

## **Re-framing the status of narrative in family business research: Towards an understanding of families in business.**

Eleanor Hamilton\*, Allan Discua Cruz, Sarah Jack

Department of Entrepreneurship, Strategy and Innovation, Lancaster University Management School, Bailrigg, LA14YX, United Kingdom

\*Corresponding author:

Eleanor Hamilton

Emeritus Professor of Entrepreneurship  
Department of Entrepreneurship Strategy and Innovation  
Lancaster University Management School, Bailrigg, LA14YX, United Kingdom  
Email: [e.hamilton@lancaster.ac.uk](mailto:e.hamilton@lancaster.ac.uk)  
Tel: +44 (0)1524 593916

Allan Discua Cruz

Lecturer in Entrepreneurship  
Department of Entrepreneurship Strategy and Innovation  
Lancaster University Management School, Bailrigg, LA14YX, United Kingdom  
Email: [a.discuacruz@lancaster.ac.uk](mailto:a.discuacruz@lancaster.ac.uk)  
Tel: +44 (0)1524 510722

Sarah Jack

Professor of Entrepreneurship  
Department of Entrepreneurship Strategy and Innovation  
Lancaster University Management School, Bailrigg, LA14YX, United Kingdom  
Email: [s.l.jack@lancaster.ac.uk](mailto:s.l.jack@lancaster.ac.uk)  
Tel: +44 (0)1524 594955

## **Abstract**

This article will emphasize the status and relevance of narrative research in the study of families in business and family business strategy. It argues that narratives can provide a better understanding of the intricate connections between family and business and across family generations in business. Narratives generate knowledge by helping to shape a collective identity and as a form of intergenerational communication. By focusing on narratives as a phenomenological inquiry, we argue that interviews allow researchers to engage often in emotionally charged and intimate conversations with individuals that want to talk about experiences as members of a family business. This paper will discuss the usefulness of narrative approaches for family business strategy research, develop a catalogue of research questions for exploration, highlight challenges and offer solutions to deal with them when using narrative methods in family business research. This paper argues that while several challenges may be encountered, narratives allow researchers to delve into the intricate lives of members of a family in business.

## 1. Background

Every family in business has a story to tell, a legend to live up to, a tragedy to lament. Such elements shape narratives that are shared by members of a family in business across generations, often with lasting effects. How relevant are these narratives to understand family business strategy? How does a researcher prepare for hearing intimate, and often emotionally charged, details of families in business's lives? This article focuses on the status and relevance of narrative in developing understanding of families in business and family business.

There are several reasons why a closer look of narratives in family business research is warranted. First, family business is the most fundamental and universal form of business organization around the world (Howorth, Rose, Hamilton, & Westhead, 2010). Detailed compilations by the family business casebook series show that they come in all shapes and sizes, operate in all industries, can be young and old, and influence both the socioeconomic fabric of small villages and large cities as well as international trade (Pieper et al., 2014; Astrachan et al., 2004). While family business has endured for centuries and shows little signs of decline (Wooldridge, 2015, *The Economist*, 2004; Hoy & Verser, 1994), we often overlook that most businesses are deeply connected with a family narrative (Steier, 2007; Fletcher, 2007), and that their strategic behaviour is influenced by family (Basco, 2014; Astrachan, 2010; Nordqvist & Melin, 2010). Second, the importance of narratives to the study of family businesses has not gone unnoticed. Narrative research allows understanding of the genesis, operation and continuity of family firms (Dalpiaz, Tracey, & Phillips, 2014; Dawson & Hjorth, 2012; Parada & Vilad as, 2010; Hamilton, 2006a). Narratives help our conceptual and theoretical understanding by grasping the subtleties and complexities of underlying processes behind the creation and management of a family firm (Larty & Hamilton, 2011; Hamilton, 2006). Finally, there is a greater interest to place the family in business at the centre of family business research (Randerson, Bettinelli, Fayolle, & Anderson, 2015; Pearson, Bergiel, & Barnett, 2014; Nordqvist & Melin, 2011; Wright & Kellermans, 2011). In that regard, a family in business broadly relates to members of a family that engage in the foundation, management and continuity of one or several family business ventures over time. Narratives place the family in business at the heart of the enquiry and reveal that they are inextricably intertwined with the strategies behind the businesses they create and manage (Hamilton, 2013). Narratives are also an important analytical tool to draw on to study strategy in organizations (Vaara, Somemshein & Boje, 2016; Balogun et al., 2014; Fenton & Langley, 2011; Phillips, Sewell, & Jaynes, 2008; Martens, Jennings, & Jennings, 2007; Barry & Elmes, 1997) and therefore relevant for our understanding of families in business and family business.

While narratives may provide a conduit to generate further insight about family business strategy, Hamilton (2013) suggests that several challenges may arise. First, qualitative researchers are often challenged in the power of their methods to demonstrate rigor and must confront the view that qualitative research is perceived as producing less reliable accounts of the social world. Second, narratives based on oral histories are often criticized due to the reliance on faulty memory and the lack of accuracy of human accounts to truly describe what

has happened in time. Third, narratives may challenge researchers to ask themselves - is this fact or fiction? Fourth, historical and cultural contexts matter when understanding the narratives that place the strategies of families in business at the heart of an inquiry. Finally, researchers may be challenged to review the connection of their personal research journey and life history with the research carried out.

