

UNDERSTANDING THE CHALLENGES OF A FAMILY BUSINESS ORGANISATION'S
SUCCESSION WITHIN THE MAURITIAN CONTEXT

AN ACTION RESEARCH INQUIRY

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by

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ABSTRACT

UNDERSTANDING THE CHALLENGES OF A FAMILY BUSINESS ORGANISATION'S

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This study focuses on the socio-emotional challenges encountered by a Mauritian family business. It is observed that the main objective of the parents is to successfully transfer the socio-emotional wealth to the next dynasty prior the legation of any financial stake. The socio-emotional wealth consists of five pillars namely; family control and influence, identification of family members to the firm, binding social ties, emotional attachment of family members and renewal of family bonds towards the firm through dynastic succession. The adoption of socio-emotional wealth is however largely influenced by social identity constructs of the next generation. These social identity challenges deploy contradicting variables in the form of role dualities, identity conflicts, power relation warfare and negative organisational politics limiting the effective transfer and adoption of social emotional wealth. The research methodology comprised a collaborative action research through Individual interviews and group workshop to shed light on the challenges and commitment towards an action plan. To cope with the emotional tensions and support the transfer of socio-emotional wealth, the family members have been advised to acquire an emotional intelligence acumen. This epistemological construct will enable the family members to take cognizance of emotions and its consequences on judgement and decisions within the family business. This methodological analysis equally empowers the family members to evaluate the degree to which mastering emotions can influence and support the transfer of socio-emotional wealth. Thus the social tensions caused by negative emotions within the family environment become explicit. Recommendations will be implemented and outsourced to a specialist in cognitive transition who will deliver personal and group training.

Guillaume Babet

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LIST OF ABBREVIATIONS

- 1 - GNP - Gross National Product
- 2 - CEO - Chief Executive Officer
- 3 - SIT - Social Identity Theory
- 4 - SEW - Socio Emotional Wealth
- 5 - EI - Emotional Intelligence
- 6 - CAR - Collaborative Action Research
- 7 - SBU - Strategic Business Unit

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DEDICATION

“Behind every successful man is a woman, behind her is his wife”.

Groucho Marx

This thesis is dedicated to my lovely wife Bianca who has been by my side for the past seventeen years, supporting my continuous studies and ensuring that I always perform in the most peaceful environment that one can cherish.

30 January 2020

AUTHOR'S DECLARATION

I do hereby declare that this thesis is the result of my own research, except to the extent indicated in the Acknowledgements and References and by comments included in the body of the report, and that it has not been submitted in part or full for any other degree to this or any other University

Signature of Student Date:

January 2020

CHAPTER 1

1.0 Introduction and Background

1.1 Context

On the 2nd of February 2011, I joined a family business organisation as General Manager. The family firm operating in the fast moving consumer goods market is ranked among the top hundred business organisations of Mauritius. The enterprise has a labour force of over two hundred staffs headed by a top management team of twelve family and non-family members. While managers within the top team are each heading a specific organisational department, yet their final decisional power is very limited as all decisions have to be ratified by the family members and ultimately the head of the family; i.e. the Father.

The family team consisted of the father; head and ultimate decision maker of all strategic moves of the organisation; the daughter, newly appointed Chief Executive Officer and nominated management successor of the family business, the eldest son, head of the mechanical division of the organisation, the youngest son who recently join the organisation as head of the Car Spa division, and finally the mother who looks after the credit control of the organisation.

The family business is currently experiencing its third generation succession having operated with an entrepreneurship culture (Gibb-Dyer, Handler, 1994) during the last twenty years. The new objective of the family business is to drive the company towards an outward looking and learning marketing-oriented enterprise *'to resemble as the big national organisation of the Country'* (Father's speech).

Being a Chartered Marketer, such above exercises did not initially pose any obstacle in view of my change management capabilities; yet, this time, I did not forecast to meet such challenges and barriers which later appeared to take its sources from the socio-emotional dynamics. In fact, the challenge faced became my main motivation in approaching a doctoral study. At that time, I was observing a number of top management, non-family executives who were leaving the family business organisations for multinational companies, and I started to doubt my choice in making the opposite move. I was afraid of failing to adapt to the contextual family business environment which seems to be continuously in turmoil and rising conflicting situation. I questioned some of the staff leaving in my new organisation and also from other business organisations in order to consider the possibility of an eventual common reason to

the problem. Most of the reasons converge towards the rising conflicting situation with family members. Power and politics seem to be constantly threatening the business environment and demotivating the executives. I decided to uncover further insights on the issue and extended my questioning on the subject matter. One executive was leaving the company for the reason stated above, and I questioned his reason; why social relational issues with family members remain unsolved? He replied categorically, *'If they (the family members) cannot agree among themselves, do you expect them to be able to agree with you?'*

The answer was simplistic, yet it was full of promises from a research perspective. I focused on one particular statement of the executive: *'They cannot agree between themselves...'* and wanted to know more why they cannot agree amongst themselves. Was this the same, highlighted problem behind so many challenges in my present family business organisation, and other family businesses in Mauritius? I realised that this was my first trigger in approaching my doctoral studies. I was confident that a doctoral thesis in business studies, with a focus on action research on family business challenges would help me uncover the insights of the challenges posed. In doing so, it may also help in proposing a solution to the problem. Ultimately, my position and choice of staying in such a contextual, emotionally loaded environment may be consolidated. I therefore approached the University of Liverpool, which seemed to be well endorsed in action research and took the final decision to embark onto the long journey.

My first doctoral modules shed light on the fact that the family members and the most important stakeholder, i.e. the Managing Director, were all *'part of the problem and the problem was part of them'* (Landry, 1995). I identify the main stakeholders, i.e. the family members themselves, as being the subject of the required change that they wanted to carry. They were observed as the resisters beside the cultural and organisational changes they initiated.

Conflicting moral objectives and embarrassments were present throughout, specially, when the change requirements triggered me to raise sensitive issues on the family's weaknesses. Issues were faced when demonstrating to the family members that they were largely contributing towards the source of the problem themselves. Such openness started to threaten my working relationship and long-term career position in the enterprise. I had to choose between forging a path to create change or to drop the objectives and leave the

organization. I knew that any of the above alternatives would not be the best option neither for the organisation, nor for me. Fortunately, the first chapters of my doctoral modules triggered an understanding of the importance the 'contextual factors' (Coghlan and Brannick, 2010) and uniqueness of the environment under which a scholar practitioner would be operating before establishing any new perspective for recommendations. Therefore, I started to perceive the family business model differently by stepping into the shoes of the family members. My first observation was that I was wrong in constantly observing the organisation through a scientific and professional lens. I was completely overlooking and assessing the presence of emotional dynamics behind judgements and decisions taken within the family business sphere. This was the critical success factor in understanding that contextual environment. I was not academically equipped at that time to understand the reasons for nepotism within family business organisations as a matter of business survival. I observed a constant requirement for compromises often accompanied by an economic loss to the business and often against the fundamental rules of corporate governance. Hence, by adopting the perspective of Eisenhardt and Martin (2000), I observed the external environment of my family business organization as a high velocity market, where holding merely some competitive resources would not be enough to succeed. An alignment of internal resources would be critical in achieving success and this internal alignment must encompass a harmonious, affective and effective family relationship.

The children occupied important positions despite being novice to the business; leading to consequential mistakes in their management and leadership approach. The mother, who had to abduct power as a deputy managing director and who opposed such succession, was constantly showing her frustration following the wrong decisions of the children. Due to those conflicts, the relationship dynamics between the mother and the children deteriorated during that period. The father's decision in placing the 'children' in top management positions without proper grooming was criticised openly by the mother and silently by other members of the organisation's staffs.

Paradoxically, since I had chosen to start my doctoral studies, I started to view such tensions only as further opportunities to learn, while previously this would have only been another reason to leave.

Reynolds and Vince (2004) supported my observation when claiming that *'There is much to be gained by embracing differences and tension'*. The authors elaborated on the richness of reflection on self and/or other's performances; a subject area equally found in my case study.

The above reflection would culminate ultimately in what Kolb's (1984) observed as 'experiential learning', where *'ideas are not fixed and immutable elements of thought but are formed and reformed through experience'* (p. 26). My different readings of my initial doctoral modules constantly reminded me that I was on the right track in learning from those tensions. Schon (1983) observed 'reflection in action' as *'on-the-spot surfacing, criticizing, restructuring, and testing of intuitive understanding of experienced phenomena'* and the extent to which one's *'reflective conversation with the situation'* would contribute to the learning (p241-242). Hence, differences of opinions and perspectives form part of the family business culture. Contrarily to a non-family business enterprise, within a family business, family members tend to use their blood ties to express those differences and opinions openly, which often resulted in conflicting debates and summarized the emotional dynamics framing that contextual environment.

Reynolds (in Pedler, 2008) extended Revan's equation of *'programmed knowledge'* by introducing the importance of shedding the light on organisational insight as a means of understanding the reality. That statement from Reynolds further triggered my curiosity in approaching the deep organisational insight under the perspective of socio-emotional challenges that exist in my family business organisation. This pressure appears to be the recurrent cause of the numerous challenges at the source of the intra-relational family conflict in the family business. Similar challenges also cascade down, across family firm performances and succession planning. The difficulties seem to amplify as we enter the business succession implementation phase where the next generation is being assigned management responsibilities. The new dynasty also brings along its new culture and management style, strongly influencing the organisational politics through their blood relationship.

Willmott (1997) described the understanding of organisational politics and its consequences as shedding the light on the *'darker'* aspects of organisational life (p.170). Vince (1996) adds that action learning could offer more by approaching the *'emotional and power dynamics in learning processes'*. Hence, in line with the above observation, the problem which was

identified in my practice and which frames my thesis title is to *'understand the challenges of the family business organisation in times of succession'*. The scope of the research focused on the socio-emotional challenges faced by different members of the family in a Mauritian business context; each member has a different perspective and experience of the emotional pressure which the latter is facing within a business succession working environment, where emotional tension and its relative challenges are at their peak. Before assessing the challenges in further details, it would be relevant to understand the family unit and its importance in the economy.

Astrachan and Shanker (2003) observed the important position held by family firms in relation to their 'size', 'qualitative characteristics' and 'contribution' to the national economy. The researchers observed that *"89 percent of the number of businesses, employ approximately half the workforce, and produce about half the nation's GNP"* (p216). However, it has also been noted that the success rate of the second generation taking ownership and/ or management is only 33 percent; 11 percent to the third generation and only 3 to 4 percent succeeding beyond the third generation. Hence, it is not surprising to read that 56 percent of family members leading their own business are not happy with the succession plan unfolded or simply do not have any plan. Moreover, 62 percent of family led firm owners do not have any plan for family succession and would lean more towards a non-family management in the successive years. (Alternative Board 2014)

The Eurofound report (2015) acclaimed that within the European economy, 40 per cent of the Fortune 500 is represented by Family business. A general increase was noted in the share of family firms, from 15 percent in 2005 to 19 percent in 2014. The same report observed that the family business is the main source of job creation, with 85 percent of new jobs in the small and medium size sector. On the European platform, family businesses account for 60 percent of job creation in the private sector (Mako et al., 2016). The research equally recognised that over two thirds of European family businesses are within the phase of business succession (ownership and Management) and 22 percent are forecasting to pass over to the next generation. 24 percent have opted to transfer management only to the next generation and 23 percent have chosen to be managed by a non-family CEO while keeping family ownership and control.

Family firms within the Mauritius economy hold the same importance. The top hundred organisations of Mauritius records 48 family led businesses, contributing to the different economic pillars of the country. (Business Mega, 2012)

However, since some few years, the threat of an ageing population is being observed. The principal demographic officer, Mr Sunkur forecasts that 20 percent of Mauritian will be aged 60 years and above by 2010.

In comparison, 14 percent of the world population will reach 60 and above by 2015. Hence, Mauritius is also pre-occupied by family business succession challenges. That demographic challenge intensifies the needs for family firms to plan for business succession as a measure to accompany retired family members.

1.1.1 Research Questions, Aims and Objectives

My contribution will assist the social demographers working on the ageing population consequences and the economists studying the complexity and sustainability of the family business and how they are involved in the daily operations of a family firm. My contribution will hopefully assist stakeholders in extending their pre-understanding of the contextual environment and challenges that are recurrent within that business environment. For family firms already within the third generation in business succession, who be experiencing socio-emotional challenges and chaos, my contribution would give them an academic support in understanding the reason for those challenges and offer them means to at least cope or mediate with the challenges, if not solve the problem.

Using an epistemological perspective and with a view of filling existing research gap, the relevancy of my thesis joins the observation of Ibrahim et al., (2001) who noted that little attention has been given to complex management challenges such as family conflicts, succession, and nepotism evolving inside the family business organisation. Those challenges deserve to be given more attention through in-depth research and by approaching the deep socio-emotional factor influencing strategic decision and direction of the family firm. Hence, my aim would be to uncover the above challenges and their impact on the succession process within the family business environment.

Somehow, getting access to such a sensitive subject of research would be a challenge to any external researcher. Even under the circumstance that an external researcher gets access to

the subject of the study, the quality of the research may be challenged due to lack of pre-understanding of the family contextual environment. In contrast, being an insider researcher and scholar practitioner offers the privilege of an inside observation and the opportunity of conducting a covert observational study. Hence, being part of that family business organisation for the past eight years enabled me to gain access to private and sensitive qualitative data.

Being the General Manager of the enterprise with a direct communication line to the members of the family business offers the opportunity of observing recurrent emotional challenges, power relation, confusions, misunderstandings and nepotism within the family business environment.

My thesis follows a different research route as compared to the traditional research methods generally adopted to analyse family businesses. Indeed, several research has focused on the entrepreneurial and managerial aspect of family business through managerial perspectives such as corporate governance (Carney, 2005), Entrepreneurship (Aldrich & Cliff 2003) or Internationalization (Graves & Thomas 2008). Contrarily to the above direction, my research observes the sensitive challenges which are usually non-existent or limited in non-family business organisations and which may culturally shock non-family members joining a family firm. The objective outcome of the research is to assist practitioners in acquiring a pre-understanding of the contextual factors (Coghlan & Brannick 2010) of family firms from a socio-emotional perspective.

It was acknowledged from the start of my observation that researching into such problem with its '*multivariate factors*' (Easterby-Smith, Thorpe & Jackson 2012, p. 284) would be complex and challenging. Even if the initial perspective gives a limited scope of fully resolving the fundamental socio-emotional problem, a ray of light on the source of the challenges would contribute to knowledge and give way to future actions which may help the family to remain, at least, at the edge of the chaos (Stacey, 2011) and '*navigate*' across the challenges in period of change crisis (Palmer & Dunford, 2008 p.22).

My research approaches sensitive emotional topics which family members would usually refrain from discussing within a day to day business context by fear of embarrassment and emotional stress. The problems are 'intrinsic' to the family environment. The Oxford

dictionary defines the term '*Intrinsic*' as '*belonging naturally*' and indeed my research focuses on challenges which naturally form part of family business organisations. Any family business organisation undergoing succession may expect to face the same at a time of their existence.

The research is motivated due to the high failure rate behind family business successions across the world. From a local context, there is also an urgency of ensuring an effective business succession within an ageing Mauritian population. Family business organisations with senior family members retiring will soon be affected by the ageing factor and are forced to have a succession plan to ensure that the next generation keeps control and influence over the business as part of its social, emotional wealth.

It is hence important for stakeholders of family business organisations to identify and understand the social emotional wealth challenges which are intrinsic to family businesses so that they reckon the barriers they need to overcome for a successful family business succession.

1.2 Problematizing write up

The previous contextual paragraph gives an appreciation of the problem which my thesis approaches. I will now funnel down my general problematic observation into a more focused research problem to enable an academic approach to the challenge.

Weick (1983) gives a clear presentation of what constitutes a problem in relation to anticipated and unanticipated events and one's interpretation and reaction to these problems. Landry (1995) claimed four specific conditions as pre-requisite to a problem. The first one being a past, present or future occurrence impacting negatively on the organisation. Secondly, the eventual possibility of attending to that problem. Thirdly, a sincere will to attend and dedicate resources in attending to the problem and finally, a degree of uncertainty about the course of action and implementation plan. As the author observed, the above characteristics can manifest in any order.

For the purpose of research, we will assume that the anticipated event is the succession process through which the family business has been through, and which is impacting negatively on the emotional environment of the organisation. The different interpretations

to this succession by current family members is giving rise to emotional tensions. However, the interpretation of that tension is very challenging for someone who is 'part of the problem'. Hence, as an insider researcher (but non-family member), I will take advantage of that non-emotional biasness position to observe, interpret and reflect on that particular problem.

'Passing the family business on to the next generation is a top priority and a consistent concern for many family business owners. A total of 88 percent of respondents believed that preparing and training the next generation is crucial for the business' survival and success, and that it is the responsibility of the senior generation to teach incumbents a solid and sustainable set of values and guiding beliefs, along with the family's principles' (Family Business Survey 2017)

The above data was recently collected during the Price Waterhouse global family business survey 2017. It was also noted during the survey that 59 percent of family businesses would either be passing the management, ownership, or even both to the next generation over the next twelve months. That latest information confirmed the previous trends noted in the global family business survey 2014, observing that more than one third of family business firms recognize succession and business transfer as an important challenge that they will face in the next five years. However, long before those recent observations, the family business has been a fascinating subject which has triggered insight from several authors. One such example is that of Sharma (2004), who reviewed 217 articles on family business studies.

Among the different themes studied within the family businesses, socio-emotional dynamics, its evolvement and succession have triggered several authors (Goto 2014; Miller- Lebreton 2014; Paszkowska, 2015; Konopacka, 2015; Devins, 2015). This complex socio-emotional dynamics puts the family firm in a unique contextual environment which appeals for observation and academic research. This socio-emotional complexity stands as well as on of the major contrasting characteristics between a family business firm and non-family enterprise.

Hence, the different academic literatures covered on the family businesses provided interesting insights on various frameworks to support my observations and approach my research. I refrained from assessing the family business against national or multinational organisations or through a comparative management model but focused more on the intrinsic characteristics which framed that unique socio-relational parameters of the family firm.

Furthermore, knowledge and problem are two strongly connected constructs, as observed by Landry (1988). The fourth characteristics of problem, as depicted by Landry as an uncertainty towards problem solving, invites for a continuous effort towards the production of knowledge towards that objective. Hence as pointed out by the author, the concept of problem solving, and knowledge production cannot be separated.

An important note before closing the academic perspective of my problem is the epistemological lens through which I have observed the problem. Landry defined that perspective as the *'structuring of incoming perceptions and making them fit with both previously accumulated perceptions and with personal, moral, rational or aesthetic values'* (p.325). That perspective calls for effort to be made between the object and subject relationship so as to alleviate the load of discomfort or embarrassment that such problem may trigger, especially when the problem is being approached by *'the external world'* which under my circumstance would be a non-family member.

Hence, taking into consideration the various scientific appreciations of problem, I framed my research problem. My concept is framed through a research perspective and lens of an insider research practitioner to be able to formalize my problematizing write-up.

I started by asking myself the following questions.

- What could be the sources of those socio relational tensions which are omnipresent within that family business enterprises?
- Would these relational tensions have any emotional construct and could they eventually be attended?

1.3 The Mauritius Economy

The Mauritian family business environment offers a unique context where the country's multicultural background influences business successions and is assumed to intensify the challenges of family business succession. I observed challenging socio-emotional relation of one of the most influential family business with regards to succession dilemmas and its consequences. The ultimate aim of that exercise is to propose a practical model representing my perspective of family business succession challenges in my company. This model may be used as a benchmark for future research and a starting point for extended quantitative and

comparative analysis across other family business firms, with a view of establishing a grounded theory of my perspective or even refute the hypothesis proposed through my perspective.

Family business organisations have proved to be major contributors to the national economy. Their sizes, continuous generational succession and close family involvement in the daily operational management of the business as well as the high opportunity for employment are specific characteristics offered by such type of organisation (Astrachan & Shanker, 2003). Venter, Boshoff and Maas (2003) noted that the family business participation in the national economy will continuously be on the rise.

In Mauritius, family businesses hold the same importance and are viewed as strong pillars of the private sector (Business Mega, 2012). Mauritian family business organisations are present in different industries ranging from construction, retail and distribution, insurance, banking and tourism (The Top Hundred Companies 2017). They participate actively in important forums through the Mauritius Chamber of Commerce towards the benefit of economic development that are highly influential in the development of the government strategic plan and initiatives. In Mauritius, 48 out of the Top hundred organisations of the country are family led (Business mega).

At an international level, scholars have also identified the important role of family organisations and their contribution to economy and society at large. Kirchhoff & Kirchhoff (1987) noted that a country which would derive a larger Gross Domestic Product from family firms would hold a competitive advantage internationally. That would result in a high productivity level observed through family businesses in contrast to non-family businesses.

Scholars have also participated in family business studies and have identified that 89 percent of United States organisations are managed by family members. They employ nearly half of the country's total workforce and are the highest contributors of the nation's Gross National Product (Astrachan & Shanker, 2003).

Carsrud (1994) observed that 35 percent of the Fortune 500 enterprises are family business organisations. Hence, the above data projects a strong and important presence of family business in different spheres of the world economy.

However, despite the importance of family business organisations and their critical role to the economy, their survival is often put at risk by the different challenges which frame the family businesses. Financial Performances, Stakeholder management, corporate governance and business succession have been the major issues of family business organizations as identified by Melin et al, (2014).

Zahra & Sharma, (2004); Chu (2009) noted that only 33 percent of family business organisations succeed in handing over management to the second generation. 11 percent manage to hand over to the third generation, and only 3-4 percent survives beyond the third generation. Within that same perspective, the alternative board in PR Web 2004 noted that 56 percent of family business owners do not have any succession plan, nor are they satisfied with the one in place and 62 percent of the owners have a pessimistic perspective about the survival of the business under family management by the next generation (Myers, 2014)

The family business succession's challenges are also relevant within the Mauritian context as the ageing population of Mauritius calls for urgent succession plan across many family businesses. The labour workforce of Mauritius as at 2016 was estimated at 581,000 (Statistics Mauritius Online) across a total population of 1.262 million inhabitants for the same year; which makes up only 46 percent of the population contributing to the national output. Furthermore, the expert group meeting on ageing in Africa (2007) forecasted that 14 percent of the Mauritian population will be 60 years old by 2015 and 20 percent will be over 60 years old by 2040. This demographic forecast led the Mauritian government to increase the retirement age from 60 years old to 65 years old, with an objective of ensuring a larger workforce in the coming years and hence sustaining the national output. This ageing workforce, which also comprises of family members, shows the importance for family firms to plan for their succession and hence ensure the survival of the business.

1.3.1 My Family Business Organisation

My family business enterprise was established in 1958. It is one of the first family dynasties in Mauritius to trade in groceries and basic staples. Within the early 1980's, this family business was flourishing and leading the fast-moving consumer goods market. The former generation was reported to be much disciplined, have a highly valued integrity and honesty.

Despite being financially well-established, the former dynasty has always cultivated and transmitted the human values of continuous effort and hard work to the second generation. Some family members of the second generation had the opportunity to enrol in tertiary education in the 1980's, at a time where such achievement was deemed to be exceptional.

The grandfather was very strict in managing the business and led the business in an autocratic style. During the 1980's that management style was accepted, and the children abided and respected that management style. The succession process was a natural one as the grandfather worked and led the organization until his last days. The father today constantly recalls his father as someone who worked until his last days; he visited the organisation and gave his last advices on the eve a surgery which was not successful.

The two sons took over the management of the enterprise, each one heading different strategic business units (SBU) of the organisation without any cross-operational interferences. Nearly forty years since those flourishing days of the traditional family business organisation of the 1980's, the SBU is led by one of the sons of the late father is ranked 58th within the top hundred organizations of Mauritius. The father himself is now over sixty years old having two sons and one daughter. He has even become grand-father some few weeks ago, as the youngest son is now the father of a beautiful daughter. Hence, the family business has already entered into its fourth generational dynasty. The dilemma of succession is highly present. The influencers/advisers counselled that the succession should be planned and implemented to avoid any family decisional conflict in the circumstances of a sudden death of the father.

Hence, I will now name the different stakeholders of the family business organisation; I will list their different roles as members of the family and their position in the family business organisation. The observation of relational pattern within their contextual environment will ultimately make the link and assess the different emotional constructs which are going to be studied.

The family is composed of the Father (Chairman of the company), the Mother (Credit Manager), the daughter (newly appointed CEO and designated family business successor), the youngest son (Business development executive), and the eldest son (Director of a different SBU in the family group).

The Father (Chairman)

The Father (head of the family) and head of the business holds the role of Chairman of the company since two years ago, he appointed his daughter as Chief Executive Officer (CEO) and official successor of the firm.

Since he has started to implement the succession process, he constantly applies a downward emotional pressure towards the family members to ensure the succession of the family's emotional wealth/endowments (Berrone et al. 2012) to the new generation taking over the business. His objective is to get the children to adopt his philosophy of business management, namely; honesty and protection of the business/family financial wealth through the consolidation of the family clan.

The handing over of that emotional wealth and his constant brainstorming techniques towards its cultivation is observed within his recurrent history telling (Beech & MacPhail 2009) to make sense of his speech (Gioia & Chittipedi, 1991). He constantly refers to the experiences of life and the values transmitted by the former generation in trying to stir the required attractive forces (Ford & Ford, 1994) within the next generation to adopt his philosophy. Management discourse and bias, power of language to influence audience (Hammersley, 2003), and Sense making (Weick, 1988) are also part of the rhetoric used to transmit that succession philosophy, in consolidation of family ties towards the protection of the business. Unfortunately, that abuse of language, metaphor and persuasion often resulted in what Drummond (2001) coined as 'bounded rationality', an oversimplification of decisions influenced extensively by a resistance from departing from one's own reality to consider other possibilities.

Nevertheless, I noted that the downward emotional pressure is not a one-way communication exercise. The family members also have an emotional response towards that downward emotional pressure. That emotional response unfolds through the challenges of social identity, which to some extent threaten and limit the transmission of the emotional wealth.

The Youngest Son (Business Development Executive)

The youngest son's philosophy is the establishment of fairness in decision making. He has recently joined the business after his tertiary studies and tries to use an emotional influence

and power as a family member and legal business heir to fight against organisation's decision, which may be taken outside the 'moral compass' (Burnes, 2009) for the overall interest of the family. His position has often caused conflicting relationship among family members as his quest for fairness among family and non-family members imply strategic decisions which may threaten family ties and kinship. Due to his young age, he has not yet acquired the family business philosophy and finds it difficult to understand the dilemma between economic loss and family harmony (Venter et al, 2012) which often bends towards the latter as a critical success for family business survival.

The Daughter (C.E.O)

The new CEO /daughter's objective is to have total management power over the organisational decision making. Until now, she has been appointed in the position of CEO, but the father has retained the ultimate decisional power within the different key business areas. However, her perspective is to change the organisational culture from an entrepreneurial business model to that of a fully professional marketing-oriented organisation.

As being the most qualified child of the family (she is an MBA holder from Warwick University), she applies an upward emotional pressure on the father by positioning herself as the most capable child in succeeding to her father's position and lobbies for total decisional power. The daughter's objective has created tension among family members who see in that pursue, an egoistic move towards personal financial gain and power at the expense of the protection of the family ties and harmony.

The Mother (Credit Manager)

The mother, who holds the role of credit manager in the organisation, does not have any management power over the executive staff. However, as a spouse, she possesses a natural emotional influence over the chairman. This natural influence increases her emotional ownership over the business (Zellweger and Astrachan, 2008; Björnberg & Nicholson, 2012) despite not possessing any legal ownership of the business and she does not form part of the succession plan of the business. That emotional influence through love is an important power relation factor in the family relationship equation as this dynamic acts as an obstacle towards the quest for total power of the daughter. That observation reinforced the claim of Thomson

(2008), who stated that an individual lacking power may make use of existing network or political relationship to resist perspective of changes. This conflicting dynamic has caused relational and work conflicts between the mother and daughter. Until date, the conflicting dynamic causes major socio-relational issues within the family environment.

The Eldest Son (Strategic Business Unit / SBU Director - Engineering Business)

The eldest son (having an engineering background) has been assigned the divisional director's role of the engineering SBU of the organisation. Despite the financial dependence of the SBU on the main business unit, the father administered direct operation between his son and himself. This decision was taken to avoid relational and work conflicts that may arise in case the daughter's managerial decisions are discordant.

Hence, despite the daughter offers an informal support over the strategic decision of that SBU in times of serious concerns, it is the eldest son manages and discusses directly with the father for daily operational issues.

As we observed, the socio-emotional challenges between family members are multi-dimensional, all pervasive and cuts across hierarchies in the family firm. The father's objective is to transmit the social, emotional endowments to his children as part of the succession wealth. He values emotional wealth comprising of norms, cultures, kinship and family business control as more valuable than financial wealth. The children's conflicting positioning in understanding and adopting the father's perspective is largely due to a conflict of identity and roles resulting in diverging perspectives.

1.4 Conclusion

Chapter one has set the base of my research background, aims and objectives. The chapter has also introduced the contextual environment of the family business organisation. I have identified my problematic as a socio-relational challenge which is highly influenced by emotional construct. The challenges originate from a conflicting succession objective beyond the legal transmission of business ownership; on one side the father cherishes the objective of transmitting family values and social emotional wealth to the next generation. On the other side, the next generation views 'succession wealth' essentially as acquiring management

power and financial wealth, relaying the emotional endowments being transmitted by the father to a secondary level.

The concept of that research will hence revolve around a collaborative exploratory research inquiry led by myself as the scholar practitioner. Being a main insider researcher, with the family members as unit of study, the challenge is to analyse this case study through Collaborative Action research (CAR). A feasible action plan will thereafter be proposed to attend the problem.

CHAPTER 2

LITERATURE REVIEW

2.0 Introduction

Chapter two discusses the different theoretical perspectives which proved to be relevant in understanding family business challenges. Theoretical constructs are wide and pervasive but often act as best management practice across organisational governance; however, my pre-understanding of the environment depicted that family business organisations have a unique organisational identity due to a high emotional presence across business management. Hence some theoretical concepts are more relevant in understanding the family socio-emotional challenges than the others. Nevertheless, before funnelling down to the most critical theoretical concept, my subject area is first analysed from a broader perspective. The stakeholder analysis remains the most practical concept as a first approach towards identifying stakeholders; differentiating and categorising each member of the family so that the research process investigates the relationship between the stakeholders and trigger relevant data. However, as we narrow down to the critical emotional challenges, the stakeholder analysis triggered the need for complementary theoretical concepts. As such, I observed other family business related theories such as the Agency Theory, Resource Base View Theory, Organisational Culture Theory, Kinship Theory, Social Identity Theory and the Socio-Emotional Wealth Theory. Having assessed those theoretical perspectives and the gaps that they triggered towards my research objective, is geared towards Social Identity Theory and the Socio-Emotional Wealth Theory as the theoretical backbone of my action research. The Socio-Emotional Wealth Theory provides the required opportunity to understand the transmission of norms and values to the next generation while the Social Identity Theory enables an insight across the different conflicting forces opposing that socio-emotional wealth transmission and adoption. Those theories discussed shed light on the problematic of the thesis.

2.1 The origin of family business research and evolution

Interest in family business has been observed since long. Firstly, through the research of Calder (1953) in his doctoral thesis on the problems encountered by small manufacturing family firms; followed by the launched of the first business centre in 1960s (Sharma et al., 2007) at a time where the requirements to understand the business challenges was a priority for business practitioners rather than a common academic requirement for the scholars.

As from the 1980's onwards (Melin et al., 2014), family business has been given growing attention in research (Sharma 2004; Zahra & Sharma, 2004). More recently, Sharma et al. (2007) explored 217 peer reviewed articles with the objective of consolidating and assessing an understanding of family businesses. The author used specific lens for that research by categorizing the family into different units of analysis; i.e. individual level, interpersonal or group level, organizational level, and societal levels. That approach ensured a multi- level theorizing (McKinley et al., 1999) instead of a single and limited observation focus. The result showed that most of previous research focused upon an analysis at an individual level which is on the family members of the organisations; but not enough attention is given to the group or organizational influence. Sharma gave strategic recommendations to enhance the level of future research by dedicating some focus to designing more effective studies which will encompass "*full cycle*" of research (p25) from a qualitative and quantitative perspective. An effective dissemination of knowledge is thus created to the community. During Sharma's next collaboration with Zahra, the latter extended on the requirement to strategize approach in researching over family business organisation. The authors observed a continuous focus over the topic of succession, the adoption of the insider researcher approach and a cross-disciplinary approach in the use of scientific principles with regular exchange among research of the same field. In the above observations, the authors identified areas of improvement in rigor, ethical issues and communication with cross-disciplinary scholars.

In another research, De Massis et al. (2012) recorded 734 articles published in 47 different journals between 1996 and 2010 which sums up to 15 years of study when comparing the research of Sharma et al. (1996) which extends from 1971 to 1995, the amount of years spent in research equals to 25. Hence, we note an increase in the interest of scholar research for family businesses as a counterpart to the contribution which this particular business model is offering to the scholarly community.

2.2 The Family business definition

Despite the growing attention and research over family business's importance and evolution, yet, it has been a challenge for the research community to come up with a common definition of that specific business model (Astrachan, Klein, & Smyrnios (2002). After reviewing the extensive literature on family business, Wortman (1994) noted that '*no one really knows what the entire field is like or what its boundaries are or should be*' (p.4); depicting the extent of the unknown parameters within that business sphere. This observation is reinforced by Zahra and Sharma (2004) who claim that the boundaries and distinctiveness of family business organisations have no consensus. However, the converging route tends to bring the definition of the family business towards the bases of ownership and management (Handler, 1989). The first perspective of the literature tends to focus on the stake ownership and the degree of involvement of the family members in the daily operational management of the organisation. In other words, how many shares would the family members or the head of the family own in the business, the number of family members employed in the business and the extent of their influential position on business strategic decisions. The Essence Approach (Chua et al., 1999; Habberson, Williams, and MacMillan, 2003; Litz, 1995) is another vital aspect found in existing literature. Chrisman et al. (2005) defines Essence Approach as "*behaviours that produce certain distinctiveness before it can be considered a family firm*" (P. 557). That essence approach is observed in terms of family bonds, loyalty and fraternity among family members. That approach would depict the social family ties within the family business environment and the extent to which those ties influence strategic business decisions. Sharma (2004) observed that the most common definition classifies firms as family firm '*... only if the family retains voting control of the business and multiple generations of family members are involved on the day to day operations of the firm*'. (P.4.) whereas Chua et al (1999) definition of family business claimed that

'The Family business is a business governed and/or managed with the intention to shape and /or pursue the vision of the business held by a dominant coalition controlled by members of the same family or a small number of families in a manner that is potentially sustainable across generations of the family or families (P.25).

Hence, stake ownership, involvement and essence are the three characteristics which would set the contextual environment and classification of a family business firm as compared to

the non-family enterprise. Despite none of the definition proposed has been widely accepted, yet most of those definitions seem to encompass family influence over the strategic direction of the organisation including resource allocation and capabilities.

