reviewed papers using a case study approach rely on data collection from

⁴ A useful example of a study that examines in detail in-depth process of power, control, collusion etc. is Ainsworth and Cox (2003). However, having 4.7 citations per year as of Google Scholar in November 2013, this was slightly below the criteria adopted for the methodology of our study.

⁵ We acknowledge our reviewer's comment that there is a tendency for the 'holistic' term to be overused and under-defined. It is used here to be internally consistent with the Miles & Huberman's (1994) usage.

multiple cases, ranging from two cases (e.g. Chirico & Nordqvist, 2010) to twelve cases (Johannisson & Huse, 2000). This is rich material for cross-case comparative purposes (especially because cases may also embed numerical data) but naturally, the more cases that are included in multiple case design, the more difficult it is to capture, interpret and understand the holistic nature of the phenomenon studied in each case. Further, the more cases the investigator adopts to investigate, the less likely it is to be able achieve an in-depth understanding of the role of context and process emergence over time.

In addition, a multi level approach also requires multiple sources of data to examine a phenomenon. This is important to report and triangulate the different opinions and intentions that stakeholders have towards individual and organizational goals, decisions and interests. It also signals the value of collecting fieldwork material from more than one respondent and from more than one data collection point in time. Referring to Table 2 and the column titled 'data collection', it is possible to observe many uses of multiple sources of data and efforts to capture a multi level view of organizational phenomena. Only 6/26 of the articles relied on one data collection method with four using only semi-structured interviews (Bagwell, 2008; Cole, 1997; Dyck, 2002; Howorth et al., 2004) and two based only on documentary or secondary data sources (DeAngelo & DeAngelo, 2000; Miller et al., 2003). The rest cited using mixed data sources ranging from interviews, observations, company documents, informal family data, websites, magazines, balance sheets, field notes, questionnaires and archival records.

Furthermore, fifteen of the twenty-six articles report that they collect data through interviews and observations from multiple respondents (i.e. Chirico & Nordqvist, 2010; De Massis, Frattini, & Pizzurno et al., 2013; Graves & Thomas, 2008; Hall & Nordqvist, 2008; Howorth et al., 2004; Irava & Moore, 2010; Karra et al., 2006; Kotlar and De Massis, 2013; Lambrecht, 2005; Murray, 2003; Nordqvist and Melin, 2010; Parada et al., (2010); Salvato et al., 2010; Steier, 2001b; Steier & Miller, 2010). This means that they include multiple perspectives in the analysis of the phenomenon they study. In many of the articles, the author(s) also describe the interview guide covering questions regarding past events, current issues, and future ambitions. This is one way of avoiding a 'snap-shot' perspective and for gathering field work material at different points in time. Relatively few of the reviewed articles, however, report explicitly that the authors used a strategy of repeated interactions in the field. Examples of articles that include research designs with longitudinal or repeated interactions in the fieldwork setting are Murray (2003), Parada et al. (2010) and Salvato et al. (2010).

From this analysis we draw the conclusion that there is a strong use of case studies in family business research which indicates a concern for holistic perspectives of family business activities. There is also a recurring use of multiple sources of data to enrich and triangulate findings and some evidence of longitudinal studies (although this could be expanded to 'increase variation in what could be observed and in the capacities to notice' Stewart, 2014, p. 74). At the same time, however, there is a tendency within extant qualitative family business research to reduce complexity and dynamics to a set of simple causal relationships devoid of context. There is also a lack of the study of repeated interactions in fieldwork over time and, in the search for unequivocal results, there is an absence of consideration to acts of organizing (Weick, 1995) or process-relational modes of inquiry (Chia & Tsoukas, 2003; Wood, 2002) which emphasizes flux, change, movement and the contradictory/paradoxical nature of organizational life. These limitations are outlined in Table 1, column 2.

4.3. Qualitative research category (iii):

To elucidate the sense-making accounts, behaviors, interactions, relationship patterns and structures reported during fieldwork; and to 'maintain field work accounts in their original forms throughout the study' (adapted from Miles & Huberman, 1994, p. 7).

Many types of qualitative research approaches are associated with the collection and analysis of verbal accounts, written texts, narratives, linguistic terms or metaphors, life histories and personal (or family) stories (see, for example, Dawson & Hjorth, 2012). As noted above, qualitative research approaches are favored, therefore, if the purpose of scholarly inquiry is to collect data that accounts for or reports the way people experience and interpret their life and work situations. Rather than coding and analyzing with numerical data, therefore, inquirers collect words and texts that they integrate to re-construct accounts that offer a deep understanding of a particular phenomenon.

