
2. Qualitative research in family business: methodological insights to leverage inspiration, avoid data asphyxiation and develop robust theory

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Abstract

This chapter echoes prior calls for a more pervasive and varied use of qualitative methodologies in family business research. The authors start with an overview of current empirical qualitative work in the family business domain in order to understand the methodological preferences of family business scholars and the methods they have gravitated towards. Having established the key difference between methods and methodologies, and the importance of linking analytical approaches to the building of theory, they discuss three exemplars of qualitative methodologies in the general management literature. The final section of the chapter elaborates on opportunities for deeper engagement with these methodologies in the family business domain and suggestions for enriching the qualitative toolkit of family business research.

Keywords

qualitative research, methods and methodologies, theory, family business

INTRODUCTION

In management research, the methodological rigor and theoretical value of qualitative research is no longer contested. The number of qualitative research papers published in high-quality European and United States (US) management journals has significantly increased in the past decades (Bluhm et al., 2011). Furthermore, qualitative papers are often awarded special recognition for being particularly interesting and for significantly advancing knowledge in the management field (Bartunek et al., 2006). Notably, a critical element that has contributed to reducing the stigma associated with qualitative research and giving it well-deserved legitimacy is the tremendous progress in making qualitative analytical steps and procedures more transparent (e.g., Gioia et al., 2013; Pratt, 2009). There has been tremendous effort to engage scholars in a conversation about the questions that qualitative methodologies are particularly suited to address, the strengths of qualitative methodologies, and the best practices that allow robust theorizing (Bansal et al., 2018; Eisenhardt et al., 2016; Gehman et al., 2018). Qualitative research has become stronger and now occupies an important place in management research.

Despite the traction gained in management research, qualitative methodologies have seemingly been slower to penetrate the family business domain (De Massis and Kotlar, 2014; Fletcher et al., 2016). Family business scholars have occasionally embraced qualitative inquiry to offer insights on the inner workings of family firms (e.g., Jennings et al., Chapter 15 in this *Handbook*; Karra et al., 2006; Nordstrom and Jennings, 2018; Steier, 2001), but this approach has been underutilized in comparison to quantitative approaches. The reliance of quantitative methodologies has indeed been critical for the

family business field to acquire legitimacy and prestige, as scholars have been able to show that family business practices, behaviors and performance are significantly different from those of non-family firms. In this regard, economics-based theoretical perspectives such as agency theory and the behavioral theory of the firm have been pivotal to test theories about the implications of various governance and management structures of family firms and non-family firms for company performance and outcomes (e.g., Chrisman and Patel, 2012; see also Odom et al., 2019 for a review). However, the emphasis on quantitative methodologies has also led to a relative dearth of qualitative research questions and an underutilization of social constructionist and interpretivist approaches (for example, institutional theory or practice theory) that are particularly suitable to guide qualitative investigations (Nordqvist et al., 2009).

There is no substitute for the insights that qualitative research can offer into the complex features and dynamics of family firms (Nordqvist et al., 2009; Reay and Zhang, 2014). As we will discuss in this chapter, qualitative research allows the researcher flexibility and creativity, while offering analytical tools for the development of an in-depth examination of the subject (Fletcher et al., 2016). Qualitative methodologies are therefore particularly suitable to improve understanding of the complex processes that are at the core of family businesses (for example, succession and interpersonal conflicts), and advance knowledge of the temporal dynamics that are associated with the emergence of family firms over time (Evert et al., 2016; Langley, 1999; Sharma, 2004). Qualitative research can also help us to make sense of the differences between different social worlds that exist within family firms, that provide uniqueness to family firms, and distinguish them from their non-family counterparts. As Fletcher et al. (2016) note, qualitative research methodologies might be particularly useful in projecting family business research into unexplored territories, that is, areas of research that still require explorative studies, such as family business paradoxes and dualities, family business processes and execution, and the contextual and industry-specific aspects of family business behavior.

Given these premises, we reiterate prior calls for a more pervasive and varied use of qualitative methodologies in family business research. We start with an overview of current empirical qualitative work in the family business domain in order to understand the methodological preferences of family business scholars and the methods they have gravitated towards. Having established the key difference between methods and methodologies and the importance of linking analytical approaches to the building of theory, we discuss three qualitative methodologies regarded as exemplars in the general management literature. The final section of the chapter elaborates on opportunities for deeper engagement with these methodologies in the family business domain, and suggestions for enriching the qualitative toolkit of family business research.

OVERVIEW OF QUALITATIVE RESEARCH IN THE FAMILY BUSINESS DOMAIN

In the past few years, an increasing number of family business scholars have encouraged the use of qualitative methodologies to explore important questions about family firms and their unique dynamics and characteristics (Chenail, 2009; De Massis and Kotlar, 2014; Fletcher et al., 2016; Leppäaho et al., 2016; Nordqvist et al., 2009; Reay and Zhang,

2014). These calls are all the more important as scholars have come to recognize that the advancement of family business scholarship has been built predominantly on quantitative empirical evidence (Evert et al., 2016). Critically, there is consensus that family business scholars underutilize qualitative inquiry and that this lack of attention limits theory development. As the broader field of management widely recognizes, qualitative studies are necessary to explore important ‘how’ and ‘why’ questions that are not suitable for quantitative inquiry. Specifically, in the family business domain, qualitative methodologies can reveal dynamics of family business behaviors and relationships for which scholars still have limited and selective understanding (Fletcher et al., 2016; Reay and Zhang, 2014).