Our article will emphasize that narratives can help researchers examine a family in business and its strategic behavior over time. To do so, the remainder of the paper will first discuss narrative as a form of knowledge and communication. Then we expand on narrative as a phenomenological inquiry. Finally, we discuss key items that pose opportunities and challenges for family business researchers.

## **2. Narratives – A form of knowledge and communication**

Narratives are as old as family business and their impact in organisational and strategy research is widely acknowledged (Rhodes & Brown, 2005; Barry & Elmes, 1997). In a broad sense, narratives are *“a fundamental method of linking individual human actions and events with interrelated aspects to gain an understanding of outcomes.... It works by creating individual stories and histories and presenting them for direct observation. Narratives can include personal and social histories, myths, fairy tales, novels or everyday stories that are used to explain or justify our own, or others, actions and behaviours”* (Smith & Anderson, 2004: 127). There is a very deep and strong connection between the life experienced by individual family members in business and narrative (Ricoeur, 1991). Individual family members in business may organize their experiences and record what they have lived in a narrative way, through stories (Bruner, 1987). For families in business, narratives may provide a framework to organize meanings, thoughts, motivations, memories and life experiences. In doing so, narratives give sense to life experiences, the world, to members of a family in business and to those working in a family business. Narratives, as analytical tools to understand family business strategy, can shed light as forms of knowledge and communication.

Narratives offer a form of knowledge by shaping identity in a family in business. In the family in business context, narratives provide a sense of where the family comes from; how they got to where they are now and why they do the things they do. Narrative approaches in strategy highlight that family business identities are constructed by, and connected to, engagement in everyday practice (Fenton & Langley, 2011). Furthermore, a family in business identity is constructed socially in relationship to others, through a process shaped by multiple discourses and stories. Narrative mediates and constitutes experiences in family businesses: the identities of family members in business (multiple and complex) draw upon, and are located within, a repertoire of narratives available to them historically, socially and culturally (Ricoeur, 1991). Some of these discourses and stories may revolve around family entrepreneurs, family and non-family heroes and villains and their actions, which feed stories, myths and legends and help explain why some strategies emerged in the business realm. Family business identities are *“mediated, negotiated and articulated in narrative”* (Hamilton, 2013: 5). Knowledge may also allow further understanding of competing and conflicting

aspects that shape the identity of a family in business. Stories may bring to light ambiguous relationships of duty, love and conflict in the circle of attachment that is the family (Kondo, 1990) embedded in wider discourses and historical and cultural contexts. The narratives that are shared in the context of a family in business may reveal the struggles, sacrifices, triumphs that family members experienced in the process to set up and develop the family firm. For example, when facing family and business crisis, what work and what did not work, how issues were addressed, who was involved and why create memories (and stories) that are shared in the family in business. These narratives are often intended for family members to learn and help guide decisions thus influencing family business strategy. Moreover, in the family in business context, narratives may provide a conduit to support and communicate an entrepreneurial identity for members of a family as an organisation (Discua Cruz, Hamilton & Jack, 2012). Family narratives may go beyond describing social relationships and reveal shared understandings, the social and moral values that belong to such relationships, revealing the identity of a family in business and shedding light into what can influence family business strategy.

As a form of communication, narratives serve as a way to articulate and transmit an organization's culture, or the way things are done by a family in business. This occurs as narratives may represent and express "*what an organization is*" (Brown & McMillan, 1991: 50) and have '*deep historical resonance and durability*' (McNay, 2000: 92). Around the world and across time, we find family business narratives that reflect the stories, legends, myths and even fairy tales told and retold across generations (see Popp, 2015; Taplin, 2015; Cardone, 2009; Bamford, 2008; Semler, 2001). The different sources that feed such narratives may be communicated around the dinner table, the boardroom, or in any informal or formal context that families find relevant (Nordqvist, 2012; Discua Cruz et al., 2012). The informal and familiar sphere provides a context where narratives mainly intended for family members influence the strategies that will be engaged in the business sphere. Families in business may be more concerned to communicate, through narratives, underlying values and principles behind their strategic decisions compared to merely transferring financial wealth. In such narratives, often relying on historical accounts and stories where family and business events are deeply intertwined, family members make sense of diverse interconnected aspects which go beyond an individual life story and attempt to connect the past, present and future.

Narratives, both on written or verbal form, may communicate events in family businesses as interconnected, and make them understandable to wider audiences within the organization (Boje, 2001). Communication in the context of families in business can take many modes and forms (Sciascia, Clinton, Nason, James, & Rivera-Algarin, 2013). Narratives communicated and shared in the organisation may allow a shared collective sense of identity for different members, both family and non-family, which may become protected from external influence (Boyce, 1995). For example, the ambition of some families in business may be to remain small - in terms of ownership and management structures – and may use narratives to communicate that such strategy can give them a competitive advantage over others. In some family businesses strategy may remain unchanged in terms of management and ownership structures, in others strategies have to be devised to cope with increasing

complexity and thus narratives can communicate stability and change (Vaara et al., 2016). Narratives collected and communicated in an organization can help to make sense of its unique culture and provide a platform to think about the future and strategize (Wortmann, 2008).

