

The Adulthood of Family Business Research Through Inbound and Outbound Theorizing

Since the early 1980s, the rapid growth of family business research has led to the establishment of the academic field of family business. Concurrently, the nature of the research conducted in the field has evolved through a number of developmental stages. Early studies, when the field was young and in its primary stage, tended to highlight the differences in the actions, behaviors, and performance of family and non-family businesses. This effort was justified and necessary, in part, in order to establish family businesses as unique organizational entities worthy of scholarly investigations (e.g., Sharma, 2004). As the field matured, gained legitimacy, and moved towards its adolescence stage, research on family business shifted to applying mainstream theories born in other disciplines (which we refer to as inbound theorizing) to show how and why family businesses are not only distinct from non-family businesses, but how family businesses are distinct from each other (e.g., Chua, Chrisman, Steier, & Rau, 2012). In this stage of development, researchers cast aside the monolithic view of family businesses and developed theories and insights that focused on their heterogeneity (e.g., Brune, Thomsen & Watrin, 2019).

This Review Issue provides evidence that the family business field has evolved further and reached the next stage – its adulthood. The four articles in this Review Issue not only highlight distinct processes among family businesses, as well as between family and non-family businesses, but actually go one step further: They review and inquire how the context of family business creates opportunities to give back to mainstream theories and thereby contribute significantly to revise, adapt, and develop existing theories and redefine their boundary conditions from other fields of study (which we refer to as outbound theorizing). Each of the four articles in this Review Issue does so in a unique way, highlighting the immense opportunities of (1) doing research in the context of family business and (2) contributing to significant theory development. In this editorial,

we will present the main insights gained from each article before discussing how they, as a group, help advance the field of family business studies and create opportunities to give back to mainstream theories.

Review Issue Papers

The four papers included in the 2020 Review Issue shed light on: (1) how the meanings of family firms in the mind of consumers form as a result from negotiations and exchanges with the firm in the marketplace (Bettinelli, Andreini, Pedeliento, & Apa, 2020); (2) how elements of familial relationships, roles, and events help explain subsequent differences in family business outcomes (Combs, Shanine, Burrows, Allen, & Pounds, 2020); (3) how the work-family interface in family businesses offers rich research opportunities (Michael-Tsabari, Houshmand, Strike, & Efrat-Treister, 2020); and (4) how different conflict management approaches can shape family businesses (Qiu & Freel, 2020). We will discuss each paper in turn.

How Consumers See Family Firms

A growing body of research is focused on how a family firm's nature (i.e., being seen or perceived as a family firm) can lead to potential competitive advantages over non-family firms and several recent review articles have addressed the value of family firms' brands in this process (e.g., Sageder, Mitter, & Feldbauer-Durstmüller, 2018). However, as noted by Bettinelli et al. (2020) in their review article entitled "How Do Consumers See Firms' Family Nature? A Review of the Literature," these reviews tended to focus on studies which viewed firms' family nature as an idiosyncratic resource (see Binz Astrachan, Botero, Astrachan, & Prügl, 2018). Such a perspective ignores that the meanings implied in being a family firm are also a by-product of negotiations which occur at the individual level, but also at the level of the multiple social spheres where consumption occurs. These authors point to the emerging consumer market research that

argues that consumption meanings (such as being a family firm) are not only explained by consumers' positive or negative perceptions with a family firm's market offerings, but are also created through a process of fit between those market offerings and the consumers' themselves. Thus, a firm's family nature is the result of negotiated and market mediated consumption practices.

In their review of 83 papers, Bettinelli et al. ask "*What do we know about how consumers form meanings about firms' family nature?*" and explore firms' family nature from consumers' perceptual, social, and cultural perspectives, not only at the individual level (micro), but also at the meso and macro levels of social spheres. In addition to the typical positive meanings and idiosyncratic resources commonly associated with family businesses (e.g., trust, authenticity, and social responsibility), the authors find evidence of negative perceptions associated with family brands (i.e., limited product selection and inflexibility).

The review then explores how consumers use meanings that they form about family firms to (1) negotiate their own identities, (2) establish social relationships, and (3) promote social and cultural ideologies. For example, consumers may develop preferences for the products of family firms as a way to convey their discordance with the values typically held by large corporations. In this sense, consumers use their consumption practices as a means to create a fit between their own beliefs and values and the meanings they ascribe to family firms. Consumers may also be attracted to family firms and find value in being part of the social groups or movements associated with family firms, and do so to feel like members of the "family" attached to the family firm. Finally, cultural and social values, such as those associated with the American West subculture (Peñaloza, 2001), can be perpetuated as consumers see family-owned ranchers and exhibitors as the most meaningful and powerful means to promote those social and cultural ideologies. The review closes with a series of important research questions to spawn new investigations of family firm brands as

socially-constructed phenomena developed as a result of interactions with a variety of market actors.