The way verbal texts and accounts are presented in a specific research paper can vary. In general, within the family business field authors have frequently emphasized narratives and storytelling (Dawson & Hjorth, 2012; Hamilton, 2013; McCollom, 1992) including some of the early works on family firms that contained anecdotes or personal stories (Donnelley, 1964). Usually, however, inquirers 'honor' the perspective of the individual actors in the analysis of their empirical material by using direct quotes derived from the descriptions and interpretations that the actors present to the inquirer in the moment of data collection. This is an important first step in qualitative research. At the same time, however, it is important to ensure what Stewart (2014, p.73) refers to as 'veracity' (descriptive truth) to safeguard that the field work effort is performed in such a way that it reflects the perspectives and descriptions made by the informants. Most qualitative inquirers, therefore, record the interviews and transcribe them verbatim, plus they take notes to ensure that the empirical material they work with reflects what is actually expressed during interviews. Further, many inquirers review the transcripts with the informants to confirm that no misunderstandings have emerged during the data collection phase.

Turning to the sample, in Table 2, it is observed that 22/26 of the reviewed qualitative articles use direct quotations from the respondents to visualize and illustrate the empirical material that forms the base of the analysis. Salvato et al's (2010) article regarding exit and divestments uses direct quotations extensively whereas others, such as Steier (2001b), use them sparingly, sometimes embedded in case study vignettes (Steier, 2001a). As qualitative research material, by its very nature, is word intensive, inquirers sometimes organize and summarize the qualitative material into diagrams and tables (e.g., Lambrecht, 2005; Murray, 2003). In other cases, the use of direct quotations is presented in the form of diagrams (e.g., Dyck et al., 2002; Irava & Moore, 2010; Steier, 2001b). This helps to reduce and display extensive amounts of data and to display connections between themes. For the qualitative articles not using direct quotations (Fletcher, 2010; Lambrecht, 2005; Murray, 2003; Tang, 2002), the qualitative material is synthesized into narratives or tables. This is applicable where the detail of what is said in the direct quotes is of secondary importance to the synthesis of the material to aid a new conceptualization or develop theoretical propositions.

There is also very little evidence of authors using direct quotations and other forms of qualitative data to expose and understand deeper symbolic meanings. With the exception of Cole's (1997) study on the use of gender discrimination behaviors as 'weapons' for gaining access to senior positions and Hall and Nordqvist's (2008) study of professional management, from the sample of published articles, relatively few studies use qualitative material for the intention of

examining more critical issues related to power, subordination, asymmetrical relations.

The conclusion we draw from the analysis of the sample regarding this category of qualitative research is that the use of direct quotations from respondents to demonstrate veracity is rare. Also, linguistic phrases are often presented in research accounts without contextual explanation which means that the everyday understandings and sense-making comments become reduced to an objectified collection of words (see **Table 1**, column 2). This overlooks the importance of language in communicating, negotiating and constituting meaning. It also contradicts with the purpose of qualitative research which is not only to display the accounts given 'in context' but also to explain their underlying logics, patterns and structural influences. As a result, the opportunity to 'go deeper' in examining how the more subtle cultural, political or structural issues shape organizational practice and sometimes produce asymmetries of power and relationships, is not fully realized.

4.4. Qualitative research category (iv):

To acknowledge the role that the researcher has in the research process.

The inquirer's active role in generating the empirical material from the field and then using this material to build new insights and knowledge is a central characteristic of qualitative research. For this reason, many qualitative research designs allow for an active involvement of the inquirer (whether this is in the form of personal interviews—both open ended or semi-structured, ethnography, covert or participant observation, forms of action or collaborative research and the more remote reviewing of archival documents). Acknowledging the centrality of the inquirer(s) in qualitative research is important to ensure the faithful reporting (and veracity) of fieldwork material. It is also important for making explicit how/why the inquirer 'treats' the empirical material and infers the connections and interpretations that relate to the emerging theoretical framework and which go beyond the "raw accounts" provided by the informants. One way of doing this is to conduct the fieldwork analysis with the purpose of extracting higher order themes and concepts that demonstrate an increased level of interpretation and theoretical understanding. The articles in **Table 2** differ with regards to how the authors have chosen to describe and motivate their choice of data analysis.