### **3. Narrative – A phenomenological inquiry**

There is a vast diversity in modes and forms of narrative research (Vaara et al., 2016; Riessman, 2016; Larty & Hamilton, 2011), as well as a large methodological repertoire (Holstein & Gubrium, 2016). In this article, we concentrate on narrative as a phenomenological inquiry (Cope, 2005). Cope (2005), based on the study by Hammond et al. (1991), conceptualises phenomenology as the *'description of things as one experiences them, or of one's experiences of things'*. Cope argues that phenomenology revolves around the *'study or description of phenomena'* (Pettit, 1969); where a 'phenomenon' is simply anything that appears or presents itself to someone in consciousness (Moran, 2000). Consequently, Cope advocates, the aim of phenomenology is to bring out the 'essences' of experiences or appearances (phenomena), to describe their underlying 'reason' (Pivcevic, 1970). Cope suggests that narrative as a phenomenological inquiry would reject dividing up reality into separate categories such as minds and bodies or subjects and objects, the intentional description of 'something' that was experienced, free from presuppositions, narrowed or 'reduced' to the essential elements of the phenomenon in question emphasizing the 'lived world'.

Adopting a phenomenological approach to study families in business asks for a research design that allows a deep understanding of experiences. Families in business that have survived for generations do not often tell the whole world about their strategies, they often keep it to their own (De Massis, Discua Cruz, Jackson, Kotlar & Mazzelli, 2014). In that sense, Thompson, Locander and Pollio (1989: 138) argue that among diverse methodological tools *'The interview is perhaps the most powerful means for attaining an in-depth understanding of another person's experiences'*. A phenomenological approach suggests that narratives need to be elicited by using a *"very open and unstructured form of interview, offering rich insights into the dynamics between family and business over time"* (Hamilton, 2013: 57). The research goal is to capture a thematic description of experience. In conducting a phenomenological approach to understanding entrepreneurship across generations, Hamilton (2013) suggests that descriptions of specific experience should be related to each other and to the overall context, in a holistic way. Furthermore, existential phenomenological interviews should focus on identifying recurring experiential patterns. Such patterns in human experience may emerge from a particular or several contexts such as the family and/or the business.

When conducting a phenomenological study, researchers may find that people in family businesses, given the space and time, would tell the story of their lives, the family and the business in rich narrative forms. In such interviews it may become apparent that life in all its richness and complexity may become ordered into "stories" that span across and between generations. Narratives rely on the resilience of the classic plot (Czarniawska, 2004). Plots

are introduced by narrators to make sense of life experiences. Thus, carrying out a phenomenological interview may feel as gathering a form of personal oral stories. Hamilton (2013) illustrates that interviews with family business founders or incumbents may begin with an open conversational device such as “*Tell me about the family and the business?*”. For succeeding generations it may be something like “*when did you first become aware of the business?*” By engaging in non-directive conversations the aim is to encourage and support participants to feel at ease, have their space and be able to respond freely to tell their own story and talk about their experiences. In doing so, family members may offer rich narratives to understand the connection between the family and business strategy. Indeed, a phenomenological inquiry offers a relevant opportunity to understand strategic thinking in family businesses (Gill, 2014).

#### **4. Quasi-intimacy in interviews: Prepare for emotions!**

Holsten and Gubrium (1994) point out that interview encounters may resemble a drama with roles and emotions often taken for granted. The interview, as a brief encounter where tactics are employed to engender levels of trust sufficient for the researcher’s purposes, is open to criticism, and the intimacy established has been labelled *quasi intimacy* (Eccles, Hamilton & Elliot, 1999). Researchers may find that a balance between sufficiently non-directive questions to allow participants to tell their stories and at the same time finding ways to establish some trust may emerge (Hamilton, 2013). Stories convey emotions linked to family experiences in businesses which are often not easily shared. The necessity to build rapport cannot however, be avoided if the intention is to foster, open flowing narrative communication. Otherwise a researcher risks getting only fragments of a narrative. Diverse techniques to engage in active interviewing, which can provide guidance on conductive interviews that may showcase emotionally charged accounts can be found in the works of Holsten and Gubrium (1994; 2016).

Emotions are often an inseparable part of the strategic decisions made in family firms (Shepherd, 2016; Astrachan & Jaskiewicz, 2008; Davis, 1983). Narrative research offers the opportunity to explore further the emotional features of families in business and how and why such emotions influence strategic decisions. Hamilton (2013) underscores that asking members of a family in business to recount their life and experiences in the family business provides an opportunity to listen to passionate, dramatic and colourful narratives. Any interview technique that promotes telling the story of any family in business over time will inevitably be an ‘*emotional encounter*’ (Hamilton, 2013: 61; Moisander, Hirsto & Fahy, 2016). Narratives may be poignant family memoirs with diverse accounts of the intertwinement between family and business events or processes. Such accounts can range from childhood memories of the participants, marriages, the motivation behind starting a firm, births, a first sale, family lives, family fortunes or misfortunes, business struggles and trials, family dreams as well as nightmares, divorces and deaths and even the sale or demise of a business venture. Everyday lives, engaged in the social practice of family and business, are often articulated in compelling narratives. Thus, narratives may tell the joys and sorrows, the ups and downs of a family in business over generations (Hamilton, 2006b). Further complexity can be expected when research into two or more generations could be viewed as a

site for inviting individuals to recount and, therefore, to open to examination their life and the lives of others in the family and the business.

