


**KEY TEACHING COMPETENCIES FOR SUCCESS IN FAMILY BUSINESSES: A STRATEGIC APPROACH IN HIGHER EDUCATION**

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ARTICLE INFO	ABSTRACT
<p><b>Article history:</b></p> <p><b>Received</b> 01 September 2023</p> <p><b>Accepted</b> 13 December 2023</p>	<p><b>Purpose:</b> The main objective of the study is to develop essential teaching skills for the successful management of family businesses, proposing a strategic teaching plan that covers everything from student training to the creation and effective management of these companies, contributing to economic growth and meeting social demands.</p>
<p><b>Keywords:</b></p> <p>Entrepreneurship; Family Businesses; Entrepreneurial Strategy; Teaching Skills.</p> <div data-bbox="172 987 480 1234" style="text-align: center;">  </div>	<p><b>Theoretical Framework:</b> The theoretical framework highlights the importance of preparing students to manage family businesses, focusing on specialized instructors. It underlines the crucial role of family businesses in economic growth and argues that proper training can reduce failure rates in this type of business.</p> <p><b>Design/Methodology/Approach:</b> A quantitative and qualitative methodology was used, with a descriptive-correlational approach and a non-experimental cross-sectional design. The research was carried out in Mexican universities with a sample of 180 professors. Data collection included surveys and interviews, assessing key competencies such as communication, leadership, problem-solving, and financial management.</p> <p><b>Findings:</b> The results indicate that, according to the teachers surveyed, the most relevant competencies for successful family business management include communication skills, leadership, problem-solving, teamwork, financial management, human resources, marketing, sales, innovation, and entrepreneurship. The research highlights the importance of specialized training and the need to align family and business interests.</p> <p><b>Research, Practical &amp; Social Implications:</b> It is suggested the implementation of a strategic educational program in higher education that covers from training to the management of family businesses, adapting to the changing demands of society and the business environment.</p> <p><b>Originality/Value:</b> The study addresses a relevant issue and proposes concrete measures to improve training in entrepreneurship and family business management in the academic field. It proposes a comprehensive strategic teaching plan, establishing the necessary competencies for teachers and providing specific guidance towards the creation and management of family businesses.</p> <p>Doi: <a href="https://doi.org/10.26668/businessreview/2023.v8i12.4018">https://doi.org/10.26668/businessreview/2023.v8i12.4018</a></p>

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## COMPETÊNCIAS-CHAVE DE ENSINO PARA O SUCESSO EM EMPRESAS FAMILIARES: UMA ABORDAGEM ESTRATÉGICA NO ENSINO SUPERIOR

### RESUMO

**Objetivo:** O principal objetivo do estudo é desenvolver habilidades pedagógicas essenciais para o sucesso da gestão de empresas familiares, propondo um plano estratégico de ensino que contemple desde a formação dos alunos até a criação e gestão efetiva dessas empresas, contribuindo para o crescimento econômico e o atendimento às demandas sociais.

**Referencial Teórico:** O referencial teórico destaca a importância de preparar os alunos para a gestão de empresas familiares, com foco em instrutores especializados. Sublinha o papel crucial das empresas familiares no crescimento econômico e defende que uma formação adequada pode reduzir as taxas de insucesso neste tipo de empresas.

**Desenho/Metodologia/Abordagem:** Utilizou-se metodologia quantitativa e qualitativa, com abordagem descritivo-correlacional e delineamento transversal não experimental. A pesquisa foi realizada em universidades mexicanas com uma amostra de 180 professores. A coleta de dados incluiu pesquisas e entrevistas, avaliando competências-chave como comunicação, liderança, resolução de problemas e gestão financeira.

**Resultados:** Os resultados indicam que, de acordo com os professores pesquisados, as competências mais relevantes para o sucesso da gestão de empresas familiares incluem habilidades de comunicação, liderança, resolução de problemas, trabalho em equipe, gestão financeira, recursos humanos, marketing, vendas, inovação e empreendedorismo. A pesquisa destaca a importância da formação especializada e a necessidade de alinhar interesses familiares e empresariais.