As noted above, most of the studies reviewed rely on a combination of multiple sources to collect fieldwork material, and all of these sources allow for the inquirer to be central to the generation of new knowledge and theory. However, not one of the studies in the sample reports in a reflexive way the role the inquirer has in interacting with fieldwork respondents. Nor does any study explicitly state the analytical trail that the inquirer takes from generating research questions, to undertaking field work to the analysis/coding/organization of that material. This is in spite of the fact that the majority of the qualitative investigations undertook their analysis using manual coding or analysis (for example, only five sets of authors expressively stated that they used some sort of computer software to support their categorization, analysis and extraction themes of the empirical material (i.e., Bagwell, 2008; Graves & Thomas, 2008; Irava & Moore, 2010; Kotlar & De Massis, 2013; Salvato et al., 2010)). Whether using computer software or not, it is important to be rigorous in reporting the development of the analytical process, as this is central to aiding theory development. Moreover, reporting and sharing of the emergent findings with the research informants does not seem to be common practice in family business research and there was no evidence of this in the sample of articles.

This leads us to the conclusion for this category that there is a lack of transparency and detailed discussion of the analytical trails

shaping the process of qualitative research, especially the trail from the research questioning and data collection to analysis and theory development (see **Table 1**, column 2). This lack of transparency undermines the scholarship of qualitative research and its role in explaining or justifying theoretical contributions. At the same time, the lack of reflexivity on the role of the qualitative inquirer in gaining access to fieldwork, building rapport and undertaking analysis, also reduces the authenticity and veracity of the reported findings. These aspects are usually stripped out of traditional research in an effort to remove bias and achieve objectivity but when acknowledged as central to research they enhance the transparency and veracity of the research account.

4.5. Qualitative research category (v):

Theory development is iterative rather than sequential and it emerges from fieldwork material and analysis (iterative process). There is no one single truth or explanation, there are multiple possibilities. 'Many interpretations of this material are possible, but some are more compelling for theoretical reasons or on grounds of internal consistency' (adapted from Miles & Huberman, 1994, p.7).

Most qualitative research approaches are either primarily inductive or abductive (Alvesson & Sköldberg, 2000). This means that while the research process can be theoretically influenced from the outset, the purpose is rarely to test a theory. Rather, the purpose is most often to develop new theory or to critique, amend or extend theory. As seen in **Table 2**, all the reviewed articles are categorized as having the theoretical purpose of building theory. However, the way they do that differs between the studies, as does the way the different articles report the new theory. Several of the sampled studies summarize the new theory in a set of propositions (e.g., Dyck et al., 2002; Howorth et al., 2004), whilst others exhibit a framework or a model (e.g., Irava & Moore, 2010; Salvato et al., 2010). In addition, new theory is sometimes presented in the form of new language and concepts (e.g. Bagwell, 2008; Johannsson & Huse, 2000) or a new conceptualization (Fletcher, 2010). Each of these ways of reporting theory development are appropriate where authors are consistent and follow through the analytical trail in terms of research questions, data collection and data analysis methods. In most cases, authors seem to have been engaged in an iterative research process characterized by an interplay of theory and empirical material that eventually leads to the elaboration of new theory or concepts. In general, however, the description and re-construction of how this process occurred is lacking.

In terms of theory development, it is interesting to observe that a majority of the reviewed qualitative articles are driven by the purpose to 'explore' how specific processes unfold or the nature of a particular phenomenon (e.g., Bagwell, 2008; Miller et al., 2003). This is consistent with traditional conceptions of qualitative research which uphold the value for exploring, uncovering and probing. However, in spite of this commitment to using qualitative methods for exploration purposes, it is rare for authors to elaborate what it means to explore processes or a phenomenon. Many authors are using qualitative methods to attempt to go beyond the surface and expose that which is not normally seen. For example, some of the studies cite descriptive theory building as the main theoretical task (DeAngelo & DeAngelo, 2000; Karra et al., 2006). This is important for illuminating and making transparent things, events or activities previously hidden (even though qualitative methods also offer more than description or illumination for exploratory purposes). In addition, as noted above, the lack of transparency on the whole analytical trail also weakens the ability of reviewers to assess what new theoretical insights are being claimed and to seek out diversity (Stewart, 2014, p.77 referring to Barth, 1999, p.82).