Researchers must keep in mind that in the context of a phenomenological interview, each encounter has its own drama with different sets, characters and scripts (Riessman, 2016). Each interview may reveal the myriad of narratives that can be present in a family firm and thus the multiple influences that strategies in a family firm may have. Narratives may tell about the way a strategy unfolded as a plot and include emotional aspects about family heroes, villains, family ambitions or aspirations and the way strategies changed or persisted in light of circumstances - it may allow to comprehend the twists and turns, the changes made and opportunities identified in the process which may help decipher the connection between seemingly disparate strategies in the firm. In studying families in business, Hamilton (2013) brings to light that each interview could be presented as its own short story drama. The personal emotional state of the interviewee can place a unique slant to the stories told. The drama of the interview itself is enhanced by the telling of the drama of the family and the business, which the interviewer must translate, interpret and construct into a “script” for purposes of the research process. Determining that special ‘something’ in the experience of family members in business is a central task for narrative researchers to interpret meaning, or the ‘point’ the narrator wishes to make (Riessman, 2016: 366). The view of the interview as a drama on its own plot has resonance with the relationship between life and narrative asserted by Ricoeur (1991). Taking emotions into account may help to explain how and why certain strategies emerged and persisted or why strategies were problematized resulting in a gradual or radical change for the family firm. In researching families in business a researcher must be prepared to hear about birth, death, illness, family feuds and tragedy; they must be prepared for laughter and tears!.

## **5. Interpreting the evidence – Temporality and narrative identity**

Narratives as well as strategies often range over time and space. Of the two, time is arguably the most problematic. Participants tend often to be asked to talk about events which sometimes took place many years ago. In interviews lasting a set period of time, the interviewee may tell “*stories of events over a long period of time, a whole lifetime and often beyond a lifetime to both previous and future generations*” (Hamilton, 2013: 62). The past, present and future may be in the present. Time and narrative and the critical relationship between the two may emerge and something that has to be understood from different perspectives (Angwin, Dacko & Checkley, 2007). Narratives of a family in businesses may illustrate temporal and identity aspects previously hidden or unspoken about which can shed light into family business strategy.

First, drawing upon narratives told by families about their own lives and businesses contributes towards understanding structures of temporality, the human experience of time and storied temporality. People can write in time and narratives based on chronological, cyclical and kairotic frames (Czarniawska, 2004). A chronological frame is sequential, ordered. A cyclical approach draws on cycles of the day, weeks, seasons, and generations. A kairotic approach is punctuated by important events that may move backwards and forward



across linear time. These time frames may become an interpretative platform for moving towards a greater understanding about what aspects of identity construction or representation could be understood through narrative analysis (Hamilton, 2013).

Hamilton (2013) found that family members rarely drew on chronological time when telling their narrative. The narrative evidence reveals the challenges people have remembering dates, or the hesitation faced in pinpointing the precise time events occurred. In telling their narrative, family members may set several dates before agreeing on one in particular. Chronicle dates appear to be rare in the narratives unless they have been pre-recorded. The examination of narratives may reveal that participants draw on different time frames, most notably cyclical and kairotic. In kairotic times in particular, critical incidents (Cope & Watts, 2000) may elucidate a language for interviewees to describe their experience around key family or business events (e.g. births, business foundation, business crisis, deaths). Hamilton (2013) found that narratives of families in business described a sense of physicality (e.g. “hard work”, “exhaustion” or “tiredness”) linked to critical events related to starting a family business and ensuring its survival over time. Particular metaphors in relation to critical incidents or episodes were used to link to stories of hard work experienced in such process. The physicality of the language linked to these events also served to emphasize the challenges faced by the members of the family as they become involved or participate in the business. Hamilton (2013: 71) argues that such language illustrates that the *“emotionally demanding and painful processes of growth are also physically challenging and this is expressed metaphorically in the narratives of the family business”*. Thus, narratives serve to capture the effort required to survive such times both emotionally and physically.

Second, the narrative capacity of family members may allow them to make sense of their identity and human experience in time. Hamilton (2013: 74) suggests that there is a *“perpetual narrative making”* in families in business that makes identities flexible and fixed at the same time. Hamilton found that narratives reveal that the permanence over time for the family business is viewed in terms of continuity as well as discontinuity. Establishing a family business could be cast as an attempt to flout mortality, to outwit time. Family businesses do not perpetuate themselves, the stories told by members of a family in business, serving often to connect subsequent generations with an entrepreneurial spirit, are crucial in such continuity (Smith, 2009). The sense of discontinuity over time is revealed as the family business must operate in the social, technological, economic and cultural climate of new generations. Family members are offered a sense of continuity, a taste of immortality, through the continuation of the business in the hands of the family (Hamilton, 2013). Discontinuity and difference, rather than continuity, are illustrated in narratives where families in business talk about changes in the business brought about by several aspects outside the firm but also by the input of family members. Mintzberg and Waters (1982) suggest that when the lifetime of a family firm is investigated and understood from the experiences of family members then a myriad of strategies, each with its own plot, can be elucidated. Some may relate to deliberate and intended actions of family members while others can be only deciphered through words and actions. Whittington (2007) argues that strategies need to be understood in light of potential continuities and discontinuities in the

firm. Narratives can also relate to the future as members of a family in business, such as successors, can relate to their present experience and where they would like to be with the existing business, where they want to be in the future and what that would entail in the existing family and business dynamic. Configuring and reconfiguring narrative makes sense of experience but may also uncover the reasons behind current or alternative courses of action in the family firm (Vaara & Tienari, 2011).

