

Expanding the Field of Family Business Research:

A Qualitative Study

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Abstract

The study of family business as a distinct discipline is only a few decades old. The majority of research in the field is conceptual and often written by and for those outside of the family business. Rigorous qualitative research, grounded in the personal experience of family business members, is limited in the current body of knowledge. This study focused on the subjective reality of family business members and asked the research question: How do family business members experience working in their family businesses? The study used analytic induction to explore the specific experiences of organizational and interpersonal dynamics within a small purposive sample of family business members. This research found that family business members were content with their family business careers. They used discussion to make decisions and to manage conflict. Family members' contributions were maximized through distinct work roles. Family members used limited external resources to help them manage their businesses and little or no emphasis was placed on next generation succession issues. This phenomenological study offers a view of family organizations from the perspective of those who work in them. In such, it makes a significant methodological contribution to family business theory and also offers practical implications for those who study and work with these organizations.

Introduction

Many people are familiar with the term “family business”. This common phrase often evokes sentimental images of small entrepreneurial enterprises: a “mom and pop” corner grocery, a favorite ethnic restaurant, or a trusted auto service station. In reality, the structures of family controlled businesses are as diverse as families themselves; enterprises range from small, first generation start-ups to huge, multi-generation, multi-national corporations. According to the broadest definition of family business reported by Shanker and Astrachan (1996), over 90 percent of all business enterprises in North America, and the majority of businesses worldwide, are family-owned. Nearly 35 percent of Fortune 500 companies are family firms and family businesses account for 78 percent of all new job creation, 60 percent of the nation's employment, and 50 percent of the Gross Domestic Product (GDP.) (Shanker and Astrachan, Summer 1996). Because family businesses are ubiquitous; a distinction between these closely held firms and their non-family-owned-counterparts might seem unnecessary; however, a growing number of academics and professionals, representing disciplines as varied as law, finance, management science and psychology, acknowledge that the family-owned business is a complex

organizational form worthy of a distinct research effort. This study uses qualitative methodology, grounded in the subjective reality of family business members, to contribute to this evolving body of family business knowledge.

Organization of Research

This paper is organized according to Joseph Maxwell's (1996) qualitative research design (see Figure 1, below.) Research purposes are presented first followed by the study's conceptual context. The conceptual context includes a statement regarding the researchers' interest in the topic, a brief discussion of the evolution of the field, and an examination of relevant literature. The research question is presented next followed by a review of the study methodology and an analysis summary. The paper concludes with a discussion of the study's findings, limitations, surprises, and recommendations for future research.

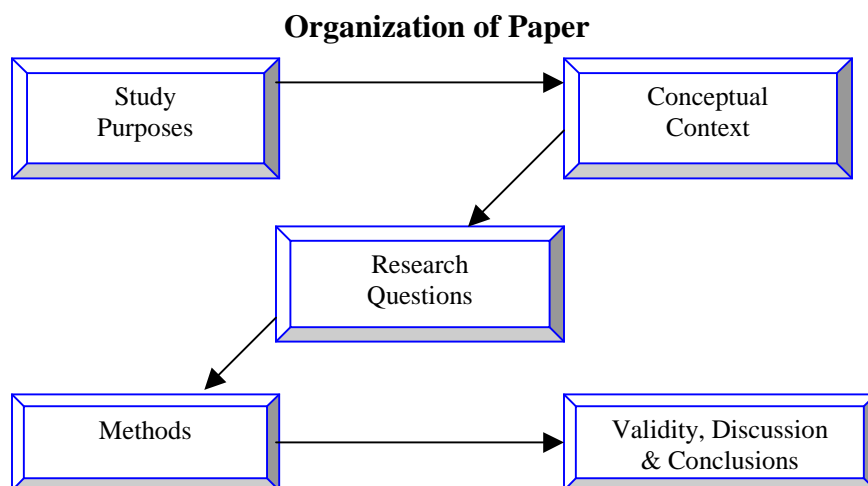


Figure 1: Maxwell's Qualitative Research Design

Study Purposes

The purpose of the study was twofold. The first purpose was to make a methodological contribution to family business research by providing a rigorous qualitative research study

focused on the subjective reality of family business members. The second purpose of the study was to offer a practical contribution to family business research by examining issues perceived as relevant to family business members *themselves*.

Conceptual Context

Historical Context of the Research

This study is part of an ongoing effort to learn about the organizational and family systems dynamics of family businesses. The first phase of the research included a literature analysis that examined the evolution of the field as represented through subject matter and publication information of over 1300 family business articles and books. The researchers found that family business literature began to appear in the middle 1950's and gradually increased until the 1980's, when the publication of family business-related writing surged. The writings included: academic literature (44 percent,) business publications (29 percent,) trade and professional journals (18 percent,) newspapers (6 percent,) popular magazines (2 percent,) and government publications (1 percent.) (See Figure 2, below.)