A further characteristic of many of the published qualitative articles in *Table 2* is that they include theoretical propositions to summarize the main findings. To be specific, eight of the reviewed articles offer propositions that formally state the relationships between a set of key variables in focus of the empirical study. For example, *Steier and Miller (2010)* in their study on pre- and post-succession governance philosophies in thirteen entrepreneurial family firms, suggest several testable propositions that summarize their qualitative evidence. The use of theoretical propositions can be a convenient and helpful way to summarize the key results of the study and to provide guidance for future research. What is more, the use of propositions that inspire future confirmatory research allows for qualitative evidence to be used and extended into theory-testing research. Some caution is necessary however, when producing propositions that have the effect of reducing the complexity of social reality to a set of simple causal relationships that are devoid of context as this undermines the qualitative effort to understand phenomena as processually and contextually situated.

Finally, qualitative research is often associated with a scientific view that holds that there is no one single truth or explanation but that there are multiple possibilities to see and understand a particular process or phenomenon. Despite the importance of this feature of qualitative research, there is a tendency in the published articles to communicate the findings as if they represent a single truth or explanation. This is related to the tendency to aggregate complex, multiple phenomena into 'tidy' organizational outcomes associated with 'performance' or 'culture' or 'familiness'. This is understandable to some extent where researchers aim to trace organizational outcomes 'backwards' to variable phenomena but in so doing, this runs the risk of over-simplifying complexity and dynamics that are not only devoid of context but which also limit the potential for multiple (possibly alternative) perspectives/explanations.

A final point in terms of theory development is that the philosophical roots are seldom discussed. In the few papers where the philosophical underpinning is explicitly specified, they are rooted in the interpretivist tradition (*Hall, Melin, & Nordqvist, 2001; Hall & Nordqvist, 2008; Nordqvist & Melin, 2010; Parada et al., 2008*) or in the constructivist tradition (*Cole, 1997*). This suggests a general lack of reflexivity about the assumptions underlying research choices.

The conclusion to be drawn from this fifth category is that the main weakness in existing theory development is the tendency to reduce complexity, paradox, contradiction and dynamics to a set of simple causal relationships devoid of context. Moreover, too much effort is attached to searching for a single truth or explanation (see *Table 1*, column 2). Also, a lack of consideration/examination of the philosophical traditions shaping the research questions undermines the potential to examine how qualitative research approaches are sometimes nuanced by particular theoretical orientations (whether realist, grounded, positivist, interpretivist, hermeneutic or social constructionist).

5. Extending the potential of qualitative research practices in family business scholarship

From the preceding analysis, we have noted the ways in which qualitative research approaches are being applied in family business research (including strengths and limitations and the kinds of issues being addressed). In this section, we respond to these limitations by arguing for more reflexivity and scrutiny of the foundational questions that we are trying to get at when we undertake qualitative research. In emphasizing the significance of foundational questions, we follow *Patton (2002, p.80)*, who uses such questions as the basis for achieving more clarity about the different lineages of qualitative research. We also extend this point to argue that re-orientating our

research towards the underlying foundational questions is important for developing understandings and theories that are well suited to family business settings (*Stewart, 2014, p.67*).

In *Table 3*, therefore, we outline a number of foundational questions that are significant when undertaking qualitative inquiry in the family business field. In the horizontal rows are questions concerning: (a) the research objectives under investigation; (b) the level of analysis being sought; and (c) the task of the researcher during the investigation. These are natural questions to address in any research project but when reflected upon in the light of the questions/issues outlined in the columns of *Table 3* (i.e., (i) actions/understandings from the point of view of situationalized individuals or groups; (ii) sensitivity to context; (iii) the role/place of words, meanings or discourses; (iv) the role of the researcher), this helps to extend our engagement with qualitative inquiry in a way that goes beyond methods choice. In making explicit the responses to such questions we can also reflect upon the process of theory development—a feature which is important for scholarship. These foundational questions are now elaborated.