Narratives are ever changing yet provide a coherent sense of self for families in business shaping the identity of generations. The narratives of a family in business can illustrate *“multifaceted, essentially temporal, aspects of individual, collective and organizational identity; the identity of individuals as they pass through different life stages, the family as it passes from one generation to the next; and the business as it passes from one era to the next”* (Hamilton, 2013: 75). A narrative provides coherence and meaning to the flux of events but is never fixed in that it is itself always open to interpretation and reconfiguration. Over time the configured narratives will be always subject to reinterpretation and reconfiguration, in the light of new experiences by members of the family in business. Such reconfiguration may reveal the features of a family in business identity that can impact family business strategy. For example, innovation, shrewdness, faith, stewardship, thrift, entrepreneurship and persistence throughout time may gradually shape the myths surrounding a family in business (Cadbury, 2010). Such narratives may prevail over time and characterise family business strategy. Yet, Mintzberg & Waters (1982) point out that in a family firm, strategies are initially justified and elaborated around founders yet they are always up for discussion and rearrangement as new generations enter the family firm. In interpreting narrative accounts researchers may provide a deep understanding about the inherent continuity and discontinuity of families in business as well as a nuanced sense of change over time (Vaara, Somersheim and Boje, 2016). In essence, the narrative of a family in business is never static; it is always in the making.

## **6. Discussion**

As suggested at the beginning of this article, narratives articulate a meshing between the spheres of business and family. Narratives are built through the interaction of items such as stories, emotions, myths, legends, life experiences, conversations, among others. Narratives can demonstrate how and why strategic business decisions are made with family and/or business objectives at the forefront (Hamilton, 2013). The involvement of several generations in the business may be articulated in narratives that explain the approach of families in business dealing with both family and business sphere for the long run. Important themes in family business research such as strategic behaviour, management practices, or succession, as well as relatively unexplored topics, can be further understood through narratives as a phenomenological inquiry.

### *6.1 Opportunities for future research involving narrative approaches*

First, management practices in family firms have historically been an area of focus in family business research (Dana & Smyrniotis, 2010). Management practices are getting increasing

attention in strategy studies (Vaara & Whittington, 2012). Every family business represents a context in which family narratives may exist in tandem with business objectives and goals. Narratives can elucidate the intricate path that family in business members and their descendants had to take, the consequences of their choices and its impact in shaping family business strategy. Recent works suggest that complex strategies around family ownership and management over time can be further investigated through narrative accounts (Michael-Tsabari, Labaki, & Zachary, 2014; Rautiainen, Pihkala, & Ikävalko, 2010). Johannisson and Huse (2000) pose that families in business have to consider the potential transformation in their firms in light of overlapping entrepreneurial, managerial and familial ideologies. Greater insight on how such ideologies coexist may be elucidated through narrative research. For example, managerial decisions around recruiting family or non-family directors, procuring professional services or investment decisions highlight different strategic objectives at play, triggered by changes in firm ownership and management (Howorth, Wright, Westhead, & Allcock, 2016; Angwin & Meadows, 2009; 2015). Narratives may reveal that families in business are not shy to consider such aspects as *“the family and the business have to change in tune with social, cultural and technological shifts between generations”* (Hamilton, 2013: 138).

Narrative research may reveal the extent to which the ebb and flow of a family in business life feeds diverse family business strategies. Recent studies suggest that strategic actors (e.g. families in business) instil strategic behavior into everyday practices (Demir, 2015). Narratives may elucidate the rationale and motivation behind strategies that pursue financial and/or family objectives (Westhead & Howorth, 2007). Narratives may also bring further insight about the strategy behind acquiring and managing knowledge across generations (Chirico & Salvato, 2016; Friesl, 2012) as well as strategies behind the growth of one venture (Angwin, Paroutis & Connell, 2015) into a diversified business or network of businesses over time (Rosa, Howorth & Discua Cruz, 2014). Families in business may collaborate and join forces with others to gain competitive advantages (Hadjielias & Poutziouris, 2015). Yet, most importantly, narratives may illustrate the underlying and unstated motivations behind family business strategies. Hamilton (2013) found that some families perceive the family business as a lifeline and shelter – providing a safe haven for members of a family when life events make family members reconsider their options or courses of action (e.g. illness, death, marriages, divorce) or where unique skills and expertise can be used to try out entrepreneurial ambitions alongside other family members (Discua Cruz, Howorth, & Hamilton, 2013).

Moving forward, there are a range of relevant research questions around the topics aforementioned that can be studied through narrative research. These include: How do family and business strategies co-evolve? How does family strategy shape business strategy and vice versa over time? When and how do families use the business to perpetuate narratives? How do family narratives adjust following restructuring such as M&A, i.e. when taking over a business how are narratives aligned/adjusted and also when family businesses themselves are acquired? How are narratives used by families in business in the context of alliances or cooperatives?

Second, narratives can help capture whole lifetimes and beyond, leading to the phenomenon we call succession. Succession is a fundamental question in family business research, with intergenerational transition as “*the ultimate challenge*” (Fletcher, 2000: 157). Le Breton-Miller, Miller & Steier (2004) highlight that succession is not an accident nor an event, but a sophisticated and often fragile process occurring over a long period of time. Once set in motion, it requires the ability to adapt in light of complex and changing circumstances. It is a process where narratives may revolve around transmission, or passing on something from one generation to another. Prior works suggest that passing on a strategic vision in business may be a goal in succession (Fiegener, Brown, Prince, & File, 1996). Several strategic decisions in the family firm are found to depend on family aspects and events before, during and after the process is engaged (Schlepphorst & Moog, 2014; Steier & Miller, 2010). A family in business offers many forms of transmission in the succession process (Hamilton, 2013: 36) yet what is passed on is often a matter of individual choice to some extent. Thus, while some narratives may be shared among family members in the succession process others may be silenced or hidden.