The above observations reinforced my objective in selecting my family business enterprise as a unit of study. My unit of study (the family business) indeed consists of the elements of ownership, involvement and essence. The father's shares ownership will ultimately form part of the succession wealth which the children will inherit, while all the family members are involved in the daily management of the business and socio-emotional challenges and kinship dynamics that are highly present within the environment.

Hence, for the needs of the present study, I will retain both definitions of Chua and Sharma which encompassed stake ownership, involvement and essence as representative of a family business enterprise.

[2.3 The differences between family and non-family business](#)

Despite the fact that there have been debates and lack of consensus in defining a family business organisation, the differentiating factors of 'family' versus 'non-family' firms seem to have been easily identified and achieved consensus amongst authors.

Indeed, the family business reflects some fundamental differences from a non-family business organisation. The major difference which most authors have cited is the inter relation between family personal financial affairs, blood ties, power relation and the emotional challenges that evolved within the family environment (Venter & Farrington, 2009). The previous statement stands in opposition to non-family business organisations. The authors observed that the above challenges framed the complexity of the family business organisation and hence differentiates the research of family business organisation to that of other non-family organisation.

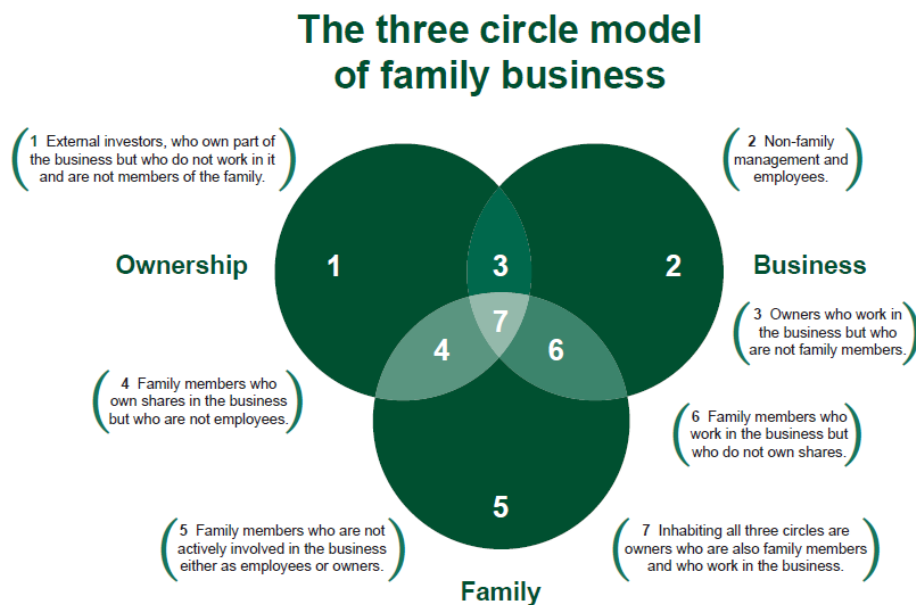
With the objective of demonstrating that overlapping relationship, Venter & Farrington (2009) propose the 'dual system' or the 'two concepts' elements of family and business in observing the challenges operating simultaneously on those two fronts, namely: the business and the family, which are even referred to as the 'family business system theory'.

Within that dual system, the theory observed that the business and family system are primarily separate entities with individual goals, rules, values and structures. The family system, on one side, is highly inward looking, emotionally based through family ties, conservatism and long-term loyalty. On the other hand, the business system is primarily task oriented, outward looking and innovative.

Venter and Farrington (2009, p 64) observed that in a non-family business organisation, the two systems would be incompatible. However, in a family business those two systems overlap and are interdependent. That overlapping may propose some opportunities to the organisation but can also be destructive to ‘both entities’.

The three - circle model as proposed by Tagiuri and Davis (1992) is the most common conceptual model used during the last decade to understand the inter relationships of sub-systems within the family business.

Table 1 - 3 Circle model of family Business by Tagiuri and Davis 1992



Source: Adapted from R. Tagiuri and John A. Davis (1982) Bivalent Attributes of the Family Firm, reprinted (1998) in the Classics section of Family Business Review, Volume IX, Number 2, Summer, 199-208

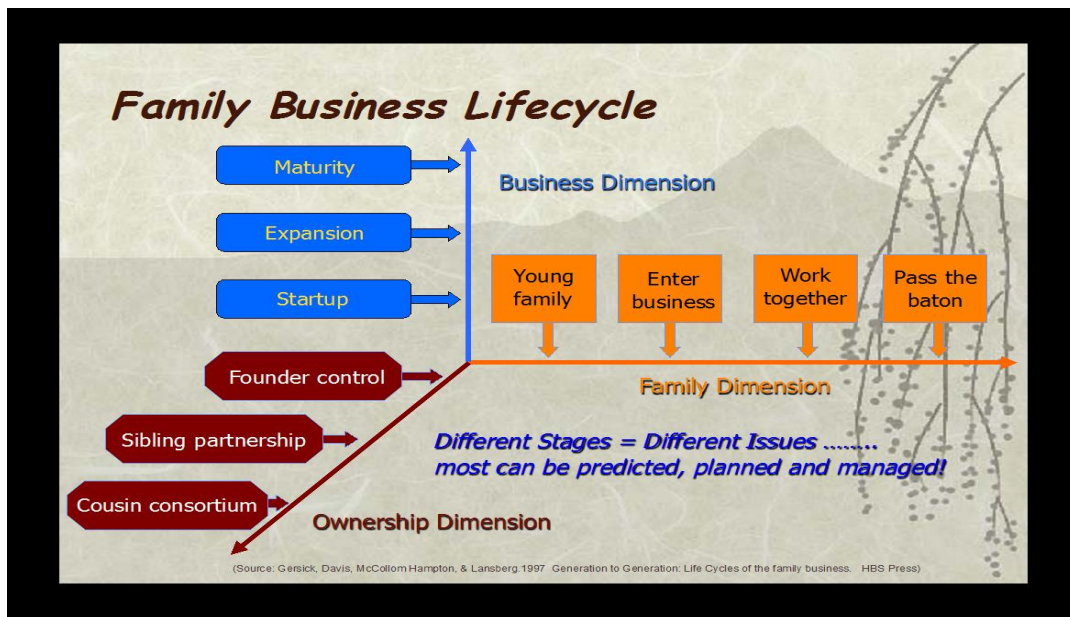
The model positioned the family, the business and ownership in three independents but include overlapping entities defined in the model as sub-systems. The overlap between each sub-system then depicts the position of the family in terms of ownership and management. The ideal position would be the related owner management position 7, which is the result of

the effective overlapping of all three subsystem. However, reaching such position in a turbulent family business environment is a real challenge and this research provides a comprehension of the turbulences and eventual solutions which bring the family business into the owner-management position. However, observing a family business organisation solely from the perspective of the three-dimensional overlapping subsystem would be a limiting factor as we would then remain at the structural level of the entities. As a result, the challenges of emotional factors would not be taken into consideration, even if those are intrinsic characteristics of family business organisations.

Contributing to those limiting factors, Johannisson (2003) as well as Johansson and Huse (2003) propose that the family business should therefore also be observed from a combination of the 'entrepreneurialism', 'managerialism' and 'paternalism' variables. The three variables are part of an ideological framework where 'entrepreneurialism' represents a state where entrepreneurship is the dominant ideology of the business; 'Paternalism' represents a state where the family is the ideology of the business and finally the 'managerialism' represents a state where the management philosophies and theories is the dominant ideology of the business. The research depicts the extent to which 'managerialism', through professionalization of the board, can overcome the traditional entrepreneurialism' and 'paternalism' weaknesses of the business and render the family firm into a more competitive enterprise. In other words, the 'managerialism' ideology would ensure that professional standards are set up at board level to ensure that the business does not suffer from the self-interest or socio-emotional ideologies of family members; but benefit from constructive criticism of non-family professional managers.

Koiranen (2003) extended the ideological stance of Johannisson by applying the concept to the C3-model to complement the three-dimensional model of Tagiuri and Davis. The ultimate objective was to fill the gap on the untouched cultural forces operating within the family business organisation.

Table 2 - Family Business Life Cycle by Gersick et al 1997



However, as a critique to the model discussed, Gersick et al. (1997) argue that the inconsideration of time is a crucial element influencing changes throughout the business cycle. Consequently, the elements of business, ownership and family are observed within the family as a separate complex construct through the three-dimensional model of Gersick et al. (1997). Each variable related to the stated elements has its own influencing factor. For example, the ownership axis will be influenced by the nature of ownership and consortium framing the ownership of the organisation. The business axis would be influenced by the state of business evolution. Decisive questions are equally addressed: Is the business a start-up, expanding or have already reached maturity? Are the family members new to the business and starting to work together? Is the business at the stage of succession? And finally, the family axis would be influenced by the family life cycle through the degree of involvement of

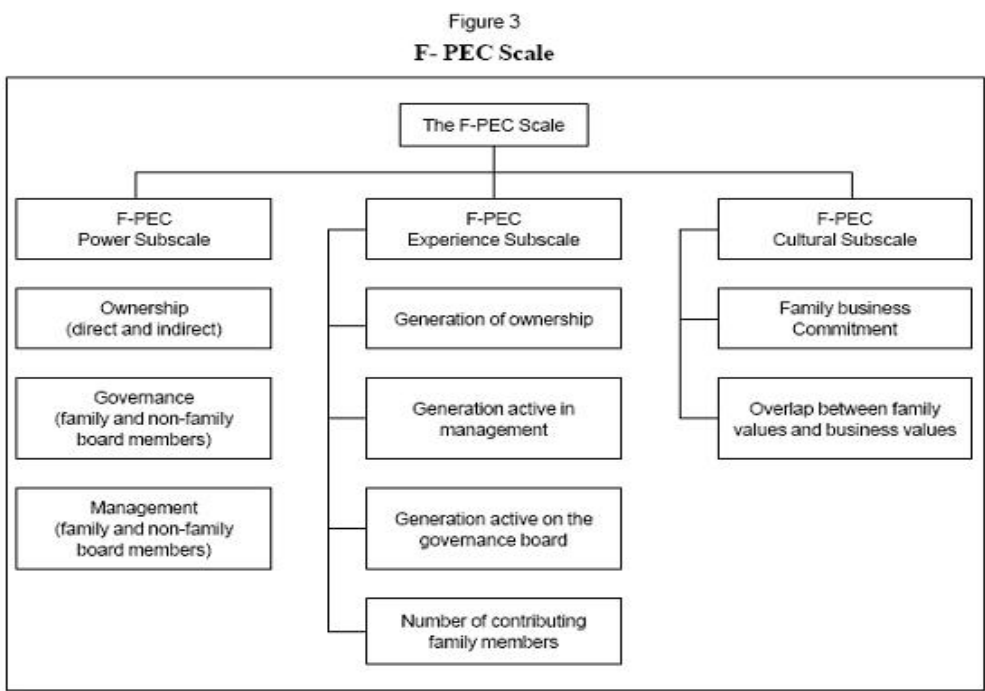
Since time factor is taken into consideration by the Gersick model, it fills in the missing gap required to observe influence and evolution of a real-life family business organisation. Rutherford, Muse and Oswald (2006) added some value to Gersick's three-dimensional model by extending on the importance of defining the specific characteristics of the variables on the different axes of the model. For example, Rutherford et al. extended on the Gersick's characteristics in terms of gender, growth orientation and education level. For business characteristics the authors proposed to consider extended elements such as capital structure

and family planning. For family characteristics, elements such as divorce rate and family turnover are proposed as important considerations to the analysis.

An essential factor to consider is that despite the family and business form one entity with family members constantly involved, there exists a variation in the degree of family involvement across businesses (Tsang 2002). Hence, involvement would not be a finite element in contrasting a family business versus a non-family firm, but it is the degree of involvement that would dictate that classification.

Astrachan, Klein & Smyrniotis (2002) proposed the experience scale (F-PEC) as a tool to analyse the degree of family involvement in the business. The following dimensions would be the variables of analysis; P=power, E=Experience and C= Culture. The involvement of the family in the business would thus be determined by power exerted over the business, the experience of the business and the culture prevailing.

Table 3 - The F-PEC Scale - Astrachan et al 2002



Source: Astrachan et al. (2002).

Therefore, instead of observing an organisation as a family or non-family business simply from an ownership perspective, the authors encouraged scholars to evaluate the extent to which family members are involved in the business. Indeed, my experience in the family business

depicted the extent to which high involvement by all members of the family in the business both intensifies the management and their emotional challenges, but also strengthens the family business structure from an involvement perspective.

However, Pearson et al (2014) criticized the experience scale due to a lack of definition and measurement of the 'family variable'. As far as all other variables are cautiously measured, the authors observed that the family variable does not carry any empirical measurement, and this is an essential weakness based on the level of heterogeneity of family structures nowadays. In other words, all family business organisations do not have a similar structure and according to the author, this must also be taken into consideration. Yet, for the purpose of research, my unit of study is considered as a traditionally accepted family business enterprise consisting of the father, mother and three children; all involved in the daily management operations of the business.

Therefore, involvement and/or essence has become a critical component in differentiating family business from non-family business organisation. Moreover, assessing the extent of that involvement is even more critical in understanding the heterogeneity of family business organisations. The authors observed that the degree of involvement could drastically influence research outcome among different family business organisation.

Other perspectives are still being recommended in understanding the complexity of the family business. Berrone et al (2012) proposed to assess the family business organisation from a socio-emotional wealth perspective. The dimensions proposed are; the family control and influence, family identification with the firm, bonding social ties, emotional attachment, and renewal of family bonds through succession. This is indeed one of the most common paternalism ideologies present in family business organisation and must be assessed to understand the power dynamics that could be exerted on business decisions by family members. Indeed, the socio-emotional wealth perspective has positioned itself as one of the most relevant theoretical perspective tools in researching my unit of study. That perspective proposed relevant dimensions of assessing the family firm's social structure, including emotional factors, and is positioned as the ultimate objective in the succession of norms and values.

Another crucial differentiating factor contrasting family and non-family firms is business context, without which, the final observation is not complete. Despite all the conceptual guidelines enumerated under that family business definitions and characteristics, the scholar practitioner would fail if the business context were to be ignored. As such, Melin et al (2014) claimed that ignoring the contextual environment influencing a phenomenon would lead to contradictions and conflicting results within the field of study (e.g., Cappelli and Sherer, 1991; Johns, 2006).

Hence, family control and influence, degree of involvement of family members and the internal cultural and political business environment are the crucial factors to be considered in observing family business within the right context. All these different models represent a challenging melting pot of family business models. The models become even more challenging when the business organisation regroups all or most of these characteristics; i.e. family control, influence and full involvement of family members.

2.4 Family Business succession

My research will depart from traditional research on succession planning and best practice, and instead approach the challenges of the family members within that period of succession. Assessing the potential challenges present within this contextual environment would trigger the stakeholders to make provision in the succession planning to account for these challenges. Nevertheless, a pre-understanding of business succession exercise is important before observing the challenges which may surface.

Succession can be observed as a '*transfer of social position within the family firm*' (Nordqvist, 2015. P.183) in terms of control and decisional power. Handler (1994), identifies the extent to which that exercise is challenging and recognized that the family structure cannot propose any 'predetermined solutions' (p.184.) to those challenges. Longenecker and Schoen (1978) observed the process of succession as a 'socialisation process' due to the fact that the exercise is not performed overnight but is unfolded through a 'lifetime learning experience' (p.1) of the identified successor. Within that lifetime experience, Churchill and Hatten (1987) proposed a succession process that would unfold across four stages, namely; owner management, training/development, cross generational partnership and finally transfer of

power. The authors insisted on the importance of role changes, adjustment and knowledge transfer as critical success factors towards final leadership of the business organisation. It is assumed at this level that the incumbent and the successor both have the necessary attributes such as: the incumbent's willingness to detach from power and delegate same to the successor; the successor's integrity and commitment to the organisation's objective, as well as possessing the necessary skills and experience to hold the required position in the organisation. Culture may have a strong influence on that selection; for example, the non-recognition of women as potential successor of a family business may be observed in some conservative societies where the eldest son is automatically identified to be the successor of the family business. Hence, one shall be prepared to possibly observe a high degree of nepotism in the selection of the next successor to run the family business (Vadnjal & Zupan 2009; Lyman, Salganicoff, & Hollander, 1985). While succession characteristics are not extended upon, the focus is made on unknown aspects of the succession exercise, and approached in ways that current research can solve.

The least explored topics identified through my literature review discuss the need to understand the dynamics surrounding business succession; in other words, the challenges surrounding that critical phase within the family business life cycle. In line with the above research objective, Nordqvist et al (2015) reinforce the need to research on social identity challenges and new role requirements, both from incumbent and successor.

Indeed, it is assumed that the incumbent and successor's effective relationship is critical for the successful succession. As a result, relationship quality and challenges are bound to influence the succession process (Cabrera-Suarez, 2005; Cabrera-Suarez et al., 2001; Dyer, 1986; Goldberg, 1996; Handler, 1990, 1992; Lansberg, 1988). That relationship is not always without challenge *'because the father influences his son's development and expectations during all their shared lifetime experience'* (Cabrera- Suarez, 2005, Pg.90.). Therefore, a shared vision is essential in the process of the incumbent transmitting the socio-emotional wealth to the successor and also the successor acknowledging the value of such wealth in the same perspective of the incumbent. Joining the perspective of shared vision, comes the need for family harmony. Morris et al (1997) sampled 209 family firms and noted that family harmony turns to be more important in the succession process than the grooming of the successor or the succession plan itself. Dunn (1995), claimed that family organisations

preferred to employ family members with the objective of securing harmony, despite that the same decision may possibly affect financial performance. The author further discussed drawbacks of disharmony and dysfunctional management system ending with the hypothesis of a *'positive relationship between the level of perceived family harmony and the agreement among family members to continue the business'* (P12).

To conclude, the research gap converges towards the need to approach the challenges in the transfer of social capital between generations. Social capital challenges tend to be influenced by family harmony and they are highly emotional and socio relational. Hence, *'exploration of the sources of harmony and conflict and establishing how such relational properties can be encouraged or mitigated is also needed'* (Nordqvist, 2015 p.256).

2.5 Theoretical perspectives in approaching Family business firms

There have not been many conceptual models created exclusively for the study of family business behaviour (Gagné et al 2014); many of the theoretical framework used to assess that business model have been borrowed from other disciplines. Yet, Chrisman et al., (2005) claimed that the uniqueness of family business can be observed only through theory of Family firm.

Nordvisk's (2015) review of the different theoretical perspectives of family businesses sheds some light on a range of tools which could be used as conceptual frameworks to analyse the data collected during the research project. The first challenge resides in understanding the contribution of each perspective with regards to its relevancy and limitations. As the author suggested, the pertinence of theoretical perspective is to *"include frameworks, interrelated concepts and language, propositions and models that may constitute a way of seeing and understanding phenomena without necessarily meeting all the formal qualifications of being a theory"* (P.4). The author also pointed out the fact that each theoretical perspective will offer a 'partial and insufficient' understanding of the problem. This should not, however, be a limitation as it reinforces the concept which the social constructionists (Easterby-Smith, Thorpe & Jackson 2012) hold towards the existence of the same realities that could be uncovered only through an ethnographic approach (Cresswell 2007). That perspective is

supported by Morgan (1980) in its request to hold to paradigms as a measure to understand a same reality.

Additionally, according to Carlton and Payne (2003), a constructionist approach implies paradoxical perspective hence leading the way to incremental knowledge creation. Therefore, the focus is made on the following theoretical perspectives namely; the Stakeholder Analysis concept, the social identity theory, the social emotional wealth and the emotional intelligence theory. Other secondary and complimentary theories such as kinship, agency theory and resource base view have also been considered within the main theoretical approach.

2.5.1 Stakeholder Analysis

Reed et al. (2009) defined a stakeholder analysis as a process which defines the influence of a decision or action upon a social or natural phenomenon. The analysis comprises of the identification of the relevant groups or individuals which have a dual relationship in the process; they can affect the process but, in return, can also be affected by the process.

While one of the common challenges in using the stakeholder analysis is the successful selection of the relevant stakeholders to include in the research, for my research, all the family members are 'de facto' relevant to the analysis. This is due to their permanent ownership and continuous strong involvement in the family business organisation. Hence, understanding their '*behaviour, interest and agendas*' (Brugha and Varvasovsky, 2000) in the succession and continuity of the family business would be much relevant for the remaining of the research.

Stakeholder analysis also raised the issue of conflicting stakeholder's interest (Friedman and Miles, 2006, 2004; Prell et al., 2007), hidden agendas or simply wrong alignment of objectives among stakeholders triggering agency cost and destroying emotional wealth. Indeed, agency has proven to be an important theoretical construct within the social structures (Hitlin & Johnson 2015). Agency theory advances the presence of rational thinking and self-interest in the decision-making process on either side resulting in a misalignment of objectives and resources and ultimately ending in what is termed; agency cost. Paradoxically, Jensen and Meckling (1976) claimed that under a family business environment, the concept of agency

cost would not be present due to the overlapping circles of the family and the business. A role duality exists in the sense that the same stakeholders are present within both the family and business sphere, limiting the risk of self-interest in any of the environment. In other words, the objectives and resources are aligned, and decisions are often taken by the same person within both spheres. Furthermore, Chrisman et al (2004) observed that family involvement may even decrease overall agency costs through better strategic planning, increasing efficiencies as compared to non-family business organisations. The paradox is that despite a limited or no presence of agency cost in family firm (in contrast to a non-family organisation), the agency cost evolved under different forms. The challenges evolved in terms of corporate governance issues, declining social interactions and weakening familial bonds (Mustakallio et al., 2002). These social challenges arise through the 'principal-principal approach' following conflicting interest between family members (Gersick, 1997; Shulze et al., 2003a). Hence, the preservation and/ or transfer of the socio-emotional wealth with its social and emotional loads also trigger agency cost. This economic loss results from the pursuit of non-financial goals at the expense of short term business opportunities.

The Kinship theory has also contributed to a similar observation. Carsrud (1994) defined a family business as an '*emotional kinship group (who) dominates ownership and policy making*' (p.40). That emotional kinship group is often recognized through the role of parenthood. Holy (1996) defined Kinship as '*...the network of genealogical relationships and social ties modelled on the relations of genealogical parenthood*' (p 40, 166-7). Fox (1983) reinforced this observation of kinship from the concept of parenthood to encompass the socialization process involved, and proposed Kinship as '*... the study of what man does with the basic facts, such as reproducing, gestation, parenting, socializing*' (p. 30). Anderson et al (2005) described kinship as the '*strongest of the strong ties*', which comprises of both tension and conflict as well.

This observation is pertinent to my research project in considering the emotional and social challenges or compromises which senior family members may undergo to achieve succession objectives. This situation often arises at the expense of short term and more lucrative business objectives. All these social challenges identified are unique to family business organisation.

As the stakeholder analysis concept demonstrated, we note that the normative and instrumental approach have been the two main approaches used to undertake the analysis (Wijnberg, 2000). Normative approach focusses on a democratic right of being considered as a stakeholder merely by being present within a structure. The instrumental approach, however, is more proactive in identifying ways and means of a fruitful collaboration among stakeholders. Both approaches can be complemented by the descriptive analysis which would support any of the selected approaches in describing the stakeholder's relationship (Donaldson and Preston, 1995; Friedman and Miles, 2006). The ultimate objective of the stakeholder analysis as observed by Mathews (1994) and Forester (1999) is to see new ways of working together.

For the purpose of this research and taking into consideration the influential family members present within the structure, both normative and instrumental approach have been considered in encompassing all the stakeholders of the family business. My family business, as described earlier, is represented by the father, mother, daughter and two sons; they are all fully involved and highly influential in the business decisions. Therefore instead of going for a sampling and classification of the stakeholders we shall opt for a full census of all the members of the family by giving all of them the same edge to the research contribution.

The stakeholders' participation will be in form of interviews and workshop. Dale and Lane (1994) supported my chosen research methods; the authors recommended to observe and compare the goals of each stakeholder and the ultimate conflicting objectives that may derive from those goals. Those conflicting objectives will ultimately impact on the family business socio-emotional dynamics.

As such, the stakeholders' analysis also make provision to assess the social ties and strength of the social ties among stakeholders. Schulze, Lubatkin and Dino, (2003b) acknowledged the limitations of the agency theory in its ignorance of the social aspects of relationships.

Therefore, the stakeholder analysis have provided a first approach to my subject of research and have identified the stakeholders within than subject of research. However, the stakeholder analysis needs to funnel down further towards complementary theoretical concepts, bringing more insight on the socio-emotional dynamics of the family business.

2.5.2 Organisational Culture and the Social Identity Theory (SIT)

Culture is a highly pervasive subject, associated most commonly with the concept or practice of values, norms and beliefs (Geertz, 1973). Culture has also been observed by objectivism through its artefacts and institutions or subjectivism. Following a difference in the beliefs of those same institutions and artefacts (Dyer, 1988). Smircich (1983) observed culture as a present and ongoing variable; something that an organisation possesses, forming his present identity. The common perspective is that culture is above all a shared interaction (Linstead & Mullarkey 2003, p.4.). The authors observed the organisation as an institution; a place where people interact and where a specific cultural environment evolves. Conforming to the above statement, my Family business organisation is viewed as a social institution operating within complex cultural norms and traditions framing the socio-relationship which have been cultivated and preserved across successive generations.

Nordqvist (2015) elaborated on a schema describing the extent to which family business interactions, successive generations and external environment are all interrelated through culture. Indeed, it has been observed that the support of new generations is compulsory to build further knowledge within the family businesses. Social interaction, being engraved in the DNA of the family business culture between family members is complex; yet, it is developing the social world, even outside the perimeters of the family business organisations. Thus, the family business study has brought new insights in understanding the evolution of culture through vertical and horizontal family social interactions, while also being influenced by the external environment. Handler and Kram (1988) and Miller et al., (2003) depicted the importance of organisational culture in the success or failure of family business organisation's successions. It also guarded us against a misapprehension of the culture which would have negative consequences on the strategic planning. Furthermore, Salvato & Melin (2008) extended on the importance of cultivating individual belongingness to the family business across generations as an objective strategic outcome. Vallejo (2008) reinforces the philosophy in nurturing value and harmony as a long-term orientation towards the survival of the organisation. In return, Duh et al (2010) reaffirmed Vallejo's observation as the author discovered major cultural differences in terms of clan network and mutual trust between family and non-family business organisations.

Business culture has been closely associated with leadership and has brought a management dimension to culture (Kuhlmann 2010). Dyer (1986) claimed that a collaborative leadership style would support a successful succession while Stavrou et al (2005) prone a more participative style of leadership to achieve the same objective. Other authors have different stances within the perspective of culture, leadership and performances. Linstead and Mullarkey (2003) observed culture as a long-term process rather than a scientific summation of leadership style versus outcome. The authors identified the process as necessitating innovation, negotiations and evolution throughout the various intervening factors of the family business environment as a gage to success.

Fletcher (2002) depicts a pertinent perspective of culture which could turn out to be highly relevant to the family business organisation in times of succession. She observed that the organisations' unseen culture is in fact a *'real force that can expel its members if they do not fit it'*. That perspective of culture would be relevant under my observation as the head of the family/ chairman enforces the adoption of his individual cultural management perspective to the family successors. That cultural perspective tends to neglect the successors perspective of innovation and evolution. Should the new generation resist that parental enforcement of cultural values, they are emotionally discredited and embarrassed as a negative motivation towards the acceptance of such cultural values.

However, a limitation of the organisational cultural concept is that simply studying the organisational behaviour and artefacts may not help to really uncover the real cultural insights of the organisation. The individual family members' behaviour is also externally influenced, and the contextual environment of the operations evolves constantly. Therefore, overlooking those key factors will lead to a failure in understanding the intrinsic culture of the organisation and may lead to a development of irrelevant strategies in action (Dyer 1986, Schein 1985). Nevertheless, the limitation is relevant to an outsider research practitioner who would be discovering the cultural aspects of that organisation for the first time and hence, the importance of ensuring that he is not being misled in his observation.

My position as being an insider research practitioner working for already seven years in that family business environment would secure me from the threat of a misapprehension of the existing cultural characteristics of the family business. The different persuasive speeches, use of language, metaphors (Van Patten 2013) and sense giving paradigm (Gioia and Chittipedi,

1991) have projected a realistic image of the existing organisational and political culture which would be recognised only by an insider observer.

Handler and Kram (1988) observed a limitation of the organisational culture in the sense that it simply juxtaposes the overlapping environment of the family and the business without necessarily shedding the light on the degree or reason for the emerging challenges and resistance towards succession. Nordqvist (2015) joined that observation in recommending future ethnographic research within that cultural family sphere, while also underlining the lack of research on the cultural tensions that are present within the family business. Langsberg (1988) and Handler (1988) are the only few articles researching on these challenges and resistance towards succession. Therefore, within that research gap perspective, I would be extending my research within that area to uncover the cultural challenges which would prevent a smooth succession of the family business to the next generation. The social identity theory revealed to be an interesting tool in understanding the individual identity conflict and challenges which are lacking under the organisational culture theory and are extended in a separate section.

Hence, the organisational cultural behaviour is a tool used to approach some existing cultural pillars of the organisation but not an end in understanding the reason behind the socio relational stresses threatening the process of succession. That uncovered cultural area will be palliated by the Social identity theory, giving attention to the intrinsic cultural roles and challenges of the subject of research.

In their article on the theoretical perspectives of family business, Nordqvist et al (2015) identified that organisational identity theory (Whetten et al., 2014) and theory on emotions in organisations (Brundin and Hartel, 2014) are much promising in the further understanding of the family business entity, uncovering the wide potential '*identity issues and emotional dimension*' (p 8) within family businesses. Socio-emotional wealth is observed by the author as a new powerful dimension, providing answer to decisions taken within the family business environment. It is noted that '*major managerial choices will be driven by a desire to preserve and enhance the family's socio-emotional wealth*' (Gomez-Mejia et al., 2011, p.656). Hence according to Nordqvist, social identity theory is highly relevant in approaching challenges related to '*succession, intra-family conflict or non-family socialisation*' (p13).

Before elaborating on the socio-emotional dimension surrounding the identities of family members, we need to take a step back and understand the basics of Social Identity Theory (SIT) before analysing its influence over the family business organisation. SIT resides in the belief that an individual has the tendency to classify himself according to specific social category (Ashforth & Mael 1989). The different categories, as elaborated by Tajfel & Turner (1985), are organizational memberships, religious affiliations, gender and age cohort. The categorization ensures a segmentation of the individuals in the social environment but also serve as a means of identification through the stereotyping principle. Extending further on SIT, Ashforth and Mael noted that group and individual identification are interchangeable and have the same behavioural characteristics. We may assume that individual members of the family or the family entity would have the same behaviour based on the SIT; each family member may have the tendency to position himself in a specific social group or the entire family can behave at a similar level.

However, we noted that SIT differs from other traditional theories of firm with regards to group relations. The authors noted a strong favouritism towards members of the group. Brewer (1979) and Tajfel (1982) observed that the mere fact that an individual forms part of a group suffices in generating group favouritism. Hence, using the SIT to understand the family business as an entity made up of members of a specific group is highly relevant to my research. That relevancy is further enhanced by the requirement of the clan to support the family in maintaining control and influence over the organisation.

From an organisational perspective, Albert & Whetten (1985) observed that an organisation has an identity if there is a shared understanding of the central, distinctive and enduring character or essence of the organisation among its members. As a result, while using the same SIT formula, there is a temptation to claim that due to the overlapping characteristics and cross relational dynamics of the family and business, the family as a group and organisation could be under influence of a similar behavioural process.

Nevertheless, the SIT approach does not observe only positive relationship alignment between the family members, and the organisation. The theory also reveals conflicting identities among individual members. The first challenge identified by Tagiuri & Davis (1992) are the overlapping circles of family, business and ownership. As identified by Lee (2006) the main characteristic of a family business organisation is that the organisation and the family as

one entity. Boers and Nordqvist (2012) observed the same conflicting identities as a combination of 'family' and 'business' which they coined as hybrid identity. Hence, that social overlapping identities may inhibit each role especially when each identity '*provide conflicting normative standards*' (Hugenberg and Bodehausen 2004, p.234).

Another observation under SIT in organisational behaviour is the role of power, which is a critical intervening factor. The theory advanced that an individual forming part of a group is automatically given a favourable support from that particular group. Consequently, that individual acquires power through belongingness to that group. Therefore, belonging to a family group gives a sense of emotional ownership of the business and hence power to all members of the family despite that most family members may not have any legal ownership, i.e., shares and stock options within the organisational legal structure. Extending within that same perspective, the belongingness to a number of group has an impact on the individual social identity through an 'amalgam of identities'. The requirement of each group can also conflict with the individual personal identity (Cheek & Briggs 1982; Leary, Wheeler & Jenkins, 1986) through the differences of values, beliefs and norms of each identity which thus leads to role conflict (Ashforth & Mael 1989). Hence, the family business environment may be at some time threatened by conflict of identities when different members of the family continuously interchange family and employee roles.

The interchange of identity may also be a source of conflict. Shepherd & Haynie (2009) discussed the Meta-Identity theory in observing the structure through which conflict emerges. The author observed that the business environment involves "different identities at different times in response to different context" (2009, p.1251). That would trigger our approach in observing the family business organisation as a complex system (Stacey, 2011), where the family needs to survive, adapt and grow within complex emotional challenges framing that business environment.

In a nutshell, we noted that identity, power and emotion are all regrouped as important elements that could be observed under the lens of social identity theory. These elements contribute to the uniqueness of the family business organisation and are also the sources of challenges in that same business structure. These three factors (Identity, power and emotion) indeed form the three opposing forces challenging the transfer and adoption of socio-

emotional wealth and will thus be my principal theoretical framework in approaching my family business socio-emotional challenges.

2.5.3 Socio-emotional Wealth (SEW) in Family Firms

Groydke (2016) noted the extent to which succession is a central function of survival. The author claimed succession as the *'transfer of business to successor in a broader sense, that it is...'* (p.51.). The statement influences our perspective in observing the succession of the organisation through a wider lens than that of an exclusive transfer of financial and economic wealth. There enters the dimensions of the Socio-emotional Wealth (Berronne et al., 2010).

Social-emotional wealth (SEW) has been an underestimated asset as compared to the tangible wealth, i.e. physical assets, which form part of the common succession exercise. In general, the social emotional wealth could encompass consideration to social relations, reputation of the firm and networking strength across firm, among others. The SEW is a new paradigm which positioned itself as the most relevant theoretical concept in approaching the business succession emotional challenges. One of the basis of that claim is that SEW concept proposed firm dimensions in assessing the emotional parameters influencing the family environment. The SEW takes its source from the theoretical perspective of *'social capital'* originated in the early 20th century and which emphasizes on the *'... social cohesion and personal investment in the community...'*. It was further developed to encompass *'...networks of personal relationship as a base for trust, cooperation and collective activities'* (Goto, 2014, p.88-89).