5.1. Actions and understandings from the point of view of individuals or groups

Referring to *Table 3*, the first task in all types of research is to clarify the research objectives or questions that can be addressed through qualitative inquiry. Examples of appropriate questions to ask are: What is the culture of this group? What tacit or mindful processes can be observed (*Nordqvist et al., 2009; Zellweger, 2014*)? What sources of conflict, solidarity or unspoken meanings or micropolitics of interactions are in play (*Stewart, 2014, p.66*)? How do people in this setting construct their social reality? What common set of symbols and understandings has emerged to give meaning to people's interactions? How do people make sense of their everyday activities? Qualitative researchers can focus on explicating actions, understandings, meanings and contradictions from the viewpoint of either significant individual people or groups of people in the family business. When undertaking qualitative research, this means focusing on verbal accounts, meanings, texts, words, linguistic phrases, images, symbols, signs, use of rhetoric, discourse and semiotic clusters of words either of individual people or collectives of individuals in dyads, alliances, kinship groups, or other interactive, social situations. Here, we see much potential in family business research especially if the research captures the interactions/dialogues/conversations/interrelationships *in situ*, as this is often the way that we can observe organizing processes unfolding and how people come to make sense of their everyday life in the organization.

5.2. Display how words, language, symbols, and images are constitutive of meaning

Having established the key set of questions that can be evaluated qualitatively, researchers have an important choice to make regarding how they 'present' their qualitative research material. One option is to present research material in verbal accounts, texts or images, semiotic clusters of words as objective 'data' that represents what is occurring within that organization. Here, there is more attention to how words signify certain kinds of behaviors (i.e. culture, familiness, professional management, etc.), rather than the meanings behind the words. Alternatively, in a more constructionist perspective, the qualitative researcher would emphasize how, through language, linguistic processes, signs or rhetoric, people (either individually or interactively) come to constitute meaning in relation to context. This latter perspective embodies a philosophical assumption that social reality is constructed interactively through symbolic and dialogic processes.

Table 3

Foundational questions for realizing the potential of qualitative research in the family business field.

	Actions and understandings from the point of view of individuals or groups	Sensitivity to context process and gaining a holistic view	Display how words, language, symbols, and images are constitutive of meaning	Role of the qualitative researcher	Theory development
1. What are my research objectives?	To explicate the actions and understandings from the point of view of the individuals or groups of people.	a) To demonstrate sensitivity to context, process and gain a holistic view of social phenomena. And/or b) To work out the arrangement and structuring of relationships, patterns, rules and logics in relation to context.	a) To display the accounts, logics patterns, structures & interactions reported during fieldwork. And b) To maintain field work accounts in their original forms throughout the study.	To make transparent the researcher-stance during the research process and report the audit trail from sensitizing concepts to fieldwork activity and analysis. ⁴¹	a) To induce theory from the contextualized accounts of respondents. Or, b) To build theory iteratively with concepts as insights emerge from local context. Or, c) To test theory deductively through the application of pre-developed propositions to insights from local context. a) Presenting insights and accounts as 'grounded theory'. Or, b) Iterative synthesis of theoretical concepts with fieldwork accounts and experiences aided by sensitization to the local context Or, c) Theory development is co-constructed with respondents.
2. What is my level of analysis?	a) Individual sense-making. And/or b) Dyads, groups, networks alliances, organizations and other collectives of individuals.	a) Individuals in socio-cultural context. And/or b) Collectivities, groups of individual in socio-cultural context(s).	Verbal accounts, meanings, texts, words, linguistic phrases, images, symbols, signs, use of rhetoric, discourse, semiotic clusters of words and meanings.	a) Accounts reported or observations made in a particular socio-cultural context. Or, b) The relationship constructed with respondents.	
3. What is my task during the research process?	a) To record the accounts and intentions of local actors 'from the inside'. b) To listen and be attentive to what is being said. c) To build rapport, dialogue and empathetic awareness with respondents.	a) To record the accounts and intentions of local actors 'from the inside' and to engage in prolonged contact within the field. b) To undertake repeated interactions in the field. c) To record actions/ events over time.	a) To assemble, cluster or categorize qualitative material into semiotic segments in order to elicit meaning, contrast/compare, and to bestow patterns. b) To maintain and privilege the original fieldwork accounts. And show the intentionality of the respondent(s).	a) To remain 'neutral' and collect data objectively. Or, b) To act 'vicariously' observing and reporting others' accounts through one's own theoretically-informed interpretations. Or, c) To construct fieldwork process and analysis in collaboration with respondents.	a) To suspend or 'bracket' preconceptions about the topic under discussion. Or, b) To examine as many perspectives or interpretations as is possible, and make choices about which are more compelling for theoretical reasons or on grounds of internal consistency. Or, c) To work closely with respondents to develop theory in line with their viewpoints and perspectives.