Furthermore, every individual recipient in a family will accept, transform or reject what is being transferred. A good narrative example revolves around the “founder myth”: the fact that the founders are often gloried in family business, which may encourage subsequent generations to make strategic decisions to steward and uphold a founders vision, yet puts a heavy emotional burden and pressure that may put the continuity of a family firm in jeopardy (Keyt, 2015). Transmission may embody shared experiences and practices, which may shape strategies devised. Narrative research may explain further how values are transmitted in the succession process (Zwack, Kraiczy, Von Schlippe, & Hack, 2016), the way knowledge is transferred and integrated and how family members learn about business continuity (Konopaski, Jack, & Hamilton, 2015). Moreover, there is a great concern about the modes and forms of next generation engagement in family firms (Howorth, Parkinson, Leitch and Stead, 2016). The narratives that are communicated in the succession process may be more important for strategic decisions than previously believed. Strategy workshops may provide a space for the next generation of a family in business to evaluate the significance of family narratives (Hodgkinson, Whittington, Johnson & Schwarz, 2006), yet little is known about how this occurs. Recent narrative studies highlight the potential disparities in the succession process and the relevance of paying close attention to the conversations taking place over time and across generations (Helin & Jabri, 2016).

Narratives allow us to rethink the process of succession and consider questions such as: How are narratives used to engage next generations of a family in business? What sources are used to feed narratives in the context of succession? What forms and modes of narratives support/hinder the succession process? When do narratives become an advantage/liability in the succession process? Further narrative research may unveil how families in business around the world find a model of succession that works for them, what is transmitted and for what purpose, and the repercussions for family business strategy.

Third, narrative approaches can also help researchers explore relatively unknown topics in family business strategy. Hamilton (2013) suggests that narrative accounts may showcase

how successful families in business form circles of attachment which relate to future generations taking up a position in the family and business realms to engage in continuing a family legacy, rather than being merely a link in inheriting a running business, property or assets. Hammond, Pearson, & Holt (2016) highlight that pursuing a legacy may shape what a family in business stands for and guide behaviour over time. Howorth, Parkinson, Leitch and Stead (2016) suggest that space is required for next generation family members in business to learn and uphold a family legacy. Narratives may support learning as a tool to guide strategic decisions and connect with the family in business legacy. In doing so, the strategic decisions that family members may take matter for generations to come. Narratives, such as stories, are perceived to be relevant in the way a legacy is shaped (Hammond et al., 2016). Narratives may allow subsequent members of a family in business to stay connected to the legacy created by founders. Furthermore, narratives may help next generations understand the managerial, financial, and investment strategies gravitating around sustainable practices connecting a family, the firm and its surrounding community over time (Le Breton-Miller & Miller, 2016). Narrative studies may illuminate the way in which legacy is interpreted, transmitted and included in the strategic outlook of family firms. Questions that can be addressed by narrative research are: To what extent are narratives used to shape and transmit a family legacy in business? Are narratives used by families in businesses in the context of long term sustainable practices? How do families in business use narratives as a form of intergenerational communication?

Additionally, narratives may also reveal the dark side of the complex entanglement of a family in business over time. Narrative becomes fundamental to reflective processes as it can be a reflective tool that emphasizes social and relational aspects rather than individual action (Hamilton, 2013: 42). Some narratives may elucidate heroic and romantic views of strategies devised by individuals or family teams in the genesis, and rise of family firms while others may showcase controversial episodes in such processes that cannot be easily ignored. While some narratives of family and business reflect the business as supporting, others articulate family business as a site of competing or conflicting issues, a place of sacrifice and suffering. In a narrative study of two generations of a family in business, Hamilton (2013) found that a second generation onwards may be marked often from childhood by no separation between family and business – no boundaries between private and public spaces. There could be tales of endless hours of working with the whole family together where relationships can be forged and strengthened but also were where concerns on the toll of family members and its effect on family life are expressed. Despite substantial involvement and input, the contribution of some family members may be overlooked and “invisible” (Hamilton, 2006a). While such issue may be overcome when critical and disruptive events emerge (Overbeke, Bilimoria, & Perelli, 2013), further studies may allow understanding of how narratives adjust when such process unfolds and its influence for family business strategy. Furthermore, in family businesses, some narratives are public while others remain private as they may relate to controversial, shameful and tragic stories involving family members (Eddleston & Kidwell, 2012; Kidwell, Eddleston, Cater III, & Kellermanns, 2013). Strong relationships in the family realm may become distant and spoilt by the human demands of business growth or by the change in roles within the business and family sphere which may turn strong ties into arm’s

length relationships. Such hidden costs in the often secret life of families in business may be brought to light through narrative research. Further narrative inquiry into controversial or taboo topics may provide a greater understanding of emergent strategies or the rationale behind a change in the course of action for family businesses. Questions that can be addressed through narrative research are: How can narratives reveal the “dark side” of a family in business? When do narratives become a liability for family firm strategy? What is the portrayal and role of “invisible” members in the narratives of families in business? How do critical incidents shape narratives of families in business and influence family business strategy? How do families in business cope and deal with controversial issues in the long term and to what extent (if any) does it influence business strategy? How are boundaries between the family and business realm reflected in the narratives of families in business?