Some numbers can be useful to provide an overview of the state of qualitative empirical research in the family business domain. De Massis et al. (2012) compiled an annotated bibliography of the 734 most influential articles in family business research. Of those, the 215 most-cited family business papers according to Google Scholar were analyzed in depth. Their results revealed that the majority of empirical studies are quantitative (87.3 percent), with only a minority of articles (18) relying on qualitative methods (8.4 percent). An updated search conducted by the same authors in 2013 found 26 articles using qualitative methodologies over a 15-year period in eight academic journals (Fletcher et al., 2016). Along the same lines, Reay and Zhang (2014) searched for family business studies published between 1999 and 2010 in 32 management journals and retrieved 656 articles, of which only 78 (12 percent) were empirical articles based on qualitative methodologies, most of them (41) published in *Family Business Review*. Confirming this evidence, Evert et al. (2016) assessed the state of empirical research in the family business domain. They examined 465 articles: 319 empirical studies published in *Family Business Review (FBR)* and 146 empirical articles on family firms published in non-*FBR* journals, that is, management-focused high-quality journals. Of these 465 articles, 339 employed quantitative methodologies, 90 articles were classified as qualitative, and 36 as mixed methods (a combination of quantitative and qualitative approaches). Evert and colleagues noted that qualitative studies account for 24 percent of the empirical work published in *FBR* during the sample time frame considered (1988–2014), but they also report that the number of studies using qualitative designs declined from 25 percent to 19 percent in *FBR* (between the decades 1988–96, and 2006–14), and even more substantially in non-*FBR* journals, from 38 percent to 6 percent. This sharp decrease may indicate a decline in popularity of qualitative methods, as suggested by these authors. However, it may also indicate a selection bias in the samples, in that the acceptance criteria for publishing qualitative studies have become more stringent, thus enhancing the quality and robustness of the studies that successfully go through the review process (Reay, 2014).

A second notable consideration that emerges from extant reviews of the literature is the predominance of case study methods in current family business qualitative studies, and a preference for a positivistic approach to qualitative investigation through this method. As De Massis and Kotlar (2014: 15) noted, ‘case studies have been the most used qualitative methodology in family business research to date’ (citing De Massis et al., 2012), and the vast majority of case study articles in the family business field are based on the positivistic tradition, with only a few exceptions (e.g., Hall et al., 2001; Hall and Nordqvist, 2008; Nordqvist and Melin, 2010; Nordstrom and Jennings, 2018; Parada et al., 2010). A full discussion of the philosophical assumptions underpinning the social science is beyond the

scope of this chapter; however, we briefly summarize the difference between a positivistic and an interpretive approach to qualitative inquiry (see Morse et al., 2009; Sandberg and Alvesson, 2011 for further elaboration on this topic).

These approaches refer to the philosophical underpinnings of the relationship between the nature of social reality (ontology) and the development of knowledge about reality (epistemology). A positivistic inquiry starts from the premise that reality is to some extent objective, and the purpose of social science is to reveal measurable regularities, laws and patterns. Qualitative inquiry that subscribes to these assumptions is primarily aimed at capturing these constructs and measures, and drawing generalizable inferences in the form of theoretical frameworks and propositions that mirror reality (Eisenhardt, 1989; Eisenhardt and Graebner, 2007; Eisenhardt et al., 2016; Yin, 2009). In contrast, an interpretive or constructivist approach is based on the assumption that reality is not objective but is constantly socially constructed by humans through actions and interactions with their context (Berger and Luckmann, 1966; Gioia et al., 2013). The purpose of qualitative inquiry is therefore to develop an in-depth understanding of the phenomenon under investigation by revealing its uniqueness and complexity (Gioia and Chittipeddi, 1991; Stake, 1995).

As noted by family business scholars, the qualitative positivist approach is predominant in the study of family businesses, and it is most frequently applied to the design of case study methods (Leppäaho et al., 2016; Nordqvist et al., 2009). In 2009, Nordqvist and colleagues were able to retrieve only 11 papers that adopted an interpretivist approach to the study of family firms and their dynamics. Similarly, Fletcher et al. (2016) observed that no less than 17 articles among the 26 papers selected in their analysis used a case study approach, with some authors relying on a single case study (e.g., Karra et al., 2006; Salvato et al., 2010), but more often employing multiple cases, ranging from two to 12 units (e.g., Miller et al., 2003; Parada et al., 2010). Two other studies that summarize the state of qualitative research in the family business domain provide additional insights. In their chapter on qualitative methods in the *SAGE Handbook of Family Business*, Reay and Zhang (2014) observed that 67 of the 78 qualitative articles examined used a case study research design (52 comparative cases and 15 single case studies), one study was an ethnography, one article was classified as interpretive or grounded theory, and three were classified as action research. Along the same lines, Leppäaho et al. (2016) conducted a qualitative content analysis of published journal articles in family business over a 15-year period (2000–2014) and found 75 qualitative papers. They counted 18 single case studies and 49 multiple case studies. In the multi-case design, the number of cases varied from two to 50. Of these papers, 67 exhibited a positivist ontology, seven an interpretivist approach, and one a critical realism approach. As the authors conclude (ibid.: 168–169), ‘we found that the qualitative positivist type of case study is the *de facto* disciplinary convention’. Importantly, these authors note that in the articles examined, ‘the discussion on ontology, epistemology, and methodology was very limited . . . and the authors seemed to struggle to align themselves with a specific philosophical orientation’.

We believe this last observation is particularly important and revealing. Family business scholarship has made significant progress in embracing qualitative methods. Scholars have developed a deeper understanding of its value for theoretical development, and growing familiarity with the techniques associated with robust and transparent qualitative inquiry. However, two caveats emerge from the review of extant research. First, while it is commendable that much attention has been devoted to qualitative research, we believe that a

stronger focus should be put on the methodology rather than just the methods. Methods are procedure and techniques to gather and analyze the data; whereas methodologies are, in a much broader sense, the overall set of strategies or plans of action organizing the choices made in a study (Chenail, 2009). Family business scholars have seemingly focused their attention on the implementation of a limited set of methodological tools (as the overwhelming use of case study methods demonstrates). However, it is essential to link these methods to the building of theory. Our contention is that this step requires scholars to clarify the assumptions that underpin different qualitative methodologies, and it is critical because different methodologies provide different ways to generate theory. In other words, more than proficiency in the use of qualitative methods, we suggest that family business scholars would benefit from a deeper understanding of the relationship between theory and methods, and how to select qualitative methodologies based on the theory–method fit (Gehman et al., 2018).