Leveraging Family Science Theories

While family business researchers have long recognized the intersection of the family and business systems as a defining principle of family businesses, most family business research has either adopted business theories and principles, or has largely focused its attention on the actions, behaviors, and outcomes of the firm (often at the expense of ignoring the family itself). In their review article entitled “What Do We Know About Business Families? Setting the Stage for Leveraging Family Science Theories,” Combs et al. (2020) highlight the growing research that suggests how various elements of familial relationships (e.g., cohesion, communication, conflict), family-member roles (e.g., parents, children, siblings), and family transitions (e.g., marriage, divorce, birth of a child, retirement) are linked to important outcomes for families (e.g., children’s health and academic performance, marital health), and the businesses they own and manage (James, Jennings, & Breitkreuz, 2012; Jaskiewicz, Combs, Shanine, & Kacmar, 2017). Combs et al. (2020) fully agree that family science research holds a great deal of promise and “suggest that embracing it requires building upon what researchers have already learned about business families” (p. xx) and use family science research as a framework to examine research on business families. These authors note that much of the prior work was conducted without reference to or knowledge about family science; this has led to descriptive, as opposed to theoretically grounded research, as well as the adoption of business-based theories poorly suited to capture the rich diversity that exists among business families.

In response, Combs et al. (2020) systematically review this fragmented research stream of 55 papers and connect research studies to appropriate family science theories. In doing so, these

authors offer a means to leverage family science theories while still benefiting from what we already know about the relationships, roles, and transitions that shape family firms' actions and outcomes. After reviewing how family science theories help tie and explain prior research results, this review presents a research agenda that points to gaps in our knowledge of business families and the well-established family science theories that could be leveraged to fill them.

Work-Family Balance in Family Firms

The topic of business families also looms prominently in Michael-Tsabari et al.'s (2020) review of the work-family interface (WFI) research in family business. Research on the WFI focuses on the "interdependencies between work and family domains" (Powell, Greenhaus, Jaskiewicz, Combs, Balkin, & Shanine, 2018, p. 99). Exemplary topics in the larger WFI literature include how employees' stress at work might carry repercussions for employees' private lives or how a happy marriage might enrich employees' work. Research on the WFI, therefore, deals with work-to-family and family-to-work enrichment and depletion. While the family business context appears to be an ideal context to study the WFI, Michael-Tsabari et al. (2020) explain that WFI research in family firms has been largely decoupled from the larger WFI literature.

Building upon this surprising observation, the authors review the paralleled development of two WFI literatures – one pertaining to family businesses and one to businesses in general – that has led to limited comparative research of the WFI in family versus other businesses. This paralleled development has, as the authors note, also regrettably facilitated idiosyncratic assumptions and poor definitions in family business WFI research, which in turn has limited theory development. To overcome this unsatisfactory status quo, the authors set out to answer three research questions: *What are the implicit assumptions and definitions separating the family business WFI literature from the larger WFI literature? What is the current state of the family*

business WFI literature? And what is a future research agenda that can help to re-connect the paralleled WFI literatures and develop more theory on the WFI in family business?

Following the review of 72 studies on the WFI in family firms, the authors identify a number of implicit assumptions that separated family business WFI from the larger WFI literature. For instance, 40% of the reviewed papers on the family business WFI lack a definition for WFI. Moreover, family business WFI studies use definitions of terms that are different from those that are used in the larger WFI literature. For example, in the family business literature, *work* refers to paid and unpaid work by family members in the family business. Whereas in the wider WFI literature, it refers to an individual's paid employment in any organization. The lack of definitions indicates a lack of transparency of family business WFI studies, while different definitions of critical terms undermine potential comparisons of results from family business WFI studies with those in the larger literature.