5.3. Sensitivity to context process and gaining a holistic view

As discussed earlier, an important feature of qualitative inquiry is to demonstrate sensitivity to context and gain a holistic view of social phenomena. As Patton (2002, p.58–61) suggests, this helps to examine: How X perspective is manifest in this phenomenon, or how and why this system as a whole functions as it does; or under what conditions did a certain phenomenon take place that makes it possible to interpret its meaning? It also helps to work out the arrangement and structuring of relationships, patterns, rules and logics in relation to contextual factors. This means that it is important to move beyond the display of verbal accounts to a deeper examination of how certain logics, patterns and structuring influences appear to be shaping linguistic processes or interactions. Either way, an important feature of qualitative research is to maintain, as far as is possible, the fieldwork accounts in their original forms throughout the study and to describe for the reader the context within which such insights were observed.

5.4. Role of the qualitative researcher

Following this, if a constructionist theoretical stance is being adopted, it is necessary that the role of researcher is made explicit within the research report⁶. This can be done by reporting/analyzing

the accounts or observations made in particular socio-political contexts (see theory development discussion below). But central to this is the need to make transparent the relationship and rapport constructed with respondents. One stance is to remain 'neutral' and collect material and accounts as it naturally occurs in an objective way as is possible. Here, the researcher might present insights and accounts as 'grounded theory' and suspend or 'bracket' preconceptions about the topic under study in order to privilege the localized accounts. Although some qualitative inquirers would argue that this is not really possible when interacting in the field, in that one's gender, class, ethnicity, way of speaking etc. is always evident and potentially shapes the nature of the fieldwork interaction, this might be preferable to those researchers who aim for the research to be as naturalist or neutral as possible.

Another stance, which is more common in qualitative inquiry, is that the researcher acts 'vicariously' observing and reporting others' accounts through one's own theoretically-informed interpretations. In these cases, there is an iterative synthesis of theoretical concepts with fieldwork accounts and experiences with sensitizing concepts from the literature. A third stance is to adopt a

⁶ See Van Maanen, J. (2011). *Tales of the field: On writing ethnography*. University of Chicago Press.

more collaborative approach to the fieldwork in a mode of co-inquiry where the research questions, problematizations and theory development are co-constructed with family business stakeholders (rather than respondents) in the fieldwork setting. Two rare examples in family business research are: Friedman (1991) who explains how his research on sibling relationships was conducted through intertwined processes of research, consultation and self-examination; and Helin (2011) who speaks in a reflexive way about the 'living moments' experienced during family business meetings.

5.5. Theory development

In Table 3, we outline three possible implications for theory development: (a) To induce theory from the contextualized accounts of respondents; (b) To build theory iteratively with concepts/theories as insights emerge from local context; (c) To test theory deductively through the application of pre-developed propositions to insights from the local context. The mode of theory development and the extent to which we reify the data as 'representations' of organizational level phenomena are determined by the research objectives and the theoretical orientation of the inquirer. For example, as we saw in the extant qualitative family business research, researchers often simplify the qualitative insights drawn in order to explain a single truth or explanation about organizational performance or culture. This misses the possibility, however, for discussing how other explanations are potentially more compelling (and internally consistent) for that particular context.

6. Conclusion

In the preceding analysis, we have suggested ways in which there is scope to further enhance qualitative inquiry in family business. First, we identified five analytical categories drawn from Miles and Huberman (1994) that represent the key characteristics of qualitative research. We then utilized these categories to review the sample of qualitative family business studies, to identify both the strengths and limitations of qualitative research in the family business field. Second, we used these categories to examine the kinds of research questions and topics that were being addressed and to assess how these questions were being applied through the use of qualitative techniques. Having identified a series of gaps and limitations, we stressed the need to extend the potential of qualitative research in family business studies by addressing the foundational questions that underlie our methods choices.

6.1. Planning for new futures

In this final section, we discuss some areas within family business research where a more intensive use of qualitative inquiry would be particularly useful for uncovering important and overlooked phenomena. The three areas that we focus on are: (i) paradoxes and dualities; (ii) family business processes and execution and (iii) contextual and industry-specific aspects of family business behavior.