In the next section, we offer an overview and discussion of three qualitative methodologies that management scholars recognize as exemplars, while encouraging methodological diversity and innovation. In particular, in presenting these methodologies we emphasize the critical link between the techniques that guide data collection, data analysis and data reduction, and the fundamental step of theory building from data, that is, how to move from empirically driven observations to abstract concepts that are susceptible of transferability and generalizability.

LINKING METHODS TO THEORY: THREE EXEMPLARS OF QUALITATIVE METHODOLOGIES

Qualitative research has a relatively long tradition in the management sciences, and there are many different qualitative methods and approaches that have been used to generate theory. Among these methodologies, the ‘grounded theory’ approach elaborated by Glaser and Strauss (1967) has become the most influential and pervasive in management research. In this classical text, these authors broke new ground. They reacted against the excessive reliance on hypothesis testing and deductive reasoning in the social sciences and, as an alternative, highlighted the idea of ‘discovering theory from data’. The practical method for conducting research that they presented and elaborated in future work (e.g., Strauss and Corbin, 1998) opened the way to a novel form of inductive theorizing, built on the principles of ‘constant comparison’ (that is, data are collected and analyzed simultaneously) and ‘theoretical sampling’ (that is, rounds of data collections are determined by the ‘emerging’ theory).

Some of the rich tradition of high-quality qualitative research in management has elaborated upon, fruitfully challenged and extended some of the key insights of Glaser and Strauss. Other classical texts have focused on alternative approaches (for example, case-based methods) or on how to ensure the rigor of qualitative methodologies. As Tavory and Timmermans (2014) summarize, qualitative research should be evaluated through criteria such as fit (that is: is the claim backed up by the observations that the research presents?), plausibility (that is: are there alternative explanations or theories that do a better job of accounting for the analysis?), and relevance (that is: what are the implications of the theorization for other research projects). Although such an extensive

Table 2.1 *Selective list of references for qualitative research*

Qualitative reference		Description	
Classics	Glaser and Strauss (1967)	Foundational text on grounded theory and inductive theorizing	
	Strauss and Corbin (1998)	Elaboration of the grounded theory approach with a focus on formal and prescriptive routine to analyze data	
	Lincoln and Guba (1985)	Elaboration of ‘naturalistic inquiry’ paradigm. Frequently cited for discussion of the principle of trustworthiness, validity and reliability in qualitative research	
	Yin (1995)	Foundational text on case studies methodologies from a positivist perspective	
	Van Maanen (1988)	A text describing how ethnographic fieldwork can be written up to make a theoretical contribution	
	Ragin (1994)	A text describing different elements and strategies researchers can use to conduct social research	
	Contemporary statement pieces	Burawoy et al. (1991)	A description of the extended case method
Eisenhardt (1989), Eisenhardt and Graebner (2007)		The Eisenhardt case study approach	
Eisenhardt et al. (2016)		The use of inductive methods to address grand challenges	
Gioia et al. (2013)		Statement piece on how to conduct analysis using the Gioia methodology	
Burawoy (1998), Eliasoph and Lichterman (1999)		Statement pieces on the extended case method	
Langley (1999), Pentland (1999)		Statement pieces on how to theorize temporal processes	
Fiss (2007)		Statement piece on set-theoretic methods, such as qualitative comparative analysis (QCA)	
Nicolini (2009), Feldman and Orlikowski (2011)		Practice theoretic approaches and methods	
Synthesis pieces		Gehman et al. (2018), Reay et al. (2018), Langley and Abdallah (2011), Golden-Biddle and Locke (1996), Kelle (2005), Charmaz (2014), Walsh et al. (2015)	Synthesis and comparative pieces on qualitative methodologies to highlight common foundations but also ontological differences

review is beyond the scope of this chapter, we provide a synopsis of big-picture references of qualitative research traditions in Table 2.1 that can serve as a resource for family business scholars. We included some ‘classic’ qualitative approaches, a few ‘contemporary statements’, and then a few ‘synthesis’ references. In this chapter, we develop an extended description of three exemplar methodologies that have been particularly influential in management research.

In management research, three qualitative methodologies have become exemplars: the interpretive approach (often associated with the work of Denny Gioia and colleagues); the deductive or positivistic approach (often linked to Kathy Eisenhardt and colleagues); and the practice and process-based approach (broadly used by a variety of scholars, but synthesized and articulated by Ann Langley). Interestingly, each of these scholars rejects the notion of ‘templates’ and advocates for richness and innovativeness in qualitative inquiry (Cornelissen, 2017; see also Gehman et al., 2018). That said, we use these examples to show how different methods (for instance, case studies) can be used very differently to build new theory, and to emphasize the utmost importance of the link between methods and theory in the use of a qualitative methodology. Specifically, these methods provide useful approaches that scholars can leverage to create coherent links and connections between research design, methodology and theory. Even though these approaches have some differences and unique characteristics, they all share the main interest in building theory from rich empirical explorations in naturalistic settings, and exploring ‘how do things happen’ research questions. We summarize the main themes of our discussion in Table 2.2.

Interpretivism/Social Constructionism

To start with, the systematic conceptual and analytical discipline that characterizes the ‘Gioia method’ requires an in-depth understanding and knowledge of the research site; typically a single case (Gioia et al., 2013; Gioia, 2017). Following the tenets of grounded theory, the study is driven by a well-specified, but rather general, research question that derives from a comprehensive review of the literature and the identification of some blind spots and/or limitations in current knowledge about the phenomenon (Suddaby, 2006). For example, the paper by Gioia et al., (2010), ‘Forging an identity: An insider–outsider study of processes involved in the formation of organizational identity’, explores a critical question about the processual mechanisms of organizational identity formation (that is: how does identity form?). To position their paper in the current literature, the authors highlight the disparate and almost mutually exclusive stances in extant studies: a social construction view based on the elaboration of identity claims, and a social actor view based on the aspiration of an organization with a formed identity to become a member of a domain. The case selected offered the opportunity to examine these apparently opposite positions, as both the organization and the field were emerging. This example emphasizes the importance for qualitative researchers to start the inquiry with a guiding research question that takes into account prior knowledge and foreshadows the contribution of the study by addressing a blind spot or gap (Reay, 2014).