**Pesquisa, Implicações Práticas e Sociais:** Sugere-se a implementação de um programa educacional estratégico no ensino superior que abranja desde a capacitação até a gestão de empresas familiares, adaptando-se às mudanças nas demandas da sociedade e do ambiente de negócios.

**Originalidade/Valor:** O estudo aborda uma questão relevante e propõe medidas concretas para melhorar a formação em empreendedorismo e gestão de empresas familiares no campo acadêmico. Propõe um plano estratégico de ensino abrangente, estabelecendo as competências necessárias para os professores e fornecendo orientações específicas para a criação e gestão de empresas familiares.

**Palavras-chave:** Empreendedorismo, Empresas Familiares, Estratégia Empreendedora, Habilidades de Ensino.

## COMPETENCIAS DOCENTES CLAVE PARA EL ÉXITO EN EMPRESAS FAMILIARES: UN ENFOQUE ESTRATÉGICO EN LA EDUCACIÓN SUPERIOR

### RESUMEN

**Propósito:** El estudio tiene como objetivo principal desarrollar competencias docentes esenciales para la gestión exitosa de empresas familiares, proponiendo un plan docente estratégico que abarque desde la formación estudiantil hasta la creación y gestión efectiva de estas empresas, contribuyendo al crecimiento económico y atendiendo demandas sociales.

**Referencia Teórica:** El punto de referencia teórico destaca la importancia de preparar a los estudiantes para la gestión de empresas familiares, con especial atención a los instructores especializados. Se hace hincapié en el papel crucial de las empresas familiares en el crecimiento económico y se sostiene que una formación adecuada puede reducir los índices de fracaso de esas empresas.

**Metodología:** Se empleó una metodología cuantitativa y cualitativa, con un enfoque descriptivo-correlacional y un diseño no experimental de corte transversal. La investigación se llevó a cabo en universidades mexicanas con una muestra de 180 profesores. La recopilación de datos incluyó encuestas y entrevistas, evaluando competencias clave como comunicación, liderazgo, resolución de problemas y gestión financiera.

**Conclusiones:** Los resultados indican que, según los profesores encuestados, las competencias más relevantes para la gestión exitosa de empresas familiares incluyen habilidades de comunicación, liderazgo, resolución de problemas, trabajo en equipo, gestión financiera, recursos humanos, marketing, ventas, innovación y emprendimiento. La investigación destaca la importancia de la formación especializada y la necesidad de alinear los intereses familiares y empresariales.

**Implicaciones de la Investigación:** Se sugiere la implementación de un programa educativo estratégico en educación superior que abarque desde la formación hasta la gestión de empresas familiares, adaptándose a las demandas cambiantes de la sociedad y el entorno empresarial.

**Originalidad/Valor:** El estudio aborda un tema relevante y propone medidas concretas para mejorar la formación en emprendimiento y gestión de empresas familiares en el ámbito académico. Propone un plan estratégico integral de enseñanza, estableciendo las competencias necesarias para los docentes y proporcionando orientación específica para la creación y gestión de empresas familiares.

**Palabras clave:** Emprendimiento, Empresas Familiares, Estrategia Empreendedora, Habilidades Docentes.

## INTRODUCTION

College entrepreneurship has grown rapidly as a result of the Harvard Business School's publication of the introduction of a course on the topic in 1945 (Katz, 2003). The subject was designed to help schoolchildren to publicize their entrepreneurial skills and experience in response to the economy recovering from World War II. By the 1970s, the course had gained popularity throughout the United States, and by 1999, there were more than 180 universities training in entrepreneurship (Jones and English, 2004). Interest in university entrepreneurship also spread to other countries, such as Canada, Mexico, Brazil and Argentina (Finkle and Deeds, 2001; Katz, 2003; Robinson and Haynes, 1991).

Interest in university entrepreneurship has been driven by a number of factors, including the growing importance of small businesses in the global economy, the increasing availability of startup funding, and the increasing demand for entrepreneurial skills by employers (Grimaldi and Grandi, 2005; Markman et al., 2005; Mian, 1994). Moreover, universities are responding to this interest by offering a variety of entrepreneurship programs, including courses, business incubators, and mentoring (Katz, 2003).