The SEW theory emphasises on the psychological ownership of the owner/ managers of the organisation in terms of emotional and intellectual dimensions which he/she intends to pass over to the next succeeding generation. The emotional constructs and its influences on the family business, if properly cultivated and passed over to the succeeding generation, provide advantages to the firm in terms of loyalty, mutual understanding and trust. However, the drawbacks can be experienced in terms of *'misunderstanding'* (Surdej, 2015, P.20.) or *'self-conflicting messages'* originating from *'ongoing social interaction leading to confusion, frustration, disappointment, rivalry and emotional trauma that is commonly experienced by business founders, successors and other stakeholders, including family members and non-kin employees'* (Devin, 2015, P.27).

The observation of SEW by Surdej (2015) in relation to Polish family businesses, goes beyond the transmission of that SEW to the immediate succeeding generation but encompass non-family members as well. The author observed that any ambiguity and unfairness should be removed between family and non-family treatment with the ultimate objective of intensifying the '*trust-based social relation*' (Mako et al., 2015, P. 22.) The uniqueness of the SEW theory claimed that family business organisations are '*... typically motivated by and committed to the preservation of their SEW*' (Beronne et al., p 259).

That preservation of SEW becomes a critical success factor for the succession of the family firms as perceived by the family members. Any actions towards the threat of that wealth will be dealt in priority, even at the expense of financial or economic loss. From that perspective, the SEW theory contradicts the agency theory where the principal/owner is assumed to act in the best financial interest of the organisation. Paradoxically under the SEW context, we may propose that the principal/ owner positioned the SEW of the family as more important endowments than financial and economic wealth. In that case, we would join the authors thought in claiming that SEW takes its roots from the behavioural agency theory. The dimensions of assessment (FIBER) as proposed by the authors are i) Family Control and Influence, ii) Identification of family members with the firm, iii) Binding Social ties iv) Emotional attachment of family members and v) Renewal of family bonds to the firm through dynastic succession.

The first element of SEW, is '*Family Control & Influence*' and joined the characteristics of the family business firm observed earlier, which are the essence/origin of the business and involvement of family members in the business. Those characteristics assess the extent to which the family members controlled the organisation through stake's ownership and formal decisional position or influence on the decision maker through power relation. That dimension is viewed as one of the most important dimensions of the SEW theory and is in fact the root of the family business model. Therefore, we may assume that family control and influence would be regarded as a critical factor highly valued by family members. The second dimension of assessment proposed by Berronne and colleagues is the '*Identification of family members with the firm*'. This element discussed the overlapping identity of the family members and the business. The dimension assesses the observation of Lee (2006) who claimed that the business and the family is one and same entity. Hence, that dimension would

assess the extent to which the feeling of belongingness of family members to the firm is emotionally present. In the context of my family business organisation, that element is highly valued by the father. His philosophical stance depicts that he wants to ensure that the next generation identifies themselves fully with the firm before transferring the financial and economic wealth to the next dynasty. That objective is not easily met when there is a generation gap, and the next generation fails to equate emotional wealth with financial wealth. The third dimension of Berronne assesses the '*binding social ties*' of family members. In fact, that dimension assesses the kin ties which exists among members family in terms of trust and solidarity. That bond is assessed in relation to the same social ties that the family holds with the external community. The binding social ties is an important element of SEW in ensuring the primary objective of family firms, which is family control and influence. Binding social ties is the extent to which family members would prioritise the family and clan interest at the expense of his/her personal interest or from any other external threat. Conflicts between family members within the family business organisation are a threat to the strengthening of social ties. This could ultimately lead to a weakening of control and influence dimension. This situation can even threaten the survival of the firm through conflicting decisional positions based on personal interest rather than family interest.

The fourth dimension which assesses the '*emotional attachment of family members*' is in fact one of the most relevant dimensions towards understanding the parent's succession objective. It assesses the profound emotional attachment which family members hold towards the business. That emotion will influence strategic decisions, as through emotional ownership of the business, family members would consider the impact of every decision not only at an organisational level but also at their individual level. Any decision taken by the father in the interest of the business but at the expense of a family member could involve high emotional resistance and result in emotional retaliation from that particular family member within the intimate family circle. Indeed, that perspective frames to some extent the problematic concept of the research. There exists a vicious circle where emotions evolve through a downward pressure from the father to the children in the form of succession parameters and requirements. However, we also observe an upward emotional response in the form of opposition and resistance from the next generation in terms of social identity challenges. The last dimension of the SEW theory deals with the '*renewal of family bond to*

the firm through succession'. This is the ultimate objective of the family business organisation regarding my research unit. This dimension dealt with the willingness of passing over the business to the next generation. The inheritance of the business includes more than a management succession plan. It includes the succession of family values and tradition (Casson, 1999, Tagiuri & Davis, 1992). Devins (2015) noted that '*... transferring the physical entity of the business itself may be less crucial than the transfer of its core values, such as entrepreneurial spirit, or of creating opportunities in general for the next generation, which can be facilitated by the building up of family (socio-emotional wealth) through business ...*' (p.24).

As we have seen in previous analysis, the father's position in my family research unit cherishes the successful transfer of core values and entrepreneurial spirit well above that of the financial transfer of assets. To achieve that goal, an important step is a successful transfer, acknowledgement and adaptation of the organisation's emotional endowments by the children. Nevertheless, it must be noted that all the dimensions of the SEW do not hold a linear positive relationship between the aim and objective of the father and the successful transfer. There are times where the dimensions would conflict among themselves. For example, the dimension of *control and influence*; an internal influence of SEW may be in conflict with *positive assessment of the firm's reputation* which is an external dimension of SEW (Vardaman & Gondo, 2014). It is noted that decisions taken to preserve control and influence of the family business entity may overrule economic and financial logic. However, if such decision overrules or damages the other external SEW, i.e a firm's reputation and identity, the authors noted a shift in priority to the external SEW protection. Once, the identity and reputation has been secured, then the internal SEW of control will regain its priority position. Hence, the author observed that external SEW becomes the '*guiding script, when the two...*' (internal & external SEW) ... *are explicitly in conflict*' (p.1321).

To conclude, we observed the complexity of family business succession from different perspectives. One perspective is as a complex entity of a father cherishing the will of transferring the emotional endowments through the SEW of the organisation to the next generation, and getting that generation to acknowledge and adopt that business philosophy. The second perspective complicates the process, as even though the next generation would adopt the SEW philosophy, there would be times where those philosophies would conflict

amongst themselves. This conflict is due to cultural differences, giving rise to a third perspective of choosing to secure the firm's reputation and identity (minimising agency cost) relaying family member's kinship temporarily at secondary level. That action may eventually weaken the kinship ties in the family business and family members may experience an upward emotional resistance and retaliation because of a more fragile kinship as presented in the problematic concept.

2.5.4 Social Identity Theory (SIT) and Social Emotional Wealth (SEW) as my thesis theoretical perspective.

The literature was funnelled down; introducing a broad stakeholder analysis, then proceeding by evaluating the implications of kinship and agency costs in understanding intrinsic sources of socio relational dynamics within the family business. Afterwards, the Social Identity Theory (SIT) and Socio-emotional Wealth Theory (SEW) were found to be fundamental pillars of comprehension for intrinsic socio-emotional challenges of the family business.

This paragraph takes a glance at some of the main reasons behind the choice of the above two perspectives as primary tools of research. SIT provides opportunities of understanding the sources of relational challenges existing among family members based on their individual cultural identities. SIT achieves such an understanding through the different identity concept which includes conflicts in role dualities, emotional strain and organisational politics and power. It is important to note that conflicting identities can prove to be destructive for business survival, and more importantly during the period of succession. The SIT concept would mainly be used to understand the sources of the conflict and the reasons to the challenges which arise within that family's intra relationship. Those challenges are experienced primarily by the children who found inconsistencies in the succession objectives of the former generation in terms of SEW. According to them, priorities are not aligned and emotional decisions taken by the father do not hold financial logic.

In contrast, SEW observes the succession objective from the father's perspective. SEW helps us to understand the importance for the father to transmit that socio-emotional wealth which has, for him, been a critical business success factors. Additionally, the SEW helps us to understand the downward emotional pressure which the next generation endures during the succession process while the SIT will shed light on the emotional pressure which role dualities of the new generation and their conflicting identities send back to the father.

The selection of the above two theoretical perspectives in approaching my problem has not been solely based on my problematic but also on previous research gaps. Ashforth and Mael (1989) recommended that further research be undertaken at the subgroup level of the organisation to understand more about conflicting identities and the dynamics of identification to the group (the family).

A possible solution to the SIT challenges has been proposed by Knapp & Colleagues (2013) in '13 Identity Work Tactics To Manage Boundaries Between The Individual And Organisational Identities' with an objective of avoiding failures in either business or family environment. Nordqvist (2015) finally recommended that research be carried out on the combination between SIT and family firms to discover insights and join my objective in using the SIT as well as SEW to understand the challenges present in the family business organisation within succession context.

The identity theory and role set triggered the direction of my research. '*Identity theory links the individual and the social structure*' (Adler & Adler, 1987 P.444). The theory observed the interaction of individuals, their behaviour and social relationship within an environment. Everyone is observed to have different behaviours which are grouped in terms of 'role-set' and operates in an environment with different 'role-set' members. However, the authors noted that the individuals would never invest their 'core feelings or self-involvement' equally in all roles. Hence, the researchers noted that some roles will then be more 'salient' than others.

The agency theory and resource base view are two widely adopted theories in family business research (Christman et al., 2010). Yet, Nordqvist (2015) depicted a gap in approaching family business organisations from an emotional perspective. The authors cited the organisational identity theory (Whetten et al., 2014) and theory on emotions in organisations (Brundin and Härtel, in Melin, Nordqvist and Sharma 2014) due to their contribution to the identity issues and emotional dimensions. In using the Social Identity theory with the support of the SEW theory on emotional endowments in organisations, I am hence targeting to uncover the challenges of family business organisations through new perspectives rarely approached by scholar practitioners.

2.6 Summary of converging themes towards my research questions

Interconnectedness of the family and the business is observed by multiple scholars as the main characteristic differentiating a family business from a non-family business organisation (Adler & Adler 1987; Sharma, 2004; Lee, 2006; Chua et al 1999). Throughout their works, the concerned authors attempted to understand the relational impact of such connectivity among family members as well as the different elements tying up the family and the business. Apart from being the main differentiating element, interconnectedness seems to be also the source of ongoing emotional challenges within family business organisations due to the challenge of segregating emotional and physical boundaries between these two environments (Venter and Farrington 2009; Lee 2006). Any decision taken within one environment which is emotionally loaded has an impact in the next environment (Kepner, 1991; Coghlan 2001)

Scholars who were exploring these challenges noted another amplifying factor complementary to that interconnectedness challenge in the form of role duality challenges (Coghlan, 2001) emerging from the Socio Identity Theory (Ashforth and Mael, 1989). This interconnection of both family and business environment implies that members from both environments constantly interchanged roles. For example, being the head of the family at home, the father is expected to hold a paternal and affective role but the next day has to shift to the role of the Chairman of the organisation where objective and dispassionate decision is expected. However, that exercise is emotionally challenging due to an amalgam of identities. This amalgam of identities is the result of conflicting social identities of different family members which Hugenberg and Bodehaussen (2004) observed as conflicting normative standards.

Emerging from the above reflection, a third important challenge is observed through the literature review; the increasing socio relational conflicts triggered by the overlapping of the family and business environment (Tagiuri and Davis, 1996) and the amalgam of identities (Cheek & Briggs 1982; Leary, Wheeler & Jenkins, 1986).

Another contributing challenge to that conflicting environment is the role augmentation factor (Ashforth and Mael 1989). As they joined the family business, family members are selected to hold additional business and/or family responsibilities over and above their

younger age initial responsibilities. Ashforth and Mael equally discussed the impact of social tension that this may impose in times of conflicting and emotional loaded decision making.

Finally, the last and surely the most critical emerging theme from the literature review is the concept of Socio Emotional Wealth (Beronne et al 2010). Socio Emotional Wealth (SEW) has been observed as a critical factor within the family business succession and the exchange process (Devins, 2015) which may attempt to explain the socio relational conflict within the family business structure.

The SEW theory defines the psychological ownership of the owner in terms of way of thinking, cultural and mental dimensions of his family business organisation. His objective is to transfer that subjective perspective of the family business organisation to the succeeding generation within a trust-based socio relationship (Mako et al., 2015) and ensuring that the perspective is accepted and cultivated and transferred across future generations. Berronne and his colleagues provided formal benchmarking in assessing the SEW factors. The five pillars being (FIBER Model); Family control and Influence (over the family business organisation), Identification of family members with the firm, Binding Social ties (among family members), emotional attachment of family members and renewal of family bonds to the firm through succession. That sensitive transfer has to be completed within a harmonious environment which is critical for the survival of the family business (Morris et al. 1997; Vallejo, 2008). Hence, the Socio Emotional Wealth is positioned as an important theme to be tested during the interview. The Socio Emotional Wealth theoretical perspective would be validated if the owner's socio emotional wealth objective is being understood and accepted by the succeeding generation. A few questions arise in this current situation: is there any conflicting perspective and misalignment in observing such SEW which could eventually destroy the social exchange expectancy (Ruben, 1998)? Ultimately, would a divergence of perspective across the socio emotional wealth leads to further socio relational challenges within the family business environment?

As a conclusion, the Social Identity theory comprising of role duality challenges and Social identity conflict together with the Social emotional wealth defined through the five FIBER pillars have been the emerging themes taken out from the literature review. Those theoretical perspectives support my action research exercises to uncover emotional challenges that has hardly been attended by scholars (Morse et al. 2002). The critical challenges observed across

the Social Identity Theory and Socio Emotional Wealth are further assessed within the interview exercises and debated in the family full day workshop with the objective of explaining the socio emotional tensions present within a family business environment and eventually propose a plan of action towards such challenges.

2.7 Conclusion

This chapter gives an extended appreciation of the literature supporting the family business from a socio relational and emotional perspective. The conceptual definition of family business and the main characteristics of that particular business model has been reviewed. Thereafter, an extensive elaboration was effected on the various theoretical perspectives. Those concerned theoretical perspectives have been used by different authors to observe family businesses. The analysis starts with a broad approach of the stakeholder to identify the family; it funnels down to kinship, agency, resource base, cultural and finally social identity and socio-emotional wealth theory.

Within those different perspectives, I have selected the Social, emotional wealth (SEW) and the Social Identity Theory (SIT) as the most relevant theories pertinent to my research. That model would assist me in providing a firm base (the FIBER, 5 dimensions) for assessing the emotional constructs of my family business organisation. A summary of how the key literature has triggered my questionnaire is available. The summary sets the understanding of the possible socio emotional challenges endangering the family business succession.

CHAPTER 3

RESEARCH METHODS

3.0 Introduction

Chapter 3 introduces my research approach in understanding the reality. This chapter unfolds as follows; firstly, an introduction to the research philosophy adopted in understanding the family business challenges. Secondly, the methodology used in carrying the research revolving around collaborative action research inquiry and finally, the data collection methods.

Clough & Nutbrown (2012) claimed that methodologies provide a rationale of the appropriateness of the methods used in inquiry, whereas Perri and Bellamy (2012) described the same methods as sets of appropriate techniques for creating, collecting, coding, organising and analysing data.

The research approaches a set of beliefs; my set of beliefs which would define my observation of reality within a specific family contextual environment. Reinforcing that perspective, the authors noted the extent to which qualitative purist observed multiple constructed realities for which a generalisation of observation would not be relevant. Hence, the value of the research would reside in the subjective observation and contribution of the knower within a specific contextual environment and study where the family business environment would stand as that contextual environment. I adopt the interpretive paradigm perspective in using a qualitative research method to investigate the construction of reality within a family business organisation, of which I am an observer and insider researcher.

3.1 My Research Philosophy

After a review of the different philosophical stances, the interpretivist perspective is opted to approach social and organisational realities within an emotionally challenging context of family business organisation. Those emotional challenges require the organisational behaviour to be appreciated as a craft (Cunliffe, 2010) rather than a science due to the subjective interpretivist philosophy of the researcher. As reckoned by Saunders et al (2012), being subjective implies that the social construction may change, that the study might be focusing on the details and reality of the research environment. Appreciating my organisation as a craft has driven my research towards a more qualitative research approach instead of a positivism and quantitative method, which would be irrelevant for that field of study and

business context. The motivation in driving my research towards a qualitative approach has most certainly been influenced by the socio-emotional challenges, rather than traditional management operational challenges, identified in the family business and framing the thesis problem. I must somehow acknowledge that initially, a dilemma existed in choosing between the positivism and interpretivist approach for my research. Benefits and challenges in adopting each different research methodologies were analysed. My observation of the Positivism philosophy depicted that using this method would mean targeting a final and objective outcome of the problem by way of rigorous scientific methods of analysis. However, as observed by Mintzberg (1979) '*Data don't generate theory, only researchers do that*' (P 584); despite using quantitative methods, a qualitative expertise would still be crucial in interpreting the data resulted from the research, so that a theory could be generated. Hence, using a positivism and quantitative approach in researching a single-family business organisation would be meaningless. The data would not be subsequent enough to generate a theory or interpretation. In contrast, the interpretivism approach triggers the subjectivity and own appreciation of the researchers' perspective within a specific contextual environment. I would be in a better position to qualitatively analyse the data after having spent several years within that family contextual environment. The subsequent primary qualitative research through family meetings, discussions and interviews would add further value to the in-depth understanding of that family business environment.

The contextual environment and the research philosophy adopted would also set the parameters for the researcher to cope with paradox (Carlton and Payne 2003) and contradictions which may in turn give different perspectives of a same reality. In other words, the interpretivist's emphasis on his subjectivity in proposing his theoretical perspective as a research outcome. However, one must reckon that adopting a particular research philosophy is in no way superior to any other alternative philosophical perspectives but only best suited in relation to the contextual environment and characteristics of the unit of study. Moreover, as noted by various authors (Niglas, 2009; Saunders et al., 2012), research philosophies often overlap and are often being studied as a multidimensional set of continua which may regroup perspectives of positivist and interpretivista This is a particular case where we may note as a well convergence of subjectivist and objectivist observations.

Understanding the socio-emotional challenges of family business organisations demands rich data, deeply rooted in realities and requiring a high involvement of the researcher within the contextual environment. Lee's (2006) observation that the family and the business may be considered as one and same entity reinforces the perspective that the boundaries between the phenomenon (family socio-emotional challenges) and the context (the business organisational environment) are blurred (Baxter and Jack, 2008; Glaser and Strauss, 1967; Johnson & Harris, 2002).

Three types of research approaches were proposed by Saunders et al., (2012) namely; exploratory, descriptive and explanatory. Exploratory research would suit the researcher looking for clarification over the nature of a problem and hence shed the light on the sources and insight within that topic. The dimensions of that type of research encompass literature reviews, expert interviews and focus group discussions. The problem is often very broad and thereafter funnelled to a more specific area of concern for a more flexible approach to research (Saunders et al., 2012). In contrast, the authors observed that descriptive studies focused more on the unfolding of an event, unit of study and sit as the initial pillar preceding the exploratory or explanatory research. Finally, explanatory research gives the causal relationship between the constructs involved in a problematic situation.

Hence, my research adopting the interpretivist perspective would converge towards an explanatory approach with a view of presenting my subjective appreciation of my family business' socio-emotional challenges during the phase of succession. Following the different interviews, observation and analysis, the nature of the problem, its sources and the possible approaches should be successfully explained.

3.2 Research Methodology - An Action Research Approach

3.2.1 Definition of Action Research

Blum (1955) observed Lewin's action research as a '*diagnosis of a social problem with a view of helping improve the situation*' (P.1). The latest definition of action research observed the exercise as a commitment to the production of knowledge in shedding the life and finding solutions to real-life problems (Elden and Chisholm, 1993; Shanks et al., 1993). However, far from only finding solutions to real life problems, the insider researcher who has already a pre-

understanding of the environment (Coghlan 2001) within which he has been operating, has primarily established a proper conceptual framework (Checkland,1991; Baskerville and Wood-Harper, 1996) strategies and supporting theoretical concepts towards the specific problem to be approached (Avison, 1993; Susman and Evered, 1978).

Hence, the authors observed that all action research would comprise of two stages:

- The diagnostic stage regrouping the analysis and hypotheses and
- The therapeutic stage in which the findings/ hypotheses are tested in a real-life situation.

3.2.2 The role of action research in my research

To make sense of my family business organisation and acknowledge the importance of action research within family contextual environment, the family business is first observed as an open and living system. As opposed to a closed system, an open system takes into consideration the power of discourse (Marshak & Grant 2008), language (Van Maanen 1995) and rhetoric (Holt 2006) which influenced the socio-emotional relationship among family members. Stacey (2011) discussed the extent to which such socio-emotional elements influence strategic decisions and in my case, this influences the successful transmission of socio-emotional wealth. Extending on the contribution of action research, Emery and Emery 1997 discussed Tolbert and Associates' methodology of action research. The authors insisted on the critical success factors of action research, comprising of creating social value within an open system context; a logical process flow comprising of an abductive, deductive and inductive reasoning, being able to monitor the cycle and recourse to any previous stages requiring adjustment.

Revans (in Pedler 2008) described learning as the summation of programmed knowledge and questioning insight ($L = P + Q$). Within my research perspective, the programmed knowledge can be defined as the various academic and scientific principles which have enabled my development during these last six years across my doctoral studies. The different and relevant modules, ranging from crisis management, complex decision making, knowledge creation and management research have enhanced my programmed knowledge within the sphere of family business. However, that programme knowledge would not have been sufficient to claim that learning has taken place without complementing the exercise with questioning

insight. That questioning insight has been unfolded through observation, interviews and workshop. Questioning the insight enables the possibility of creating single, double and triple loop learning which remain important requirements of action research. Vince (2004) has extended Revan's equation by insisting on the importance of understanding the organisational insight i.e. 'O' which is the unique contextual factor surrounding the emergence of learning. The family business, as depicted extensively through the literature review, carries unique characteristics such as role dualities, power relations and identity conflicts and as such those elements need to be taken into consideration when triggering the emergence of learning.

Nevertheless, the problem solving will require more than a single loop learning approach which consists only of attending the problem without questioning the underlying assumptions about its source (Argyris and Schon 1974). The double loop learning, according to the authors, goes further in taking into consideration the *'assumptions and mental models which govern our action'* (Kwon and Nicolaidis 2017, P 88.). That double loop approach joins my research in shedding the light on the profound reason behind family business emotional challenges. However, my action research would not be completed without approaching the triple loop learning which consists of a transformation and radical innovation through a change process (Peschl, 2007). That radical change would hence take place through a mind transformation programme for the family members delivered by a professional trainer.

Having reviewed the requirement of action research, I confirm that my action research project honours the requirements of Tolbert's methodology and makes provision for the planning, implementing and monitoring of the exercise in a near future. Blum (1955) also observed that *"ideally action research should be undertaken by a team small enough to function as a group which is sufficiently large to represent different (1) personality types (2) social values and (3) talents"* (p. 3). Indeed, the family members could be observed as an ideal group with different personalities. These personalities are the result of different identities acquired during the years that each child has spent overseas for their tertiary education. They acquired different values and developed various talents in their specific field of specialisation. These personalities are now to some extent different from that of their parents who still cultivate their traditional family identity and are often the reason for identity conflicts. Hence, the first two requirements of action research, i.e. the diagnosis and therapeutic stage have both been

respected during my research. The first stage consisting of the diagnosis and findings reports have been elaborated in Chapter 4 consisting of the consideration in the interconnectedness of the family and the business, the preservation of harmony and family ties, succession, power and politics and finally generation gap and management style, autocratic management style and presence of emotional dissonance. The second stage, being the therapeutic stage, is the application of the triple loop learning and the outsourcing of a personal trainer to enable a mind transformation through the acquisition of emotional intelligence.

3.3 Research Methods - Collaborative action Research (CAR)

Action research holds an important place within the overall analysis of the family business environmental challenges. Thomas (2004) observed the contribution of action research in providing evidence-based practice and Torrance (2004) added that it motivates those involved in that exercise to adopt a researcher's position in their practice. However, as noted by Mc Niff et al., (2003), that research should be above all collaborative in nature.

Mc Niff and Whitehead (2006) noted that CAR method proposed a well framed research process starting from the location of the problem, the planning and implementing the research intervention, gathering the data, framing the problem and finally analysing and testing of the theories emerging from that process.

Frankham and Howes (2006) claimed that the CAR's term takes its source from the concept of the team and practitioner working together. In relation to my contextual research, the family business represents the team and I hold the role of the practitioner who enters into a research partnership with the team towards a mutual objective. The need for collaboration between the parties is crucial in the research inquiry. Indeed, the term 'collaborative' action research stresses the need to go beyond just gathering two parties into a research exercise, but getting the parties to fully collaborate so that a kind of synergistic result evolves from that collaboration (Avgitidou, 2009).

Mc Niff et al., (2003) further claimed that the CAR method promotes change at both individual and organizational level. Hence within my context, I will expect the CAR to benefit not only the family members as individual players within the organisation, but successively the overall family business organisation. Ultimately, that collaborative research result may even benefit

other family business organisations operating in Mauritius and are facing similar contextual emotional challenges.

The following requirements of CAR have been observed by Ramnarain (2016) based on the works of Capobianco (2007) and will be further transposed within my business socio-emotional challenges.

The problems observed have been mutually defined by both parties; i.e. Practitioner and Researcher. Indeed, within my context, all family members representing the practitioners and myself as the researcher/practitioner have identified the socio-emotional factors as the main source of challenges, threatening the smooth business succession exercise.

The element of collaboration is a critical success factor of investigation in finding solutions to problems. There have been interviews held to uncover the socio-emotional challenges which contribute to relational tension among family members. Each family collaborated with the ultimate objective of appeasing such family tension. That objective is again based on the theory that society is held together when there is a threat of their world falling apart; complexity and chaos is not always destructive but may offer opportunity to survive, adapt and grow (Stacey, 2011).

The research partnership allows for the creation of knowledge for both parties. The family members have been involved in data generation, have understood the reason behind its collection and the perspective in further analysing and interpreting the data. In counterpart, as an insider researcher, I was triggered to observe the problem from each family member's perspective. Their perspectives have improved my pre-understanding of the unique organisational contextual environment (Coghland & Brannick, 2010). The interviews have catered for open ended questions where the participants were free to express their feelings and their own perspectives of the family socio-emotional challenges. Hence, from that exchange between the interviewer (Researcher) and the interviewee (Practitioner) have evolved a critical reflection highly pertinent to the contextual challenges and held a critical stance in the research outcome.

The CAR has for final objective, initiating appropriate actions in helping the family to approach the socio-emotional challenges threatening business succession, as well as a help to other family firms going through the same chaos.

Hence, collaborative action research has been an important data collection tool following observation which has been used in understanding the socio-emotional challenges of the family firm. We observed the CAR process as a collection of people forming part of an action research process. The most important pre-requirements for an effective CAR is the collaboration and participation commitment between the researcher and practitioner. Platteel et al., (2010) discussed about the difficulties encountered during that collaboration due to the complexity of relationships and challenges met when researching in groups. The effort to establish the required trust has been observed to be a critical factor in collaborative action research. However, the trust from which I already benefitted as an insider researcher helped enormously in securing that requirement.

The CAR processes unfolded through a phase of planning, action, observation, analysis and reflection. The approach in unfolding each phase is discussed in the different research chapters.

3.3.1 Collaborative Action Research - The Planning Phase

The planning phase summarizes the steps in the research study. The action phase gives insight on the possible tools that could be unfolded to attend the problem. The observation phase provides a record of the different data collected during the collaborative action research, discussion and inquiries. It is essential that those data are transcribed in written format. The analysis consists of converting the data into a thematic style to allow proper reflection and hence interpret the information in a deductive style to approach reality. That reality would frame the outcome of my research and could be used as starting point for other researchers who may use that piece of work for future research across family business enterprise.

My action research unfolds through two CAR cycles. The first CAR cycle is the individual interview of the five family members (father, mother, daughter and two sons). Second CAR cycle is the workshop run with all family members following the findings of the first CAR cycle. An exposé of the overall research and findings is presented to the family members. A clear strategic development plan is recommended to attend to the challenges and commitment towards the implementation of those recommendations have been obtained.

3.3.1.1 *The Participants in the research*

The participants in the research have been exclusively the five family members who are all executive members of the organisation. All family members have agreed to participate in the

research process. They have all vetted the consent form and information sheet detailing the different aspects of the research. Moreover, they all cherished the objective of overcoming or at least mediating the socio-emotional challenges faced by their family business organisation. The family members look forward to benefiting from a real harmonious socio relationship across both family and business environment.

3.3.1.2 Preparing for the CAR cycle

The planning phase of my CAR unfolded through several discussions with the family members. I opted for individual discussions to raise the level of trust and confidence between myself as the researcher and the family members as the practitioner. The research process and timings were explained to the family members.

I explained the family members that my main data collection techniques have been in the form of observation but will now be complemented through a one to one interview with open ended questions. The respondents will have the freedom of expressing themselves on the pre-identified research topics facing the family business organisation in relation to the socio-emotional challenges during succession period. The interviews will be recorded in notes form and the session will last approximatively two hours.

After the first set of interviews, I analysed the data collected and again reviewed the literature supporting those areas of research. The literature shared additional insight on that first set of data collected and, in some cases, probed some emergent inquiries (Keegan, 2009). Hence, provision for an additional hour of interview with each family member was forecasted.

The final exercise of the CAR consisted of a workshop where an initial expose of my analysis was made, and discussion about specific challenges facilitated. The whole team brainstormed on the challenges, along with my pre-prepared recommendations. As a team, we discussed and debated on the possible solutions in attending the identified challenges. The outcome of the workshop and recommendations discussed have contributed to the concluding discussions of my thesis.

3.4 Data Collection

3.4.1 Observation: a foundation pillar of my research methods

Before proceeding to the analysis of the family business organisation and the insight which I gathered during the past years working within that specific context, it would be judicious to explain the theoretical concept behind my main data collection method. Observation is a research technique in itself, as a scientific tool and research parameters that need to be respected during the observation process. Observation studies was defined by Gorman and Clayton (2005) as an exercise that *“involve systematic recording of observable phenomena or behaviour in a natural setting”* (P.40). As noted by Baker (2006) the exercise of observation can be extended to be part of an ethnographic research or a simple participation observation. For the purpose of my research, the natural environment for observation is represented by the family business environment. My observation, together with the collaborative action research exercise with the family members, leads to an *‘ethnographic description’* (Spradley 1980, P. 6) of the family socio-emotional challenges. This ethnographic research, which tends to be complementary to the observation exercise is described by Spradley as understanding *‘another way of life from the native point of view’* (p.3) and would allow to understand *‘the social settings that reveal reality as lived by members of those settings’* (Chatman, 1992. P.3) The observer may however endorse very specific roles in the process of observation. As proposed by Gold (1985) who expanded the theory of Buford Junkers, the observer may adopt four specific roles namely; Complete observer, Observer-as -participant, Participant-as-observer, and complete participant (p.217).

The **complete observer’s role** allows for the presence of the researcher within the field of study but into a complete passive role (Spradley, 1980). Hence, the researcher would not interact with the insider but only listen and observe the insider’s behaviour in his native environment. He would then record the perception derived from such behaviour and analysed accordingly. The **observer as participant** allows a dominant role of the observer over the participative role (Gold 1958; Pearsall 1970). The researcher within than role remains *‘strongly research oriented’* and do *‘not cross into the friendship domain’* (Adler & Adler, 1994, p.380) but would have a limited participative involvement within the insider’s native environment. The **participant’s observer** would imply a more dominant participative role and extended degree of relationship into friendship rather than that of the simple observer. Hence within that role, the observer would be participating actively within the insider’s

environment and the boundary between the participative and observation role would be highly flexible. The **complete participation** implies a full membership of the researcher within the sphere of research in such a way that the researcher may ultimately find himself part of the problem and the problem part of him (Landry, 1995). The differentiating element under that role is that the researcher would act as a member and would not segregate his relational role as a researcher from the insider with the aim to not '*alter the flow of the interaction*' (Adler & Adler, 1994, p.380). Hence, within that ontological perspective, preserving the relation becomes a prerequisite for research.

Having considered the different epistemological perspective of the observer's role, I view myself initially as that of a *complete observer* who has for some years covertly observed the insider's behaviour of that family business organisation by '*observing things that happen, listening to what is said*' (Becker and Geer 1970, p.133). However, as I started my thesis research, my role evolved into the role of an *observer as participant*, starting to ask question, unveiling my scholar/practitioner role to the insiders. I prevented myself from being tempted by any extended relationship to avoid joining the participant since this situation would have a negative impact on the objectivity of my perspective and hence jeopardize my initial approach to the research. Hence, I entered my final thesis research stage in the role of an observer as participant.

3.4.2 Observational Sampling

Despite my field of research being limited from a sample size perspective, questions such as: who is going to be interviewed, what is going to be researched, where will the research take place and when will that research take place are relevant aspects approached under the observational studies. The sampling of what is going to be observed is a critical pre-understanding so that rich information is gathered through empirical data.

Hence, I have been using Polit and Hungler's (1987), Molar and Molecular approach in my observation sampling. The authors described 'Molar' as observing large units of activity as a whole, whereas the molecular approach '*uses small and highly specific behaviours as the unit of observation*' (p.268). It is to be noted that the adoption of any of the approach are not mutually exclusive and can be changed as the research unfolds.

My initial covert observation which started a few years ago would be considered as the molar approach in observing my family business organisation. The family business environment is observed as a whole entity, different challenges evolving across relationships as part of the family organisation were equally identified along with the culture and politics pertinent to that setting. As the research evolved and I entered the final formal research phase, my observation approach changed into that of a molecular approach. This consisted of identifying the specific behavioural attitudes and questioning of the insiders. Each family member's behaviour, attitudes and philosophies were questioned. The results were contrasted with those of their family counterparts to identify the sources of the challenges. Socio-emotional challenges were identified as the main source of conflicts, amplifying as the succession process unfolded.

3.5 Interviews

My main research method has been the one to one interview with closed and open-ended questions. The family members were offered the freedom of expressing themselves on the pre-identified emotional research topics facing the family business organisation.