Finally, narratives may reveal differences in families in business related to their experiences working together and how it shapes a collective identity. Experiences and interaction (or the lack of it) may explain the strategies taken by members of a family in business and provide a greater understanding of the way they come together as a team, interact, devise and engage in entrepreneurial strategies over time (Discua Cruz, Hadjielias, & Howorth, 2017). For example, we can expect a different narrative in a family business where there was not a previous generation with a family business background compared with the narratives of a multigenerational and long lived family business where several succession processes have occurred. In addition, little is known whether several narratives may exist in the context of families in business developing a series or a portfolio of businesses (Rosa et al., 2014). Narrative studies could reveal the features and uniqueness of collective identity in such cases (Brown, 2006; Pratt, 2003) and how they influence strategic decisions made over time. Leitch & Harrison (2016) suggest that to understand the influence of identity of family members in business strategy further attention needs to be paid to the process by which a collective identity is shaped. In doing so, narrative studies could elucidate the effect of identity on family dynamics, conflict, succession planning, differences in identity between the founder and subsequent generation’s identity, impact between family identity and non-family members (Leitch & Harrison, 2016: 187). The question of maintaining a collective identity becomes even more important (and, to a certain extent, more challenging) as the family grows larger and more dispersed as complexity arises. Research questions around identity and strategy need to be further explored, for example: How do families use narratives to develop a collective, family identity? Are several narratives used when family members engage, as a team, in a serial or portfolio entrepreneurship strategy? How do families use narratives to negotiate identities between family and business?

The questions presented above are mainly the tip of the iceberg of what can be studied through narrative research in the context of family business strategy, yet researchers should be mindful of potential challenges.

## *6.2 Challenges along the way*

In this section we expand on challenges raised earlier in the introduction. First, qualitative researchers are often challenged in the power of their methods to demonstrate rigor. An

account of the research will be judged rigorous according to emergent and contested criteria, often derived from concepts more suited for quantitative research such as validity and reliability (Fletcher, De Massis, & Nordqvist, 2016; Leppäaho, Plakoyiannaki, & Dimitratos, 2015; De Massis & Kotlar, 2014; Bansal & Corley, 2012; Tracy, 2010; Pratt, 2009). Narrative research is an essential part of qualitative methods that can help accelerate the field of family business strategy (Wilson et al., 2014). Researchers must confront the view that qualitative research produces, in some way, less reliable accounts of the social world. Transforming research processes and practices into becoming more organized, coherent and conceptually framed is central to our task as researchers. As researchers, we need to interrogate our assumptions from time to time and be wary of concepts we assume to be shared and universal. Qualitative researchers can offer evidence that despite such standing, narrative research can generate ground-breaking results around strategy in family firm research. The pressure to produce a rigorous account of the research means that we may draw on certain narrative items and exclude others in the account of the research. Sometimes the final story may represent what is appropriate to disclose. The interpretative power of the researchers is central to what is told or not told from the narratives of families in business. Researchers need to be mindful of such interpretation as they provide the validity in the final story told (Eisenhardt, 1991).

Second, in producing and interpreting narrative archives we can find articulations of complex social phenomena across time and space. Traditionally, narratives found in oral histories were judged as “*profoundly unreliable*” in comparison with documentary evidence because of their anecdotal nature and inability to represent beyond the individual (Summerfield, 2004, 65). Oral histories are often criticized due to the reliance on faulty memory and the inability of human accounts to reflect what has happened in time (Golden, 1992). The work of social historians and later business historians has however provided relevance to the use of oral histories to understand the relevance of families across time and in particular contexts (e.g. Rose, 2000). Recent studies relying on retrospective accounts and historical records reveal that entrepreneurial activities and change in a family firm is articulated based on past, present and future actions of family members in business (Roscoe, Discua Cruz, & Howorth, 2013; Sasaki & Sone, 2015). Narratives can help make sense of how families in business relate to being in and across time (Drakopoulou Dodd, Anderson, & Jack, 2013). Furthermore, Boje, Haley, & Saylor (2016) suggest that the structuring power of narratives may be both retroactive and proactive; where past events are meaningfully connected and current and future experiences may be selected to fit into an evolving plot of a narrative that is on constant creation. Thus, narrative studies can capture such socio-temporal aspects to illustrate the often elusive strategies of organizations like family businesses (Fahy, Easterby-Smith, Lervik, 2014).

Third, Riessman (2016: 367) warns of *narrative seduction*, based on the illusion created by a skilful narrator that a story is as it is and needs little interpretation (Bruner, 1991). In listening to a story told by a family member, researchers may be predisposed to one and only one way of understanding meaning. Narrators may gloss over stories, provide a rose-tinted account of what actually happened or exaggerate the events and facts behind intended and realised

strategies. Yet to address such a challenge, the question in the mind of the researcher may become: is it fact or fiction? To overcome such hurdles researchers can engage in an interpretive activity, questioning the narrator and the focus on how the account was generated, its structure and effects, and the position of other characters (family or non-family members). It is the researcher's role to interrogate what is being accomplished with the particular narrative choice a family in business member makes. Moreover, further attention can be paid to the stories of diverse family members representing different generations. The stories told by different members, may reveal aligned, conflicting, competing or contrasting narratives based on diverse experiences of family members in business, thus providing a comprehensive and holistic insight of the strategies undertaken by a family in business over time. In doing so, we may find that there are family members who keep the family in business narrative alive and use diverse arenas to communicate it. Some members may continue to be perceived as "invisible" yet fulfil a crucial function in shaping the identity of a family in business. Narratives provide a useful tool to go beyond individual accounts of family members and tap into the social and group level about the experiences of a family in business. Further studies that focus on capturing the narratives of several family members in business across generations may reveal how and why families in business build their narratives as a social unit, based on inherent processes such as culturization, leadership and relationships built over time (Pieper, 2010).