However, there is still debate as to whether college entrepreneurship can actually teach students to be entrepreneurs (Finkle and Deeds, 2001; Katz, 2003). There are some studies that have found that students who take entrepreneurship courses are more likely to start businesses (Peterman and Kennedy, 2003), while other studies have found no significant impact (Finkle and Deeds, 2001). However, it is possible that the effectiveness of university entrepreneurship depends on a number of elements, including the quality of the program, student motivation and the entrepreneurial environment (Katz, 2003). Despite doubts about its effectiveness, university entrepreneurship is a trend that is highly important to continue in the coming years, and as the global economy becomes increasingly competitive, universities will have an increasingly important role to play in preparing students to develop and train for entrepreneurial success.

Universities are centers of training and knowledge transmission. They have the potential to contribute to the promotion of entrepreneurship not only being students the main segment, but also involving other members of the university community. To this end, they must create a more qualified workforce, difficult to replace, with greater adaptability to change and better mobility between and within different economic sectors. This will have to increase in the attainment of common qualifications and constant learning through extensive strategies that support the acquisition, inclusion and modernization of capacity. The economic situation has exposed the fragility of the modern economy and the growing labor market gap. The

communities that recover fastest from the economic crisis are those that specialize in specific economic sections and are also competently flexible enough to employ novel and emerging advantages in the global market when they emerge (Audretsch, 2016; OECD, 2017). In this regard, it is said that family firms have been and are an important engine of economic growth. They are more successful than non-family businesses but keeping them alive is a complex task. They must compete in a stormier environment nurtured by new processes, new values, pluralistic society, increasing competition, global economy, changing policies and regulations (Chandler, 2014; Zahra, 2014).

Some of the elements that help a family business to be successful are good long-term planning, practice and sequence, family business environment, social responsibility, productive quality, and innovation and entrepreneurship (Audretsch, 2016; Chandler, 2014; Zahra, 2014). However, one factor that is essential is the training of leaders. If leaders know these factors well, family businesses are sure to succeed and grow properly (Chandler, 2014; Zahra, 2014).

Currently, students are prepared primarily to manage and administer organizations in various fields. It should be noted that there is no specific alignment program in higher education institutions for family businesses, both in prosperous and emerging economies. Although, the interest of entrepreneurship has aroused great benefit among researchers and academic institutions in charge of promoting entrepreneurship, it has not yet been reinforced (ILO, 2016; World Bank, 2016).

Accordingly, it is important to perform management and skills that allow family companies to create, grow and develop a direction and a competitive strategy. To this end, this paper proposes to design a necessary teaching program with comprehensive learning and research particularities for family businesses in the field of higher education, establishing the necessary skills to train students in the development and management of family businesses (Zahra, 2014). Universities take on important roles in the development of family entrepreneurship. They can do so by providing students with the resources and understanding needed to start and manage successful family businesses. In addition, universities can help family businesses grow and thrive by providing financial support, mentoring, and training.

University entrepreneurship is a topic that has gained momentum in recent years due to several factors, including the implications of the success of MSMEs in the global economy, the availability of funding for startups, and the increasing demand for entrepreneurial skills by employers (Katz, 2003; Jones and English, 2004; Zahra, 2005; Welter and Smallbone, 2011). Additionally, college entrepreneurship can take many forms, including

entrepreneurship courses, business incubators, and mentoring (Robinson and Sexton, 1994; Vesper, 1980; Kuratko and Hodgetts, 2007) also, universities can help students succeed in college entrepreneurship by providing financial support, counseling, and training (Deakins and Freel, 2003; Shane, 2004; Drucker, 1985). Family entrepreneurship is another important issue that has gained momentum today; moreover, family businesses are an important engine of economic growth and are more successful than non-family businesses (Gersick et al., 1997; Ward, 2004; Lansberg, 2004). However, they also face challenges, such as competing in a changing and increasingly globalized environment (Handler, 1994; Klein and Welter, 2009), despite this, to succeed in family business management, leaders must have entrepreneurial skills, leadership skills, conflict resolution, negotiation, communication and problem-solving abilities (Katz, 2003; Chandler, 2014; Zahra, 2014). Universities are a crucial part of starting family entrepreneurship by introducing students to the necessary skills and knowledge, as well as financial support, mentoring and training to family businesses (ILO, 2016; World Bank, 2016). Additionally, the future of university and family entrepreneurship is promising, both types of entrepreneurships contribute to economic growth and innovation. Moreover, universities offer an important role in advancing entrepreneurial skills in students and supporting family entrepreneurship.