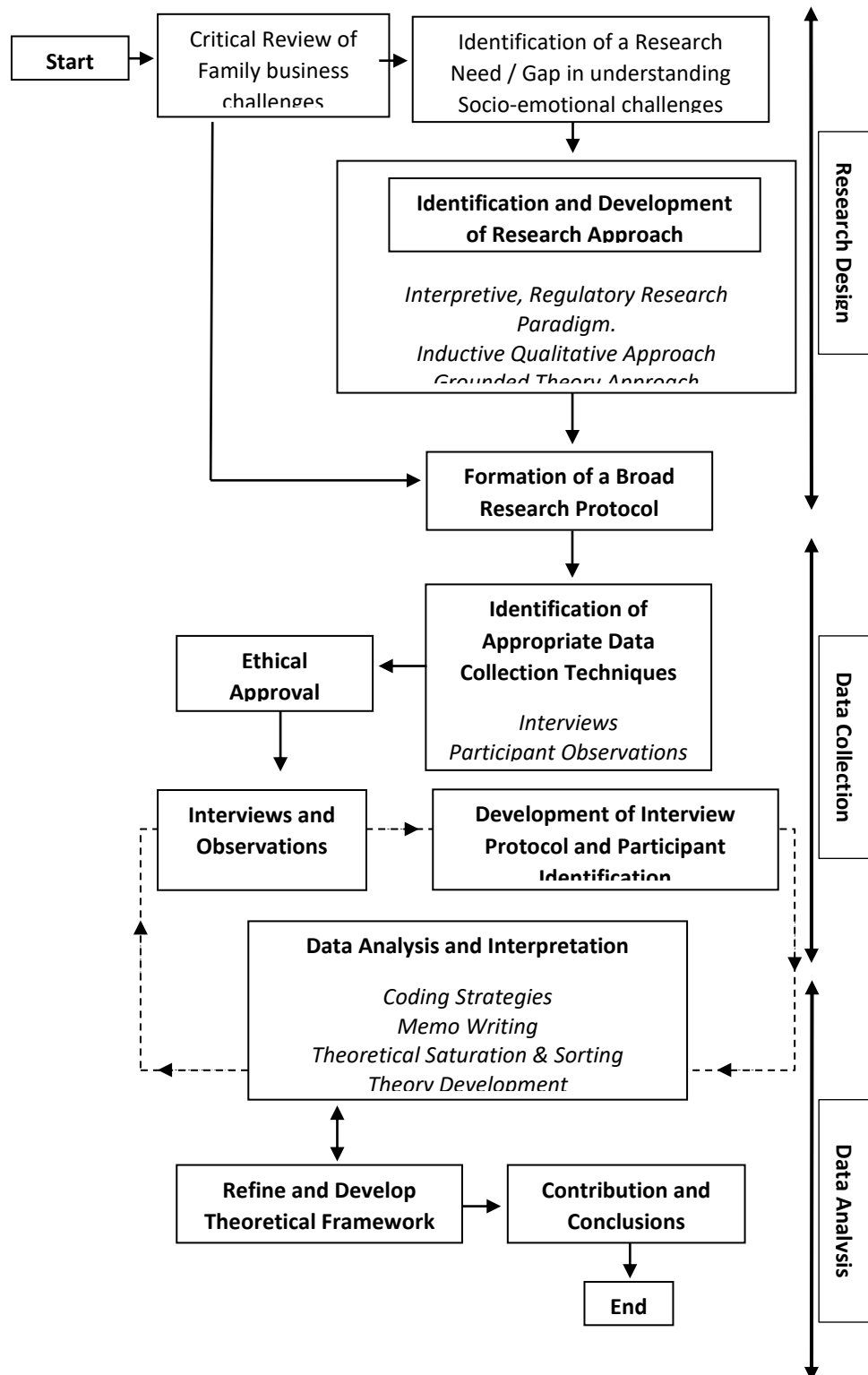
After the first set of interviews, a first group of the data collected was made for coding purposes and analysis. The findings were gathered and assessed in relation to the literature review. The research has been conducted exclusively with family members of the organisation, i.e. the immediate family members who are all involved in the day to day activities of the family organisation. The interviews were conducted individually with each member of the family, namely; the Father (Chairman), the Mother (Credit Manager), the Daughter and eldest children (Chief Executive Officer) and Youngest Son (Business Development Executive). The eldest brother (Director) of another SBU with a direct reporting line to the Chairman has been interviewed at secondary level so that we can gather his perspective about the primary family firm and his relationship with his sister, the CEO of the primary business.

Thereafter, one action research workshop was run with a view of approaching the challenges identified and discussion about the findings with regards to the data collected. The final objective is to propose a recommendation strategy to attend the challenges or at least mediate through the complex socio-emotional situation. The research framework below

presents an overall picture of the research process across the three main activities namely research design, data collection and data analysis.

3.5.1 The Research Process

Table 4 – The Research Process



3.6 Action Phase of the CAR

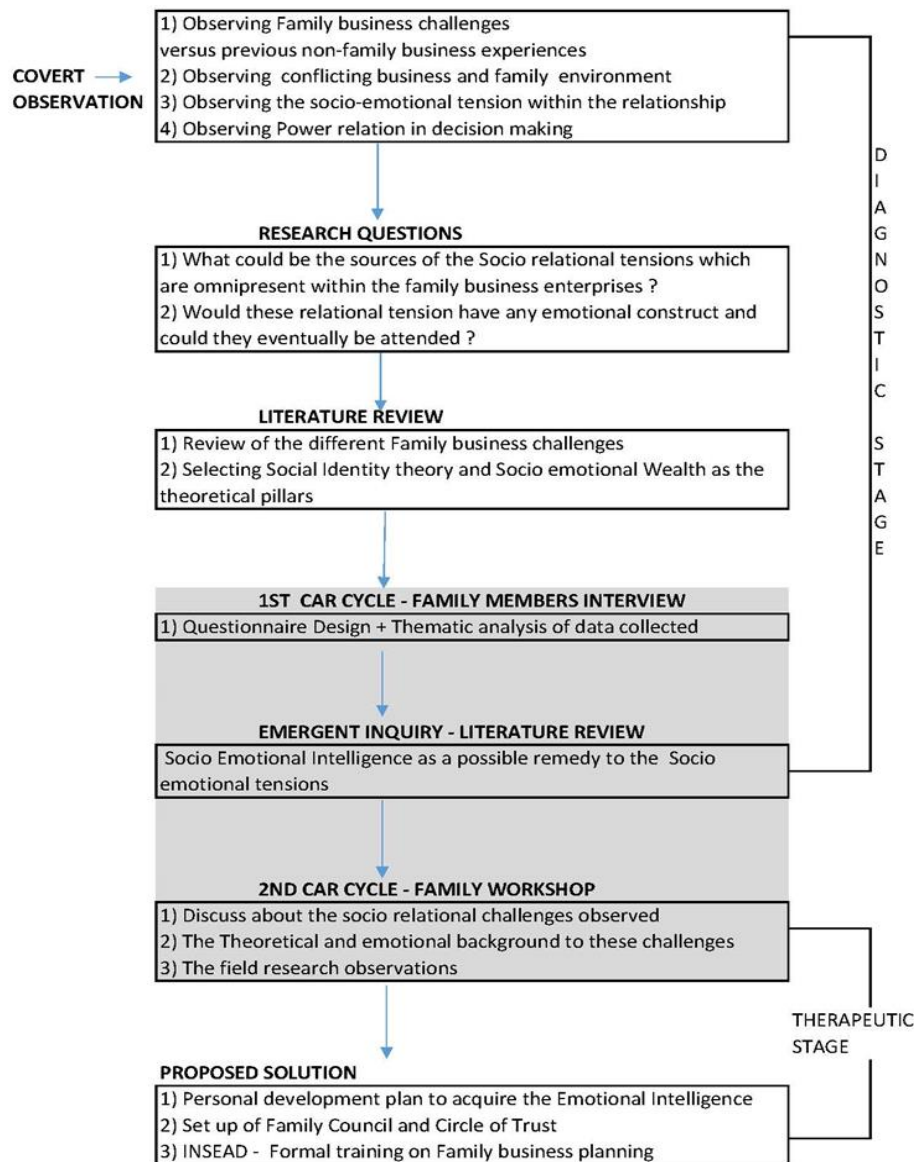
3.6.1 Preparing and collecting the data

During the action phase, I established the following protocol for data collection; convening for the best places to conduct the research to avoid any noise distortion of the data collected. As such, the daughter's/CEO interview was carried at her place of residence as she wanted to be totally disconnected from any professional commitment when she would be attending to the different questions. The other family interviews were carried in the private executive lounge of the family business organisation. The organisation's executive lounge is synonymous to confidentiality and privacy which secured an effective unfolding of the interviews as well. Signature of consent form, ethical and administrative documents in relation to the research, were a mere administrative formality from the respondent's perspective due to the trust they had in the researcher.

Explanation pertaining to the technicalities of the questionnaire and the requirement for translation in local languages were needed. Data was mainly collected through open ended question interviews and note forms. The questionnaire was quite lengthy and each interview lasted for an average of two hours.

Figure 5 below depicts the the entire CAR processes unfolded

Figure 5 - CAR Cycle



3.7 CAR - Observation phase

The interaction with the respondents was very casual and I had to make the most of the trust, which was already present due to the daily operational management of the company; but which was now a prerequisite in opening access to sensitive and emotional feelings of the

respondents. We have always discussed the operational management challenges, but it was the first time that we would be discussing socio-emotional challenges which have been up until now a very discrete subject even among family members.

The one to one interview held in an isolated place of the organisation and at the CEO's private residence helped in establishing and enhancing trust. One respondent felt very emotional in attending the question and avers that the interview was a psychotherapy enabling him to bring out profound feelings about the family business which he has never had the opportunity to discuss. My pre-understanding of the environment from being present in the organisation for eight years created that atmosphere of mutual understanding which was primordial for the effectiveness of the interviews. Action learning emerged as we discussed and debated on the different perspectives following the open-ended questions set. Recurrent bond of trust was constantly being expressed by respondents such as *'I am going to tell you something very personal...'*, *'Between you and me, this is how I feel...'* Or *'I have never got the occasion until now to describe such feelings, situations...'*

Hence, I felt that during those exchanges, all respondents openly and honestly discussed the topics tested. It was noted though, that under some circumstances, I observed some contradictions in feelings and expressions especially from the parents. I deduced that these were not deliberate resistance in attending some challenging topics; they were merely adhering to a wishful thinking in holding to illusion and their own construction of reality in the absence of scientific enlightenment. Indeed, the parents were trying to instil an environment of 'groupthink' (Janis, 1973) by spreading the illusion of harmony and facilitated decision process. Unfortunately, the process of transferring and adopting socio-emotional wealth cannot be deployed within the fallacy of an illusion of harmony but only through a real cultivation of norms, values and traditions accepted and cherished by the succeeding generation.

3.7.1 Validity and reliability of my observation

Qualitative research tends to be criticized from the perspective of offering limited reliability and validity. Johnson (1997) observed validity as a *'plausible, credible, trustworthy, and therefore defensible'* (p.282) and proposed different strategies which could be used to defend the validity of the qualitative research and under my case the validity and reliability of my observation. To defend the claim that the perspective used is a biased one, a selective

observation or selective recording of information and subjective interpretation of situations is adopted. I endorsed both '*multiple observer*' and '*negative cases*' approach to my primary observation (Johnson, 1997 p.284; Adler & Adler, 1994). For example, the observations and hypothesis formed of specific family members' socio-emotional behaviour were cross examined with other family members on the same issues. Then, the extent of converging and diverging perspectives in relation to my own observations are evaluated. One of the key findings under this method reveal that the generally accepted dual identity of the family and the business as one entity was supported only by the children. The parents had a totally divergent perspective towards that dual identity and in contrast supported and enforced a segregation of the family and business environment which became the source of other challenges, such as an emotional confusion in the family business. Interpretive validity has included participant feedback, maximising on '*low inference descriptors*' (p.283), i.e. direct quotations to avoid any risk of data distortion and ensuring an '*accuracy in reporting the facts*' (p.283). Sense making (Luscher & Lewis, 2008) and Sense giving (Gioia & Chittipedi, 1991), as used by the insiders, are recurrent concepts which have supported, added and confirmed my own observation. Indeed, working through paradoxes and conflicting perspectives contributed towards the understanding of different realities.

3.7.2 Limitations of Interviews as Data collection method

Interviews have been an important method of data collection in the collaborative action research exercise as they have allowed my observation to be validated and/or contradicted by the insider's perspectives. However, I must acknowledge that interviews have some limitations that I had to mitigate within the CAR process to ensure validity and reliability of the data collected. Creswell (2003) observed the limitations of interviews as follows:

- The filtering of information by interviewees in relation to their perspectives.
- When the research is done outside the native environment.
- When the information is distorted in the collection process due to researcher's bias and inferences.

Therefore, I have attended to those limitations by ensuring the following;

- Filtering of information by interviewees were mitigated as my pre-understanding of the environment and passive observation of the last eight years have ensured that my

prior knowledge attends to any covert data held by the insiders. Fortunately, the respondents have been completely overt to the questions. The eldest son even claimed that the interview felt as a psychotherapy session and an opportunity to be relieved after having expressed some deep socio-emotional feelings deliberately withheld for several years. Initially, the observation of the parents seemed paradoxically bias as I felt that they were trying to hide their real emotional stances towards the children within the business environment. However, after having triangulated their emotions through alternative questions, I noted that they cultivated their own sense of reality through several years of wishful thinking. For example, their strong beliefs towards the segregation of the family and the business goes against all previous scientific observations that the business and the family is one and same entity. However, they are so much convinced about that perspective that this have become their reality.

- Limitations two of Creswell is not applicable to my research as the family firm is the native environment within which the research has being carried, hence offering the most relevant field for data collection.
- A transcript of the interviews is kept for further verification of information at any point in time and will also be part of the annexes of the thesis report, hence limiting the threat of distortion of data by the researcher.

3.7.3 Limits to Collaborative Action Research

It is to be noted that CAR may have some limitations as well; For example, the researchers will not have any power to research factors outside his control and contextual environment (Cohen et al., 2011). Despite being a limit, this will not be pertinent to my research as the research has been carried out under my own contextual environment and the practitioners/ family members have allowed access to all relevant information for an effective research.

Power and authority issues have been raised by Aspland et al., (1998) while Dickson and Green (2001) warned against a value conflict. Both limits have been analysed and countered within my research process. The research is a personal philosophical and academic endeavour and hence has not been in any way commissioned and/ or remunerated by the organisation. Hence, the project is being much more appreciated as a 'gift' offered to the family members with the objective of helping them appease the social tension within the family and business

life. The issue of power and authority as well as value conflict would not be pertinent in the sense that none of the family members expect to come out with any self interest in this project but in contrast, are looking forward for a group achievement.

Another debate across CAR, contributing to its limit is the validity, trustworthiness and reliability of its findings. That limit assumes that practitioners do not have the competency to generate reliable claims or that the limitation of the project in sampling size and scope is not sufficient enough to understand a situation. That assumption may be highly prejudicial to my research which is based on a collaborative exercise with practitioners and is limited in scope; i.e., researching one family business and interviewing only five family members may be perceived as a limiting exercise in generating knowledge; Babbie and Mouton (2001) claim that reliability is achieved when the application of a technique is repeatedly applied to a process and that process would give out a same outcome. Another insight from Cohen et al (2011) claimed that despite reliability is necessary, yet, reliability alone would not be sufficient to validate a research. Hence, to refute any perspective of bias which may evolve from the small sample and area of my research, I would propose the claim of Hernon and Schwartz (2009) who argued that validity of a research is highly dependable on the quality of the data and results. That validity, according to the authors, extends to the consistency of the methods used and the provision to ensure that the process can be audited or reproduced. As this being the first family business research being carried within the Mauritian context, I have focused more on the quality of the research; I have ensured that despite the sample being limited, the family firm contributed to knowledge and discipline by helping to shed light on those sensitive socio-emotional challenges present within a family business which can be observed and understood only by an insider researcher. That first ever research being performed in Mauritius may be positioned as a stepping stone for other researchers to repeat the process in other family business organisations to observe any converging or diverging patterns to my research outcome.

The process in approaching the subject of research has been clearly explained, and the questionnaire design was elaborated to encompass the different socio-emotional challenges emerging through a family business organisation. As such, that process can be audited or compared to existing literatures to validate the relevancy of the challenges but can also act as a socio-emotional pillar for future research that may be undertaken within that area of organisational behaviour.

To further solidify my research contribution and improve its outcome validity, I adopted Anderson and Herr (In Bruce et al., 2011) recommendations.

The research process provided a solution to the problem (or under my research scope, would provide means to at least mediate the problem).

Process validity - The research provided room for incremental knowledge to both practitioners and researcher. I am contributing to shed light on socio-emotional challenges of family business enterprise rarely approached by research. The research has also contributed to my own knowledge in extending and correcting my pre-understanding of the contextual environment of my family business enterprise.

Democratic validity - The fairness in sampling selection provided for contribution to all stakeholders as well as the relevancy of the solutions provided. Under my research, a full census was performed by gathering the perspectives of all family members.

Catalytic validity – the characteristics of the research process will motivate the practitioners for further continuous improvement. The final CAR workshop has taken ownership in driving the family members towards a commitment to unfold the proposed plan to solve, or at least mediate, the social emotional challenges identified during the research.

Dialogic validity – The action research was carried out in full transparency and allowed debate and peer review. The interview records and transcript were kept safe and can be consulted/ audited as and when required.

The limitations of the interviews and the mitigation strategies relied a lot on the trust that has been established between the family members and myself. My ethical stance and my professional standards during the last eight years helped in building that mutual trust which has today supported this research exercise. Even though the ethical approval processes required the completion of several documentations; i.e. organisation approval letter, consent forms, the expressive rights to withdraw at any time of the research, the family members did not see at any point in time the relevancy of such parameters which were constantly overshadowed by the existing level of trust between the organisation and myself.

In view of enhancing the ethical stance and transparency of the data collection, I have reviewed the article of Moravcsik (2014) in relation to the three dimensions of Research transparency as recognised by the American Political Science Association (2012). Hence through the extended transcript and the different coding stages, the readers will be able to

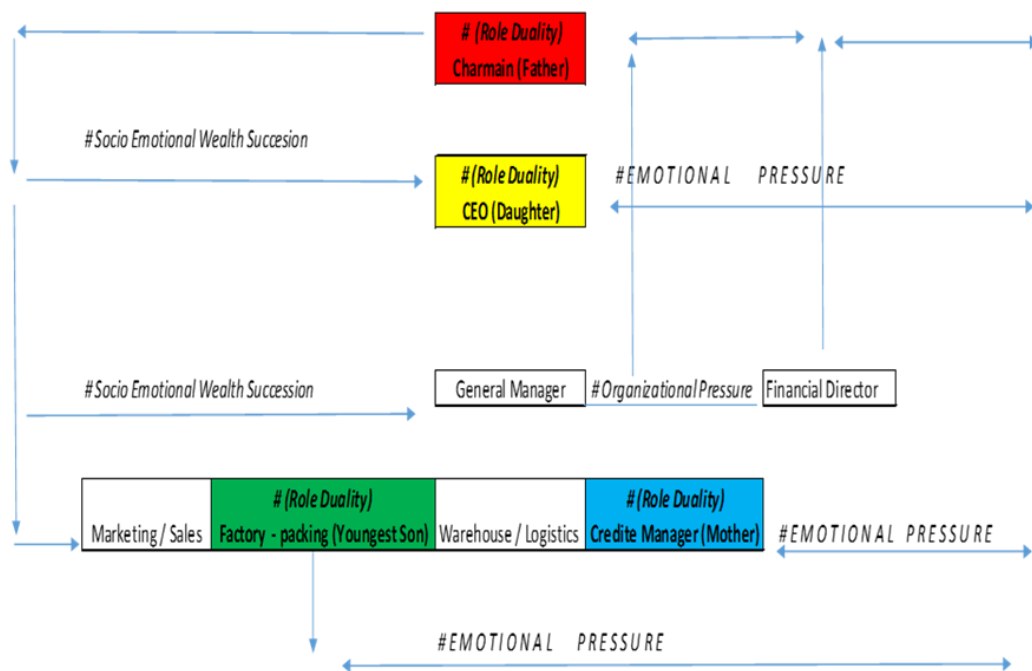
accompany the evolution of the researcher. Thereafter, the axial coding supports the analytic transparency in the interpretive process of understating the fundamental information behind the raw data. Finally, the emerging themes ensure the production transparency in the research evolution towards the epistemological concepts supporting the information which evolved from the data collected.

3.8 Analysis of Data collection

3.8.1 My Research Problematic

The 'Rich Picture' gives an overview of my problematic prior to my field research. The Rich Picture and the different arrows depicts the communication line and social relationship which ties the different members of the family in the business organisation. The main observation before carrying the in-depth interviews was depicted as emotional pressures arising mainly from role dualities and affecting every member of the family. Hence, this has been presented in the Rich Picture as all pervasive arrows affective all the member of the family. The Rich Picture also observed the Socio emotional wealth objective of the father which was since the beginning an overt father's objective to all family members.

Figure 6 - The Rich Picture of my Family Business Organisation - Version 1



The Father, sitting as the chairman, just appointed the eldest daughter, the most academically qualified child, as the Chief Executive officer and chosen successor of the company. That appointment did not make unanimity in the family. The mother and the sons viewed the daughter as lacking competences to hold that position. The mother is now holding the seat of credit manager after holding for many years the post of deputy Managing Director, assisting her husband across the different spheres of the family business since the time the company was in its early days. She has now been driven to adopt a deputy position for the benefit of the daughter, who is now hierarchically the head and in charge of the business assisting her father (Chairman).

For my part, I sit in the role of General Manager, a non-family member executive and insider researcher working for nearly ten years in that family business organisation. The executive team is completed by the two youngest sons; the eldest son as an executive director of a different SBU and the youngest son, who recently completed his tertiary education, has joined the business as business development manager and is very ambitious to prove himself as a capable manager and heir.

The Rich Picture through the downward communication line carries the socio-emotional wealth succession objectives which the father is targeting to achieve in the coming years, despite the different tensions and resistance that may exist within the family business. The socio-emotional wealth succession objectives cherished by the father encompass a whole set of values, philosophies and commitment which the father has as objective to transmit to the children as part of the business succession pre-requisite. Simultaneously, the father experiences an upward emotional pressure and anxiety of failing in that exercise. The main reason remains the extent of socio-emotional pressure surrounding the family business' social relationships. The tension between siblings and the importance of keeping the family harmony stands above all business challenges.

Hence, the research will approach the sources of those socio-emotional challenges. The first CAR exercise, consisting of the different sets of interviews, are carried out with the objectives of understanding the different perspectives of the family members with regards to the socio-emotional issues challenging the transmission and adoption of the socio-emotional wealth. Thereafter, the second CAR exercise, in the form of an action research workshop, devises and proposes a strategy to attend or at least mediate the destructive elements of those socio-emotional challenges and ultimately establish a commitment from all stakeholders to attend the recommendations given.

3.8.2 Conceptualising the Research Framework

My research project uses a qualitative research approach in understanding the challenges of family business succession within the Mauritian context. Understanding such social phenomena is very complex and requires a 'multidisciplinary approach' (Jabareen 2009) in gathering insights from different bodies of knowledge. The complexity in understanding the social challenges present within a family business reinforces the observation of Morse et al. (2002, p. 1) who defined those complex phenomena as lacking elements "*identified from previous inquiry that provide an internal structure and a starting point for observations and interview questions and for analysis.*", where researchers could "*proceeds by building on these structures or categories, padding them out or "giving them flesh"*" and organizing the ways they fit together. Hence, due to the complexity of the research approach, those insights will be consolidated in the form of a mix of field observations, historical studies, discussions,

meetings and interviews. The analysis and interpretation of all those data gives a sense in understanding the complex socio-emotional challenges within the family business environment.

Before starting the research, it is primordial to critically review the possible theoretical research perspectives that supports the adoption of an appropriate conceptual stance. That theoretical research perspective serves as the fundamental base for the research and help in developing an interpretive approach to reality. Indeed, one of the most important elements of my problematic write up is the complexity of human interaction through the process of meaning. Cunliffe (2010) observed that subjectivist view of reality as imagined. Hence for the subjectivist, reality is the product of the human mind and through their creative imagination, gives meaning to their surroundings. The subjectivist knowledge would then tend to be experiential and personal. Therefore, methods following the subjectivist approach focus on an individual understanding and subjective behaviour within my specific context.

3.9 Conclusion

Chapter three proposes an overview of my research approach in shedding light on family business socio-emotional challenges. The research philosophy and stance taken as an interpretivist is introduced before embarking on an explanatory research on family business organisation and its socio-emotional challenges within a succession period. The outcome of that approach has given rise to a subjective appreciation which would answer the 'how' and 'why' of these socio-emotional challenges. An in-depth explanation of the action research approach and the methods used in unfolding a collaborative approach is used in collecting data. Indeed, there was a need for a collaborative action approach between myself (as the researcher/practitioner) and the family members (as practitioners); a critical success factor in understanding the reality, bringing possible solutions to the problem as well as contributing incrementally to the field of family business knowledge. The data collection methods are explained and include interviews and observation. The next chapter will elaborate on a critical reflection upon the data collected and the findings.

CHAPTER 4

FINDINGS AND REFLECTIONS

4.0 Introduction

Chapter four discusses my findings following the field research and the extent to which the data collected helped me in understanding the socio-emotional challenges within a family business organisation in a phase of succession. The chapter also provides an analysis of those data in light of the literature covered and gives a sense to the problematic framework and challenges noted within the family business enterprise. Two main research methods, namely; observation and Collaborative Action research (CAR) have been adopted to collect data. The data revealed findings which have thereafter been presented and discussed in the family, full day action research workshop. Strategic recommendations have been made and commitment with regards to the implementation of these have been taken note of.

Four emerging pillars framing the main challenges of the family business enterprise came out following the thematic coding of the data.

The **interconnectedness** of the family and business environment.

The priority for the **preservation of harmony** and family ties.

The **emotional challenges** surrounding succession and assignment of power among family members.

The generation gap challenges between **two schools of thought** presented on one side by the parents and on the other side by the children working side by side.

4.1 Findings

I approached the data collected through the six phase's thematic approach of Braun and Clarke (2006). I started with an in-depth analysis of the data collected through repeated readings of the answers with a view of shedding light on existing patterns. The data was collected via interviews led by a detailed questionnaire design and the data transcription. The file notes of the different interviews were kept for further consultation all through the research process. The interview and transcription process were very time-consuming tasks but were indeed a critical one which shed light on the socio-emotional challenges. I considered this exercise as the moment of truth of the whole research.

Following the interview exercise and transcription of the respondent’s answers, the coding exercise was started. I started with the initial coding which represented the recording of the common patterns and recurrent answers coming out from the different respondent’s data. It must be pointed out that despite the manual initial coding consisting mainly of grouping the converging answers, yet divergent answers, when felt pertinent, were also coded for further consideration.

The below table gives a snapshot of the initial coding exercise.

Table 7 - Sample of initial coding exercise

	PARTICIPANT VIEWS	INITIAL CODING
1a)	Do you perceive your firm as a family business organisation?	
b)	Why do you see your business as a family business organisation?	
	<p><i>All: Yes</i></p> <p>CEO/ Eldest Daughter: <i>Firstly, because it <u>is owned by family members</u>, its <u>board is 100% family members</u>, and, it’s got characteristics of a family business.</i></p> <p>Business Dev Mgr/ Youngest son: <i>Because the management is (euhh hesitate ... from my point of view) <u>my father & my sister and all the family comes from the family</u> and <u>Aqiliss is part of the family group</u>.</i></p> <p>Divisional Director/ Eldest Son:</p> <p><i>Yes of course.</i></p> <p><i>It started in 1958, the business <u>started with the uncles</u> and my father and expanded through <u>family succession</u> until now is <u>managed by family members</u>.</i></p> <p>Credit Controller/ Mother: <i>Because all <u>Children are involved in the business</u>, my husband is involved in the business and his <u>parents before him were involved in the business</u>.</i></p>	<p>Owned by Family members, board 100% family members</p> <p>Management represented by Father & Sister, is a subsidiary of the family group.</p> <p>Started by former family relatives, expanded and managed by family members.</p> <p>Children & husband are involved in the business</p>

	<p>Chairman/Father: <i>All shareholders, directors are family members, the <u>business is managed by family members</u>, and the business has been <u>inherited from family members</u> is presently being run by the second generation in phase of succession towards the 3rd generation.</i></p>	<p>as former generation did.</p> <p>Owned & Managed by family members, inherited from family members</p>
<p>2a)</p> <p>b)</p>	<p>What does your organisation represent to you emotionally and financially?</p> <p>Why?</p> <p>Emotional status can be described as a status of Fear, Anger, Sadness, Envy, Love, Anticipation, Trust, Courage, calmness etc. If your organisation was an emotion, which emotional status would best describe your organisation? (Choose up to 3 Status)</p> <p>CEO/ Eldest Daughter: <i>Trust, Passion... (Silence..., Doubtful... Hesitating in giving other status)</i></p> <p><i>Why: Trust: <u>There is a sense of trust among all family members.</u> Trust is an emotion among the family members which has cascaded down to non- family members.</i></p> <p><i>Passion: <u>The founding father was passionate about the business and this emotional characteristic has also been transmitted to the next generation.</u></i></p> <p>Business Dev Mgr/Youngest Son: <i><u>Relaxing Atmosphere,</u></i> <i>Calmness</i></p> <p><i>Why: Because there is a <u>sense of professionalism</u>; people are not stressed because they are <u>experts in what they do</u>, hence there is a rather relaxing atmosphere and calmness through good chats among employees and ultimately <u>leading to team spirit.</u></i></p> <p>Divisional Director / Eldest Son: <i><u>There is Love, Envy and Trust</u></i></p> <p><i>Love: <u>Love for the family business</u>, because there is the dad on top of the pyramid and between siblings <u>because of the blood relationship.</u></i></p>	<p>Trust, Passion.....</p> <p>Trust among family members, Passion transmitted to succeeding generation</p> <p>Relaxing atmosphere, expertise, team spirit</p> <p>Love and trust for the business due to blood relationship</p>

<p><i>Trust: Because <u>despite all differences and challenges you need to trust the family members.</u></i></p> <p><i>Envy: <u>Envy between the siblings</u>, due to the youngest brother who joined lately and who is <u>not finding his mark</u>. He is observing his elder brother who is already an executive director and his daughter as the CEO. Hence a sense of envy between the siblings exist is felt.</i></p> <p>Credit Controller/ Mother: <u>Love, Trust, Courage</u></p> <p><i>Love: A certain <u>pride that your children, your husband are leading that organisation.</u></i></p> <p><i>Trust: The fact that the company is <u>being handled by children and husband ensures the presence of trust in the future of the organisation.</u></i></p> <p><i>Courage: The above emotional presence gives me <u>courage and motivation in my daily tasks.</u></i></p> <p>Chairman / Father: (Long hesitation ... 'it's a very pertinent question') <i>As it is a family business organisation, it's the <u>thought of continuity.</u> There are several emotional factors, It's sensitive.... the business has been created by the family hence we have the <u>fear that the business does not perform</u>, needs lot of courage.</i></p> <p><i>Hence there is <u>Anxiety, Love/ passion</u> for the business and <u>Courage.</u></i></p> <p>**All respondents privilege emotional perspectives over financial perspectives. This position was further confirmed in question 4 where respondents rejected economic/ financial opportunity as a compensation of emotional challenges.</p>	<p>Envy felt from impatient sibling.</p> <p>Love and trust due to family involvement. Courage and motivation because of the above.</p> <p>The stress in ensuring continuity. Anxiety for the long-term survival of the business. Love and passion for the business.</p>
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Following the initial coding, a second process of coding; i.e. the axial/thematic coding was performed. The objective of the thematic coding was to convert the different converging elements collected in the initial coding phase into broader themes for a more meaningful analysis. Thereafter, I moved into a second phase whereby I read all the answers and initial codes created. I grouped the common codes into meaningful themes. As we moved through the axial coding, the themes started to funnel down and showed a more coherent view of the

research outcome. The patterns were observed, and they echoed the extensive literature covered in the initial phase of my thesis research. The converging and diverging themes in relation to those literature were equally identified. Finally, I completed my coding exercise in listing those patterns as the emerging themes coding. The emerging themes consisted of transposing the axial codes into theoretical themes which would make sense for a further epistemological study. Those emerging themes and their theoretical concepts are further discussed in the theorizing section of 4.4.1 and gave an epistemological perspective of the research outcome.

The table below gives a snapshot of the thematic coding and the emerging themes.

Table 8 - Sample of thematic Coding exercise

Do you perceive your firm as a family business organisation? Why do you see your business as a family business organisation			
INITIAL CODING	AXIAL CODING	EMERGING THEME	
<p>Owned by Family members, board 100% family members</p> <p>Management represented by Father & Sister, is a subsidiary of the family group.</p> <p>Started by former family relatives, expanded and managed by family members.</p> <p>Children & husband are involved in the business as former generations did.</p> <p>Owned & Managed by family members, inherited from family members</p>	<p>Management comprises of family members, inherited from family members and subsidiary of family group</p>	<p>Involvement and Essence</p>	

What does your organisation represent to you emotionally and financially? Why?			
Trust, Passion..... Trust among family members, Passion transmitted to succeeding generation	Positive and negative emotional State of mind	Constant Emotional battle due to emotional ownership	
Relaxing atmosphere, expertise, team spirit			
Love and trust for the business due to blood relationship Envy felt from impatient sibling.			
Love and trust due to family involvement. Courage and motivation because of the above.			
The stress in ensuring continuity. Anxiety for the long-term survival of the business. Love and passion for the business.			

Following the coding exercise, the analysis provided the following insight.

4.1.1 Interconnectedness of the family and business environment

This section will relate my findings with regards to the interconnection between the family and the business. The family and business overlap has been observed as one of the sources of challenge for the stakeholders in their daily roles. Hence my interview questions have focussed strongly in understanding the family members perspective towards that interconnectedness.

As a prerequisite of the research, I had to validate the fact that all stakeholders understood the concept of a family business. Indeed, all respondents were fully knowledgeable about the essence of ownership and involvement of family members which contributed in rendering their organisation a family business enterprise. They recalled the origin of the organisation and the different family successions which have taken place up to the actual managing dynasty.

The father: *'My father and my uncles started that business. It used to be a very small entity, working with limited client portfolio, financial resources and management expertise; I have thereafter inherited the business and contribute to its growth and now I want to prepare the next dynasty to take over from me'.*

The Daughter: *'It is owned by family members. The board consists 100% of family members and it has all the characteristics of a family business'.*

They actually acknowledged the high degree of involvement of the family in the enterprise and they observed opportunities offered by the interconnectedness of the two environments.

The mother: *'All my children are involved in the business; my husband is involved in the business and his parents before him were involved in the businesses'.*

The eldest brother *'I am always a call away from my siblings and parents even during nonworking days and ready to meet at any time to socialise and discuss'.*

They reckoned the numerous simultaneous roles, such as children, business executives, business heirs, family heirs, parents and confidants and the extent to which those roles often conflict. The children acknowledged the extent to which their roles have extended since the day they joined the organisation.

All other family members (except the mother) have observed an extension in their role position and reckoned that they occupy important roles now in the family business. They are aware that they will be the successors of one of the biggest family businesses of Mauritius. However, they are still at the naïve age period, where they are desperately trying to prove themselves capable of managing the business as well as being seen as strong leaders, capable of gaining the respect and trust of non-family members. Unfortunately, their objective is a

challenge as their endeavour towards holding the ownership and management of the family business does not initially trigger a unanimous support.

From a positive perspective, the extended roles acquired by the father and children have contributed to an increase in emotional ownership of the family business organisation tightening further the family and business environment. As a result of that interconnectedness, the children (paradoxically, not the parents) reckoned the high degree of emotional challenges emerging from those two-interconnected environments. They reckoned the extent to which positive or negative emotional constructs in one environment resulted in an immediate impact on the connected environment. For example, a conflicting discussion at the office with the parents or siblings during office hours would immediately destroy the social relationship at home where all join after office hours.

The Daughter: *'There is a dual environment. If there is a crisis at work, the harmony will be affected at home. As soon as we start talking about work, the mood changes.'*

The eldest son: *'There is a direct impact. The family business and the family are one and same. We just need to know how to play around it. The bad news and discussions continue at home and vice versa. The good news (work related) as well are celebrated at home.'*

'It's impossible to have a split between the business and home environment. We try to have that gentlemen agreement and respect the home environment and minimize the discussion to less sensitive work issues, but we have to realize that the 'family business is part of us', I see myself and the company as one.'