Even though multiple data sources (archives, field observation, media documentation, and so on) are employed, the semi-structured interview is the primary way in which scholars capture the ‘voices’ of their knowledgeable informants. These are essential, and typically constitute the raw data that will subsequently be grouped into first-order codes through open coding, and into more abstract themes (or second-order codes) through axial coding to search for relationships between and among these emergent categories (Strauss and Corbin, 1998). Other sources of data should be used to corroborate information, triangulate sources and ensure the robustness of the authors’ emerging interpretations (Lincoln and Guba, 1985).

Table 2.2 Three exemplars of qualitative methodologies

Methodology	Grounded theory building ‘How do things happen?’ questions	Deductive/positivistic (K. Eisenhardt)	Process-based theorizing (A. Langley)
Research design	Interpretivism/social constructionism (D. Gioia) Well-specified but rather general research question (for example, ‘How is organizational identity formed?’) In-depth single case study (reveatory case)	Starting research question for which no answer can be found in the literature (for example, ‘How do firms originate high-performing portfolios?’) Multiple case studies (theoretical sampling)	Starting question revolves around flows, activities and events over time Grounded in literature review (for example, ‘Why do actors become bound to networks of indecision?’ ‘Why do they seem unable either to transform them into positive outcomes, to escape their influence, or to let projects die?’ ‘What managerial practices contribute to the constitution, maintenance, and evolution of networks of indecision?’)
Methods	Data collection Multiple sources of data Semi-structured interviews Interview protocol Creation of the ‘data structure’ Open coding and axial coding to generate first-order and second-order codes	Multiple sources of data Semi-structured interviews Qualitative and quantitative data Longitudinal history of each case Cross-case pattern recognition and replication logic	Longitudinal single or multiple case study Multiple sources of data Rich longitudinal data to track events over time (archival, retrospective and real-time interviews) Analysis focuses on temporal relations among events in sequence to reveal evolution, activity and flow over time Various strategies: narrative, quantification, alternate templates, grounded theory, visual mapping, temporal bracketing, comparative cases
			Longitudinal replication

<p>Data synthesis and findings presentation</p>	<p>Presentation of emerging themes, with quotes in the text and additional illustrative evidence in tables</p>	<p>Generation of 'measures' and 'constructs' that illustrate relationships (tables)</p>	<p>Depends on the analytical strategy Examples include narratives, case history with temporal phases, visual maps and so on</p>
<p>Theory building</p>	<p>Theory is 'a statement of concepts and their interrelationships that shows how and/or why a phenomenon occurs' Theory emerges from the integration of emerging themes in a dynamic model</p>	<p>Theory is 'a combination of constructs, propositions that link those constructs, and the theoretical arguments for why propositions explain a general phenomenon' Theory emerges from the articulation of the 'whys' constructs and measures are linked</p>	<p>Theory is to 'understand the world in terms of interlinked events, activity, temporality and flow' It depends on analytical methods used It involves three processes: (1) induction (data-driven generalization); (2) deduction (theory driven hypothesis testing); and (3) inspiration (driven by creativity and insight).</p>
<p>They can be presented in testable propositions</p>			

The purposes of this analytical process (and the data structure that derives) are multi-fold. The aggregation of bits and pieces of data into broader categories enable the researcher to capture underlying patterns and similarities, as well as differences, in the data. These emerging categories provide a scaffolding for the researcher to begin a process of abstraction from raw data to more generalizable themes and mechanisms. In fact, as noted by Gioia and colleagues, the second-order themes represent the boxes in a boxes-and-arrows diagram: these are the pillars that enable the generation of new theory. Additionally, but no less importantly, these analytical steps offer a rigorous and transparent procedure that allows researchers to demonstrate the rigor and transparency of their analyses and prevent them from drawing in the typically enormous quantity of data gathered from multiple and heterogeneous sources, which can, and often does, lead to data asphyxiation. Finally, the formalization of categories is also a useful tool of data synthesis and can be used to effectively communicate the findings of a study. The findings section of a paper is typically structured around the emergent themes, illustrated by ‘juicy’ quotes interspersed in the narrative, and additional illustrative evidence summarized in tables.

The last and most critical step for any form of qualitative inquiry is building the theory from the empirical case under investigation. This is what makes this approach a methodology and not just a method, a set of cookbook techniques. According to Corley and Gioia (2011: 12), theory is ‘a statement of concepts and their interrelationships that shows how and/or why a phenomenon occurs’. As such, the methodology these authors suggest uses the emerging themes identified in the data structure as the building blocks (or boxes) of a grounded theory model. This model connects these themes through ‘arrows’ that explicate the dynamic relationships among the emerging concepts. For example, in the 2010 paper by Gioia et al. on identity formation, the grounded theory model offers a simplified but illustrative model of how the static emerging themes connect to one another in a dynamic progression that has unfolded over time.

We present two final observations on this methodology, and specifically, on some variations around the Gioia method that can be found in the literature. One may ask whether a grounded theory theoretical model is indeed necessary to generate theory from raw data. It is not, in our view. In a study where the purpose is to identify underlying theoretical mechanisms, the organizing of second-order themes into the overarching dimensions can be sufficient to support theorizing. A very good example is the paper by Dacin et al. (2010), ‘Formal dining at Cambridge colleges: Linking ritual performance and institutional maintenance’. The authors draw on multiple sources of data and various rounds of coding to identify three aggregate theoretical dimensions – performance, individual transformation, and shift in social positions – and build theory on how organizational rituals support the maintenance of macro-level institutions.

A second observation can be made about the use of this methodology when multiple case studies are included in the research design: As we will discuss later, multiple case studies are conducive to variance theorizing, where differences across cases can be used for variance control in explaining a phenomenon. One may ask whether the inductive, interpretive approach used by Gioia and colleagues, which focused on similarities rather than differences, may be equally fruitful. Our short answer is that it can. An example is the paper by Di Domenico et al. (2010), ‘Social bricolage: Theorizing social value creation in social enterprises’, where the authors used interview data from eight social enterprises

to extend knowledge of bricolage to social ventures ('social bricolage'). Although the paper does not include a data structure, the authors employed inductive theory building, as 'text extracts from across the range of informants were isolated and recurrent patterns in the data grouped into conceptual categories'. The procedure of data synthesis led to the identification of three processes – social value creation, stakeholder participation and persuasion – that offer an extension of extant bricolage processes from the study of social enterprises: making do, a refusal to be constrained by limitations, and improvisation.