Entrepreneurship is a very interesting topic in the world and therefore, Mexico cannot be left behind, because it is considered as the main path for economic and social progress. Family businesses take a great importance in entrepreneurship, since they represent a great proportion of the companies in Mexico. Teaching competencies are the skills, preparations and qualities that teachers need to educate effectively. These competencies are important for entrepreneurship, as they support students to increase the skills and knowledge needed to open and manage their own businesses. Several research studies have been conducted on teaching competencies as drivers of entrepreneurship in family businesses in Mexico. These studies have found that teaching competencies have a positive impact on student entrepreneurship, because they help students to use their skills and knowledge necessary to open and manage their own businesses.

To mention some of the most relevant research on this concept are presented by Aguilar-Robledo, et al, (2016). Addressing the "Teaching competencies that drive entrepreneurship in Mexican family businesses". Another study was conducted by Linda García- Rodríguez (2015) with the topic of "The development of a strategic educational approach with the purpose of training university students in the foundation and management of family businesses", and

García-Gutiérrez, et al, (2017). With the research on "Teaching competencies and entrepreneurship in Mexican family businesses." These studies show that teaching competencies have a positive impact on student entrepreneurship, as they help students to be independent entrepreneurs. Although, research on teaching competencies as drivers of entrepreneurship in family businesses in Mexico is still incipient so more studies are needed to identify the specific teaching competencies that have the greatest impact on student entrepreneurship. However, existing studies suggest that teaching competencies play an important role in fostering entrepreneurship in Mexico, it is due to the above, that designing an educational program of strategies with integral qualities of learning and exploration in the field of higher education, employing the substantial skills for teachers in development from students to the establishment and management of families and businesses, as well as meeting the demands of society is the main objective of this paper.

## **METHODOLOGY**

The present work was developed using a quantitative and qualitative methodology, with a descriptive-correlational, non-experimental, cross-sectional approach. The objective was to describe the type of family businesses and to identify the qualities and profile required of the faculty to establish and manage family businesses through strategic university programs in higher education schools. The study was conducted in universities in Mexico in the year 2022 after returning from the isolation derived from the COVID-19 pandemic, due to which there was a limitation in the number of teachers surveyed and only had a sample of 180 teachers. The data used were collected by means of a survey and an interview. The results showed that the teachers consider that the most important competencies for success in family business management are the following:

- Communication skills (Hernández, Fernández, & Baptista, 2010).
- Leadership skills (Robbins & Judge, 2017).
- Problem solving skills (De Bono, 2016).
- Teamwork skills (Katzenbach & Smith, 2015).
- Financial management skills (Gitman & Zutter, 2018).
- Human resource management skills (Dessler, 2018).
- Marketing skills (Kotler & Armstrong, 2018).
- Sales skills (Moore, 2017).
- Innovation skills (Christensen, Hall, Dillon, & Duncan, 2016).

- Entrepreneurship skills (Blank, Dorf, & Smith, 2019).

### **Sample Size Determination**

The study targeted family organizations and business operations and management in Mexico. The population size included faculty from six private universities in Mexico. Of these, four were in Puebla, one in Veracruz and one in Tlaxcala. The information was collected by university professors. The names of the universities will not be disclosed in this study to avoid problems related to the information disclosed in the paper.

Sampling was conducted in two ways: Probabilistic and random (Levin, 2011). The former refers to the fact that all individuals within the population have an equal chance of being selected to form the sample, on the other hand, judgmental sampling was used, where perception and decision are used to choose the subjects from the population to be included in the sample. In the present study, the sample consisted of 120 family businesses and 180 professors from different institutions.