Despite family members have different appreciations of emotional challenges and the extent to which that affects their personal living, they acknowledge that the situation is often hard to deal. As the daughter observed, *'that business is emotionally loaded'*. Hence, they also acknowledge that safeguards against the emotional challenges should be established to preserve the harmony and prevent a destruction of the family social relationship. Currently, the only safeguard against emotional challenges is the mutual consent of avoiding discussing sensitive office matters which could raise conflicting debates within the home environment.

The Daughter: *'There can be a relation between work and home environment but generally when we do not talk about work, there is an honest peaceful environment'*.

This above reflection showed some positive results but under several circumstances this agreement has not been respected as work requirements, urgencies or family positions override that agreement. Despite being young and naïve from a management perspective, the children projected a very strong social and philosophical acumen. They are highly realistic with regards to the emotional challenges present in the business. They are highly effective in observing, acknowledging and assessing the impact of emotional challenges across both family and business environment.

Surprisingly, the parents projected a different appreciation of that interconnectedness; they showed the enforcement of a deliberate pressure to segregate the socio-emotional challenges binding family and business environment.

The Father: *'I can manage my position and emotions when it comes to the professional work. There is a line of conduct which I strictly adhere to, and I park all emotions relating to family matters which the role dualities can trigger. Hence, I do not observe any issue which the different roles can trigger'.*

At the workplace my position is strictly professional, and I insist that everyone hold their professional position. Hence, I have learnt to observe my daughters and sons as management members and not as children in the professional environment.

The business owns certain values/ philosophies, inherited from previous generations, i.e. nothing is guaranteed, perpetual self-assessment, view ourselves above all as employees of the organisation and having to deliver at least the minimum as expected from a non-family employee.

The mother: *'If something happens at home, we do not bring that at the work place'. (Observation: Self-convincing comment – Coming back regularly to the Chairman speech)*

For the parents, the two environments are not connected and should not be connected. The father and mother constantly used imageries such as *'the office is like a place of worship'*, *'there is no daughter, sons or wife'*, *'everyone is an employer and accountable'* to show that there is no preferred or privileged relationship and they will never be emotionally biased.

That position was strongly contested by the eldest brother who observed the family and the business despite all existing challenges met as one and same entity. He further claimed that

'The dual roles are difficult to avoid and maybe I don't want to change that' i.e. the interconnectedness 'because I love my job', 'and my family as well'. Hence for him the segregation of the two environments would just be an illusion of an emotionless behaviour, but emotional challenges would still be constantly emerging below the surface and dictating management decision. Supporting that position, the daughter stated that she often relies on that privileged father-daughter relationship to influence decisions, despite the overall perspective of the family is to have a democratic decision-making system where unanimity should prevail, and even external expertise should contribute to the organisation's strategic development.

The Daughter *'I would lie if I had to say it's my recommendation, but I have read and experienced a lot about it. If you have a strong team of non-family members, it changes the dynamics of the business a lot and this is personally what I tried to do. I have recruited my own team so that it feels much more of a corporate environment than a family environment'.*

While I observed her influence in driving the organisation towards a corporate environment, I also noted that she paradoxically also calls for the privileges of being a member of the family business enterprises.

The Daughter *'I do recognise that in some circumstances, the father-daughter relationship does help to facilitate or influence decision'.*

'.. When there is alignment you feel strong, powerful but when there is misalignment this is the worst that can happen'.

That claim of the daughter towards a privileged relationship was confirmed by the mother's observation. Hence, there is a realistic acknowledgement of a high presence of emotional dynamics within the family business despite the political perspective of the parents is to ignore such presence.

Moreover, a relationship between power and politics is observed when the daughter acknowledges using the privilege 'father – daughter' relationship to facilitate / influence decision through an augmented power relation. Hence, under that construct, power, politics and emotions present a dependable relationship. We observe the extent to which the daughter constantly tries to increase her power at the head of the organisation as a means to

enforce alignment while avoiding the emotional influence that other family members may enforce on business management.

The Daughter: *'Sometimes certain things make business sense, but because you have a family member there who does not get what is happening you just have to do with it. There is a political anger which you have to manage. The family members are not on the same page.... not on the same level... but having the same or even more emotional influence'*.

An interesting observation across the interviews depicts that over and above the quest for management power, there is also a constant battle to counter the emotional influences that members of the family may exert over the decision maker. As such, the daughter observed that other family members exert emotional influences on the chairman of the organisation towards management decision, while the brothers and the mother have the same observation over the daughter.

The Mother: *When there is a conflict between the daughter and the father, the daughter will back out but will try again through the use of emotional politics to try to achieve her ultimate objective. But against other family members, the daughter will insist until she gets what she deserves. The brothers have a respect towards her, so emotionally she will win the battle against other member of the family.*

The Youngest Son: *My sister is emotionally bias, and as she has the ear of my father, she would correlate her emotions into a wishful thinking and persuade my father towards her own perspective of reality.*

To conclude, the findings have depicted that the children have rightly observed and understood the challenges posed by the family and business interconnection. However, the parents contradicted that observation in trying to impose a boundary to segregate the family and business environment, which may be the roots to further challenges such as social identity conflicts. Hence, despite we will deal with emotional challenges associated with succession and power in another section, nevertheless we have observed as well the presence of emotion within that interconnectedness challenges

4.1.2 The preservation of harmony and family ties

This section deals with the element of harmony. It was noted that the need for harmony holds an important place within the family and business environment. Hence, this section presents the critical information gathered during the interview in relation to harmony.

The perspective on the preservation of harmony and family ties have been tested at various intervals during the interviews. The perspective of harmony was first tested at an individual level and secondly, at business level. At the individual level, all participants described their personal harmony in terms of inner peace and good health. They unanimously rejected financial and economic wealth as a dependent variable of personal harmony.

At business level, the responses towards business harmony showed a strong convergence towards the preservation of family ties. The eldest son made an interesting claim in relation to the business and financial sacrifices that he would be prepared to undertake to protect and preserve the family ties. He stated that *'even if the business goes wrong, at least I will still have a family'*.

The need for the preservation of harmony and family ties from the perspective of the parents converged mainly towards the need for succession and business survival.

Father: *'For smooth succession (of the business), it's important that there are strong social ties'*.

The eldest son: *'If the business goes down, you need to still have the family which is the most important thing. But on the other side, again if we have a problem in the family, there will be a direct impact on the business. Again, this duality. Hence it is very important to preserve that social tie. If I have to choose between the family, continue to see each other; go for lunch on Sunday or be separated from the family even if the business is still here, I will choose the family at any point in time'*.

The mother, again, seems confused and lost in observing the connectedness of both environments and tends to follow the perspective of the father in his usual paternal speech.

The mother: *'Priority is the work, family ties come after'*.

The requirement to protect family ties raised a sense of frustration at CEO level. The eldest daughter/ CEO claimed that she often feels powerless in circumstances where she would

enforce decisions but must finally compromise because the enforcement may raise conflicting family debates. That protection of family ties would even imply the adoption of a relativism approach to ethics were the contextual family harmony requirement may give rise to the adoption of a nepotism culture instead of establishing a best practice management approach. That political anger made her opt for a stance where she perceived that family ties should not take precedence over the business and that she would rather replace family members by non-family professionals instead of having to constantly compromise at the expense of business financials and economic opportunities.

The Daughter: *'Family social ties are not a priority in the family firms as family members can be replaced by non-family members in the business if needed. So, challenging the fact that the family business and the family is one entity. There can be a business without family members by replacing the family members with professionals'*

Hence for the CEO/ daughter, preserving family ties at all cost is not a priority. However, paradoxically, she reckoned that her second priority would still be to manage both worlds (i.e. the family members and the family business) effectively.

The Daughter: *Managing your stakeholders (and aligning family members) so that you do not get misalignments that are disruptive to the business and the key success factor of the family business is same to any other business, to have a strong team, operational excellence but with management of family members.*

She was then challenged on the fact that her second priority may contradict her initial position. Indeed, family ties need to be taken into consideration and preserve to succeed at both ends. She then recognized that preserving family ties is also important but at this stage is confused on what would be the degree of importance to pay to the preservation of family ties as a compromise of economic and financial business opportunity.

The Daughter: *'Damage control, Social ties (family) is still a dimension that you want to manage because if it goes wrong it would be destructive to the business, both (Family ties and business growth) are important to a same level).*

Her confusion reinforces my problematic observations over the extent to which family business challenges are emotionally difficult to overcome. Despite opting at the first instance

to give priority to business growth and performances, she realised that ignoring the importance of family harmony and family ties may have a negative effect on business performance and survival.

Her autocratic management style has indeed lead to some tension in the family as the siblings observed the new CEO as someone who would be emotionally biased and selfish, having at heart her priorities in leading the business instead of accommodating the differences and weaknesses of family members. Hence, among the family members, the daughter remains the most challenging character to be groomed in the cultivation, adoption and protection of family ties. A strong sense of individualism in her character is noted; this may lead her to opt out from the family circle of trust if she lacks leading power.

This section has depicted different perspectives with regards to the need to keep a family and business harmony for the survival of the business and peaceful family environment. The eldest brother has shown a readiness in sacrificing his personal business interest for family harmony. The father ready to compromise to keep both a harmonius business environment while the daughter has shown much interest in sacrificing the family harmony towards business interest.

4.1.3 Emotional Challenges, Power and Politics surrounding Succession

Succession is the prevailing environment within which the research has been carried out. All participants acknowledge the contextual environment which unfolded three years back and which is still in its early phase of deployment.

The eldest daughter has been appointed as the next succeeding CEO of the organisation. The power assigned to her (even limited at this moment) seems to be contested by the siblings and the mother. The siblings and the mother found in her a lack of capability/experience. While she projected a strong academic acumen towards other family members, she was also described as '*stubborn*' and '*selfish*' and individualistic from a leadership perspective. According to other family members these are serious weaknesses of leadership as a leader for which comparatively the father excels. The siblings' perspectives were observed and recorded during their sarcastic reply '*... depends who*', when questioned about their views of a family member holding total decisional power over the business.

The eldest son: *'Totally against that. Because it's a company. It's not a dictatorship. Else don't work with a team; there is no such thing as total handing over. I will call it a continuity. Handing over for me would be synonym to a break in a status at some point in time. There should be the next dynasty working side by side with the former dynasty until a natural phasing out i.e. death or health redundancy. It has always been like that with the former generation and it should always be like that.'*

Despite the next managing successor (the daughter) has officially been chosen and presented to the family, there is a strong sense of rejection of that decision by other family members. I felt that there is currently an illusion of harmony which is extremely fragile, and any succession decision taken by the father may be reviewed in the future after the natural departure of the father.

The mother was also questioned about her roles in the organisation and tested about her perspective of succession. She unfolded her career path and I observed a strong feeling of sadness and frustration when she related the degree of power she held during the early days of the business, when it was run by her husband and herself only. She took some time to acknowledge and accept that she must now abduct that power as the children have joined the business and a new management and succession structure is in place.

The mother and the two sons all depicted a sense of powerlessness in the succession decision and must accept the chairman's choice with the ultimate perspective of preserving family harmony or at least the illusion of harmony and long-term business survival.

The youngest son who just joined the business seems to have already been conditioned to adhere to that philosophy of illusion of harmony and shows a confusing reaction to the perspective of power and harmony (most probably due to his naïve young age) and would reply, *'We should not question...'* *'We should go with the flow'* when queried about his perspective on the presence or not of harmony in the business and at home. The Father/Chairman has also taken cognizance of the cold war and opposition he is facing after having appointed his daughter as CEO of the company. He reckons the presence of politics in the organisation and avers that he must play his own positive politics to curb negative ones and prevent the destruction of family harmony.

The Father: *'Family members need to be able to manage positive politics to preserve the harmony at the workplace. Trust, compromise, comprehension are important and I need to establish my own politics to preserve that philosophy. There is negative politics, this is inevitable, but we shall manage to prevent the negative politics destroy the relationship.'*

The Mother's reaction to negative organization politics: *'I am helpless because if I intervene to criticize a behaviour, I will create frustration and endanger the fragile harmony. So, I better leave my husband to tackle any abuse of politics. The husband as well has his own political positions towards the children which is a self-sensitizing of responsibilities. He owns more respect as well from the children and is in a better position to manage the politics.'*

Hence with the view of preserving harmony and avoiding open conflict with the sister, the father is supporting the two brothers in growing their individual SBU's and has established a direct reporting line with him as chairman to avoid relational and management conflict between the siblings. The father's intervention in mediating across the sibling's relational conflicts ultimately depicts his recognition of the presence of emotion within the family business and also shows the extent to which the relational dynamics can be destructive to the business, hence the importance for mediation and compromise. That indirect recognition also contradicts the illusion of emotional dissonance behaviour that he usually enforces towards family members. By intervening in emotional conflicts and compromising across family members' relational dynamics, the father is forced to acknowledge the presence and influences of socio-emotional challenges as an intrinsic factor of family business organisations.

The perspective of a physical segregation of the business unit is also tested as well during the interview and indeed the eldest brother pointed out that *'breathing space'* is a pre-requisite for him to preserve and nurture family relationships and as such. He deliberately avoids visiting his daughter's SBU and neither gets involved in her operational management to prevent management clashes.

The eldest son: *'I maintain a stable relationship because I have a guest appearance in the family relationship (top team meeting) at the place of work. I managed deliberately, on purpose to keep the relationship going by putting lot of space into the relationship. We can give each other advice but will not run their businesses.'*

He further relates a recent happening when his youngest brother (who was initially reporting to the eldest sister) had a conflicting argument with the sister and wanted to join the eldest brother's SBU. He categorically refused, and even threatened to leave the family business if ever this change would be imposed upon him by the father. His explanation was that he cherishes the family relationship too much to take the risk of putting that relationship at risk by sacrificing that breathing space and accommodating another family member in his SBU.

The Eldest brother: *'There is no money which can compensate psychological strain. I believe in quality of life. Yes, we need a certain amount of money to live a quality life. Exceeding that amount, you can live more comfortably but at the expense of other elements and which are often closely related to socio relational challenges. I can work more, for example, run the workshop during week-ends, make more turnover but it will really be at a certain social expense.*

So, if all of the siblings have to join together and work together under the same roof even for a financial and economic opportunity, I would better drop the project to preserve the family relationship'.

That position, despite seeming egoistical and contradicting, denoted a deep sense of sacrifice as the elder brother even proposed to leave the SBU and offer full control of the business to his younger brother with the aim of preserving the family ties. Fortunately, that decision was not imposed, and the youngest brother finally embarked in a different SBU project supported by the father/chairman. Hence, we witness again the intervention of the father in acknowledging the presence and outcome of relational dynamics within the family business necessitating his intervention for mediation.

This section helped us to gather interesting data in relation to the different stakeholders feelings to the daughter's succession. Family politics emerged as a result of a critical need to keep harmony for business survival and we noted again that emotions, positive and negative are both underlying factor behind the different decisions taken.

4.1.4 Generation gap and management style

This section will enable us to understand the key role of the father within that challenging succession equation. Despite being constantly emotionally influenced by the different family members, he remains the ultimate decision maker. His management style has been assessed

and we shall depict any relation between his management style and the emotional challenges with the family and business environment.

The paternalistic leadership style of the father denoted a strong generation gap between the father's perspective of the different topics tested during the interviews and the children's perspective of the same. The father adopted a strong autocratic leadership approach in managing emotions or at least the illusion that he is managing emotions and that he can depart from emotions. While paradoxically he strongly supports the preservation of harmony and strong family ties (which grows naturally with an emotional construct), he constantly imposed a segregation of environments and does not reckon any connectedness between the family and business environment. He claimed that he can control his emotions and hence segregate the management of the business emotional conflict and family emotional conflict.

The father *'I can easily manage my emotions, so that any family member conflict at the office is not carried under the family roof.'*

However, inquiries with other family members depicted that within various circumstances, office conflicting debates have indeed extended under the family roof, showing that the segregation of emotion was never successful but a mere fallacy.

The father further stated that his biggest emotional challenge for the business was the anxiety that the business does not survive, and it is observed that effective succession, family involvement and harmony was a critical element of that anxiety.

The Father: *Anxiety is at its peak due to competition, the inherited wealth, and responsibility towards employee. My biggest anxiety is towards being able to pay the salary of employees. The anxiety is always present. Despite experiencing happiness and some happy moments, anxiety always comes back and is present for the long run sustainability of the business as nothing is guaranteed in the fast-moving consumer good business.*

Hence, the father fears that internal emotional challenges may bring a lack of focus on the external competitive threat over the organisation and ultimately put the organisation at risk. Thus, he continuously enforces a segregation of emotion as possible means of eliminating that variable from the equation.

The paradox is that both the father and the mother recognised the presence of emotions within the business sphere. They were both tested on the emotional representation of the business to them.

The Father: *(Long hesitation) 'It's a very pertinent question...*

As it's a family business, it's a continuation. There are several emotional factors. It's sensitive. The business has been created by the family, hence we have the fear that the business does not perform. It needs lot of courage. Hence there is fear, love/ passion for the business and courage'.

The mother: *Love/ Pride - A certain pride that your children, your husband are leading that organisation.*

Trust: The fact that the company is being handled by children and husband ensure the presence of trust in the future of the organisation.

Courage: The above emotions give me courage in my daily tasks.

The mother further claimed that she recognises the presence of emotional challenges within the business: *'Communication Stresses, Generation gap conflict and embarrassing situation of not being able to bring constructive criticism are due to the fear of destroying the social relationship with the children'.*

Contrarily, the children seem more enlightened in recognising that both environments are emotionally connected and that the challenges evolved in the business environment have a direct impact on the other (family) environment and vice versa.

The father's autocratic approach has further been tested on his long-term objective in relation to the children's involvement and career growth in the business. He stated that he does not expect the children to make any mistake for which they have been warned.

The father *'I did not have the opportunity to be counselled in my young age. I made several mistakes and learnt from my mistakes; but my children have the opportunity of being accompanied and counselled, hence I don't expect them to make mistakes for which they have been warned'.*

Indeed, the major source of conflict arising in the daily operational management of the business are subject to business opportunities which the father has observed by experience. The children unfortunately do not depict this on time and becomes the source of conflicting debates.

While he acknowledged that compromise forms part of conflict resolution, he also enforced the perspective that there should not be any problems but only solution, i.e. all problems should be resolved; meaning he expects family members to also respect his decision and compromise without endangering the family harmony.

Finally, to cope with all the above challenges and different perspectives, he relies on time factor. He believes that time factor and a professional team are the best cure and that time would unfold results and may resolve complex issues.

'Time is an important aspect which will accompany success or failure, where organisation growth will be the end result and a Managing professional team put in place appeases my anxiety'.

At this particular time, the parents were not aware of the eventual recommendations that would follow through the workshop to enable them to navigate across those emotional challenges. Hence, for the father, time and management professionals are the only tools in ensuring business succession and solving socio-emotional challenges.

After having completed the interviews, observations and after having analysed the data towards establishing my findings, I came up with a modified problematic framework. The new problematic framework still observed the fundamental succession objective of the father as the transmission and adoption of the Socio-emotional Wealth (SEW) to the next dynasty. He firmly holds to the perspective of getting the children to understand and adopt the five pillars of socio-emotional wealth as a critical success factor for the good management and long-term survival of the business. However, the diverging factors are the rejection of the overlapping environmental conditions between the nuclear family and the family business organisation. Hence, the SEW transmission is taking place within an environment where the father is enforcing a segregation of the family and business entity. That paradox is creating an emotional confusion for the children who are lost between developing an affective/paternalistic love for the business as imposed by the socio-emotional wealth, and

keeping a dispassionate and objective perspective towards the business and run the business as would do a non-family professional.

That complexity and chaos raised by the SEW transmission objective, added by the enforcement of a segregation of identity, is further amplified when added to the intrinsic social identity conflict of the family members. A behavioural confusion evolved in understanding which role they needed to play in relation to the objective set by the father. The sister/ CEO has even claimed that *'sometimes I have the impression that he prefers to discuss and work more with the non-family employees than his children'*. That statement amplifies the confusion of the daughter between driving the organisation towards a professional corporate management style (which may threaten family ties and successful adoption of the social emotional wealth) or prioritising family ties, protection of family harmony and hence continuously navigate across role dualities, conflicting identities and paradoxes.

Furthermore, the SEW recommends the transmission and adoption of specific family values such as family control and influence of the business by family members. Those are binding social ties among family members, emotional attachment of family members to the firm; elements which would conflict with the enforcement of a segregation of family and business identity.

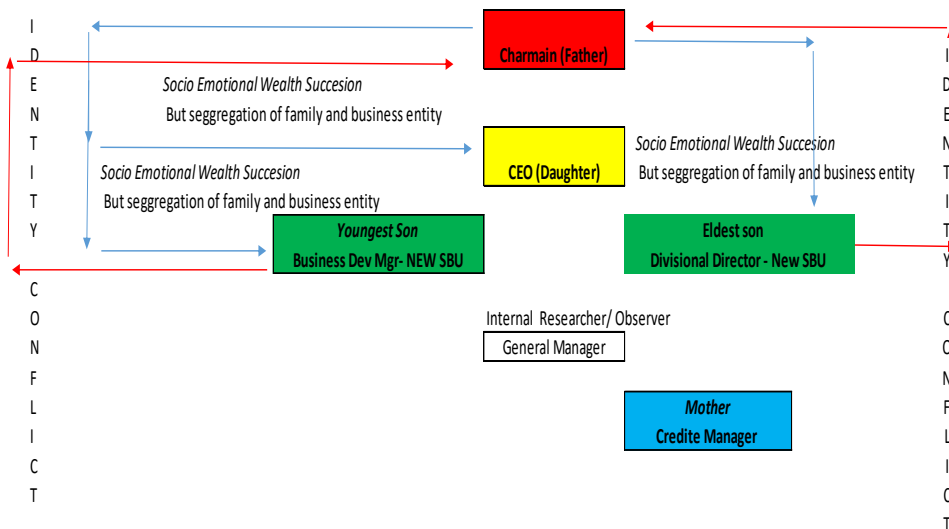
The children have developed their individual personal identities over the several years they spent in foreign cultures. They came back to their home culture and entered the family business with a perspective of business continuation within a family environment. That perspective is supported and welcomed through the social emotional wealth succession exercise, but contradicts with segregation enforcement of the family and business environment. Hence under a social emotional wealth transmission perspective, they are expected to be brothers, sister and wife to support and protect the family values, while under a segregation of entity perspective, they are expected to be only business executives who are accountable to the board as much as non-family executives.

To conclude, this section shows us a head of family, i.e the father, overcome by the socio emotional challenges of succession. He is trying, despite his lack of scientific background to mediate across the emotions, contradiction and paradox of the family and business

environment. He tried to manage by experience but encounters the challenges posed by a gap in scientific support of this succession process.

4.2 My New Problematic Concept

Figure 9 - The Rich Picture of my Family business organisation (amended) Version 2



DOWNWARDS SOCIO EMOTIONAL OBJECTIVES

SOCIO EMOTIONAL WEALTH SUCCESSION

- Family Control and Influence
- Identification of family members with the firm
- Binding Social ties
- Emotional attachment of family members
- Renewal of family bonds to the firm through dynastic succession

UPWARDS SOCIO EMOTIONAL CHALLENGES

SOCIAL IDENTITY CONFLICT

- Role Duality
- Identity conflicts
- Power relations
- Family Organisationsal Politics

Having now covered the literature review, the field research, analysis of the data and finding outcomes, I am now able to propose an updated problematic framework. Hence, Figure 9 proposes an amended problematic. The above framework describes the socio-emotional dynamics within the family business in the form of a downward pressure exerted by the father over the succeeding generation (downward blue arrow) in transferring and adopting the socio-emotional wealth of the family business. That socio-emotional wealth takes the forms of family control and influence, identification of family members with the firm, binding Social ties, emotional attachment of family members and renewal of family bond to the firm through dynastic succession.

However, the downward transmission objective of the father is challenged by an upward identity conflict of the children (upward red arrow). The social identity conflicts take their sources from the challenges of role dualities, power relations, family politics and conflicting cultural identities. Those two conflicting parameters render the succession process challenging by creating constant emotional chaos within the family environment. Unless a appropriate solution is proposed and adopted by the family members, that chaos may be destructive to the succession process and to the family harmony at large.

4.3 Discussion of Findings

A summary of the above the data is collected and report findings of observations and interviews exercises. Now, we shall analyse the findings in relation to the theoretical perspective brought out from the literature review. Indeed, following the interviews, the literature is reviewed in light of the data gathered, hence, further insight is developed prior to approaching the final recommendations to be discussed in the action research family workshop.

4.3.1 Interconnectedness of the business and family environment

The first question of the interview required family members to confirm their perspective of their business as a family business organization and the reasons behind which they hold to that perspective. That test was important as the fundamentals of the research lie on the conceptual socio-emotional challenges of a family business organization, and therefore it was crucial to validate the context of the research. I had to ensure that the researcher and the family members were aligned on the essential characteristics which must be present to qualify their business as a family business. Their answers and description confirming stake ownership, essence and involvement (Chua et al, 1999, Sharma 2004) validated the contextual environment and allowed me to proceed further through the interviews. After defining and validating the contextual environment, I moved forward to validate the statement of Lee (2006) who noted that *'the business and the family are intimately connected'*; that theory was supported by all the children. The children related different happenings where office debates were carried out at home and where the discussions often destroyed the home atmosphere. The children's comments echoe Kepner's (1991) statement in Lee (2006) who observes that *one (business or family) cannot change without affecting the other'* (pp 175). Hence, it was noted that any change in the office socio- emotional

atmosphere would have a direct impact on the home atmosphere. My understanding of the reason behind that action and reaction construct between the family and the business, is borrowed from the role duality theory of Coghlan (2001). The respondents have stated that since they joined the family business, their roles have consequently increased. Beside being the legitimate children they are now also business executives, business heirs and often confidants of their parents. As pointed out by Coghlan, these role augmentations are often confusing, ambiguous and conflicting. The author pointed out that the management of political dynamics under these role changes is crucial in managing their personal and organizational needs. Applying Coghlan's theory to the family business would require a strong political entrepreneur's acumen in managing family emotional challenges from that of business challenges keeping in mind that both environments are connected, and hence the synergistic effect of both environment may further raise challenges.

The next socio-emotional issue emerging from the role duality challenges and the interconnectedness of both family and business environment is that of role identity conflict (Ashforth & Mael, 1989) where the different identities would provide '*conflicting normative standards*' (Hugenberg and Bodehausen 2004, p.234). The role identity conflict emerges from the social identity theory of Ashforth and Mael which stipulates that individuals classified themselves according to social categories which, however, may conflict between themselves.

The family business which was initially a nuclear family representing a social category has, since some years, evolved and has adopted different identities. Those identities were constructed due to the differing life experiences of the children. The daughter has spent several years studying and working in United Kingdom before coming back to Mauritius and joining the family business. The eldest son has also gone for international study, and is now back in the business and married to a South African resident. The youngest son, after completing his studies in United Kingdom, came back, married a local girl and joined the business as well.

Hence all the children have been raised within a specific family identity but also adopted different social identities in relation to the years they spent in foreign countries and/or through marriage. On the other side, the organizational identity has not evolved. It still holds the traditional organizational culture which was originally inherited from the former generation and preserved by the father. That traditional culture, through its socio-emotional

wealth, is being enforced downwards through succession to the next dynasty. Hence, the conflict of identity emerges when the new generation's identity overlaps with the parent and family business identity; the conflict is further amplified when the overlapping consists of divergent identities. Thereafter, the fact that both business and family are interconnected creates a dual impact of the challenges within both environments.

In light of the above argument, the extent to which social identity conflict challenges may amplify due to the interconnectedness of the family business is analysed. An analysis of the family and the impact of role dualities is even conducted. The contradictive factor observed during my research is that the perspective of interconnectedness is supported only by the younger generation. As claimed by the youngest son, *'I love my job and my family'* and *'maybe, I don't want to change this'*, i.e. the interconnectedness of both environments. The parent paradoxically showed a strong opposition towards that interconnectedness. They constantly enforced the segregation of those two environments. They fear that by acknowledging a connection between the two environments, the children would abuse of the privilege and group power of being family members and enter the dark side of management (Cennamo et al 2009; Wilmott 1997) in abusing their power relation's position. To avoid such situations, the parents have adopted an autocratic leadership style which gives an illusion that all parental socio-emotional feelings within the business environment are ignored and that family and non-family members have the same socio-emotional attention.

Therefore, going back to the rich picture it is denoted that the father, being part of his business succession plan wants to transmit the socio-emotional wealth comprising of family Control and Influence; Identification of family members with the firm; binding social ties; emotional attachment of family members; renewal of family bonds to the firm through dynastic succession to the next dynasty. However, the father's paternalistic leadership approach during that succession exercise and methods of segregating all emotions within the family business enterprise goes in the opposite direction. The process is hence missing the philosophical requirements of establishing a strong family emotional cohesion to cultivate the required attachment for the adoption of socio-emotional wealth.

4.3.2 Preservation of Harmony and Family ties

The research conducted by Morris et al (1997) over 209 family businesses observed harmony as an important pre-requisite for business succession. Vallejo (2008) converged towards the same perspective in claiming that nurturing harmony is a long-term orientation towards the survival of the organization. Hence, the perspective of the family members towards harmony was tested during the research. All the findings converged towards that importance of harmony in the family. The daughter/CEO who is more of a task-oriented executive initially did not rate the preservation of harmony as a priority. Her perspective supported the effectiveness and performance of managers including family members. However, when she was asked what would be her second priority, she still pointed to the preservation of family ties and reckons that managing both environments effectively is a pre-requisite for long-term survival and growth of the business. Hence, it was noted that the psychological pressure exerted on any family member to hold to the preservation of family harmony is a critical success factor for succession and long-term survival of the family business.

That philosophy of sacrifices recalled the observation of Steward (2003) where preservation of family ties may take precedence over business logic. The CEO, being frustrated by poor performances of family members still feels powerless in enforcing changes. This is an example of the social cost which the family members are prepared to incur for the preservation of family ties and harmony. The father/chairman is prepared to accept minor mistakes and compromise at certain level to preserve the harmony.

The mother's contribution to such philosophy claims that she holds too much to the family harmony that she prefers to compromise and avoid criticizing any wrong doings of the children due to the fear of destroying the fragile family harmony. Despite being capable to bring innovative ideas, the eldest brother avoids being involved in his sister's operations, in order to minimise management and relation clashes. He was even prepared to abandon his business unit to his younger brother to protect that 'breathing space' which he cherishes as a critical success factor for family harmony.

Hence, we noted that all the different examples which have been gathered through the research are social costs to the family business; all the different sacrifices that are being done with the perspective of preserving family harmony are also major opportunities for economic improvement within the business but which are being foregone to avoid any threat to the

family ties. After all, as observed by Anderson et al., (2005), *'Kinship ties are the strongest of strong ties'*.

However, the contradictive element to kinship is noted through the observation of Hall (2003) who claims that, proximity of living of siblings or cousins encourages the tightening of the relationship. My research tends to give contradictive outcome where 'breathing space' is highly valued to protect the family ties and prevent daily operational debates to affect family ties. Moris et al's research gap denoted a need in approaching the challenges in the transfer of social capital which in our research has been described as the transfer of socio-emotional wealth. Nordqvist (2015) emphasizes the need for *'exploration of the sources of harmony and conflict and establishing how such relational properties can be encouraged or mitigated...'* (p.256.). This particular issue is addressed in the action research workshop where joint recommendations have been proposed to attend the sources of harmony and mitigation of conflict.

4.3.3 Emotional challenges, Power and Politics surrounding Succession

After having gone through the extensive interviews and discussions with family members, I observed the formal business succession; i.e. the mere transfer of power and ownership from one leader to the other leader as the least important aspect of the succession exercise. Over and above that mere transfer of leadership resides the challenging task of the transfer of socio-emotional wealth to the assign successor (Berrone et al., 2012). The function of kinship with regards to the grooming of the successor holds an utmost place in the succession exercise (Aldrich & Cliff, 2003) and is more important than the transfer of power. Through the transmission of that socio-emotional wealth, resides the values and norms which the former generation wants to hand over to the next dynasty as part of the social exchange process. A misalignment in the understanding of the importance of socio-emotional wealth creates complex challenges in terms of conflicting objectives, creating emotional tension which may put the family harmony at risk and even threaten organisation survival in the long run. The daughter, who is a task-oriented successor, tends to concentrate on the organizational growth and performances. However, that business perspective as the dominant business philosophy contradicts the philosophy of the father/ chairman and other family business members who are simultaneously highly oriented people with regards to family and non-family relationship. Hence, socio relational challenges emerged between the siblings who

observed the sister as a hot tempered leader and who does not take into consideration the required compromises to preserve family ties. The father, on the other side, is sticking to his objective of getting the children to grasp the fundamentals of socio-emotional wealth as a prerequisite before assigning them more power in the management of their respective SBUs. Indeed, the element of power has been questioned through that exercise of succession. The emotional strain of the mother was witnessed; she had to abduct power and compromise her position for the benefit of her daughter and family harmony at large. The power of the successor, i.e. the CEO, is still contested by other family members. The eldest son claimed that despite his sister being the CEO of the family business, he managed to establish a direct line of reporting with his father for key decisional matters, bypassing the hierarchical reporting line to the sister. The youngest brother, who only recently joined the organization, reporting to his elder sister had socio-relational issues and started to openly challenge the sister's authority. To avoid a deterioration of the business family business environment, he succeeded in getting the father to create a new business unit with direct reporting line to the father/chairman similar to the eldest brother.

The assignment of power is a strong influencing factor within the succession exercise and when such power is contested, this may lead to a negative impact on family ties and harmony. This situation is different from a non-family business organization where the acceptance of hierarchical power and position by subordinates is enforced by management. Within a family business organisation, the interconnection between the family members, the business organization and the ultimate business harmony establishes a complex equation which always require compromise and mediation.

The exchange theory can partly answer the complexity of that succession exchange process. As observed by Sabatelli and Shehan (1993), the theory assumes that social structural patterns reflect above all the individual's economic motivations. Ruben (1998) further observed the interplay of the economic social factors within the family environment in describing the business model as a 'family economy' (P.312) where love, loyalty and pride are considered as important resources. Being part of that exchange constructs, it follows that passing the socio-emotional wealth from one dynasty to the other would be considered as an exchange which should be completed by an economic or social return.

Longmore and DeMaris (1997) elaborated on the feeling of anger or guilt for under or over-benefitted individuals respectively. That feeling was raised during the research, when the brothers expressed their anger towards their sister who according to them over benefitted from being appointed as CEO of the organization. The CEO on the other side, who initially started with the firm intention of managing the organization from a non-emotional perspective, was caught up feeling as an over-benefitted individual and realized that compromising and holding to the family harmony is still a priority. That compromise of the sister could be identified as an emotional cost (Michael-Tsabari and Lavee, 2008) that she prepared to forego for the benefit of being gratified by an emotional reward, which may fill the gap and appease the feeling of over-benefitted children. As the author pointed out, the fact that the two environments are interconnected, the investment and reward does not have to come from a single environment. Hence, the compromise towards the underperformance of some family members could be observed as an emotional cost within the business environment which the sister expects to offset against an emotional reward within the family environment.