Deductive/Positivistic

The second exemplar methodology we review is the one perfected by Kathy Eisenhardt and her colleagues with a multiple case study research design (Eisenhardt, 1989; Eisenhardt and Graebner, 2007; Eisenhardt et al., 2016). Given that excellent papers explaining the case study method are available (e.g., De Massis and Kotlar, 2014), we are not going to provide guidelines for a competent execution of this method. Our focus is the link between methods, that is, the techniques used for data gathering, analysis and synthesis, and the creation of theory, which we consider essential to understand this methodology. Compared to the interpretivist approach, which focuses on the point of view of informants and highlights concepts such as interpretation, meaning and understanding (Nordqvist et al., 2009), this methodology utilizes an inductive approach closely related to deductive theory testing. That is, the analysis of each case as a stand-alone entity (within-case analysis) enables the researcher to develop emergent theory, which is tested in each case by investigating similarities or differences between the cases (cross-case analysis).

As in any type of qualitative research, knowing the literature is essential to formulate a guiding research question. Inductive research is particularly useful to address 'how' questions that have not been explored yet, such as those examining complex processes and hard-to-measure constructs (Gehman et al., 2018). For example, Ozcan and Eisenhardt (2009), in their paper 'Origin of alliance portfolios: Entrepreneurs, network strategies, and firm performance', investigated the creation of high-performance alliance portfolios by entrepreneurial game publishers. As the authors note, the literature on alliances and portfolio creation had looked at the characteristics of these portfolios and their evolution in terms of network structure; however, what strategic actions companies can use to create them remained unclear, and only suggestive evidence existed on this topic. Notably, the research question focused on an emergent process that an inductive longitudinal study is very well equipped to unpack.

In multi-case research, the research question is also critical because it requires an adequate sample to address it. This is what is usually referred to as theoretical sampling. Cases should not be selected randomly or based on convenience (for example, geographic proximity or access to informants), but in a purposeful manner so that the researcher can control for some variables that are not of interest (extraneous variation), and focus on creating variation in some characteristics that are the focus of the analysis. For instance, in the paper on game publishers (Ozcan and Eisenhardt, 2009), the authors were interested in tracking the development of portfolios from the beginning, so they selected four companies founded when the industry was still new and for which information from birth was available. Importantly, these companies were comparable in terms of resources, investors, technical excellence and founder connections; all variables that the literature indicates as

important for the creation of alliance portfolios. Two other companies included in the sample provided variation around the ‘time’ variable, as they were ‘late entrants’ but with initial endowments similar to the other companies in the sample. Notably, the authors also controlled for extraneous variation due to the explosive industry growth in the late 2002 by choosing only companies founded prior to that critical milestone.

Although they may appear quite dissimilar, the data analysis in the multiple case inductive methodology and the interpretive approach are both grounded theory methodologies aimed at investigating the data and then abstracting at a higher level. In this methodology, the in-depth analysis of each case and their cross-examination are used to identify similar constructs and themes (Eisenhardt and Graebner, 2007). The cases are analyzed following a replication logic, which means that the understanding of initial relationships among the constructs is refined by revisiting each case and comparing occurrences. There is no doubt that these steps require not only a very in-depth understanding of the research context and the cases (obtainable with deep immersion in the data), but also a good dose of inspiration and ability to ‘connect the dots’ and see novel and interesting relationships within the data. In the following stage, the data are ‘reduced’ and synthesized so that the emerging relationships are concisely explained to the readers. Summaries of measures and constructs in comparative tables help visualize differences and similarities among the cases. In contrast to the interpretive approach, where quoting informants is essential to illuminate meanings and interpretations, this methodology is more ‘factual’, and showing quantitative as well as qualitative evidence is important to convey trustworthiness and reliability.

The most critical outcome of the multi-case analysis is theorizing – that is, the generation of emergent theory – a step that requires scholars to compare and contrast data and evidence with the extant literature. This iterative comparison allows the researcher to provide logical explanations for the relationships identified in the cases; the ‘whys’ that are condensed in testable propositions. Although propositions may not strictly be necessary, the development of a new theory or the elaboration of an existing one is incomplete if the authors do not tie up their analysis in providing explanations for the underlying logic linking together constructs (for example, industry infrastructure) and measures (for example, performance).

Process-Based/Practice-Based Theorizing

The last methodology is typically associated with the work of Ann Langley and colleagues, and maintains a theoretical focus on the process rather than variance theorizing (Langley, 1999, 2007; Langley and Abdallah, 2011; Langley et al., 2013). Process research is concerned with understanding why certain evolutions occur over time and why they evolve in a particular way. In comparative terms, this is perhaps the methodology that is affected the most by the data asphyxiation problem identified by Pettigrew (1990). As Langley et al. (2013: 4) nicely put it: ‘if variance theorizing generates *know-that* type of knowledge, process theorizing produces *know-how* knowledge’. Explaining events and activities over time is inherently difficult because the phenomenon of interest is not typically neatly bounded; it may extend over a long period of time, encompassing multiple units and levels of analysis, and it may be best captured with a large set of heterogeneous data from multiple sources that the researcher needs to ‘make sense of’. The development

of new theory is not an easy task either. Long narratives of events have the tendency to be very descriptive; a fatal flaw that Langley defines as ‘illustrative theorizing’ (Gehman et al., 2018). Describing the events in chronological order, even with a coarse-grained breakdown into phases, does not represent theory. Process theorizing requires digging deeper beyond the surface and revealing novel insights about patterns, meanings and underpinning mechanisms. As we will discuss in this section, the reduction of data and their analysis are critical steps, as different analytical procedures do lead to different theory-building outcomes.