The study found that professors from private universities in Mexico have a strong interest in entrepreneurship and family business management, and also found that professors are well informed about the challenges and opportunities faced by family businesses.

### **Measurement Instrument**

The researchers of the present study used two quantitative instruments to collect information: a questionnaire-type interrogation to establish the necessary competencies of teachers to train students in the opening and management of family businesses, and a questionnaire-type measurement instrument supported by Alvarez (2009) to determine the necessary teaching skills to implement in the course. The questionnaire to establish the necessary capabilities of the teachers consisted of two sections: one to determine the importance of specialized training in the formation and management of family businesses, and the other to determine the areas of training required by managers in charge of family businesses. The Alvarez-based questionnaire consists of six areas: teacher planning, teacher development, evaluation, student mentoring, management skills and continuing education. All the information collected through these questionnaires was clear and standardized. In addition, the researchers found that family business managers consider that specific training in the formation and management of family businesses is important, and that teachers should have a set of competencies to train students in this subject.

### **Application of the Selected Instrument**

First, an online questionnaire was used to collect information from undergraduate students. Then, the questionnaire was sent via email, Blackboard and Facebook to students at six institutions. Additionally, the message included a link to the questionnaire and a short presentation and finally, the questionnaire was self-administered, meaning that students were able to complete it at their own time and place.

The questionnaire consisted of a series of questions about students' experiences with entrepreneurship, the skills they believe are important for entrepreneurs, and the barriers they believe entrepreneurs face. In this regard, they found that students had a number of positive experiences with entrepreneurship and that they believed the most important skills for entrepreneurs were creativity, innovation, and problem solving; they also found that students believed the main barriers entrepreneurs face are lack of funding, experience, and lack of support.

The results of the present study are important because they provide insight into college students' experiences and beliefs about entrepreneurship. Additionally, the results of the study are available for use by educators and policy makers to develop programs and policies that support entrepreneurship among college students.

### **Instrument Reliability or Trustworthiness**

To determine the reliability of the tools used, a group was selected and a questionnaire was administered. The results were captured, analyzed and tabulated using a confidence level using Cronbach's alpha supported by Minitab software version 18.1. Cronbach's alpha is a measure of the internal consistency of a measurement instrument. A high Cronbach's alpha value indicates that the instrument is reliable, meaning that the questions in the instrument measure the same construct. In this study, the Cronbach's alpha obtained for the questionnaire was .90. This is a high value, indicating that the questionnaire is reliable, which means that the questions in the questionnaire measure the same construct.

Tables 1 and 2, show the reliability of each variable of the questionnaire. Table 1 presents the reliability results of the independent variables and Table 2 presents the reliability of the dependent variables. The results of the present study indicated that the applied questionnaire is reliable. This means that the results of the questionnaire are reliable and can be used to make inferences about the population.



Table 1 – Reliability of the instrument applied to Family Businesses

Variable	Ítem	A. Cronbach	A. Cronbach's sum	Reliability
Training in FE	8	0.821	0.862	High
EF training needs	7	0.824		High

Source: Own elaboration.

Table 2 – Reliability of the instrument applied to teachers

Variable	a) Teaching planning capacity	b) Teaching development capacity	c) Evaluation skills	d) Student mentoring skills	e) Management skills	f) Continuing education skills
Ítem	11	15	10	6	9	9
Alfa of Cronbach	0.814	0.821	0.702	0.832	0.832	0.853
Reliability (dependability)	High	High	High	Medium	High	High
Cronbach's alpha joint	0.852					

Source: Own elaboration.

Item validity is a measure of a question's ability to assess what it is supposed to measure. In this case, the tool reflects a set of specific options that are intended to make known about each variable.

## Development

The results of the questionnaires show that respondents believe that specific training in family businesses is important. Likewise, survey participants maintain that training for family business leaders is essential and stress the importance of aligning the interests and requirements of the family with those of the business.

Table 3 presents data on the frequency and percentage of responses indicating "Strongly Agree" or "Agree" to the last four questions of the first section of the questionnaire.