4.3.4 Paternalistic leadership Style and Emotional Dissonance

The paternalistic leadership style of the chairman combining benevolence and authoritarianism was observed (Farh & Cheng 2000). This duality in leadership style often tends to reflect upon the father's personality as a 'benevolent dictator' (Mansur et al., 2017) enforcing the adoption of his life and business philosophies to the next generation. The father's benevolence, charisma/value base leadership is depicted in his actions whereby he showcases vision, inspiration, self-sacrifice with a high sense on integrity (Wanasika et al., 2011).

However within his patriarchal behaviour, he often as well projected the image of someone who sees emotion as a sign of weakness which family or non-family members can exploit for their self-interest. As such, he finds primordial to ignore the presence of such feelings by showing a total absence of emotion in the management of the business. Hence, he manages across paradoxes of working his social relations; shifting from cherishing family '*in-group solidarity*' and '*loyalty to the family clan*' (p 239) to a radical emotionless behaviour when comes the time to strengthen his patriarchal control. This observation reinforced the paternalism concept of Aycan (2006) who claimed that a paternalism style should compulsory

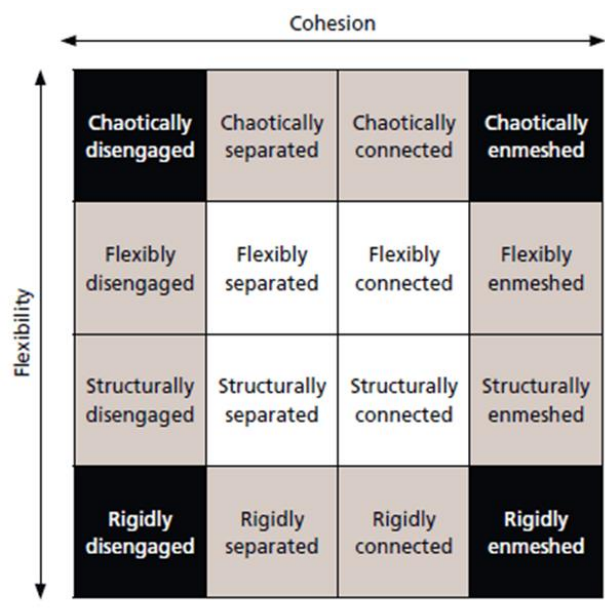
regroup 'care' and 'control'. Sinha (1990) denoted the same requirement towards a paternalistic leadership. The author emphasises on the 'twin requirements' for the leader to demonstrate compliance and harmony together with benevolence and authority.

In the light of that paradox and possible emotional confusion that this may project on the family members, the literature is extended following the first CAR. I approached the concept of emotional dissonance (Abraham, 1998b; Morris and Feldman, 1996; Zerbe, 2000), the construct of emotional dissonance, also called emotive dissonance, taking its sources from the emotional labour theory which observed that individuals control their emotions by displaying what they perceived as acceptable (Ashforth and Humphrey, 1993; Hochschild, 1983). There has not been any in-depth research on emotive dissonance in the family business yet (Labaki, Michael-Tsabari and Zachary 2010) but my observation of the father's emotional behaviour as chairman shows sign of emotive dissonance by restricting himself from showing any sign of compassion within the family business environment. The theory also applies to the other members of the family who are forced to overcome any feeling of anger or frustration within the business environment to preserve the family business harmony. The eldest brother supported this observation by claiming that at home there is no frontier and hence the latter can voice out his real feelings but in the business environment a prescribed emotional behaviour must be observed (Tagiuri and Davis 1996). Kepner's (1983) observation of emotional expression as inhibited and ritualized reminded the chairman/ father's continuous comparison of the family business as a '*sacred place of worship*' which needs to be respected and protected and where there is no tolerance for any profane behaviours including emotional feelings, which may be seen as a threat towards that philosophy. Affirmatively, Lansberg (1998) observes that open discussion on inheritance and succession could be sensitive discussion which may destroy family harmony, despite there is a definite resistance to the succession decision of the father/ chairman, the subject is never openly discussed within the family business.

To conclude, Labaki, Tsabari, & Zachary (2010), propose that researchers focus in developing an approach which would shed the light on sustainable, organizational, desired emotions and family desired emotions. The authors reckon that despite emotional communication has been scarcely studied, the few observations tend to converge towards positive relationships between the expression of emotions and family business performances. Mustakallio (2002)

observed the extent to which the communication of emotions is critical in the development, maintenance and change of relations. Gaelick et al (1985) claimed that an inability to communicating emotions is associated with conflicting relations, whereas emotional expression is associated with relationship satisfaction. Finally, the authors observed that the balance of family ties is highly dependent on the degree of emotional expressiveness within the family and that family should find its equilibrium between flexibility and cohesion.

Table 10 – The Circumplex Model – Olson 2000



For a further understanding of the evolution of emotion across the family business, Labaki et al (2010) proposed to observe the evolution of emotion across the family business life stage. As such, the authors propose different hypothesis by starting at the foundation level of the business where the founder would predominate the emotional dimensions of the business inherited from the previous dynasty. The second stage of the family business life span forecasts a wider diffusion of emotions across family members and sibling rivalries. This is the stage where the family and business norms dictates the level of emotional dissonance where family harmony remains the ultimate objective. The third and final stage leaves an open avenue to different scenarios ranging from consolidation, stability or deterioration of the environment. Future researchers can analyse the extent to which a lack in managing

emotional challenges is related to the failure of the family business organisation after the third generation.

I observe my family business as one which is currently on the second stage of the family business life stage. The father/ chairman adopted the founding emotional philosophies of his late father and now wishes to transmit same to the next dynasty. However, the changing equation is that the system now requires more effort with regards to positive emotional expression within the family as part of the strategy of transmitting that socio-emotional wealth factors.

4.4 Emergent Inquiry - Emotional Intelligence (EI)

After having covered the most relevant literature in relation to family business socio relational challenges and selected my main theoretical concept (SIT & SEW), completed the primary research and analysis of the research findings, there has been an apparent need for an emergent literature review on emotional support techniques to assist the existing emotional challenges within the family business environment.

Emotional intelligence offered interesting epistemological concepts and has thus been considered as a possible solution to attend the family business relational dynamics. Boyatzis (2008; 2013) define a positive emotional attractor (PEA) which equally acts as physiological positive influence on the nervous system of an individual which resulting in dominating positive emotions rather than negative ones. The author further states that the character of the individual under that state would be emotionally more extrovert, permanently questioning the status quo which would in turn improve his performance (Boyatzis and McKee, 2005; Boyatzis and Akrivou, 2006). This status would, according to the author, spread an emotional contagion and would hence positively influence the mood and behaviour of the immediate environment.

Challenges of family business in periods of succession are numerous. Their consequences may lead to an ultimate failure in the business succession process following individual, financial, process or contextual factors (De Massis et al.2008). However, as observed by the authors, relational factors have also been identified as critical elements impacting on the success of family business succession. The relational factors affect the interpersonal dynamics and may be sources of conflict. Unfortunately, it has been observed that seventy percent of family

businesses do not have any procedures to deal with conflict, while these conflicts are the greatest enemies of this business type model (Nasser, 2014).

Davis and Stern (1988) proposed four possible solutions in attending family challenges, namely; Intersystem boundary conditions, emotional containment, development of task infrastructures and processes and legitimisation structures.

While the authors observed an interrelation of those factors, for study and socio-emotional aspect, we shall focus on the emotional containment of the process. The critical success factor identified by the author is the development of internal processes which would ease the *'containment, confrontation and resolution of family problem'* (p217). Therefore, as a natural extension to my research problem on social emotional challenges within the family business, I have proposed the family members to approach and develop that internal process by maximising on the scope and benefit of mastering emotional intelligence.

Mayer et al, (2008) in The Annual Psychology journal made an interesting claim in relation to the benefit of higher EI. It was found that higher EI has positive correlations with better social relations with children, social interactions deviating from negative social norms. Within my family business context, that may imply that a better EI may bring a better acceptance of the socio-emotional wealth by the children and its critical requirements to succeed in adopting that philosophy. The research also denotes that EI drives better social relations for adults as well in terms of *'better self-perception of social ability and more successful interpersonal relationships'*.

That eventual achievement by the parents in the family business would improve their perception of their actual leadership and emotional skills in driving the succession of the business and the fundamental roles of emotions through that exercise. The EI subjects, as observed by the authors, would reflect a *'pleasant, socially skilled and empathic'* image in their surroundings and hence appease conflict and disruptive tensions which may evolve in the absence of emotions. A high EI has also proven to improve a better relationship within the family environment by promoting the intimacy between partners.

Table 11 – Summary of Selected trends in emotional intelligence outcome studies

General effect	EI measures	Representative studies*
1. Better social relations for children. Among children and adolescents, EI positively correlates with good social relations and negatively correlates with social deviance, measured both in and out of school as reported by children themselves, their family members, and their teachers.	DANVA ER Q-Sort EKT ESK MSCEIT	<ul style="list-style-type: none"> • Denham et al. (2003) • Eisenberg et al. (2000) • Fine et al. (2003) • Izard et al. (2001)
2. Better social relations for adults. Among adults, higher EI leads to greater self-perception of social competence and less use of destructive interpersonal strategies.	EARS MEIS MSCEIT	<ul style="list-style-type: none"> • Brackett et al. (2006) • Lopes et al. (2004)
3. High-EI individuals are perceived more positively by others. Others perceive high-EI individuals as more pleasant to be around, more empathic, and more socially adroit than those low in EI.	MSCEIT	<ul style="list-style-type: none"> • Brackett et al. (2006) • Lopes et al. (2004) • Lopes et al. (2005)
4. Better family and intimate relationships. EI is correlated with some aspects of family and intimate relationships as reported by self and others.	DANVA-2 MEIS MSCEIT	<ul style="list-style-type: none"> • Brackett et al. (2005) • Carton et al. (1999)
5. Better academic achievement. EI is correlated with higher academic achievement as reported by teachers, but generally not with higher grades once IQ is taken into account.	LEAS MSCEIT	<ul style="list-style-type: none"> • Barchard (2003) • Izard et al. (2001) • O'Connor & Little (2003)
6. Better social relations during work performance and in negotiations. EI is correlated with more positive performance outcomes and negotiation outcomes in the laboratory and with more success at work, according to some preliminary research.	DANVA JACBART MEIS MSCEIT	<ul style="list-style-type: none"> • Côté & Miners (2006) • Elfenbein et al. (2007) • Rubin et al. 2005
7. Better psychological well-being. EI is correlated with greater life satisfaction and self-esteem and lower ratings of depression; EI also is correlated inversely with some negative physical health behaviors, but this has not yet been found as a strong set of relationships.	MSCEIT LEAS	<ul style="list-style-type: none"> • Bastian et al. (2005) • Gohm et al. (2005) • Matthews et al. (2006)

4.4.1 Overview of Emotional Intelligence (EI) concepts

To understand emotional intelligence, one should first understand the meaning of emotions and intelligence as two different constructs.

Mayer et al (2008) identifies emotion as *'an integrated feeling state involving physiological changes, motor-preparedness, cognitions about action, and inner experiences that emerges from an appraisal of the self or situation'* while intelligence is synonymous to a *'... mental ability (or set of mental abilities) that permit the recognition, learning, memory for, and capacity to reason about a particular form of information, such as verbal information'*.

Hence the author summarizes both constructs; emotion and intelligence as:

'..the ability to carry out accurate reasoning about emotions and the ability to use emotions and emotional knowledge to enhance thought'.

Coleman and Andrew (2008) joined Mayer et al definition in observing EI as the ability to identify one's own and other people's emotions, to be able to evaluate, analyse and label those different emotions and thereafter to use the information derived from the above exercise to guide thinking and behaviour. Mayer (2008) goes further in observing EI as the ability to join intelligence, empathy and emotions with the objective of improving the synergy of thoughts and a better understanding of interpersonal dynamics. It was observed that the

main problem in the socio-emotional challenges of my family business resulted from the interpersonal dynamics which projected conflicting emotional perspectives, thus creating an emotional confusion. Therefore, EI can be relied on to attend to those interpersonal, emotional and relational challenges.

According to Goleman (1998a; 1998b), achieving emotional competencies can be acquired and improved through learning. However, the author also claimed that the intrinsic emotional intelligence by birth of an individual certainly influences the extent to which that individual may acquire and improve his emotional competencies.

EI carries three main models namely the *Ability model*, the *mixed model* and the *Trait model*. Each model tends to approach specific constructs, even if they may seem to overlap under some circumstances.

4.4.1.1 The Ability model

Mayer et al (2001) defined the Ability model as the '*ability to perceive emotion, integrate emotion to facilitate thought, understand emotions and to regulate emotions to promote personal growth*'. That definition was further enlarged to encompass "*the capacity to reason about emotions and to enhance thinking*"; with the ultimate objective of reaching emotional and intellectual growth (Mayer et al, 2004). The authors framed the basics of the ability model within the four pillars of *perceiving emotions, using emotions, understanding emotions and managing emotions*. *Perceiving emotions* is the first exercise which is sine qua non in unfolding the other emotional tools and consists of the ability to observe and denote emotions within our contextual environment. *Using emotions* is the ability to reach for our set objectives by arousing different emotional moods relevant to that purpose. Here, an empathetical stance, a paternalistic speech or appealing to a self-discipline stance are different emotional tools that can be used to reach a specific objective. *Understanding emotions* works in an opposite direction from that of using emotions. Within that circumstance, the concept requires an understanding of emotions from the perspective of the recipient and comprehend the emotional construct that is evolving from our counterpart. Understanding emotions would differ from perceiving emotions in the sense that it would focus more on the evolution of the emotion over time, instead of perceiving an emotional stance at a specific time.

Managing emotions is the ability to make the best use of that emotional mastery to achieve set objectives. It is to be observed that the emotional mastery implies not only other's emotions but also overcoming our own negative emotions which can be much more challenging towards achieving our ultimate objective.

Hence, the ability model focuses on the self-understanding and reflection of emotions and to what extent one could become a better decision maker in mastering the emotional intelligence (Lyubomirsky et al. 2005).

4.4.1.2 The mixed model

The mixed model defines EI as encompassing various competencies in improving leadership, namely; *self-awareness* which is similar to the ability of 'perceiving emotions'; *self-regulation* in the management of destructive emotional stances; social skill as the ability to influence the behaviour of our surrounding towards a set objective; *empathy*, as the ability to consider and understand people's emotional stance during decision making and finally the role of *motivation* as the driving factor in achieving any goal. The mixed model overlaps extensively the ability model and extended in encompassing the motivational and empathetical factors which are on their own considered as critical emotional competencies.

4.4.1.3 The trait model

The trait-based model is conceptually different from the ability-based model of Goleman (1998) Trait EI is "*a constellation of emotional self-perceptions located at the lower levels of personality.*" The fundamental differences of the trait-based model reside in the behavioural dispositions and self-perceptions of the subject in opposition to the ability theory, which focuses on the current abilities of the subject. The trait model should not be investigated in isolation but within a personality framework (Petrides and Furnham, 2001), hence the importance of the self-inventory report of the personality. The below framework shows the different trait factors which Petrides and colleagues selected to be part of the self-inventory exercise used in an adult sampling.

Table 12 - Trait Emotional Intelligence – Petrides and Furnham 2001

Facet	High Scorers Perceive Themselves as...
Adaptability	Flexible and willing to adapt to new conditions
Assertiveness	Forthright, frank, and willing to stand up for their rights
Emotion perception (self and others)	Clear about their own and other people's feelings
Emotion expression	Capable of communicating their feelings to others
Emotion management (others)	Capable of influencing other people's feelings
Emotion regulation	Capable of controlling their emotions
Impulsiveness (low)	Reflective and less likely to give in to their urges
Relationships	Capable of having fulfilling personal relationships
Self-esteem	Successful and self-confident
Self-motivation	Driven and unlikely to give up in the face of adversity
Social awareness	Accomplished networkers with excellent social skills
Stress management	Capable of withstanding pressure and regulating stress
Trait empathy	Capable of taking someone else's perspective
Trait happiness	Cheerful and satisfied with their lives
Trait optimism	Confident and likely to "look on the bright side" of life

Hence, assessing the individual trait personality of each family member is an important exercise in the full emotional intelligence training program. That personality/ trait assessment is evaluated jointly with Kilmann and Thomas' (1978) conflict personality model.

Conflict has been found to be a recurrent outcome of the emotional confusion present within the family business. However, as observed by Kilmann and Thomas, the influencing variable of handling the conflict would be the trait personality of each family member. The authors defined two trait dimensions namely cooperation (attempting to satisfy the other party's concern) or assertiveness (attempting to satisfy one's own concerns). The positioning of the family members' trait personalities across the model would be supported by the questionnaire (annex) which the family members would complete, revealing their trait personality. Those questionnaire compete, collaborate, compromise, avoid and accommodate towards conflict management (Appendix 3). The conflict management style assessment would be an important exercise which enables the mind transformation coach

(Appendix 4) to define a personal action plan in assisting the family member in mastering the emotional intelligence concepts.

4.5 Conclusion

This chapter presented my appreciation of the data collected during my research exercise. After having set the scene with regards to my research approach, its limits and the extent to which I ensured viability of my data collected, I elaborated on the critical observation of the research. Interconnectedness of the family and business environment, preservation of harmony and finally the emotional tension present when two schools of thought work side by side have been the most common observation noted during the CAR. I explained my perspective on the findings and the main source of the tension as a lack of emotional cohesion within the family business environment. The different individual identities, style and philosophies of management and their different appreciations of the succession exercise have been sources of recurrent conflict in the family business environment. The conflicts further intensified the emotional confusion and tension with an ultimate threat on family and business harmony. Hence, the management of emotion is observed as the critical success factor in approaching the socio emotional challenges of a family business organisation within a period of succession. As the narrative of the thesis approaches chapter five which explores the implementation of a strategy, an emergent inquiry with regards to a possible solution arise in the form of emotional intelligence development by family members. Hence, the different supports which could be offered by this epistemological construct have been evaluated as part of the final recommendations

CHAPTER 5

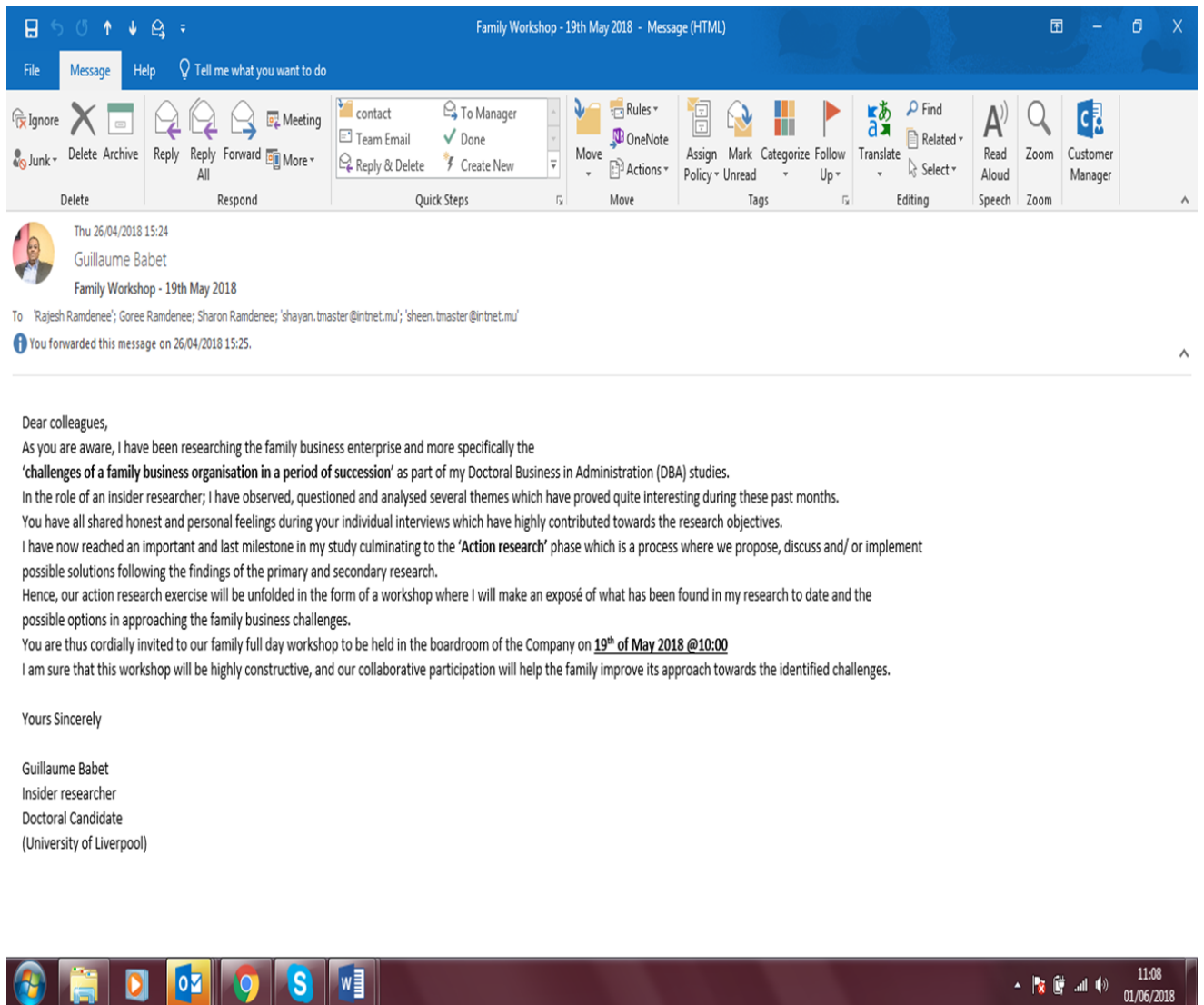
ACTION RESEARCH AND RECOMMENDATIONS

5.0 Introduction

Chapter five discusses the recommendations which propose in assisting the family members mediating across the complex socio-emotional environment in which they evolved. It has been observed that emotional gap and/or emotional confusion exists within the family socio relationship. Emotional gap exists in the sense that the parents initially wanted to segregate the management of the business and the management of the family hence creating an emotional dissonance between the two environments. This in turn creates an emotional confusion within the family members as from the children's perspective, the two environments overlap and emotions between the two environments cannot be segregated. Those emotional challenges prevented a smooth transmission of the socio-emotional wealth by the former dynasty and a proper adoption and cultivation of that wealth by the successor. Hence, it is observed that Emotional intelligence (EI) acumen would be the most appropriate epistemological construct which could be used to approach the family business emotional challenges. Apart from supporting the transfer process of the socio-emotional wealth an EI acumen also assists in limiting the threat imposed by the socio identity factors namely; role dualities, power relations, identity conflicts and negative organisational conflicts.

EI proposed several theoretical models namely the trait model, the ability model and mixed model which could be used by the different family members to mediate across the complex socio-emotional challenges. To assess their readiness to embark on a full training across emotional intelligence, a full day action research workshop (Appendix 2) was conducted in the organisation's board room on Saturday 19th of May to inculcate to the family members the new emotional philosophy. Thereafter, a follow up of the workshop enabled an assessment of their take-away from that workshop and their commitment to the adoption of the emotional intelligence philosophy across the family social relationships.

Figure 13 - Mail invitation to family members for the full day family workshop



5.1 The need for a change in emotional perspective behaviour

Kim and Kankanhalli (2009) discussed the cost perspective of a change process with regards to the possibility of maintaining a status quo. The fundamental theoretical concept of attempting to a change, according to the authors, relies firstly on the assessment of the financial and social cost of that change. Thereafter, one should assess the recipient's behaviour to the change and any obligation for maintaining the status quo resulting from the latest assessment. Despite the problems depicted, my observation of the challenging emotional tension present within the family business and the recommendations established, I had to evaluate the social cost of the change and against maintaining a status quo.

As we have seen earlier, family business survival is very challenging, pressurized by emotional dynamics. Over and above the succession exercise which is already a challenging task in relation to the successful transfer of emotional wealth, my nuclear family is also in an expansion stage; i.e. the two sons are recently married and are both already fathers of new born kids. Hence, we may assume that the perspective of emotional dynamics will be further amplified in the coming years with extended family member's influences (Daughters in law and relatives) on the business as well as the new objectives which the sons may set in relation to their new nuclear family. After observing the actual status and forecasting the future of the family and survival risk of the organisation, I concluded that a family personal emotional intelligence development plan was critical in helping them to navigate across their actual challenges as well as the future challenges which will naturally emerge as a result of an extended family.

5.2 The Workshop Report

5.2.1 Before the Workshop

All family members were invited three weeks ahead of the workshop to participate in a full day workshop which would be held on Saturday 19th of May 2018 in the boardroom of the company (Annex mail invitation).

During their individual interviews from January, I reassured them that the data collected during the exercise would be strictly confidential and would not even be discussed with other members of the family. Hence, despite sending a formal mail invitation, I felt it was important to have a personal discussion with each member of the family to explain the timings and objectives behind the workshop. They had to be reassured that we would be discussing the findings with the overall analysis of the situation without entering any personal data collected during the interview processes. Indeed, I noted after my discussion that the reassurance was important and that some family members were initially embarrassed by that workshop. They were apprehending sensitive or emotional debates which could weaken their power position in the family. I reassured them that as a moderator, I would not allow any deviation from the objective of the workshop which is; the presentation of the findings and a commitment in establishing the way forward towards approaching the problem and not questioning the individual findings.

After the personal discussions, they were all looking forward to a fruitful journey which would eventually help them in alleviating the burden of socio-emotional challenges, which continuously deteriorate the family business environment. It was important and very convenient to run that workshop on a Saturday. Firstly, due to the intimacy of the office compound, Saturday being a non-working day, the workshop could be run in strict confidentiality and the office board room would offer the required intimacy without other employees walking in between offices. Secondly, knowing the sensitivity and apprehension of the topics to be presented and discussed, Saturday usually being a day off, alleviated the usual monotonous office tension and stresses and would help to instil an appropriate atmosphere for a pro-active discussion. I also insisted that all family members dress up in a very casual way which would contribute to that peaceful and relaxing atmosphere. They all adhered to the dress code and came in shorts, tongs and T-shirts. Seeing the chairman and family members dressed very casually in the organisation's board room, a place where they used to run meetings very formally dressed established the required atmosphere and the mood was very relaxing and positive to start the day after some coffee and a light breakfast. In fact, I succeeded through that dressing code and atmosphere set up in enabling a first overlap of the business and the family. In getting to the office with those outfit, they observe themselves as members of a family and not only as employees. The situation was propitious to introduce the family members the concept of interconnectedness and overlapping of the family and business environment.

5.2.2 During the Workshop

The workshop started with a presentation of my research to date. I explained to them that the objective of the action research is not only for the contribution of knowledge from an academic perspective, but to also help the family to approach the sensitive socio-emotional challenges which may threaten their long-term survival. My introduction of the family business organisation and the socio-emotional challenges of the family business sets the base of the fundamental overlapping of the business and the family. The father and the mother who initially (as depicted in the interview) had the firm belief that the family and the business environment should be segregated and were establishing an emotional dissonant philosophy were surprised to learn the extent of that interconnectedness between both environment supported by the different researcher's article. Thereafter, the concept of Socio-emotional Wealth of Beronne et al. (2012) was introduced to the children to enable them to understand

the complex social transmission which their parents are aspiring in passing to them. I insisted on the fact that they need to understand the concept of socio-emotional wealth so that trust can be enhanced between the two generations before they can benefit from any additional power and access to other family wealth. The parents were really surprised to note that the values and norms which they were struggling to transfer to the children were already documented academically as socio-emotional wealth (Beronne et al 2010). After an in-depth explanation of that concept, they were confident that they will be supported with technical tools to enable that transfer and adoption process. I further discussed my findings following the individual interviews which was conducted in early January along with my appreciation of the level of their mindfulness towards the five pillars of the socio-emotional wealth namely; family control and influence, identification of family members with the firm, binding social ties, emotional attachment of family members and renewal of family bonds to the firm through dynastic succession. I explained to the family that at the time when I assessed the socio-emotional wealth transmission effectiveness, I noted room for improvement within the 'social ties' and 'emotional attachment of family members'. I focused on those two negative performances by extending on the consequences of such weakness across two family business organisations, namely; former Happy World Foods (Local enterprise) and the well-known multinational Ambani group (Indian origin) where family social challenges (with a focus on social ties) have hugely contributed to the downfall of the company at a time when they had enormous growth potential. I insisted on the fact that sibling harmonious social relationship is a critical success factor in the transmission of socio-emotional wealth and may even be a key decisional factor for the final legal transmission of the business to the next generation. Indeed, the final element of the Socio-emotional wealth, i.e. *'Renewal of family bonds to the firm through dynastic succession'* has been noted as a question mark as it would highly depend on the successful improvement of *'family social ties'* and *'emotional attachment'*.

I ended my presentation of that section on a more positive note by emphasising on the fact they are all positively adopting the three other elements of the socio-emotional wealth, i.e. *'Family control and influence'*, *'Identification of family members with the firm'*, hence it would not take them much to succeed in using the appropriate tools to help them improve *'family ties'* and *'emotional attachment of family members'*.

5.2.3 After the Workshop

The workshop ended with a friendly collation; an opportunity for everyone to debrief on their appreciation and take-away of the workshop and future commitment. While the parents seemed to be more accommodating towards the learning outcome, the children seem emotionally drained. After having run some personal talks with each of them, I noted that the workshop has had an emotional impact on their self-consciousness. Through the different topics covered they have suddenly noted that they were not immune from conflicts and threat to the survival of the family business organisation. The symptoms depicted in terms of weak family ties and lack of emotional attachment, coupled with the challenges of social identity (role dualities, identity conflict, power relation and negative organisational politics) were all converging towards a threat to the long-term survival of the organisation. Before leaving, each family member was given a pack-file which we named 'Family Survival Kit'.

That pack-file comprised of:

The presentation slides

A quick base of reference of the whole research.

The problem definition, the objective and priority of the parents in transferring the socio-emotional wealth to the next generation; the assessment of that transmission done during the interview and the findings thereupon. The contradicting factors in terms of role duality, social identity conflict, power relation and negative organisation politics which endanger that socio-emotional wealth transmission with a specific tension on family ties and emotional attachment.

The required readings

After having gone through an introduction of the articles, I requested the family members to read the prescribed articles thoroughly to understand the triggering factors influencing the socio-emotional wealth transfer process and its eventual acceptance by the next dynasty, as well as the opposing social forces refraining complete acceptance and adoption of that emotional wealth.

Exploring Emotional Intelligence as a Line of development (An Integral Stage Development Model) - Kirk Leslie – Journal of Integral Theory and Practice, pp. 74-85

The article focused on the basics of emotional intelligence as an important tool towards personal development, including the measurement of the emotional skills, discussion on the different types of emotional intelligence ranging from the traits model emotional intelligence, to the ability model. It also includes up to the seven stages development affective line model of emotional intelligence which the author regrouped from models of Mayer and Salovey (1997), Mayer et al. (2004) and Goleman (1995). The interesting claim of that article on the concluding comments from Mayer et al (2007, p 525) elaborated on the different positive results of an improved emotional intelligence. These claims struck the family members as they proposed better socio relational factors across family members as well as improvement in work performance. I used that article to show to the family members the ultimate outcome in mastering emotional intelligence and created a motivational outcome from the article for further development.

Emotional Intelligence in Family Firms: Its impact on interpersonal dynamics in the family, business and ownership systems - Gozalo Gomez Betancourt et al. 2014

After introducing the basics of emotional intelligence through Leslie's article, I extended further on the concept of emotional intelligence and its impact on interpersonal dynamics. The research has depicted socio relational challenges threatening the smooth transmission and adoption of the socio-emotional wealth with a focus on kinship and emotional attachment of family members. Hence, the article helped in showing the family members the extent to which emotions influence judgement and decision making. Judgement and decisions taken in family business by family members impacting on family members often resulted in emotional construct due to that interpersonal dynamics created by the overlapping of the business and the family. The article triggers different techniques of emotional intelligence with a view of positively influencing the decision by forecasting the emotional consequences that such decision or judgement can create.

Vision, Leadership and Emotional intelligence transforming family business. Boyatziz and Soler (2012)

That article of Boyatziz and Soler was selected as it shows the result of an emotionally intelligent family. Statistics showed that family business survival became very challenging beyond the third generation, yet that article also describes how two fifth-generation family members succeeded in developing an emotional contagion among other family members in driving the business successfully through emotional and social intelligence. The shared vision was created across emotional intelligence, social intelligence and cognitive competencies and resonant relationship took the leadership over dissonant relationship. Indeed, after the workshop, I noted that the article inspired the eldest children of the family in taking the lead to work in improving the siblings' relationships. After the workshop, the parents signed off, but the three children sat together and started debriefing on their situation and the emotional tension present. Our discussion on Boyatziz's article triggered them to understand that mastering the EI individually would be the start of understanding emotions, but not an end in itself. They would still need to manage and apply that EI across their daily business life to create that emotional contagion which their counterparts may be missing.

Emotional ownership: The next Generation's Relationship with the Family Firm - Asa Bjornberg and Nigel Nicholson - Family Business review 2012 (P 374-390)

The article of Bjornberg and Nicholson was selected with the objective of inculcating to the new generation the perspective of emotional ownership, which is a critical success factor in sustaining the family business in the long term. The authors observed that while some degree of emotional ownership is important for long term survival of the family firm, it would not suffice without a strong attachment or identification to the organization. Hence, the article observes emotional ownership as the outcome and requirement of the next generation to have a strong attachment and identification to the family business. This hypothesis re-iterates the importance of a successful transfer of the socio-emotional wealth to the next generation as a gage for survival.

Emotional Returns and Emotional Costs in Privately held family business: Advancing Traditional Business valuation - Joseph H. Astrachan, Peter Jaskiewicz - Family Business Review no 2 June 2008

One of the emotional confusions that has been noted between the children and the parents was due to a lack of understanding of the parent's emotional attachment to the business. Hence, the article of Astrachan and Jaskiewicz helped them to understand the assessment of the business value from their parents' perspective. The authors observed that a family business from an owner's perspective is not assessed only in terms of financial value but also from an emotional perspective. As such, the value formula would be the discounted sum of all financial benefits added to the net emotional return; i.e. emotional return minus emotional cost. That article helped me in teaching the family members that the value of a family from an owner's perspective is largely influenced by emotional return and emotional cost. Hence, any failure in adopting the socio-emotional wealth or a deterioration of the socio relational factors would increase that emotional cost and as a result, decrease the value of the business from the owner's (father) perspective. An ultimate increase in such cost may even lead the former generation to review the succession plan, including the possibility of selling out the business to an external non-family enterprise.