Process research typically involves two analytic moves of importance: focusing on action and focusing on temporal sequences of events. First, process research often features a focus on the practices or actions. Whereas the Gioia method described above tends to rely on interview data, and the Eisenhardt method focuses on understanding the variance in performance outcomes, practice theories focus on the sequences of events and the ways that actors use material objects or artifacts to accomplish activities (Langley and Abdallah, 2011). The idea behind this perspective is that the fundamental unit explaining social life is action (Feldman and Orlikowski, 2011). Understanding social action requires the researcher to observe activities from a variety of perspectives (Nicolini, 2009). By focusing on the actions, scholars can understand how the relationships between actors and artifacts influence and shape social activities and outcomes. To illustrate this, scholars often describe vignettes that provide a thick description or illustration of the actions that occurred in a particularly influential or representative time of their story. Second, process research focuses on dynamic analysis of temporal sequences of events. As Langley (2007: 271) suggests, ‘process thinking involves considering phenomena dynamically – in terms of movement, activity, events, change and temporal evolution’.

Given the idiosyncratic characteristics of dynamic processes, very few cookie cutter techniques are available to support researchers in their attempt to make sense of their data and guide them in the process of moving from descriptive evidence to abstracted explanation. For example, as in any type of grounded theory approach, it is essential to define a specific research question based on a careful review of the literature (Suddaby, 2006), even if the study is initiated by an ‘interesting’ empirical observation. A very good example is provided in the paper on ‘Escalating indecision: Between reification and strategic ambiguity’ by Denis et al. (2011). The authors clearly indicate that the paper is motivated by an empirical anomaly encountered in their own research: the reorganization of clinical services across the three hospital sites. The implementation of a merger became a situation where participants kept investing in decision-making activity, but the strategic process continued for ten years with little progress towards a final resolution. The goal of the paper is to understand these dynamics, but the authors’ research questions go beyond this general idea in order to offer specific insights. After reviewing the literature on pathologies in decision-making and how decisions are made in pluralistic settings with multiple voices, the authors focus on the concepts of ‘networks of indecision’, and their theorizing revolves around the concept of ‘escalation of indecision’, a concept that differs from the most well-known idea of escalation of commitment.

In terms of research design, process research is very flexible. The particular example of the Denis et al. paper is an in-depth single longitudinal case study. However, this methodology can also be used with other designs, such as comparative archival cases (for example, Maguire and Hardy’s 2013 comparative discourse analysis of two chemical products) and

real-time multiple embedded case studies (for example, Bresman's 2013 analysis of eight drug developmental teams in two sites).

In terms of data collection, there is virtually no limit to the type and amount of data that can be gathered in process research. The critical step for the researcher is to be able to gather rich longitudinal data and identify the saturation point where there is sufficiently rich and fine-grained evidence about the phenomenon of interest, and no new information emerges from additional data collection. To study evolving processes and unfolding events, the data can be archival or collected through interviews. A caveat of this last data-gathering technique is that interviews should be able to cover the events in real time, especially if respondents are asked to recall meanings and interpretations more than facts or milestones. This is why process-based research is often based on ethnographies evidence (Bruns, 2013) or archival longitudinal data that track events as they unfold (e.g., Wright and Zammuto, 2013).

Typically, the data analysis begins with an attempt by scholars to get the 'big picture' through a historical narrative that captures the sequence of events, major milestones, critical incidents and rupture points in their empirical story. For example, in their paper on escalating indecision, the first step of analysis for Denis et al. (2011) was the writing of an extended 60-page narrative that links the events chronologically and is supported, as is the norm, by secondary sources and illustrative quotes. The second step was to create a descriptive first-order narrative of the key periods and episodes of the case, remaining as close to the data as possible, and using extensive quotations from empirical materials. The final stage is the writing of a second-order narrative, where the story is abstracted and the focus is no longer on description, but on explanation.

In addition to the prolonged immersion in the context and in-depth understanding of the empirical dynamics, the researcher has several techniques available to categorize the data and group them together. Langley (1999) offers a comprehensive overview of these possible approaches – narrative, quantification, alternate templates, grounded theory, visual mapping, temporal bracketing and comparative cases – stating clearly that they are not mutually exclusive but rather complementary tools. Other excellent examples of how to mine the data and coherently develop emerging interpretations are the papers published in the *Academy of Management Journal* Special Issue on Process Studies (in February 2013). The authors show a wide array of visual and narrative techniques that enable them to move from an 'empirical descriptive' story (the first step of the analysis) to a more 'abstract theoretical' story that provide key concepts and mechanisms that can be transferred to other contexts and generalized beyond the specific case(s). Either by showing temporally separated phases in visual diagrams or by creating narratives pertaining to each time period and associated episodes, a researcher uses 'longitudinal replication' to compare and contrast different time frames ('brackets') in order to show how the 'time' component plays a critical role in the process under investigation.

Finally, as process research is used primarily in explaining evolving phenomena, theorizing 'explicitly incorporates temporal progressions of activities as elements of explanation and understanding' (Langley et al., 2013: 1). For example, Denis et al. (2011) extend the strategic management literature on (pathological) organizational decision-making by developing a dynamic model of escalating indecision that is rooted in the practices of decision-makers. Gehman et al. (2012) enrich our understanding of processes of value creation and performance by showing the inherently dynamic process through

which values emerge and are transformed through interactions and relationships ('value work'). Wright and Zammuto (2013) revisit theories of institutional change by revealing the cross-level and dynamic processes through which societal, field and organizational values align as a result of institutional work by peripheral and central actors. Glaser (2017) shows how the interactions between actors, artifacts, practices and theories influence organizational efforts to change routines.

Theorizing is indeed a challenging task when the data provide such richness and complexity. Theory building is based on a combination of inductive work (that allows the data to speak and enables the researcher to generate novel insights from empirical data), deductive work (that aims at understanding how emerging insights are coherent with or different from prior knowledge), and inspiration (that supports the connection of dots, provides the sparkle and leads to the 'eureka' moment). Of course, not every single piece of the story or model can necessarily be novel. The purpose of process theorizing is to reveal broader dynamics and underlying mechanisms that are often neglected or obfuscated by cross-sectional research.