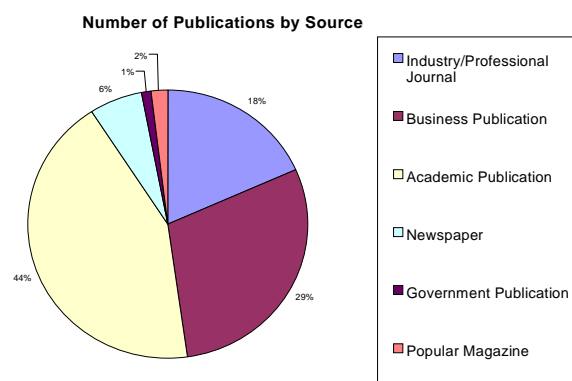


Figure 2: Number of Publications by Source

The subjects most represented in the literature were succession and exit strategies, business strategy, financial management, work and family roles and relationships (see Figure 3 below.)

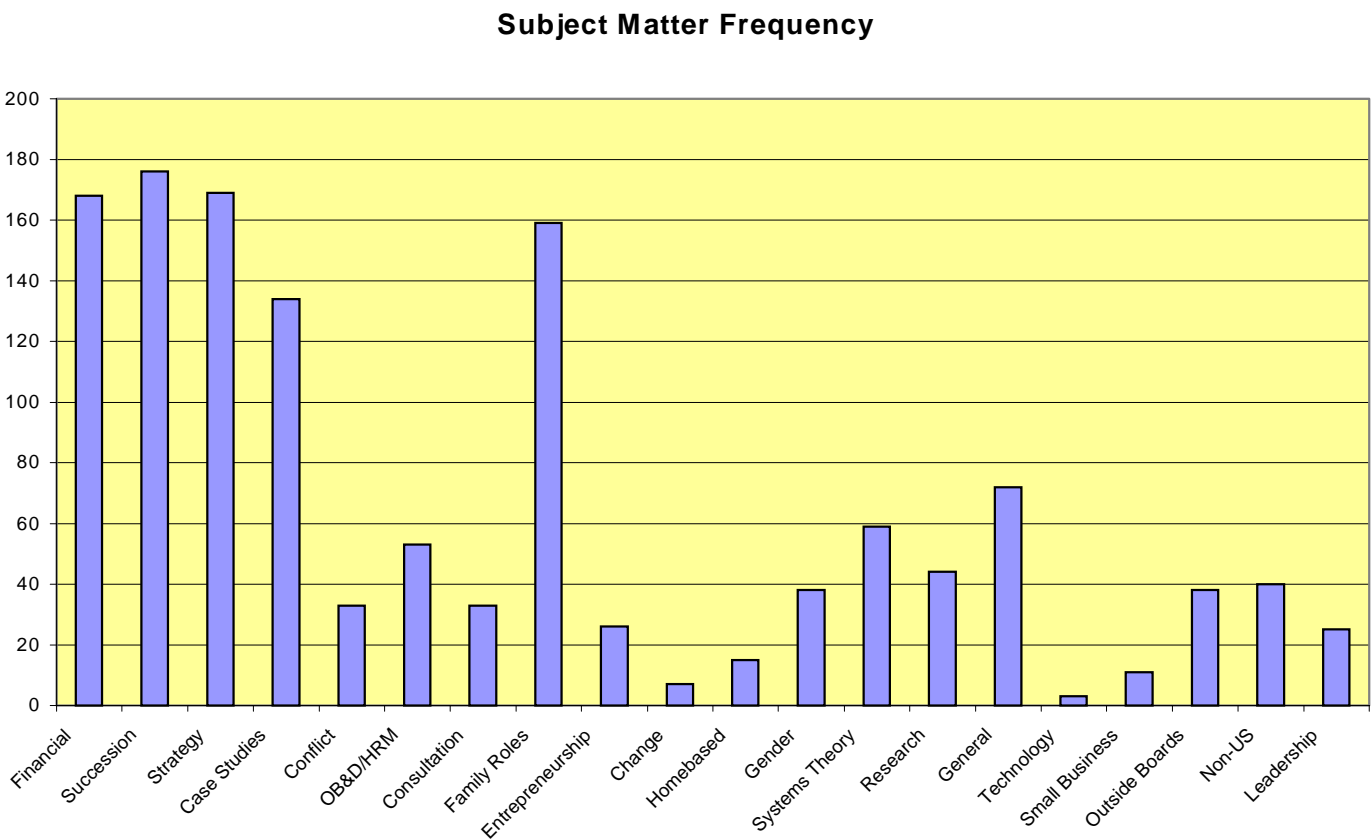


Figure 3: Subject Matter Frequency

Upon completion of this phase of the research, additional questions remained. Does the current body of family business knowledge address the personal experiences of people in family businesses and is family business literature relevant to family business members?