Table 3 – Concentrate of responses, part 1

Importance of training in family businesses	Specific training	Professional managers	Matching of needs: company-family	Management training
Frequency	55	40	56	70
Percentages	0.4583	0.3333	0.4667	0.5833
% cumulative	0.4333	0.5333	0.4333	0.2917

Source: Own elaboration.

The findings of the study indicated that, according to the entrepreneurs, specific training and the development of managerial skills have a high value, and emphasized the relevance of aligning family businesses with the interests of both the family and the company.

Table 4 shows the frequency and percentage of responses with "Strongly Agree" and "Agree" in the total responses to the last four questions of the first section of the questionnaire.

Table 4 – Concentrate of responses, part 2

<b>Entrepreneurs' views on what will help them to be educated and trained in family businesses.</b>	<b>Leadership training</b>	<b>Training entrepreneurs</b>	<b>Reducing the failure rate</b>	<b>Driving growth</b>
<b>Frequency</b>	55	38	39	43
<b>Percentages</b>	0.4583	0.3167	0.325	0.3583
<b>% cumulative</b>	0.4333	0.5417	0.5583	0.5167

Source: Own elaboration.

The results of the study indicate that the entrepreneurs consider that family business education is important and that it can help family members to implement the necessary skills to run a family business.

## RESULTS AND DISCUSSION

The results obtained from the survey conducted in the second questionnaire addressed to the teaching staff are mentioned below. The descriptive statistical values are derived from the six segments of the previous questionnaire. The questionnaires are designed specifically for the teaching staff. The results of the six sections are included in the questionnaire. The first section is teaching planning ability. This section focuses on determining the main skills for the organization of teaching in the field of family business (FB). The fact sheet of the study conducted summarizes the key points described below:

Table 5 – Results of competencies for planning

<b>Question</b>	<b>Competencies for the organization</b>	<b>Frequency</b>	<b>Percentage</b>
1	Essential fundamentals.	107	0.569
2	Students' ability to learn autonomously.	98	0.521
3	Adapt practical activities according to the skills required.	99	0.527
4	Structuring and relating the contents.	97	0.516
5	Planning practices	96	0.511
6	Reconfiguring the delivery of information.	93	0.495
7	Align knowledge with required skills.	92	0.489
8	Evaluate and create teaching-learning contexts.	94	0.5
9	Develop learning strategies that promote student responsibility and autonomy.	101	0.537

Question	Competencies for the organization	Frequency	Percentage
10	Link the content taught with practical applications in the professional environment.	110	0.585
11	Involve students in research to provide a comprehensive understanding of the research process.	87	0.463

Source: Own elaboration.

## CONCLUSIONS

Through the results of the second questionnaire administered to teachers, the significant relevance of specialized training in the context of family businesses is highlighted, as well as the essential role that educators play in using the necessary competencies to design teaching in this environment.

The results show that teachers believe it is essential to have a solid knowledge of basic concepts, promote students' self-learning, align practical activities with the required skills, structure and relate content, plan practices and transform the transmission of content. In addition, the importance of aligning knowledge with the required skills, evaluating and creating teaching-learning contexts, promoting students' independence and responsibility, and connecting the content taught with applications in the professional field is emphasized. It also stresses the need to involve undergraduates in research, offering them a comprehensive view of the research process.

These results coincide with previous research by Aguilar-Robledo et al. (2016), García-Rodríguez (2015) and García-Gutiérrez et al. (2017), who also found that teaching competencies are fundamental to boost entrepreneurship in family businesses in Mexico.

The results also showed that professors believe that universities should provide more training in these competencies to students who wish to start or manage family businesses.

The study concludes that teaching competencies are important for success in managing family businesses. Also, universities should provide more training in these competencies to students who wish to start or manage family businesses.

In conclusion, the importance of strengthening teaching skills in the field of family entrepreneurship is highlighted, as these skills allow students to acquire the knowledge and abilities necessary to start and manage their own family businesses. It is necessary to continue promoting training and support for teachers in this field, in order to foster entrepreneurship and contribute to economic growth and innovation in Mexico.

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