OPPORTUNITIES FOR ENGAGEMENT AND EXPANSION OF THE THEORETICAL TOOLKIT OF FAMILY BUSINESS RESEARCH

Theoretical Opportunities

There are several opportunities for family business researchers to delve deeper into the inner working of family firms, the experiences and interpretations of kinship relationships, and the effects of the family–business link on governance and management practices through qualitative methodologies. In this section, we discuss these opportunities, taking as inspiration the recent review article of the state of empirical family business research published by Evert et al. (2016). In this article, the authors offer six categories of topics and themes that have commanded the attention of family business scholars: (1) management of the firm; (2) business performance and growth; (3) characteristics and attributes; (4) interpersonal family dynamics; (5) governance; and (6) succession. We offer suggestions on some of these research topics and explain how the three methodologies discussed above can support this endeavor.

Management of the firm

Studies in this category primarily focus on the strategic process in family firms, that is, how firms make decisions based on their allocation of resources, their competitive positioning, and their internal goals and external environment. As Evert et al. (2016), scholars have spent considerable effort unpacking differences between the decision-making process and strategic implementation of family and non-family firms. Frameworks such as socio-emotional wealth (SEW) and stewardship theories have provided the foundations for understanding key differences. This area of research offers promising opportunities for further examination of the differences between family and non-family firms, and to improve our understanding of the heterogeneity of family firms (Chua et al., 2012). For example, an interpretivist/social constructionist approach could be used to examine how

strategic decisions result as the outcome of processes of sensemaking in organizations (Gioia and Chittipeddi, 1991; Weick, 1995). Sensemaking is ‘the process through which people work to understand issues or events that are novel, ambiguous, confusing, or in some other way violate expectations’ (Maitlis and Christianson, 2014). The potential of sensemaking and attention-based perspectives is evidenced by scholarly work published in general management journals (e.g., Kammerlander and Ganter, 2015; Strike and Rerup, 2016). Yet, the term is notably rare in scholarly publications dedicated to family business research. For example, a quick search for ‘sensemaking’ in *Family Business Review* returned only five results. Embracing qualitative research can facilitate the engagement of family business scholars with cognate organization theories such as sensemaking, which can shed further light on the critical role that familiness and family dynamics play in explaining how family and non-family members interpret situations and make decisions accordingly.

Similarly, we envision many opportunities to design multiple case studies *à la* Eisenhardt to compare and contrast management styles and decisions of family and non-family firms facing similar environmental conditions. As discussed earlier, theoretical sampling can ensure that some of the sample variation is controlled, so as to highlight the role of other key dimensions (such as family ownership and management) on organizations’ strategic behaviors and postures.

Finally, many studies that Ann Langley has conducted over the years have revolved around strategic processes. Family business scholars have a great opportunity to conduct longitudinal process studies that examine the flow of events and activities over time that led to a certain outcome (for example, a decision about a merger, or the pursuit of an internationalization opportunity, and so on). Although strategic managerial decisions of family firms have been successfully explored and we have a good understanding of the variation in competitive behaviors and actions, in our view, qualitative research can really unpack how family firms ‘think’, and – if they think differently – explain the how and the why.

Business performance and growth

This topic has also attracted much interest from family business scholars based on the evidence that family firms care about both financial and non-financial performance. Quantitative studies have produced mixed evidence regarding how family firms perform vis-à-vis non-family firms, and consensus seems to be forming that family involvement does not affect financial performance (O’Boyle et al., 2012). Understanding whether and how family involvement affects non-financial performance and the propensity to engage in socially responsible behavior is another topic of interest that has been explored with quantitative methods (Cruz et al., 2013; Dyer and Whetten, 2006). To complement these studies, qualitative research offers the opportunity to more fully understand how family firms interpret and negotiate performance – both financial and non-financial – in their everyday practices. A stream of qualitative research at the intersection of institutional theory and practice-based theorizing has looked at how organizations cope with seemingly conflicting demands; that is, institutional complexity (Greenwood et al., 2011). For example, an ethnographic study by Smets et al. (2015) identified three mechanisms – segmenting, bridging and demarcating – that allow individuals to manage competing logics and their shifting salience within their everyday work. Along the same lines, in-depth single case studies, multiple case studies and/or longitudinal studies can provide invaluable

qualitative evidence of the processes and mechanisms through which family owners and managers look at financial and non-financial goals and adjudicate priorities.

Another research topic where qualitative studies can offer important support is the growth strategies of family firms, particularly internationalization strategies and processes. Prior thoughtful reviews (Fernández and Nieto, 2014; Kontinen and Ojala, 2010; Pukall and Calabrò, 2014; Reuber, 2016) have made a strong case for the relevance of and need for process-based research on family firms' internationalization. Qualitative theorizing can give rich and insightful accounts of when, how and why family firms become multinational. In-depth single case studies and processual analyses can offer insights on the internal processes that may lead a company to choose to invest or not, or invest and divest in different countries. A multiple case study design can be used to explore questions about best practices in terms of strategic approaches, or help us to understand why some strategies succeed and others fail. These investigations would nicely complement the large body of variance studies that have examined the antecedents and determinants of internationalization decisions (Duran et al., 2017; Welch and Paavilainen-Mäntymäki, 2014).