Fourth, the concepts of family and business are time bound and context-specific. This implies that we should be mindful of historical and cultural contexts if we are interested in any phenomenon that places family at its heart, such as family firms. The family firm and the self-made family founder often evoke romanticised narratives of individuals and firms. Some narratives may invoke for example tales of migration, overcoming roadblocks in unfamiliar territories, and even include aspects of countercultural behaviour. While in some contexts narratives may emphasize strategies and endeavours of individual entrepreneurs, in others, narratives may focus on a family and their story within a locality, region or country (Fernández Pérez & Lluch, 2016; Gupta & Levenburg, 2010; Johannisson et al., 2007). Accounts of experience need to be located in prevailing culture and tradition, interpretivists should not be content to adopt an uncritical stance in relation to the context of their research, we need to consider power relations, socially and historically constituted (Crotty, 1998: 159).

For instance, succession happens in a cultural context - it often calls families in business to match family culture with formal and informal rules (Gupta & Levenburg, 2010). Narrative approaches may identify patriarchal patterns and assumptions and whether they endure and why (e.g. primogeniture) in family business in diverse contexts (Colli, Fernández Pérez, & Rose, 2003). The stories that families in business tell over time and for what purpose may vary depending on context (Johansson, Li, & Tsai, 2015; McMillan Lequieu, 2015; Kar & Samantarai, 2011). To address such challenge, researchers need to grasp a strategy's connections, its embeddedness, and, both its changes and its continuities in context (Whittington, 2007). In doing so, narrative research may reveal how and why contextual aspects have transformed or influenced family business strategy (Wright et al., 2014). A narrative approach, may unveil how and why family members become pillars of local



establishments, champions of socially responsible initiatives and important figures in their communities (Campopiano, De Massis, & Chirico, 2014; Fitzgerald, Haynes, Schrank, & Danes, 2010) as well as how families in business overcome contextual pressures, institutional issues in certain contexts (e.g. corruption, marginalization, stigmatization) and the strategies used to overcome them (Ivanova, 2009). By acknowledging the relevance of context then tradition, tragedy, farce, a migration tale, faith, among others, may serve as cultural resources for any family business member around the world when telling their narrative (Brunner, 1991) yet close attention needs to be paid to the way such narrative elements unite the past, present and future of a family business strategy.

Moreover, there are issues, concerns, and practices regarding interpretation and translation in qualitative research. Such aspects present a challenge to researchers that wish to engage in cross-cultural narrative studies of family business strategy. Drawing on the interpretation of narratives from two generations of family business, we can find, for example, that the dynamics identified in one culture may have some (or no) resonance in another (e.g. UK and Japan). Some narrative elements, while can be interesting in one context may be irrelevant to other audiences, simply because the words may or may not tie into larger historical events, circumstances, customs, issues, problems or relationships (Lincoln, González, & Massera, 2016). To overcome such challenge, researchers may concentrate on narrative elements such as metaphors. In every cultural setting, metaphors are a reflection of the ordinary lives of families in business. Metaphors allow members of a family in business to place experiences in the light of their real meaning (Dodd, 2002). Metaphors make sense because they emanate out of social practices. Memorable metaphors may prompt members of a family in business into thinking in a new way. In the context of families in business metaphors may be not so much statements of fact as educational or training devices which can have a significant influence in the underlying features of a family business strategy. There are different ways in which metaphors, facts and stories can be woven together when studying strategy in family businesses (Vaara, Tienari & Säntti, 2003; Czarniawska, 1997). Further attention to the relevance of metaphors in the context of families in business and strategy within a country or across countries is warranted.

Finally, while a narrative research journey itself may be arduous, long and messy, it needs to be acknowledged. An important element of the clarity in conducting a phenomenological inquiry is the researcher's own narrative embedded in academic communities and in dialogue with theory and practice. Sometimes, Hamilton (2013) argues, the narrative of that journey is abandoned, disguised or obliterated. It can be cast aside because it is not valued or it can be purposely withheld, hidden or even retold. Yet, researchers have linked their personal life history with the research carried out (e.g. Ram, 1994) allowing a different perspective to illuminate the interpretation of narratives examined. Researchers engaging in narrative research need to be open and explicit about the deep connection between their personal history, their family history, the research interests and the research outcomes.

## **7. Conclusion**

This article focused on the status and relevance of narratives for the study of families in business and family business strategy. Narratives may advance the field by allowing a deep understanding of the process of being and becoming a family in business. Attention to families in business is important as they devise strategies that impact family businesses over time. To study strategy in a family business without acknowledging the narrative items (e.g. stories, myths, metaphors) that families in business are willing to share, may only provide a partial representation of reality. We argue that narratives, as a phenomenological inquiry, may provide a privileged opportunity for researchers to understand, among others, the emotions and motivations of family members behind the creation, management and development of one or more businesses over time. Narratives provide a platform to understand that strategies in family firms may be deeply connected to intergenerational values, emotions, achievements, struggles and tragedies. The study of families in business is inherently multidisciplinary and thus narratives can help in developing theoretical frameworks that draw from areas such as history, sociology, entrepreneurship and learning. Scholars are encouraged to appreciate, through narratives, the inevitable change and transformation that families in business and family businesses experience over time and the strategies that accompany and entice such change. In doing so, Hamilton (2013) suggests, future studies may find out what families in business around the world seem to attest through their narratives: one lifetime is not enough!

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