After analyzing the state of the family business WFI literature, the authors point out three shortcomings. First, the ownership system is largely omitted from existing research. Second, most studies focus on negative aspects of the family business WFI, such as WF conflicts (37% of studies), while only 14% analyze positive aspects, like WF enrichment. Finally, studies neither consider potential changes of the WFI across family life cycle stages nor account for societal/cultural differences of families. Building upon this overview, the authors develop a research agenda consisting of 19 important research questions in three areas, namely ownership, WF enrichment, and the ecological system. For each of these areas, they delineate research opportunities on the individual, family, and work level of analysis. For instance, at the intersection of WF enrichment and the work level, they ask: *How do business characteristics (such as industry, products or location) affect norms in facilitating the use of work resources to benefit family*

members? Or, at the intersection of the ecological system and the individual level of analysis, they ask: *How do cultural norms (e.g., regarding gender and equality) influence WFI for women family business members compared to men family business members?* Their research questions not only highlight the prevalent gaps in the family business WFI literature, but also indicate the bridges that can be built to improve our understanding of the WFI in general. The authors conclude that the family business context offers a field of abundant opportunities for WFI scholars.

Conflict in Family Firms

Complementing Combs et al.'s (2020) and Michael-Tsabari et al.'s (2020), Qiu and Freel (2020) also focus on business families by examining a key issue embedded in both family science theories and the work family interface research—conflict. In their review entitled “Managing Family-Related Conflicts in Family Businesses: A Review and Research Agenda,” Qiu and Freel (2020) note that most of the 93 studies examined in their review address family-related conflict by examining the nature of conflict in the family (and firm) or by focusing on the strategies used to manage those conflicts. The authors note, however, family-related conflict and conflict management strategies are two intricately coupled components that are best examined together if scholars and researchers are to completely understand the implications that conflict may have in family firms (whether positive or negative).

Moving to integrate these two components, Qiu and Freel (2020) initially synthesize the studies that have examined the antecedents, characteristics, and consequences of family-related conflict. Their review highlights the nuanced and complex nature of conflicts in family firms where a driver or antecedent of conflict in one context can become a mediator of conflict in another (e.g., senior generation involvement post-succession may create conflict for new leaders, but help avoid conflict *before* the later generation cedes control). This inherent complexity

suggests that a contingency approach is most suited to theoretically understand how to effectively manage conflict in family firms. Thus, Qiu and Freel introduce a theoretically, grounded framework that includes *either-or* (e.g., avoidance), *both-and* (e.g., collaboration), and *more-than* (e.g., changing/learning) approaches to conflict management that can be used to understand family-related conflict and the influence that feedback loops may have on conflict outcomes.

The framework put forth by Qiu and Freel (2020) provides a road map to contribute to our understanding of family-related conflict and its management. By integrating the characteristics of conflicts with the contexts in which they are embedded, for instance, the authors show how scholars can explain how conflict management strategies would be expected to coevolve with the evolution of the family (and the embedded relationships) and the firm. This line of inquiry could help us develop a meaningful theory that explains how conflict might positively or negatively shape the dual nature of the family business management, which often balances operational efficiency and effectiveness with family-related goals and interests. Like the other reviews, Qui and Freel (2020) highlight how research conducted within family firms presents an opportunity to inform broader discussions and theoretical development in the management literature. Within the domain of conflict and conflict management, for instance, family businesses can serve as a platform to expose the many implications that emotions play in conflict management strategies, especially within complex nested structures across levels and time.

Discussion

We started this Introduction to the 2020 Review Issue by pointing out that the field of family business studies has matured by reaching the next stage – its adulthood. Based on the four

articles in this Review Issue, we see clearly how family business researchers not only draw upon well-established theories from other fields, such as organizational behavior, family science, and marketing, but also leverage the context of family business to give back and thus contribute to refine and advance (i.e., extend and/or enrich) mainstream theories.

Bettinelli et al. (2020) acknowledge the active role consumers play in contemporary marketplaces, which has spawned novel perspectives like consumer culture theory (CCT) (Arnould & Thompson, 2005) and service dominant logic (Lusch & Vargo, 2006). This work, which has urged scholars to view the marketplace as more than just vehicle of consumption, but also as a fabric of meanings (Giesler & Fischer, 2017), can help researchers view the family brand as more than just a characteristic leading to competitive advantages. Instead, researchers can ask how consumers' and family firms' personalities and values are connected or how different consumers attach different brand personalities to family firms than the ones intended to be conveyed by the family firm. Such research is also important to inform marketing theories, which have largely ignored the unique attributes of family businesses and the relationships they build with their consumers. This appears timely and relevant because the meanings that can be prescribed to families and their brands go beyond those that are regularly attached to business brands, thereby offering ample opportunities for refining boundary conditions of marketing theories based on the study of family firms.