An assessment of their take-away from the workshop

Before we ended the workshop, it was important to assess the family members' assimilation of the different topics covered. The extent to which they have grasped the basic requirement of emotional intelligence as the main psychological tool enabling them to approach the socio-emotional challenges observed during the research. I circulated an evaluation sheet and tried to get them to recall the different topics covered without consulting the slides and notes of the workshop. The result was amazing. Despite it being the first time they were introduced to such concepts, they managed to report on the basics of the whole workshop. The key concepts of Socio-emotional wealth, the challenges of the social identity theory were retained, and emotional intelligence acumen were recognised as being the critical tool to support their approach towards the family-business relationship challenges.

5.2.4 Follow up of the workshop

Two weeks following the workshop, I had a post workshop session with each family member to discuss their eventual commitment to attend the challenges depicted during the research and discussed during the workshop. They were reminded that the approach in attending the different challenges identified will certainly be a mix of individual and group effort. As such, I asked them to reflect on four challenges ranging among Role duality, Social Identity conflict,

Power relation and Organisational politics. They would select four different issues across those challenges and make a proposal of how they would approach the problem. Having already identified some problems as wicked problem, acknowledging the social complexity in attending the issues, I supported them in triggering realistic approaches by proposing four different possibilities to categorize the problems. I started with the least complex proposition with leading questions such as *'I will solve the problem by...'*, *'I will approach the problem by trying to'*, and thereafter triggering a more complex approach towards *'I would require further assistance from a professional in approaching the problem because'*, and finally driving them to identify any wicked problem and explain the reason of that complexity and triggering their limit towards approaching that specific issue. Hence *'I take cognizance of the problem and while it seems very difficult to solve because, nevertheless, I will further inquire about the tools in attending or mediating across such challenge'*.

5.2.4.1 The family commitment

The Mother

Role duality was identified as the easiest problem to attend and she proposed in the short term to refrain from discussing work problems within the home/ family environment and identifies the consequences in *'spoiling the family atmosphere'*.

(b) **Power relation** was identified as the next challenge. Despite the father holding the full decisional power in the business, the mother is perceived as the strongest influencer in decision making. Hence, that position deteriorates the relationship between herself and the children as they all hold directorship of their business unit but feel a lack in decisional power, which is held by the father and influenced by the mother. That challenge will be approached by requesting the father to clarify decisional power among family members and commit to decisional hierarchy in the business.

(c) **Social identity conflict** was identified as the third challenging problem. She noted that her children's personalities have evolved during the past years they have studied in foreign countries, including their cultural identities, norms and behaviours which are now in conflict with her own identity. According to her, that social identity conflict is the reason for the recurrent diverging opinions, resulting in the practice of negative organisation politics within the business environment. This consequence has a negative emotional impact on her

psychology as the overlapping of both business and family environment intensifies the emotional tensions within both atmosphere.

She felt that as she is approaching the sixties, the love of her children is more important than office politics, norms and culture. Therefore, she has set as a priority, to reconquer her children's love and consolidate her family ties. To achieve that aim, she would request in the short term the service of a psychologist to accompany her in her endeavours. She is also planning her pre-retirement within the next two years, to leave the floor to the children and concentrate on the unique role of a mother.

(d) As an extension to the above challenge, the mother observed the **social identity conflict** to be the most complex challenge to approach. Planning her retirement seems the only solution in solving the issue or at least mediating the problem. When we discussed, I wanted to understand the reason behind categorising that challenge as the most difficult one as retirement seems to be an easy solution to solving that problem. The explanation was very interesting as well as relevant. Planning an early retirement from a business which she started together with her husband thirty-seven years ago and where she expected to work as long as possible is not an easy decision. The emotional ownership is at its peak and planning to separate from that environment is emotionally loaded. We decided that we should approach that eventual decision collectively. I advised her to think about her post retirement, to plan her post professional responsibilities and hobbies. It is essential for her to see her retirement not as a forced departure but as an opportunity to support her family differently. The two sons will in some few months both become fathers. So, taking care of her grandchildren will be another pleasant task that she is looking forward to while simultaneously planning an eventual part time business as wedding planner for foreigners looking to celebrate their wedding on our beautiful island. Once she will be emotionally prepared to make the final steps, then we shall start approaching the official handling over of her responsibilities.

The Father

Negative organisation politics have been identified as the easiest problem which the father can eliminate. The latter is committed to uncover any possible hidden agenda of any family members. As the father and chairman of the company, he will ensure that the family succession's objectives are set transparently and adhered to.

After the workshop, the patriarch finally recognised the **duality** and overlapping of both family and business environments which he initially observed as two emotionally autonomous entities. He intends to further develop the required expertise to manage this duality.

The complexities of **Role dualities** have again been cited here as he further takes cognisance of his roles as father, chairman and husband within overlapping environments. As we discussed about the mother's role complexity and her plan to retire, the father recognised that he would need to accompany her emotionally through that exercise after all the years that they have been working together for the company. So, he expresses his need to be accompanied by a professional to master the critical acumen of emotional intelligence as a critical tool before approaching the different emotional challenges.

Social identity conflict is observed as a wicked problem by the father. He recognises that his children's personalities evolved during the years spent far from their nuclear family. Their norms and individual culture have largely been influenced and trying to change their new mind-set will create further emotional tensions. As such, he expects that the emotional intelligence acumen would help him to observe the challenges from the perspective of the children and develop relevant approach to these challenges within a mutual understanding atmosphere.

The Children Group Commitment

The Youngest son

Social identity conflict was identified as the easiest challenge to approach from his perspective. He noted that despite the years spent studying in England, his recent married life and the organisational culture, he is able to manage across the requirements of the different norms and culture imposed by these different environments. Hence, he is confident that with the help of emotional intelligence, he will easily overcome any identity conflicts raised by the imported culture and will be able to respond accordingly.

Negative organisational Politics have been observed as the second easiest resolvable challenges. In fact, one of the observed weaknesses of the youngest son is his introvert personality. He seems to constantly retain his emotion. However, we have observed in some circumstances that the latter has a sudden over emotional reaction. Hence, when he observes

negative family politics, he tends to show an insensitiveness as if he is immunized from such practices, but he is in reality hurt by such negative practices and can at any time react aggressively to them. He has now realised that he shall not retain his emotions and that he shall be more extrovert in talking openly to family members during conflicting situations thus avoiding an accumulation of stress and thereafter an overreaction to conflicts.

The youngest son observed **power relation** as a challenging task to overcome. By his introvert personality and young age, he finds it difficult to compete against other members of the family when claiming a share of voice and decisional power. He noted that he will need a professional who will act as a mediator between himself and his parents to clarify his position within the business and establish a sense of belonging through more power and decisional responsibilities. In conclusion, he was looking for a boundary manager (Fisher, 2000); someone who will mediate between both environments' facilitating communication, appeasing conflicts and taking the responsibility of implementing tasks which may be emotionally loaded for any family members. It came to my realisation that he was in fact identifying myself and requesting my support to mediate between the two generations. I tried to further understand the reason of that subtle request and discovered that he found myself as someone having a moral compass (Burnes, 2009) with an ethical stance. He identifies me as a non-family member who will neither abuse power nor make use of office politics for a personal interest. Hence my expertise in 'navigating' (Palmer and Dunford 2008, p. 22) between family challenges and organisational requirements has established my personality as a role model. However, I need to acknowledge that this role is easier to hold due to a non-blood relationship with the family members, hence allowing a limited emotional impact following family business decisions.

Role Duality is the wicked problem observed by the youngest son. He recognized that he would not be able to overcome that overlapping environment. He fears that his father will always see him as a child and the youngest son of the family, never as an executive manager of the business who is capable of assuming the highest role in the organisation just as a non-family member. This observation strikes me as it is drastically different from that of the other siblings who have a contrary perspective of their father upon their role. Indeed, the other siblings observed their father as being emotionally dissonant and seeing them more as employees, forcing a segregation of environment. This leads to conclude that the youngest

son is suffering from an inferiority complex of inferiority in the business as the youngest son who is not being assigned executive power to the same level of his siblings.

No commitment were taken by the daughter and the eldest son who opted for the completion of the emotional intelligence grooming before discussing about an emotional commitment.

5.3 Family Personal Development Programme (2019)

The workshop presentation and discussions covered the basic approach to the problem. The assessment of the family member's assimilation on the workshop's insights was positive. Their proposition in attending the issues was promising. Yet, it was agreed that for the family to reap a real success in the long term and full application of EI in every sphere of the business, a formal personal development program needed to be established.

With the support of Mr Bundhun, the mind transformation specialist, a detailed program has been established. The training covers three spheres;

Firstly, a focus on emotional intelligence through a self-awareness programme. Secondly, the extension of that self-awareness programme into a family council formal structure to discuss further about the overlapping family and business challenges. The training ends with a formal development program in 'Leading the businesses' from a family leadership perspective led by INSEAD.

5.3.1 Leading Self - 1 Workshop

5.3.1.1 *Discovering the Big 5*

Leading self will be a full day workshop designed as a self-awareness workshop. The main objective of the workshop is to enable the family members to take cognisance of their own traits, personalities and attitudes as well as that of their family member counterparts. The programme covers the big five personality theory and the facet five theory. The 'big five' model is an essential concept which has been designed to observe key individual personalities, namely: extraversion, neuroticism, agreeableness, conscientiousness and openness (John, Naumann, & Soto, 2008; Markon et al., 2005). While the Big five's objective is to shed light on the dominant personalities of an individual, it does not give any explanation for that presence. Hence, the role of the facets theory or CBT5 in explaining the trait variations and its influences on the individual personalities (Denissen & Penke, 2008; Nettle, 2006, 2007).

5.3.1.2 Uncovering the hidden facts and enabling communication

The development programme also covers the Johari's window concept, which was introduced during the family workshop. That objective behind Johari's theory is to uncover the hidden facets of the family member's behaviours which influence the communication process. As observed by Verklan (2007), when feelings are kept hidden, we tend to send out faulty communications that are thereafter wrongly perceived by others due to incomprehension or its illogical stance. A better insight on the Johari concept would entrust the family members to approach the 'hidden', 'blind' and 'unknown' facets of their personality to improve the communication process and hence reduce the threat of emotional tension caused by miscommunication.

To support the Johari concept, the Neuro Linguistic programming concept is introduced to the family members. The Neuro linguistic claims that behaviours are influenced by neurological processes (Neuro) which are thereafter unfolded through language and communication (Linguistic). The 'programming' responsibility is the organizing of these different factors to drive a desired outcome. Hence, it is an interesting tool which focuses on a conscious management of one's own behaviour and communication processes by improving the 'rapport skills' (Grinder & Bandler, 1976, p. 14) towards a final objective.

5.3.1.3 Team mapping and facet 5 / Conflict Management

The team mapping training handles the conflict management style (Kilmann and Thomas 1978) in alignment with the 'facet five' individual personalities. One key aspect of that training is the assessment of each family member conflict management style through a questionnaire design (Annex) and thereafter triggers the participant to discover his/her conflict management style among competing, collaborating, compromising, avoiding and accommodating.

These conflict styles are the outcome of the degree of assertiveness and cooperativeness held by the subject. These factors of 'assertiveness' and 'cooperativeness' can further be analysed through the big five facets of personalities under the circumstances that the family member cherish a change in his/her conflict management style.

5.3.1.4 Circle of trust

The initial action research depicts fragile family ties and a weak emotional attachment between family members. That observation denotes that family members are not all

regrouped in the same circle of trust. The differences caused by recurrent emotional tensions and conflicts imply that each family member had its own circle of trust, often with friends, relatives, confident or influences outside the nuclear family. The objective of the mind transformation programme should positively result in the creation of a circle of trust which, on the first hand, regroup only the members of the family business. That circle of trust would be the outcome of an effective effort in discussing about the circle of concern and influence (Covey, 1989). The circle of concern and influence, as proposed by the author, will drive the family members to understand the limitation of their independency/ individualism and the extent of their dependency as individual and interdependent as a family group having to manage collectively.

Once the family ties have been solidified and emotional attachment regained in intensity, the family members would have the necessary acumen as an effective and strong group to evaluate the eventual welcoming of any external member who would add value to that family circle of trust. Hence, the circle of trust re-evaluates and consolidates the social identity theory of the family as a group which has, as objective, the protection of the members of the group; i.e. the family members.

5.3.2 Set up of the Family Council

The final proposition of the emotional intelligence workshop approaches the setting up of a family council. After uncovering the challenges of role dualities, the family members now understand the overlapping element of the social and emotional factors binding the family and business. Hence, a family council will be set up as a forum where challenges having an impact on both family and business environment are discussed. The aim of that council is to exchange ideas and project between family members, but also invite the participation of non-family professionals who are deemed to add value to the growth of the family affair.

To conclude, one can observe the family council as an extension of the circle of trust in action. The effectiveness of that trust would be unfolding with the objective of driving the organisation to success quantitatively and qualitatively.

5.3.3 Leading the Business - 'The Family Enterprise Challenge' by INSEAD

It was noted in the initial interviews that the children who are all fully qualified tend to lead the business from a scientific perspective, overlooking the family perspective and emotional construct present. Having covered the basics of the challenges in the workshop, the family

members are now well equipped to be further trained in leading the business from a family business perspective.

INSEAD has proved to be the suitable institution which focuses on an interpretation of management concept through a family business lens. I proposed that the children enrol in a five day seminar at INSEAD to grasp that important acumen. The relevant topics covered by INSEAD within the four day seminar range from: family business and challenges, family relationships, aligning ownership, strategy and governance, family harmony and performance and finally the action planning and operational management from a family business perspective (Appendix 5). The INSEAD family programme is headed by two specialists in the field of entrepreneurship and family affairs namely; Christine Blondel & Dr Randel S. Carlock. The key decisional factor which has motivated the recommendation of INSEAD as a complimentary development programme for the family members is the innovative Parallel planning process map developed by the institute. That conceptual framework proposes a dual planning process of the family and the organisation. Hence, the process takes into consideration the overlapping elements of the family and the business in the planning of the business. That strong consideration of the contextual environment in planning minimises the limits of applying university management best practice which in turn conflicts with family norms and values. By taking into consideration the norms and culture of each family businesses, students are prone to working towards a real-life planning.

5.4 Conclusion

The final thesis chapter presents my action research cycles, implementation, and recommendations. Firstly, I presented my conceptual framework of the problematic to the family members summarizing the objective of the parents as transmitting the socio-emotional wealth to the children. Secondly, I detailed my approach in observing the family socio relational challenges within the social identity theory. Thirdly, I presented the outcome of my research in describing the extent to which the social identity challenges conflicted with the effective transmission of the socio-emotional wealth. Finally, I propose recommendations to alleviate the challenges and ensure the long-term survival and succession of the organisation. The recommendations are very intensive in its implementation phase and will require a long term approach. The exercise unfolds through a mind transformation, coached by a specialist

with the objectives of mastering emotional intelligence, the setting up of a family council to palliate the kinship and communication gap between family and business. Finally, I recommend a five day complementary seminar at INSEAD to acquire a sound, family-business management acumen.

CHAPTER 6

6.0 CONCLUSION

This research was performed with the objective of identifying and approaching the challenges faced by a Mauritian family business organisation within a period of succession. It has been found that within this particular family business context, socio relational tensions are the most critical challenge which threaten the long-term survival of the organisation. A conceptual framework was developed and presented the challenges on one side as the parent's objective of transmitting a socio-emotional wealth to the children. The socio emotional wealth comprising of specific cultural norms such as family control and influence, identification of family members with the firm, binding social ties, emotional attachment of family members, renewal of family bonds to the firm through dynastic succession to the next dynasty. On the other side, the challenges opposing that successful adoption of the values in the form of the social identity challenges emerging through role dualities, power relations, social identity conflicts and negative organisational politics. In some cases, these opposing forces created intense emotional conflicts through interpersonal dynamics and rendered the adoption and cultivation of family norms and values highly challenging. After completing the primary research in the form of interviews, the data was consolidated, and the findings analysed. Thereafter, a full day action research workshop was organised with the family members and the findings of the research were discussed with the objective of establishing commitments in approaching the problem. It was the first time that the family members had the opportunity to observe their intrinsic challenges within the lens of an academic researcher. They were surprised to note that the tensions which they were enduring in terms of socio-emotional challenges had not only already been scientifically documented, but tools had also been developed by academics to attend to those challenges.

6.1 Recommendations

While financial, contextual, process or individual factors were not the critical success factor in approaching the research problem, the focus was essentially on the emotional perspective which would assist the family in approaching the specific emotional challenge. As such, the emotional intelligence concept of Goleman was proposed as a critical tool which supports the family in mediating across the socio-emotional challenges which were identified as the main reason for conflicts. The action research workshop covers the fundamentals of the emotional intelligence concept so that the family members understand what they should expect in

acquiring such acumen. They were introduced to the importance of being able to be aware, identify, observe and manage emotions successfully within the family business and the impact of emotional dynamics on their judgement and decisions.

6.2 Implementation of recommendations

It was explained to the family members that as an insider researcher who is reaching the end of his project, I will soon depart from the role of insider researcher and will resume my sole role of General Manager in the company. Hence, the decision of implementation of the recommendations will solely be a family decision. They have demonstrated an enthusiasm in proceeding further in mastering the emotional intelligence concept. I thus recommended a full training program to the family with the help of a professional of emotional intelligence. I will hence approach Mr Manish Bhundun who holds a master's degree in Mind Transformation Neuro Linguistic programming and coaching, with over fifteen years of experience and practice in the field of human resource and leadership.

6.3 Reflection

My research project has been a long and extremely fruitful journey. When I started my research, as an insider researcher, I could not assess the extent of the unknown. My business philosophy was based solely upon scientific management principles. My focus was driven solely towards programmed knowledge (Pedler 2008) and rigorous schools of thought (Nonaka and Takeuchi 1995; Ramirez and Morales 2011). As such, my initial observation of a conflicting family business environment was very confusing. It was very prejudicial at that moment to claim, being in a position to explain the reason of that situation and even more pretending to be capable of solving or attempting to solve the problem. As I moved across my research studies and even when I was shedding light on that emotional construct, which was the common source of family conflicts, I doubted being able to solve that challenge due to the complex emotional construct.

However, after that doctoral journey, I adopted a totally different picture of the family business organisation and its challenges. I recognise the social contribution to knowledge that could emerge from such a complex environment. The psychological, sociological and political perspective (Devinney and Siegel 2012) of such business is much more complex than traditional management challenges. The family business, in a period of succession, regrouped two schools of thought which Buchanan and Bryman (2007) coined as a meeting point of

numerous disciplines. Bansal et al (2012) in return suggest evolving into a relational scholarship approach with the objective of merging both schools of thought and triggering synergy between both generations while still keeping their individual identity. However, for that merger to be successful and get both schools of thought to work together with a minimum socio relational conflict, a mastering of emotions would be critical and hence, remain as the first objective which has been approached. That emotional intelligence among family members would help them adopt and develop a spiritual leadership style (Madison and Kellermans, 2003) within their relationship translating into patience and altruistic love (Raelin, 2003).

However, as I started the research, I still feared failure in getting access to the required information. I fear that sensitivity, embarrassment and privacy of the field of study would overcome the will to share the feelings and attend to the problem. I was unfortunately underestimating the trust which the family members held in my role as insider researcher. As the chairman claimed at different occasions in the workshop, *'I am part of the family'* and they are not embarrassed to discuss and debate any family emotional challenges if this can help to solve or at least mediate through the problem. Hence, I guess that despite my formal role as an insider researcher would come to an end in a few months, I will never stop in supporting that family in mediating through their emotional challenges and living life as an inquiry (Marshall 1999) will from now on be my lifetime philosophy.

They still have a long journey to cover in mastering and implementing the emotional intelligence acumen as a major tool in approaching their family challenges and they will surely need my assistance towards that achievement. By the time I complete my thesis writing, the two sons are now the happy dads of two beautiful babies who are now the fourth generation of the family and effective succession is more than ever a critical exercise. Being able to understand and adopt the socio-emotional wealth of the organisation will ensure not only the survival of the business in the short term, but also help the children to understand that process effectively to transmit same to the fourth dynasty in some years.

6.4 Contribution to Knowledge

A major tool utilised in my research to assess the theoretical dimensions of the norms and values which the former generation wanted to transmit to the next generation is the Socio-emotional wealth factors. The five elements (FIBER); family control and influence, Identification of family members with the firm, binding social ties, emotional attachment of family members and renewal of family bonds to the firm through dynastic succession have been assessed. The assessment is the starting point in establishing the succession objective of the Parents. Thereafter, I have assessed the conflicting factors preventing the successful transmission and adoption of the socio-emotional wealth by the children in terms of role dualities, power relation, social identity conflict and negative organisation politics. This is my thesis problem and I approached the issue in recommending a personal development plan which would help the family members acquire the emotional intelligence acumen. Various authors have observed that the different epistemological concept proposed in understanding the family business lack some focus when it comes to the role of emotions within that family-business equation, hence it has been my priority to focus on that area of research within the family- business dynamics as my symbolic contribution to knowledge. My success in getting the family members to recognise the problem, accept the recommendations made in acquiring an emotional acumen, and thus producing incremental knowledge to them has fulfilled the objective in solving the problem. As observed by Landry (1988)

'It is only by reference to a previous state of knowledge that the genesis of a problem can be explained; it is only by producing knowledge that the problem can be solved'

Another interesting outcome of the research is that the emotional acumen of the family members was successful triggered by emerging the importance of emotional management through their individual traits. Following the extensive mind transformation coaching which they will undertake and the workshop at INSEAD, we can expect a full transformation of a tacit knowledge into an explicit knowledge (Nonaka & Takeuchi 1995).

6.5 Limits of my research and Scope for future research

This research is conducted for the first time in Mauritius within a Mauritian family business enterprise as subject of study. The research sample was relatively small as the research focussed on uncovering a deep, sensitive and qualitative insights. Future research could test the actual findings on a larger scale and propose a hypothesis to confirm or reject the socio-

emotional challenges as a critical factor influencing effective family business succession. Through a larger sample, together with the contribution of quantitative data, future research could take into consideration other influencing factors such as cultural differences of family businesses and the degree of management versus ownership family members prevailing in the business environment. Future research could also identify the extent to which family firms are still holding to the transmission of the socio-emotional wealth as a primary objective of succession; or how far family firms are welcoming a split of management and ownership of their enterprises to reduce the involvement in the business and hence the threat of emotional challenges during daily operational management of the company.

Referring back to my initial research question and my objective of understanding the sources of emotional challenges behind family tensions; I would tend to claim that (from a subjective perspective) I have achieved my objective. However, I have to acknowledge the limits and possible challenges in succeeding to solve the relational tensions. Despite that the process will be accompanied by a mind transformation specialist, yet the proposed solutions require a long term approach and extensive effort on one's psychological and emotional traits. The different recommendations in unfolding the circle of trust, family council, mind transformation programme and academic family training at INSEAD will reside solely on the family member's long term and personal commitment towards such improvement.

Appendix 1 – Questionnaire

Themes - Interconnection of the family and the business

- 1) Do you perceive your firm as a family business organisation?
- 2) Why do you see your business as a family business organisation?
- 3) What does your organisation represent to you emotionally and financially? Why?
- 4) Now from a personal perspective, what are the different emotional challenges which you tend to experience within a 5-day's work lapse?
- 5) According to you what would be the recurrent reasons behind those emotional challenges
- 6) Emotional challenges are difficult to overcome because of psychological strain; is economic or financial opportunity a triggering factor to overcome such challenges?

Theme : Role Duality and social identity conflict challenges

- 7) As a member of the family working in the family business, you may happen to wear several 'hats' which can be described as 'roles'; e.x as a Children, as an Business Executive, as a Business Heir, As a family heir, as a parent's confident etc.
- 8) What are the different roles which you play within today's family business organisation management?
- 9) How had these roles evolved since you joined the organisation?
- 10) Do you observe opportunities and / or challenges in holding those roles?
- 11) What are the opportunities and/or challenges triggered by such role over the family and the business in general?
- 12) Do you believe that those different/ simultaneous role play could be avoided in the business context within which you are operating?

Theme : Harmony – Power Relation versus Agency Cost

- 13) What does Harmony represent to you?
- 14) Do you observe harmony in the business? (Yes/No - Why?)
- 15) Do you observe harmony at home? (Yes/No - Why)
- 16) Do you observe any direct relationship between family harmony and business harmony?
- 17) What are the consequences observed as a result of this inter-relationship?

- 18) What are the opportunities which evolved when family members hold management position in the family business?
- 19) What are the challenges which evolved when family members hold management position in the family business?
- 20) What would be your recommendation to avoid those challenges?
- 21) A family member needs to hold total decisional control over the business, Do you agree?
- 22) What are the opportunities offered when family members have total decisional control over the business?
- 23) What are the challenges and threat present when family members have total decisional control over the business?
- 24) How can these threats be mitigated?
- 25) Are you familiar with the alternative business board structure that a business can adopt?
- 26) In case the decisional control is limited, Family members need to be in a position to at least influence the decisions
- 27) What would be the possible opportunities and challenges of having non- family members on the board of directors?
- 28) What would be the critical success factor to overcome those challenges?

Theme – Kinship and attachment to Family values

- 29) The family members and the family firm should be seen as one and same entity internally and externally.
- 30) Do you believe that the Family dynasty 'name' should be immediately associated to the business from an external perspective?
- 31) What would be the opportunities of having the family name endorsed to the organisation?
- 32) What would be the challenges if the name of the family shadowed the organization's entity?
- 33) Would you rank the building/ consolidation and preservation of family social ties as the utmost priority in your family firm?
- 34) What would be the second utmost priority of the business?

- 35) Do you agree that a family firm need to be absolutely handed over to the next dynasty?
- 36) What are the essential succession philosophies/ factors / values which you perceive to be crucial in handing over the firm to the next generation?
- 37) How would you would assess the success achievement in reaching your succession goal?
- 38) Do you have an alternative plan if ever your philosophies are not adopted by the next dynasty?

Themes - Assessing Socio Emotional Wealth

- 39) What does 'Wealth' represents to you?
- 40) What are the different types of wealth that you have observed in the family business organisation?
- 41) In the examples you have cited, can you recognise the different financial and emotional wealth present?
- 42) Describe the emotional characteristics of your family members?

Assessing the Father's possible sources of conflicting position against the succeeding generation (Father's Specific questions)

- 43) Which important part of your own character do you recognize in your children?
- 44) Do you see that as a strength or a weakness in your succession plan?
- 45) Would you like your successors to work on that weakness or do you observe that weakness as an intrinsic part of his/her own character?
- 46) Would that have a definite impact on your succession decision or would you be prepared to overlook that weakness in the coming years?
- 47) Do you often encounter business/decisional or relational conflict with your successors?
(Validate the presence of family harmony, power relations and politics)
- 48) What are the major reasons for these conflicts?
- 49) What is your emotional status when you experience family relational conflict?
- 50) How often did you succeed or fail in resolving the conflict?
- 51) What is the critical success factor in resolving the conflict?
- 52) Can all the conflicts be resolved (# Validate the presence of Wicked problem and the need for mediation in the absence of conflict resolution)

- 53) What would be the alternatives to conflict resolution? (Check the presence of Compromise, validate SEW importance over financial and economic wealth)
- 54) Finally, how would you want to see the 'family relationships' evolving within the business in the coming years?
- 55) What is your biggest fear/ threat to your family business organisation?
- 56) Objective: Observe if the fear goes towards threat to family members or threat to the business entity and if ultimately both are treated as one)
- 57) What are the safeguard that you would like to put in place to avoid such happening?
- 58) Are you succeeding setting up the safeguard?
- 59) Does politics exist in family business organisation?
- 60) How would you define organisational politics in your family business organisation?
- 61) How do you react to organisation politics, practiced by family members trying to influence your business decisions?

Appendix 2 – Workshop Slides

Understanding the challenges of a family business organization succession ... A Mauritian Context



Guillaume Babet
Doctoral Candidate
University of Liverpool
May 2018

Understanding the challenges of a family business organization's succession , a Mauritian Context

Workshop Agenda

- ❑ 10:00 -10:30 An introduction to the Action research –Thesis aims and objectives
- ❑ 10:30 -11:00 Presentation of the Problematic and research outcomes
- ❑ 11:00 -12:00 My Thesis Conceptual Model and recommendations.
- ❑ 12:00 -12:30 Trait personalities and Conflict Management handling tools
- ❑ 12:30 -13:30 Lunch break
- ❑ 13:45 -15:00 15:00 -16:00 Discussion
- ❑ 16:00 -16:45 Closing comments and commitment undertaken.
- ❑ 16:45 -17:00 Further readings to support application of emotional intelligence

Understanding the challenges of a family business organization's succession , a Mauritian Context



Important

- I am **not the General Manager** of our Company today ... I am a facilitator with an '**insider perspective**'
- As a business we are at crossroads today ... 2 generations working together
- Today's workshop is an opportunity build on our strong bases and bridge the gap towards a ideal future for our business
- Today's workshop is not an end in itself but a trigger for further reflection in approaching the challenges of our business organisation in a period of change and transition
- That workshop is being run in strict confidentiality and is govern by the ethics and consent form of the research.

Understanding the challenges of a family business organization's succession , a Mauritian Context

Objective of my Thesis

Understanding the challenges of a family business organisation's succession within a Mauritian Context

Why is it so challenging for a family business to maintain a sustainable social relationship and overcome the interpersonal dynamics which constantly threaten the social atmosphere within a period of succession?

Understanding the challenges of a family business organization's succession , a Mauritian Context



PricewaterhouseCoopers Family Business Survey

- 50% of the family firms interviewed told us that they have argued about the **future direction** of the family business.
- Nearly 40% said they have argued about the **performance of family members** employed in the business.
- Over 25% of the family businesses argued about the **setting of remuneration levels** for family members actively involved in the business.
- Over **70%** of the family businesses surveyed did not **have any procedures for dealing with disputes** between family members

Source: www.pwc.com - Understanding Family Dynamics Family Conflicts.docx

Understanding the challenges of a family business organization's succession, a Mauritian Context



Common Reasons for failure in succession

- **Individual** factors - Issues related to successor and predecessor
- **Financial** factors - Availability of Financial resources
- **Contextual** factors - Environmental Changes
- **Process** factors - The processes or procedures in place
- **Relational factors** - Emotional factors affects interpersonal dynamics that may lead to **conflict** in a family firm and later affect the succession process.

(Source De Massis et al, 2008)

Understanding the challenges of a family business organization's succession, a Mauritian Context




Why is **relational factor** such an important influence in the family business ?



- **Overlapping circle of Family, Business, and Ownership** (Tagiuri & Davis 1992)
- The main characteristic of a family business organisation is that the **organisation and the family is one entity**. (Lee 2006)
- **Conflicting identities** as a **combination of 'family' and 'business'** coined as **hybrid identity**. Boers and Nordqvist (2012)

Understanding the challenges of a family business organization's succession , a Mauritian Context

What is the **primary reason** of doing what we are doing. Is it....?

- Due to financial motivations ? 
- Due to succession - Are we oblige to do this ? 
- For the **love and prestige** of the family business ? 

Understanding the challenges of a family business organization's succession , a Mauritian Context

Trans-generation's Objective

The successful transmission and preservation of the socioemotional wealth to the next dynasty



Wealth

An abundance of valuable possessions or money
a plentiful supply of a particular desirable thing

Socio Emotional Wealth

The **psychological ownership** of the owner/ managers in terms of **way of thinking** and **mental dimensions** of the family business organisation which he/she intends to **pass over** to the next succeeding generation.

Understanding the challenges of a family business organization's succession, a Mauritian Context

FIBER Factors

- ✓ **Family Control and Influence** - High degree of Involvement and Essence
- ✓ **Identification of family members with the firm** - Legal and emotional ownership which confirms the overlapping of both identity.
- ✓ **Binding Social ties** - Trust and Solidarity/Self-Sacrificing
- ✓ **Emotional attachment of family members** - Emotional Ownership for the business (As much love for the business as for the family) - refer to the Chinese business culture
- ✓ **Renewal of family bonds to the firm through dynastic succession** - Willingness to Pass over the business not only from a financial and economic perspective but with the values and traditions.

Source: Berronne et al 2010

Understanding the challenges of a family business organization's succession, a Mauritian Context

Research outcome on the FIBER factors

Family control and influence

Involvement and Essence + External professional board members



Identification of family members with the firm

Legal and Emotional Ownership noted - Overlapping recognized partially



Binding Social ties

From self-sacrificing for the benefit of family ties - to parting with family members for the benefit of the business.



Emotional attachment of family members

At its peak – but under the family hat not under the business hat

Emotional Confusion at the office (This will extend to family environment in the coming years)



Renewal of family bonds to the firm through dynastic succession

In phase but very fragile atmosphere which can deteriorate in the future

Will values and traditions be kept and transmitted ???



Understanding the challenges of a family business organization's succession, a Mauritian Context

Why do we have challenges in relation to...



- **Binding Social ties ?**
- **Emotional attachment of family members ?**
- **Renewal of family bonds to the firm through dynastic succession ?**

Understanding the challenges of a family business organization's succession, a Mauritian Context

- Because the **socio relational dynamics** calls for our **personality traits** in managing challenges
- Failing to **manage properly our emotion** may result in the **destruction of our environment**
- The fact that **the family and the business is one entity** would impose a domino effect resulting from any challenge within a particular entity



Understanding the challenges of a family business organization's succession , a Mauritian Context

What are the critical challenges identified ?



Role Duality

Identity Conflict



Power Relation

Types of Organizational Politics



Organizational Politics

Understanding the challenges of a family business organization's succession , a Mauritian Context

Role Dualities



Overlapping of the family and business roles.

- The uniqueness of a family business is the **mutual interdependence between family and business** overlapping each other

(Beckhard & Dyer, 1983b; Lansberg, 1983).

- The family system is so **closely and intimately interconnected** with the business system that **one cannot change without affecting the other** system.

(Kepner, 1991).

Understanding the challenges of a family business organization's succession , a Mauritian Context

List 2 role dualities and/or example of challenges that you encounter due to these role dualities



1.....

2.....

Understanding the challenges of a family business organization's succession , a Mauritian Context

Social Identity conflicts



- Each system holds different **interests, norms, values, and structures**, problems easily surface when an individual has to **fulfil obligations** in both systems.
- This **tension** between the **two different systems** has its effects on **both work and nonwork-related attitudes and behaviours** in the **working environment (Zedeck, 1992)**.

Understanding the challenges of a family business organization's succession , a Mauritian Context



List your different

- Interest
- Norms
- Culture

How may these norms challenge your environment when you have to fulfil obligations

- Interest
- Norms
- Culture

Understanding the challenges of a family business organization's succession , a Mauritian Context

Power relation

- The Social Identity theory (SIT) claimed that an individual forming part of a group is automatically given a favourable support from that group.
- That individual acquires power through belongingness to that group. Therefore, belonging to a family group gives automatically a sense of emotional ownership and hence power
- ❖ How do I use that power ?
- ❖ What is the emotional impact of that power on the social relationship I maintain with other family members ?
- ❖ Would that be a source of conflict within the family and business organisation?

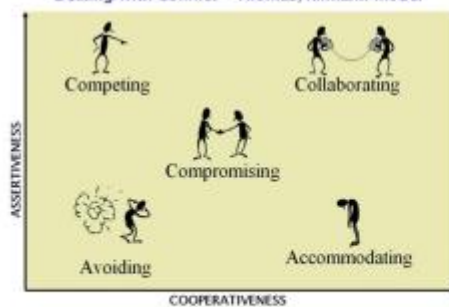


Understanding the challenges of a family business organization's succession, a Mauritian Context

Conflict Modes by Thomas – Kilmann

Everyone has a "fall back" response to conflict.
(It may not be the best response.)