As noted earlier, the notion of paradox (Lewis, 2000; Smith & Lewis, 2011) and the related notion of duality (Jackson, 1999) are very relevant topics for qualitative inquiry given the characteristics of family firms and their complex or 'Janus-faced' nature (Miller et al., 2015). Another distinctive feature of family firms is the interactions between the individual, the firm and the family. These interactions from various forces give rise to simultaneously-present tensions and paradoxes which change over time. This means that they cannot be managed in a 'one size fits all' solution, and their importance cannot be easily captured through

conventional research approaches emphasizing variance rather than process (Poole & Van de Ven, 1989). Closer attention to family business paradoxes and dualities through qualitative methodologies would help to demonstrate how various organizational processes are interconnected. It would also help to reconcile existing findings from quantitative studies and enhance our conceptual and practical understanding of the deeper foundational issues characterizing family business life and experiences. Even when quantitative studies reveal a potential family business paradox or duality through curvilinear relationships (e.g., Bolin, Pieper, & Covin, 2015), the mechanisms and micro-foundations underlying that paradox can hardly be grasped without recurring to qualitative methodologies.

A second topical area where a more intensive use of qualitative inquiry would be particularly useful is related to family business processes and execution. By this we mean how social actors in family businesses: identify decisions and actions to resolve issues and problems, set organizational goals, delegate tasks and the sequence within which these issues are resolved and the accountabilities and deliverables demanded from each person involved (De Massis & Kotlar, 2015). Considering that the involvement of the controlling family will necessarily introduce family dynamics into the organization, the decision making, strategy planning and implementation processes adopted by family firms may be distinctive as well. Currently, however, we know very little about how decisions are made or behaviors are manifested in family firms because the processes by which family firms execute their strategies and produce their distinctiveness remain understudied. Qualitative methodologies are well suited to fill this knowledge gap.

A third topical area in which qualitative research can be further extended relates to the contextual and industry-specific aspects of family business behavior. Individuals, families and organizations interact in numerous ways with peers and competitors, customers, regulators and other stakeholders who, collectively, are perceived as an industry. Such industries can differ in terms of their political, economic, socio-cultural and technological conditions (Dess, Ireland, & Hitt, 1990). In turn, these differences are likely to shape the determinants, processes and outcomes of family business behavior. Moreover, the particularistic behavior of family firms is strongly intertwined with the goals, beliefs, heuristics, intuition, and accurate or inaccurate information that derive from individuals' experience within an industry. For example, behavioral perspectives in family business research suggest that the relationships of family business owners and managers with a high- versus low-tech sector can shape the way they engage in innovation (Gomez-Mejia, Campbell, Martin, Hoskisson, Makri, & Sirmon, 2014).

Despite the increasing attention to the role of context in family business (e.g., Wright, Chrisman, Chua, & Steier, 2014), and despite acknowledgement of how industry variables have long dominated individual-, group- and organization-level variables in empirical studies of family business behavior, the underlying mechanisms through which the industrial sector shapes family business behavior and the micro-strategies, routines and capabilities through which individuals, families, organizations and industries interact in conducting business activity remain largely under theorized and little understood. Qualitative inquiry has the potential to guide future family business research toward a deeper understanding of industry-specific determinants, processes and outcomes of family business behavior.

The selection of these topics serves to remind us about the potential of qualitative research for examining the 'micro-foundations' (Gagné et al., 2014; Zahra et al., 2014) of family business structures and behaviors and for 'narrowing the micro-macro gap' (Bamberger, 2008, p.840) in family business research. In addition, we argue that greater scrutiny about the foundational

questions we are trying to address through qualitative inquiry is important because there is no 'single, monolithic approach to qualitative research and evaluation' (Patton, 2002, p.76) or accepted 'boilerplate' that standardizes the approach to and writing of qualitative research (Pratt, 2009, p.856). On the contrary, in qualitative inquiry there is: 'an exhilarating and [even] at times exhausting proliferation of types' (Patton, 2000, 76, referring to Page, 2000, p.3). This diversity and breadth is not only demonstrated by the range of methods available. It derives from the fact that the key principles of qualitative inquiry derive from various theoretical schools of thought (such as pragmatism, phenomenology, interpretivism, hermeneutics, symbolic interactionism, ethnmethodology, social constructionism and post-structuralism) that privilege (amongst other things) the subjective, the social, the contextual, the value laden, the ethical, the negotiated and the taken for granted. A key message behind this article is to encourage greater 'experimentation and creativity in the craft of qualitative research' (Pratt et al., 2009 p.857). This will help to promote the scholarship of micro-level research and to address those illusive processes that manifest themselves in contradictions, paradoxes, conflicts, mindfulness and the complexities that are central to the accountabilities of social actors who manage the obligations that come with being a member of a family and a business.

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