In the case of Combs et al. (2020), the consideration of family science theories such as family communication patterns theory (Fitzpatrick & Ritchie, 1994; Ritchie & Fitzpatrick, 1990), and intergenerational solidarity (Bengston & Roberts, 1991), can allow family business researchers to move beyond simple investigations, such as single family-relationship dimensions (e.g., conflict). Other theories, such as parental control theory (Baumrind, 1971) and the family-niche

model of birth order and personality (Sulloway, 1996), can be used to explain how children and sibling roles develop and shape the way family firms are managed, while family development (e.g., Rodgers, 1964) and life courses (Elder, Johnson, & Crosnoe, 2003) theories can help researchers understand how the addition or subtraction of family resources can impact family firm strategy and performance. In short, by changing the theoretical lens researchers use to examine family businesses, scholars can ask and answer novel research questions that will deepen our understanding of the actions and performance of business families. This is important because the uniqueness of family businesses has been for too long assumed to originate in the family behind the business. Combs et al. (2020) show how family science theories can be leveraged to predict how families shape family businesses and how family businesses shape families. At the same time, their review does give back to family science. Whereas family science theories have been amply applied to explain household, couple, and individual (e.g., health) outcomes, their implications for organizations have been relatively neglected (Jaskiewicz et al., 2017).

Outbound and inbound theorizing is similarly highlighted by Michael-Tsabari et al. (2020), who draw on the larger WFI literature to highlight the shortcomings of the separate family business WFI literature before developing a list of research questions that not only leverage mainstream theories to fill apparent gaps in our understanding of the WFI in family business, but also provide opportunities for family business WFI research to give back to mainstream theories. Of special relevance is that Michael-Tsabari et al. (2020) detail how the particularly strong integration of the WFI in family businesses, due to the overlap of family, work, and ownership, enables developing and testing more refined WFI theory. In some ways, the family business context is the prototypical, yet largely ignored, context to study the WFI; Michael-Tsabari et al. (2020) lay out opportunities to enrich WFI theories and their boundary conditions.

The unique opportunity of studying the family business context is also suggested by Qiu and Freel (2020). They show how integrating conflict management theories into the context of family business can help us understand productive and destructive conflict processes and how their trajectories can be shaped. Since Levinson (1971), family business researchers have known that “family businesses are plagued by conflicts”. Qiu and Freel (2020) go further by suggesting how conflicts in the context of family business are an opportunity to apply and give back to conflict management paradigms and theories. Specifically, Qiu and Freel (2020) highlight how conflict is inherently dynamic and emotional, and models detailing the conflict process reflect how felt or expressed emotions emerge and lead to attitudinal and behavioral outcomes. These, in turn, influence others’ emotions and subsequent behaviors. While these dynamic influences have been acknowledged, few studies have explored them (Cronin & Bezrukova, 2019; Qiu & Freel, 2020). Exploring conflict within family firms, because of the relatively enduring nature of the firms and the members’ relationships, could offer a unique setting that sheds light on the dynamic influence that emotion plays as critical feedback loops are integrated into our understanding of conflict and how it is managed—a key discussion in the conflict literature (Cronin & Bezrukova, 2019).

Taking all four papers together, the family business field has evolved from adolescence to adulthood through the combination of: (1) inbound theorizing – i.e., exchanges which bring in theories and/or literatures from other fields to support, enrich, or provide different perspectives on family firms; and (2) outbound theorizing – i.e., exchanges which draw on the uniqueness of the family business to challenge the boundary conditions of broader theory(ies). We applaud this bi-directional exchange across fields and encourage family business researchers to do the same; to shift their focus to not only consider the heterogeneity of family businesses, but also to include

visions of how family business research can give back to prevailing theories in other business and social science disciplines

Implications

Consistent with the notion of reaching adulthood, all papers in this Review Issue suggest that drawing on mainstream research and theories is useful for advancing our understanding of families and the businesses they own and manage. A natural next step for scholars is to leverage the family business context to refine the boundary conditions of the mainstream theories they draw upon. A second step is to extend and/or enrich mainstream theories. Ultimately, however, in the process of applying mainstream theories to the context of family businesses, new theories of these organizations will hopefully be developed. Below, we provide our own views on where we think family business scholars should focus their efforts to leverage the bi-directional exchange across fields in the development of theory relevant to family businesses. We offer two suggestions, as follows.