Dealing With Conflict - Thomas/Kilmann model



Where would you position yourself and your family members in your business ?
(Start from the most dominating trait down to the least)

- Chairman
- CEO
- SBU Director
- Business Dev Mgr
- Credit Manger

Understanding the challenges of a family business organization's succession, a Mauritian Context

The worst case... not so far from us

- **When family Power is foregone for the benefit of individual power...**



Antoine et Sir René Seeyave se partagent Happy World

Est-ce la fin de la guerre ? Chez les Seeyave en tout cas, c'est ainsi qu'on présente le développement intervenu hier. Sir René Seeyave et son frère Antoine Seeyave se sont réconciliés autour d'un deal qui représente un partage des affaires de la famille. Sir René et Victor Seeyave ont pris toutes les actions qu'Antoine Seeyave détenait au sein de Happy World Foods Ltd (HWF) tandis que ce dernier cède ses parts dans Happy World Ltd au tandem Sir René et Victor Seeyave.

L'express.mu 18 Aout 2004

Understanding the challenges of a family business organization's succession , a Mauritian Context



- A l'origine de la discorde entre les Seeyave, la rupture d'un partnership agreement qui régissait la conduite des affaires du groupe. Cet accord n'a jamais existé disait alors Sir René.

- ***Demande de dissolution***

Antoine Seeyave avait également été suspendu sans raison, de son poste de Chief Executive Officer de Happy World Ltd. Deux années plus tard, il avait démissionné de toutes les instances du groupe familial pour réclamer en justice la dissolution de l'entreprise. C'était, disait-il à l'époque, la seule manière pour lui de récupérer le contrôle de ses investissements. Mais selon les observateurs des milieux des affaires, le litige aurait surtout pour origine, un conflit de génération qui s'est traduit dans des cultures d'entreprise différentes. L'ouverture et les valeurs familiales se sont trouvées en contradiction.

L'express.mu 18 Aout 2004

Understanding the challenges of a family business organization's succession , a Mauritian Context

Reliance - Ambani family (India)

BROTHERS IN ARMS: 14-YEAR TELECOM SAGA

- July 2002**: Disruptive Anand enters arena. Mukesh Ambani launches RL Chairman & Anil Ambani vice-chairman
- Dec 2003**: Mukesh Ambani spearheads Reliance Industry's telecom foray as former Dhiru Aker Ambani's 60th anniversary.
- Nov 2004**: Mukesh & Anil Ambani Test becomes public.
- 2005**: Kollabon Ambani makes a deal for his two sons.
- 2006**: Reliance is split up. Mukesh Ambani gets control of flagship RL with petroleum, oil&gas, textiles. Anil Ambani gets telecom, power, entertainment, financial services. Both brothers agree on a non-compete.
- May 2010**: Mukesh Ambani & Anil Ambani call off non-compete pact shortly after SC verdict.
- 2010**: SC rules in favour of Mukesh Ambani's RL over Anil Ambani's RIL in the gas battle.
- 2008**: The bitter gas battle between RL & Anil Ambani's RIL escalates.
- July 2008**: RCom calls off merger talks with Anil Ambani's RIL after Mukesh Ambani's claim on the telco's shares.
- June 2009**: Mukesh Ambani enters telecom by buying 70% stake in Reliance Infratel.
- 2014**: RCom & Mukesh Ambani's Rel Jio move back to where telecom battle.
- 2016**: Rel Jio is launched.
- June 2017**: RCom's debt troubles come out in public.
- Dec 2017**: Jio calls off RCom.
- Nov 2017**: RCom shuts down wireless tel.

THE TALE OF TWO BROTHERS

MUKESH AMBANI
Listed Firms

- Reliance Industries
- Reliance Industrial Infrastructure

ANIL AMBANI
Listed Firms

- Reliance Infra
- Reliance Communications
- Reliance Capital
- Reliance Power
- Reliance Naval
- Reliance Home Finance
- Reliance Nippon Asset Management

Bloomberg | Q&A

Understanding the challenges of a family business organization's succession , a Mauritian Context



- What is the current legal and management structure of your family business?
- What are the risk of having such power relation challenges in the coming years?
- How far will **family power** overcome the temptation of **individual power** (Consider also a strong influence from the extended family)

Understanding the challenges of a family business organization's succession , a Mauritian Context

Negative Organisation politics

- To what extent do we manage impressions for our self interest?
- To what extent do we attack and blame for our self interest ?
- To what extent are we bias in controlling information for our self interest?
- To what extent do we form coalitions for our self interest?
- To what extent do we cultivate network ? 'My team v/s the rest of the world'
- Creating obligations (moral reciprocity/fraternity)



Source: Allen et al (1979) 'Organisational Politics, tactics and its actors'

Understanding the challenges of a family business organization's succession , a Mauritian Context

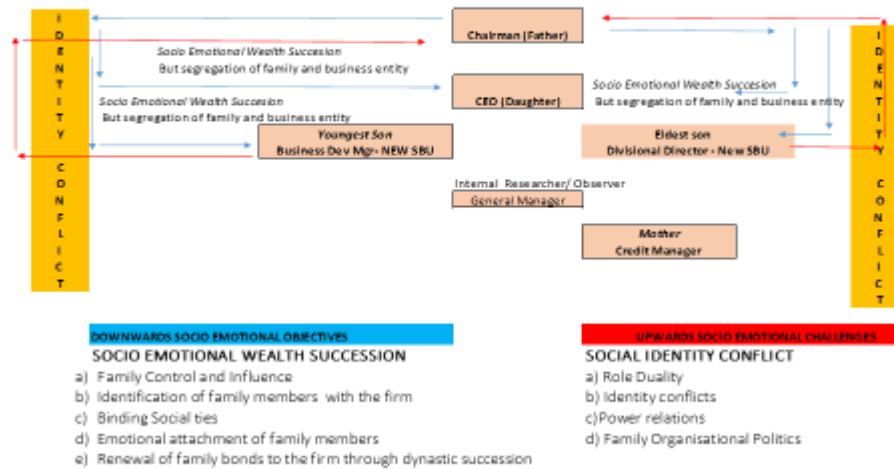
Positive Organisational politics

The Bottom Line: Managing Organizational Politics Effectively



Understanding the challenges of a family business organization's succession , a Mauritian Context

Our Situation at hand



Understanding the challenges of a family business organization's succession, a Mauritian Context

Are we facing a wicked problem?

- Global warming
- Plastic pollution in the ocean
- Skills mismatch and talent shortage in Mauritius

➤ No true or False... No immediate solution ..

Understanding the challenges of a family business organization's succession, a Mauritian Context

Is our problem a Wicked Problem ?



Based upon Rittel and Wabser (1973)

Understanding the challenges of a family business organization's succession , a Mauritian Context

What would be the pre-requisite in becoming a **better person** to support the transmission of the **socio emotional wealth** and mediate through the family **socio emotional challenges** ?

Start to understand and Master the **Emotional Intelligence** techniques



Understanding the challenges of a family business organization's succession , a Mauritian Context

First lets discuss about emotions

- **Emotions as a nuance to rational decision making** but an important role in understanding human research **because it influence judgments**

(Caccioppo and Garner, 1999, Niedenthal and Brauer 2012, Oatley and Jenkins 1992)

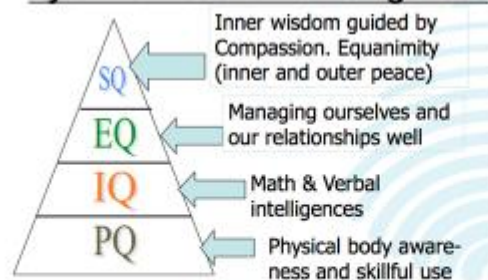
- Emotion can represent a **source of internal conflict** and **suppression of emotion** is essential under some cases (**Management of emotions**)
- Emotions within the family business context are reflected in:
 - ✓ The **Degree of attachment** between family members
 - ✓ **Degree of social referencing** learned from parents
 - ✓ The way the individual **represent their feelings** from their parents

Understanding the challenges of a family business organization's succession , a Mauritian Context

What is emotional intelligence (EQ) ?

The capacity to **be aware of**, **control**, and **express one's emotions**, and to handle interpersonal relationships **judiciously** and **empathetically**.

Pyramid Model of 4 Intelligences



Understanding the challenges of a family business organization's succession , a Mauritian Context

How can Emotional intelligence facilitates

Role Duality? Identity Conflicts? Power relations? Family Organisation politics?

"emotions are among the primary determinants of behavior at work and profoundly influence both the social climate and the productivity of companies and organizations"
Pekrun, R. and M. Frese, 1992



Understanding the challenges of a family business organization's succession , a Mauritian Context



1- Are you aware of emotions ? Can you express your emotion properly to others ? They way you express your emotion will affect judgement and decision.

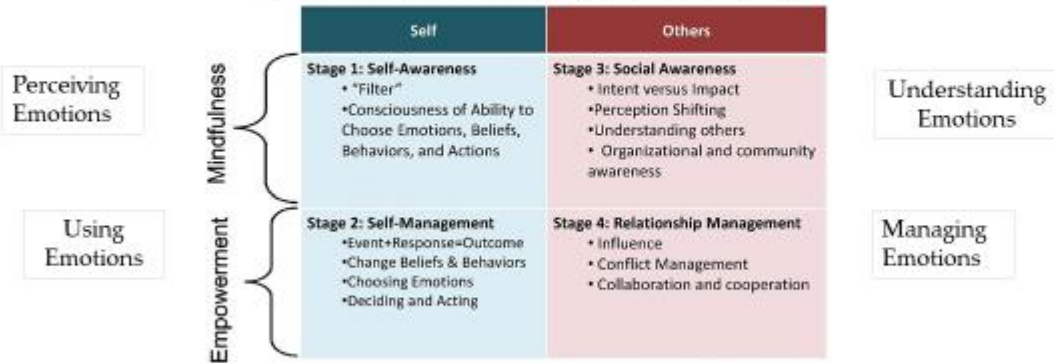
2- Understanding the predictions and consequences of emotions.

3- Using emotion in functional way – Being able to use emotion to signal what is happening

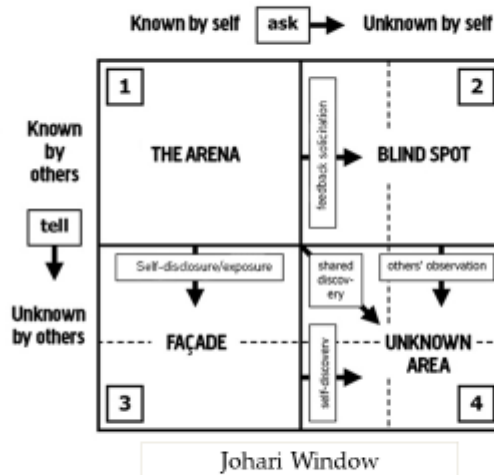
4 - Capturing the differences in emotional ability in managing owns and other mood and emotion.

Understanding the challenges of a family business organization's succession , a Mauritian Context

Emotional Intelligence Components



Understanding the challenges of a family business organization's succession , a Mauritian Context



Johari Window

A Johari window is a psychological tool created by Joseph Luft and Harry Ingham in 1955.

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New areas of exploration within the family business

- **Emotional Intelligence** (Gomez Betancourt et al 2014)

How emotions and the management of emotions play a role in the interpersonal dynamics of family business owners. The purpose of this paper is to explore how the way family members manage their emotions affects the interpersonal dynamics in the family, business, and ownership subsystems of a family firm.

- **Emotional Ownership** (Bjornberg and Nicholson 2012)

The measurement of the next generation's feelings toward the firm which would influence their intentions to take over the business.

- **Emotional Value** (Zellweger and Astrachan, 2008)

To explain how emotions affect the value individuals place onto a family firm.
Endowment and possession attachment

- **Emotional returns and costs** (Astrachan and Jaskiewicz, 2008)

Financial return is not the only variable which the owner takes into consideration when valuing the family business

Understanding the challenges of a family business organization's succession, a Mauritian Context

Total value of the Family Business (TV) - For the owner



Dr Joseph Astrachan

1) **Financial Value = Discounted Future Cash Flow (DFC):** from operations of the business

+

Discounted Financial private benefits (DFPB): Dividend, Owners fringe benefits

2) **Emotional Value = Emotional return (ER):** Result of Achievement, Financial & Non Financial, pride, self worth

-

Emotional Cost (EC): Family tension, conflicts, Sibling Rivalry, Reduction of leisure time

$$3) \quad TV = DCF + DFPB + (ER - EC)$$

Source: Astrachan & Jaskiewicz (2008)

Understanding the challenges of a family business organization's succession, a Mauritian Context

Do you want to go further in improving your 'self' ?

Competencies of Spiritual Intelligence	
Self/Self Awareness 1.Awareness of own worldview 2.Awareness of Life Purpose (Mission) 3.Awareness of Values Hierarchy 4.Complexity of inner thought 5.Awareness of Ego self/Higher Self	Universal Awareness 6. Awareness of interconnectedness of life 7. Awareness of worldviews of others 8. Breadth of Time perception 9. Awareness of limitations / power of human perception 10.Awareness of Spiritual Laws 11.Experience of transcendent oneness
Self/ Self Mastery 12.Commitment to spiritual growth 13.Keeping Higher Self in charge 14.Living your purpose and values 15.Sustaining faith 16.Seeking guidance from Spirit Calm, peaceful at all times	Social Mastery/Spiritual Presence 17.Wise and effective teacher / mentor 18.Wise and effective leader / change agent 19.Makes Compassionate AND Wise decisions 20.A calming, healing presence 21.Being aligned with the ebb and flow of life Compassionate and Wise Action

Understanding the challenges of a family business organization's succession , a Mauritian Context

Vision, leadership and emotional intelligence transforming family business

(Boyatzis & Soler 2012)

Research on the power of vision and EI to transform businesses is emerging, but **none of it has focused on family businesses, and in particular, multi-generational ones.** This paper shows how such leadership can transform a family, its business, and a region.

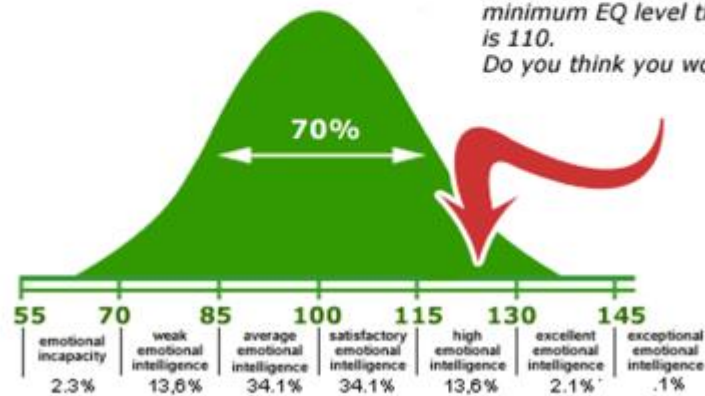


Using emotional and social intelligence, two 'fifth-generation family' business members inspired others by building **resonant relationships** with them. They created a shared vision among the various stakeholders in the family, the organization and the community. They got others **excited about the vision** using positive, **emotional contagion**. The contagion and resonance **spread to others** in the family, organization, and region.

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**EMPLOYEES = EQ of 110 and above
HOW ABOUT YOU?**

"Well-known international companies are now using EQ tests in their recruitment process for certain key positions. The minimum EQ level they require is 110. Do you think you would qualify?"



Understanding the challenges of a family business organization's succession , a Mauritian Context

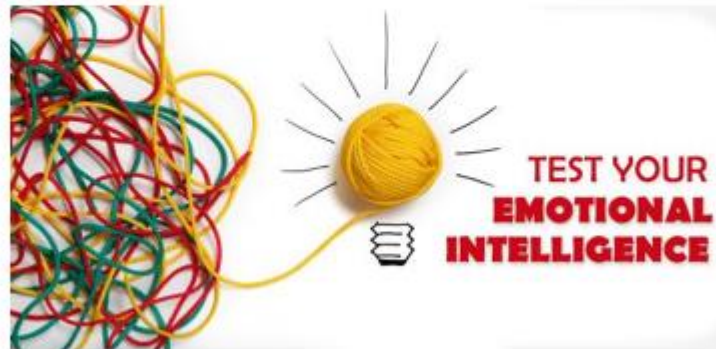
Positive general trends of having higher emotional intelligence

- Better social relations for adults
- Better social relations for children
- High emotional individuals are perceived more positively by others
- Better family and intimate relationships
- Better academic achievement
- Better social relations during work performance and in negotiations
- Better psychological well-being

Mayer et al. (2007)

Understanding the challenges of a family business organization's succession , a Mauritian Context

Test you EQ – Honestly...



Understanding the challenges of a family business organization's succession , a Mauritian Context

My key take-aways from this workshop ?

-
-
-
-
-
-
-
-
-

Understanding the challenges of a family business organization's succession , a Mauritian Context



My commitment

- **Role Duality / Social Identity Conflict/ Power relation/Organisational Politics**

Problem.....

I will solve the problem by

.....
.....
.....
.....

Understanding the challenges of a family business organization's succession , a Mauritian Context



My commitment

Problem

I will approach the problem by trying to

.....
.....
.....
.....
.....

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My commitment

Problem.....

I would require further assistance from a professional in approaching the problem because.....

.....
.....
.....
.....

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My commitment

Problem

I take cognizance of the problem and while it seems very difficult to solve because of

.....
.....
.....

nevertheless, I will further inquire about the tools in attending or mediating such challenge

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Thank you

Emotional intelligence is being
smarter with feelings.



Understanding the challenges of a family business organization's succession , a Mauritian Context

Appendix 3 - Thomas and Kilmann Conflict management style Questionnaire

For each question below you must circle the statement that is most typical of you and how you would respond in a Conflict situation. There are no right and wrong answers; you should choose the response that seems most accurate

1	A	There are times when I allow other people to take responsibility for solving a problem.
	B	When I disagree with someone I try to stress those things on which we both agree rather than where we disagree
2	A	I generally try and find a solution that is a compromise
	B	I try to deal with other people's and my own concerns
3	A	I am usually firm in pursuing my goals and stick by them
	B	I sometimes try to sooth other people's feelings and save our relationship
4	A	I usually look for solutions from which both parties will gain - a compromise is the best answer
	B	I often sacrifice my own need for the needs of the other person
5	A	I regularly look for other people's help in working out a solution
	B	I usually try and to what is necessary to avoid unnecessary tension
6	A	I try and avoid creating unpleasantness for myself
	B	I try and win my position and prove my point
7	A	I try and postpone the issue until I have had an opportunity to think about it first
	B	I am prepared to give up some things in exchange for others
8	A	I am generally very focused and firm in pursuing my goals
	B	I aim at getting concerns and issues out into the open immediately
9	A	I feel that differences are not always worth fussing over
	B	I make an effort to get my way
10	A	I am very strong in pursuing and achieving my goals
	B	I usually prefer to find a compromise solution
11	A	I attempt to get all concerns and issues in the open
	B	I regularly try and soothe the other person's feelings and preserve the relationship

12	A	I will avoid taking a position that leads to controversy
	B	I will let others have some things their way if I am allowed to have some things my way
13	A	I am the one to propose the middle ground
	B	I will push to get my point across
14	A	I tell others my ideas and ask them for theirs
	B	I usually try and show others the logic and benefit of my position
15	A	I usually try and soothe the other person's feelings and maintain our relationship
	B	I try and do what I can to avoid tension
16	A	I try not to hurt the other person's feelings
	B	I generally aim at convincing the other person of the merits of my opinion
17	A	I am someone who is firm in pursuing my aims and goals
	B	I try to do what is necessary to avoid negative tension or vibes
18	A	I Might let the other persons get their way if it makes them happy
	B	I will usually let others have some things their way if I can have some things my way
19	A	I usually try to air all my concerns as quickly as possible
	B	I try to postpone the issue until I have thought it over
20	A	I try to work through all differences and concerns immediately
	B	I try to find a fair combination of gains and losses for both sides
21	A	In negotiations, I consider the other person's needs and wants
	B	I prefer dealing with my problems via direct discussion
22	A	I always try to find the middle ground
	B	I assert my needs and preferences

23	A	I usually try to satisfy everyone's wishes
	B	I sometimes allow others to take responsibility for solving problems
24	A	If the other persons' position seem important to them, I give in
	B	I try to get others to settle for a compromise
25	A	I try to show others the benefit of my position
	B	In approaching negotiations, I try to consider the other person's wishes and viewpoints
26	A	I prefer to propose a middle ground agreement
	B	I try to ensure both parties needs are met
27	A	I usually avoid taking a position which could cause controversy
	B	I usually let the other persons maintain their point of view if it makes them happy
28	A	I am focussed and firm in pursuing my goals
	B	I usually seek out the other person's help in finding a solution
29	A	I prefer to find a middle ground agreement
	B	I generally feel that differences are not worth worrying about
30	A	I try not to hurt other peoples' feelings
	B	I always share the problem with the other person to try and find a solution together

Analyzing your score - Put across in each block where you marked the same score

Number					
1				A	B
2		B	A		
3	A				B

4			A		B
5		A		B	
6	B			A	
7			B	A	
8	A	B			
9	B			A	
10	A		B		
11		A			B
12			B	A	
13	B		A		
14	B	A			
15				B	A
16	B				A
17	A			B	
18			B		A
19		A		B	
20		A	B		
21		B			A
22	B		A		
23		A		B	
24			B		A
25	A				B
26		B	A		
27				A	B
28	A	B			
29			A	B	
30		B			A
	Total	Total	Total	Total	Total
	Competing	Collaborating	Compromising	Avoiding	Accommodating

Appendix 4 - Mind Transformation coach specialist – Mr Manish Bundhun

Profile - Manish Bundhun



Manish is a Human Capital Business Leader, Executive Coach and Facilitator based in Mauritius.

His personal mission is to ignite the spark of transformation in people.

Manish is currently a C-suite Business Executive in the Rogers Group, where he heads Human Capital & the Rogers Academy. His current area of responsibility covers 5,500+ employees over 12 countries and 6 business sectors (Aviation, Agribusiness, Fintech, Hospitality, Leisure & Logistics) - (www.rogers.mu)

With over 15+ years in Human Resources and People Development, Manish has worked across various industries (Telecommunications, Technology, Logistics, Tourism, Financial Services and Aviation) with a varied international exposure (including Mauritius, France, India, Madagascar, Mozambique, South Africa and Singapore).

Born and living with his happy family in the tropical island of Mauritius, Manish has studied in Mauritius, Singapore & United Kingdom, and travelled extensively in Africa, Asia and Europe. He speaks four languages fluently (English, French, Hindi and Creole) and is passionate about making Mauritius a better place to work.

Holder of a Master’s in Business Administration (MBA honours), Manish is a certified Master Practitioner in Neuro Semantics and Neuro Linguistic Programming (NLP). He is a trained Executive Coach, a certified Agility Coach, a Coactive Professional Coach (CTI – Coach Training Institute) and a certified facilitator of LEGO Serious Play. Manish is accredited in various psychometric tools (Facet 5, Enneagram, Agile Profile, ViewSuite, LAB profile and StressScan).

He also practices an adjunct University professor where he facilitates post-graduate courses in Organisation Behaviour, Organisational Design, and Human Resources Management. As part of his job and passion, Manish delivers and facilitates executive workshops articulated around themes such as Strategic Management, Self Leadership, Executive Team Coaching, Emotional Intelligence, Reading People, The Psychology of Influence, Developing Agility in Organisations, Balanced Scorecard, Presentation Skills and Training of Trainers / Facilitators.

Directorships

- Non-Executive Board Director – Enterprise Information Solutions Ltd
- Non-Executive Board Director – Reliance Security Ltd
- Chairman and Board Member – Rogers Money Purchase Retirement Fund
- Chairman and Board Member – Rogers Group Provident Association
- Independent Non-Executive Board Director - Charles Telfair Institute

Name **Manish BUNDHUN**

Address 21 Mayer Street, Port-Louis, Mauritius (Residence)
5 President John Kennedy Street, Port Louis, Mauritius (Office)

Date of Birth 01 September 1979

Nationality Mauritian

Current Position Chief Human Resources Executive
Rogers Group (www.rogers.mu)

Contact details

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E-mail	manish.bundhun@rogers.mu		(Office)
	manish.bundhun@gmail.com		(Personal)
Linkedin	http://mu.linkedin.com/in/manishbundhun		
Skype	manish.bundhun		

Education / Training

2018	Certified Facilitator – LEGO Serious Play Trivium (LEGO Serious Play Master Trainers), Denmark
2016	Co-active Professional Coach Coach Training Institute (CTI) – USA (Dubai Campus)
2016	Executive Education – Business Strategy for HR Leaders INSEAD, Singapore
2014	Certified Agility Coach & Trainer Agile Organisation & Action, France
2013	Executive Education – Financing the Entrepreneurial Business London Business School, United Kingdom
2012	Master Practitioner in NLP (Neuro Linguistic Programming) Mind Transformations Ltd, Singapore
2009	Master Practitioner in NLP & Neuro Semantics Self-Leadership International, Singapore
2005	Master of Business Administration (with Distinction) University of Mauritius (<i>Postgraduate scholarship</i>)
2003	B.Sc. (Hons) Management (1 st Class with Honours) University of Mauritius

Experience

- Chief Human Resources Executive** (May 2008 – now)
Executive Management level, Rogers Group (Corporate office)
- Division Manager – Human Resources** (Jan 2006 – April 2008)
Senior Management level, Rogers Group (Logistics Sector)
- Human Resources Manager** (June 2005 – Dec 2005)
Virtual Human Resources Ltd (HR Consultancy firm)
- Human Resources Manager** (2003 – 2005)
ADB Networks (Internet Service Provider / Telecommunications)

Key Skills & Expertise

- **Co-active Coach / Executive Coach**
- **Team Coaching / Workshop Facilitator**
- **Certified Agility Coach and Trainer**
- **Certified LEGO Serious Play Facilitator**
- **Balanced scorecard Trainer and Champion**
- Accredited and certified in a range of **psychometric tools**
(1) **Facet 5**, (2) **Viewsuite**, (3) **Stress scan** (4) **Enneagram** (5) **LAB Profile** (6) **Agile Profile**
- Trained in **Targeted Selection**
- Trained and accredited as **Mentor**
- Registered trainer and workshop facilitator – **Self Leadership, The Psychology of Influence, The Leader as a Coach, Strategic Management, Balanced Scorecard, Employee Engagement, Train the Trainer, Reading people for results, The art and science of selection, Carrying out performance reviews, Developing Agility in Organisations, Emotional Intelligence at work, Resilient Leadership.**

Affiliations Past National Chairman, Board of Advisors, AIESEC Mauritius (2010-12)
Founder Member - Mauritius Round Table No 7
Founder Member – HRC (Human Resources Community) Mauritius

Languages **English** – Fluent, in both spoken and written
French – Fluent, in both spoken and written
Hindi – Fluent, in both spoken and written
Creole – Fluent, in both spoken and written

Interests / hobbies Travelling and discovering new countries, cultures and veg cuisine
Learning & Reading, People Psychology, Coaching,
Neuro Linguistic Programming, Science, Meditation, Yoga
Sports (football, swimming, table-tennis, trekking, cycling)
Cars and Technology

Driving Licence Clean and valid international driving licence (Private Car)

Referees Available on request



EXECUTIVE EDUCATION
ENTREPRENEURSHIP AND FAMILY BUSINESS

The Family Enterprise Challenge



The Business School
for the World®

THE FAMILY ENTERPRISE CHALLENGE

ADDRESSING FAMILY FIRMS' UNIQUE CHALLENGES

Family-owned enterprises face special challenges. Who will lead the family and/ or the firm into the next generation? How to disentangle personal and business relationships? Should long-term investment take precedence over short-term dividends?

Get the answers wrong and the results can be disastrous – for family and firm alike. Get them right and you will have a high-performance business and a happy, wealthy family.

The Family Enterprise Challenge is designed to help you address the universal issues as they apply to your own business and family. It combines rigorous learning – based on the latest research – with practical workshops. Over four and a half intensive days, teams of two to eight representatives from each participating firm learn from each other and INSEAD's expert professors by sharing, reflecting and above all applying new behaviours.

By working together as a family team – but outside your normal environment – you will reach a new level of personal trust. And by undertaking selected assignments with people from other family firms, you will gain a fresh perspective on your challenges.

The Family Enterprise Challenge integrates learning from entrepreneurship, strategy, finance, governance, leadership and psychology. Using case studies, lectures, simulations, individual and family assignments, team exercises, class discussions and film clips – all developed at INSEAD, the programme will raise your collective performance both as a business and as a family.

This is an opportunity not only to learn together at a leading business school but also to spend valuable time relating to each other as family and colleagues. The Family Enterprise Challenge is an experience as well as an education.

KEY BENEFITS

- Develop a concrete action plan for career planning, talent development, family meetings, family agreements and governance
- Gain insights into the psychological dynamics of family leadership, business management, and family and business Governance
- Learn to manage conflict, complex family structures, diverse personalities and difficult relationships
- Master a range of powerful family business tools, such as the Parallel Planning Process and Fair Process (both unique to INSEAD)

PROGRAMME CONTENT

All sessions take a distinctively intentional and interactive approach, reflecting the cosmopolitan make-up of the participants and leveraging their rich experience. Over four and a half days, you will cover the following topics using a wide variety of stimulating learning materials developed specifically for the programme at INSEAD. Most sessions are anchored in a real-life case study from a family business.

Addressing the family business system and challenges

- A shared vocabulary to understand the challenges facing business families
- Preparing for transitions in the family, ownership and leadership
- Clarifying and practising family values

- Understanding and strengthening family relationships
- Clarifying family aspirations based on values, vision and mission to create options for individual and family contributions
- Learning to address conflict
- Understanding and leveraging family dynamics

Aligning family ownership, business strategy and governance

- Using the Parallel Planning Process to integrate family and business goals
- Making key strategic decisions about growth, investment, financial structure and future ownership
- Understanding and developing family and business governance (boards, family councils, charters etc)
- Exploring succession and careers as an ongoing process involving family, business, governance and ownership roles
- Balancing the owners' expectations with the business' realities

Developing new skills to improve family harmony and business performance

- Using the concept of Fair Process in family and business governance to build trust and commitment
- Strengthening interpersonal and family communication skills to improve relationships

Action planning, execution and follow-up

- Practising effective family meetings – with support and coaching from faculty members
- Identifying specific next steps for action so that the family can meet individual and collective goals
- Creating a business family that is professionally emotional and a source of happiness and satisfaction

PARTICIPANT PROFILE

We recommend that participants attend the programme in teams of at least two to eight members from the same family enterprise. This may include non-family managers or directors. The more team members you bring, the more perspectives and issues you will address – and the more you will all learn. You will also be able to implement changes more effectively and efficiently, when you return to work and home.

PROGRAMME DIRECTORS



Christine Blondel

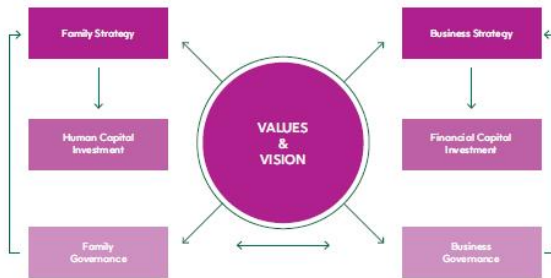
Adjunct Professor of Entrepreneurship and Family Enterprise



Dr. Randel S. Carlock

Senior Affiliate Professor of Entrepreneurship and Family Enterprise
The Benjamin L. Child Chaired Professor of Entrepreneurial Leadership

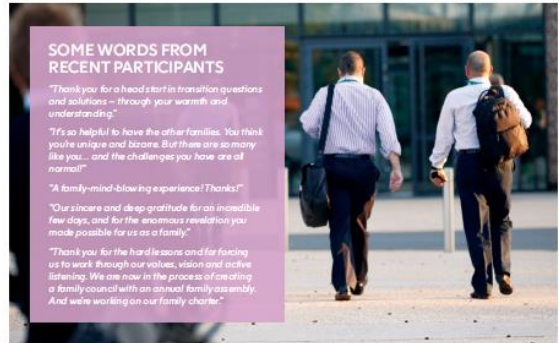
PARALLEL PLANNING PROCESS MAP



The Parallel Planning Process (PPP) outlined in the diagram above was developed at INSEAD to help business families plan for both the business and the family – two very different but interlocking systems.

The strength of the Parallel Planning Process is not just that it works. It is that the Parallel Planning Process is applicable the world over. It is rooted in the shared values of the individual family rather than inappropriate notions of universal best practice.

The programme does not simply teach the Parallel Planning Process. An intensive workshop uses visual and listening techniques to give all those present a voice about values and vision – and thus acts as a springboard for the process of real-life planning.



SOME WORDS FROM RECENT PARTICIPANTS

"Thank you for a head start in transition questions and solutions – through your warmth and understanding."

"It's so helpful to have the other families. You think you're unique and bizarre. But there are so many like you... and the challenges you have are all normal!"

"A family-mind-blowing experience! Thanks!"

"Our sincere and deep gratitude for an incredible few days, and for the enormous revelation you made possible for us as a family."

"Thank you for the hard lessons and for forcing us to work through our values, vision and active listening. We are now in the process of creating a family council with an annual family assembly. And we're working on our family charter."



CERTIFICATE IN GLOBAL MANAGEMENT

Deepen your global management and leadership skills at one of the world's leading business schools.

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THE STRATEGIC WAY TO DEVELOP YOUR CAREER

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WHY CHOOSE THE CERTIFICATE?

1ST CLASS EDUCATION

The Certificate in Global Management provides you with a residential and formal recognition from the top global business school in the world. Learn from world-class thought leaders and gain fresh perspectives on the latest business trends.

ALUMNI STATUS

Join our elite worldwide network of 56,000+ alumni in 172 countries and benefit from lifelong networking, professional development opportunities and preferential rates for all Executive Education programmes.

FLEXIBILITY

Within a 4-year period, you have the time to identify and select the programmes that best address your development needs as your career evolves.



1

PERSONAL ASSESSMENT

Talk to our experienced programme advisers for a personal assessment and to identify the skills that you would like to develop or reinforce.

Build your personalised learning development plan under the close guidance of our team of advisors.

2

DEVELOPMENT PLAN

Select and attend at least 3 programmes, totalling 15 days or more, over a 4-year period.

OPTION 1
Complete 1 core programme + 2 specialised programmes

OPTION 2
Complete 2 core programmes + 1 specialised programme

OPTION 3
Complete 3 core programmes

OPTION 4
Complete 1 customised or partner programme (minimum 3 days) + 2 programmes (core or specialised)

3

ENROLMENT

To enrol, you can visit our website to download and complete our pre-application form, indicating the programmes that you are considering for your certificate. A programme advisor will then be in touch to review your options and help you with the application process for your first programme.

Alternatively, you can contact a programme advisor to discuss the enrolment process.

For more information:
Email CGM_Contact@insead.edu

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