Characteristics and attributes

This category of studies has traditionally been dedicated to identifying distinguishing features or qualities of family firms, but until recently, this line of work was primarily descriptive and had little or no theoretical foundations. As Evert et al. (2016: 34) note, this area of research is 'in need of reawakening, both conceptually and empirically'. Understanding what features and characteristics make family firms unique is a great research opportunity for qualitative family business researchers, in particular those who draw on interpretivist and social constructionist approaches. Research on identity is particularly suitable to explore family firms' distinctiveness. In the family business domain, studies of organizational identity are still relatively sparse (Deephouse and Jaskiewicz, 2013; Zellweger et al., 2013). To our knowledge, there has also been little effort to understand the relationship between the family identity and the business identity. They are inherently intertwined, but the desire to maintain the integrity of one or the other may create some challenges. Interpretive qualitative research can shed light on the role that values and beliefs play within organizations; these elements constitute a key tenet of the organizational identity of family firms (Koiranen, 2002; Parada et al., 2010). Understanding how meanings are created within organizations and how they are negotiated with external stakeholders can also shed light on important sources of heterogeneity in family firms (Marques et al., 2014; Nordqvist et al., 2009). Indeed, socio-cultural studies of values, meanings, framings and interpretations can be used to identify novel dimensions on which family firms differ, and used to create taxonomies of family firms (see Garcia-Alvarez and Lopez-Sintas, 2001). Finally, the focus on characteristics and attributes can offer an excellent starting point to develop insightful research on the cross-cultural similarities and differences in practices and attitudes of family firms in different countries (Bhappu, 2000; Micelotta and Raynard, 2011). There is so much yet to be discovered about family businesses around the world. It is often the case that variance studies either focus on specific sets of firms in specific countries, or hint at, but cannot really provide explanations for, the role of country-level factors. Qualitative research that investigates cross-cultural phenomenon is long overdue (Evert et al., 2016) and can substantially extend our knowledge about the variety of approaches to family capitalism all around the world.

Interpersonal family dynamics

Research classified under this label investigates the interactions and relationships between family members (and non-family members) as they operate the business (Jennings et al., forthcoming). Many of these studies focus on conflicts and disagreements that may influence business evaluations and even jeopardize the success of the business (Rousseau et al., 2018). In this regard, we suggest that there are opportunities to extend our knowledge of the impact of family dynamics on the business (and vice versa) through qualitative research. Similarly to the remarks made by Payne (2018) in a recent *FBR* editorial, there is the tendency to see the family as part of the unit of the family business. However, families do represent separate entities. Some family members may be very influential, even though they do not (or no longer) manage the firm. For example, the patriarch of a family may retire from the business but still have significant influence over the generation that has taken over. As Payne (2018: 172) notes:

Important and influential members of the family may not be part of any business operations explicitly, but may play a role in directing the family and its interests, which can ultimately influence the associated business or businesses, even inadvertently. Such relationships are only just being mentioned in the extant literature and there remains much to explore (e.g., Jaskiewicz and Dyer, 2017).

Family science theories can continue to be useful, as well as engagement with leadership theories and insights from theories on emotions (Shepherd, 2016). Another direction that is particularly salient and deserving of further exploration is how intermediaries (for example, consultants, advisers, therapists) support family businesses. Families are entities that evolve with society; they struggle with complex problems (for example, a family member's addiction), but they also provide a stock of precious resources that give them strength and resilience. Qualitative in-depth and longitudinal studies can reveal the unique resources and capabilities that families offer to the business, as well as the unique challenges they face. They can also reveal the impact of the business on the well-being of the family, an area of research that deserves further attention (see Nordstrom and Jennings, 2018).

Succession

Succession is a favorite and critical topic in family business research, but one that is in dire need of longitudinal designs and qualitative in-depth and comparative studies. As Evert et al. (2016) note, succession takes time, as it is a process ascribed with numerous activities over a protracted time period. As such, there are many opportunities for scholars who have the interest and time to ethnographically examine the unfolding of the process of succession. Longitudinal designs that capture the flow and timing of activities could finally reveal how and why successful succession processes must start early to make the process smoother. Multiple case studies can also be used to compare and contrast succession processes in a sample of firms, and establish how the process itself contributes to successful or unsuccessful outcomes. There is also the opportunity to study succession processes where the family exits voluntarily, discontinuing the business, due to the lack of suitable or interested family generations to take over. How can family owners make the transition smooth so that the company may retain the legacy and positive social and organizational capital built by the family, while transitioning to a non-family status? How

does this process affect the family and the organizational identity? The topic of succession has often focused attention on best practices that could guide family businesses through the process of transgenerational sustainability. The processes and mechanisms underpinning this critical event will remain a salient topic for many years to come.

New Methods

In this chapter, we have focused on showing specific examples of how family business scholars can leverage three common and predominant qualitative methodologies in order to generate new theoretical insights that can advance our understanding of family businesses. We also encourage scholars to explore the potential of other qualitative methodologies. For example, methods such as rich thick description (e.g., Reay et al., 2018), qualitative comparative analysis (e.g., Fiss, 2007; Ragin, 2008) and topic modeling (e.g., Mohr and Bogdanov, 2013) have recently been used to generate new theory in a variety of disciplines. Each of these methods provides a unique toolkit that family business scholars can use to generate new insights about the processes and dynamics associated with family business activities.

For example, qualitative comparative analysis (QCA) offers a unique perspective that family business scholars can apply to theorize family business outcomes of interest, such as firm performance, succession or business renewal. Ragin (2008) suggests that traditional approaches that use correlational methods, such as regression to explain performance, treat the presence and absence of a cause identically, and do not account for the complexity often required to understand social outcomes. Organizations can be understood in terms of configurations, multidimensional and conceptually distinct characteristics that occur together (Fiss, 2007). This set-theoretic approach to understanding social and organizational phenomena allows scholars to take into account critical concepts such as equifinality (that is, the way that the same end state can be reached via different paths or configurations), and causal asymmetry (that is, the presence and the absence of a variable do not necessarily behave in the same manner) (Fiss, 2007).

Configurational thinking may be particularly relevant to family business research, as core concepts such as family governance structures may operate distinctly in particular industries or particular types of firm characteristics, such as size. We thus encourage family business scholars to look to established research methodologies as inspiration to pursue novel, groundbreaking, theoretical insights.

CONCLUSIONS

The family business field is theoretically rich and nuanced. Drawing on a wide array of theoretical frameworks has allowed scholars to explore multiple paths and to offer a multifaceted view of these fascinating organizations. In this chapter, we have echoed prior calls for a deeper engagement with qualitative methods. We have also emphasized, however, that theorizing is at the core of the research process, and we reviewed three exemplar methodologies.

Methodologies support the research effort by offering analytical tools and techniques for data collection, analysis, synthesis and ontological and epistemological foundations

that enable robust theorizing. We hope that family business scholars will continue to hone their skills in the use of qualitative techniques, and draw on these important tools to generate insightful family business theories.

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