First, rather than focusing on the consequences of family firm heterogeneity, more scholarly attention needs to be devoted to the theoretical causes of family firm heterogeneity. Most family business research begins with the explicit or implicit assumption of family firm heterogeneity. If this heterogeneity is supposed to lead to novel theory development, it is important that we understand its origins. To provide an example, Bika, Rosa, and Karakas (2019) describe in detail how family members were socialized across generations and that each form of socialization (e.g., interactive, internal, or experiential socialization) was aligned with the larger economic and social pressures that the business and family faced at a particular time. As such, the authors identify family members' form of socialization as one potential source of family business heterogeneity. We feel that, by providing insights into the origins of family firm heterogeneity, we

may be able to understand better how family firm managers and owners can generate and manage their firms' differences. This Review Issue provides some important new insights in this regard. It points to origins of such heterogeneity in terms of (1) the meaning that consumers prescribe to families and their brands (Bettinelli et al., 2020), (2) the dynamics of families shaping their firms' unique goals, processes and behaviors (Combs et al., 2020), (3) the particular overlap between family, work and ownership as a driver of family firm uniqueness (Michael-Tsabari et al., 2020); and (4) the approaches to manage common conflicts in family firms as drivers of family firm variation (Qiu & Freel, 2020). Understanding the extent to which durable differences exist across all firms, family business or not, may revolve around the extent to which there are systematic differences in family-related issues.

Second, all papers in the Review Issue point to the need to pay closer attention to underlying processes. Whereas considerable attention has been paid to the distinct goals, behaviors, and outcomes of family businesses (e.g., Chua et al., 2012), relatively little is known about how these goals, behaviors and outcomes come into place and are connected to each other. Fortunately, recent research has started to pay more attention to the importance of such processes. For example, Murphy, Huybrechts, and Lambrechts (2019) shed light on the processes that lead next generation members to pay more attention to the pursuit of non-financial, socioemotional goals in the family business: Next generation members who interact frequently with the family business during their childhood tend to identify more strongly with the business later and therefore adopt a mind frame that regards the business as a means to not only satisfy financial but also socioemotional needs such as those related to identification. By shedding light on the role of family members' life paths, the authors highlight one process that shapes the nature of the goals that family members pursue in their family business.

The importance of process is similarly highlighted by all articles in this Review Issue: Bettinelli et al. (2020) explain that the uniqueness of family businesses might be socially constructed by consumers outside of the family business, whereas Combs et al. (2020) discuss that the very nature of the family shapes the processes that business families devise in their firms. A different take is offered by Michael-Tsabari et al. (2020), who reason that the overlap of family, work, and ownership, as well as their position in the family life cycle and their cultural context, will shape family business processes. Finally, Qiu and Freel (2020) suggest that the chosen approach to common conflicts will shape decision-making processes and behaviors in family businesses. Taken together, each of the papers in the Review Issue points to important yet poorly understood antecedents and processes that distinguish family businesses from each other and non-family businesses. We envision future studies aimed to explore how processes unfold within family firms and the distinctive stages, flows, decision points, and actors of such processes. This research will ideally shed light on how family firm decisions are made and the processes by which family firms plan and execute their behavior, which is regrettably a largely neglected research area (Chrisman, Chua, De Massis, Minola, & Vismara, 2016).

Conclusion

After the establishment of the field of family business research, researchers looked inside these businesses. In the following years, they looked outside to gather theories and paradigms to improve their understanding of family business. Now, they look ahead to give back to mainstream theories and research, such as Hussinger and Issah (2019) do in their study of acquisition behaviors of family firms. This is an incredible opportunity for family business researchers to leave a mark and make a difference beyond our own field. We believe that it is also our duty.

Family business scholars need to devote more time to explaining how the unique insights derived from studying family businesses change our understanding of mainstream theories. We believe that, to date, family business scholars have been too content simply stating their unique findings in the context of family businesses. The adulthood of our field demands that we go further. For us, it is an oxymoron that most mainstream theories were developed based on the observation of a minority of organizations (i.e., non-family firms), but that it is widely accepted that these theories apply to and explain the goals, processes, and outcomes of all businesses – including family businesses. As our field reaches adulthood, it will be our mission to test mainstream theories in the context of family businesses – that is about 2/3 of all businesses in the world – and to use gained insights to support, refine, or reject mainstream theories as well as develop novel ones. The articles in this Review Issue exemplify important first steps in this regard. The bridges they build will hopefully become the cornerstones for significant theory development and rich implications in and beyond family business.

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