Literature Review

The purpose of this literature review is to present a brief summary of family business literature germane to this study. The review begins with a discussion of the intentional boundaries of the literature review. This is followed by a discussion of the definition of family

business. The section is concluded with a review of several relevant research findings about families in business.

This review does not present an exhaustive summary of empirical publications but rather treats "...the literature not as an authority to be deferred to, but as a useful but fallible source of ideas about what's going on..." In this case the "fallible source of ideas" comes directly from the growing body of family business literature (Maxwell, 1996). The study excludes other bodies of literature such as organizational theory, psychology and family therapy because the study is directly related to what literature currently exists in the field of family business, and how rigorous qualitative research is limited in that body of knowledge. This review is a constructed approach to the existing literature that presents a snapshot of what is being studied in the field, what is missing from the research, and how this study contributes to understanding experiences in family businesses (Maxwell, 1996).

Family business literature began to emerge in academic publications in the middle of the twentieth century. As interest in the field intensified, the number and sources of family business literature increased. Despite the wide-ranging interest in the topic, or perhaps because of it, a single definition of family business still does not exist in the literature (Desmond and Brush, 1992). This study used the definition that most closely matched the researchers' understanding of a family business: "...any business in which a majority ownership or control lies within a single family and in which two or more family members are, or at some time, were directly involved in the business (Rosenblatt, deMik, Anderson & Johnson, 1985).

The organizational and interpersonal dynamics of family businesses are complex-the objectives of both family and business must be addressed. Early theorist called for a separation of family and business to minimize the influence of the family upon the business (Levinson,

1971; Miller and Rice, 1988; Cohn and Lindberg, 1974). This approach was later replaced by a dual-systems approach that viewed the family business as one system made up of two subsystems, the family and the business (Lansberg, Summer 1983; Tagiuri and J. Davis, 1985; Swartz, 1989). This overlapping systems framework remains the most accepted paradigm for understanding family businesses. Understanding the existence of two systems does not eliminate the conflict that can be caused between the two. In a study of 86 businesses between 1976 and 1981, Ambrose (1984) found that time demand of the family business on the founder leaves him with less time to build relationships in the family. Conflicts related to stress, time and worries about the business that spill over into the family were also reported (Wilmott, 1971; Burke, Weir, and DuWors, Jr., 1980; Crouter, 1984).

Generally family businesses are recognized for strengths that include a loyal and dedicated workforce, warmer interpersonal relationships, greater sensitivity to local culture, and long-term continuity (Donnelley, 1964; Hayes, July 1981). A pioneering study conducted by Tagiuri and Davis (1992) identified six goals as priorities for family firms. These goals included: (1) having a company where employees can be happy, productive, and proud; (2) establishing financial security and benefits to the owner; (3) developing new and quality products; (4) creating a vehicle for personal growth, social advancement, and autonomy; (5) being a good corporate citizen; and (6) offering job security. None of these goals addressed the next generation. This is particularly relevant given that succession is the focus of roughly 20 percent of family business literature and constitutes the core of research in the field (Sharma, Chrisman & Chua, 1996).

Despite this extensive treatment in the literature, leadership succession in a family business is seldom planned (Rosenblatt, deMik, Anderson & Johnson, 1985; Lansberg, 1988;

Astrachan and Kolenko, 1994). At this time there is no evidence in the literature that succession planning has a positive effect on family business performance or provides any benefits (Sharma, et al, 1996).

The existing body of family business literature is predominantly written through the lens of the “outsider” with academics, consultants and professionals offering objective analyses of family business issues. In a review of family business research written by Sharma, Chrisman and Chua (1996) only 11 of the 226 articles reviewed used qualitative methodology based on narratives from, or observations of, members of family businesses. This lack of research grounded in “insider” experience may be due in part to the difficulty of accessing the private lives of families in business; family enterprises are often secretive and may not welcome researchers into their worlds (Neubauer and Lank, 1998). Limited qualitative research may also be a function of the field’s development; by some accounts the study of family business as a distinct discipline is only about 30 years old (Neubauer and Lank, 1998). This study is an effort toward building a body of literature grounded in the subjective reality of family business members. By shifting the research lens to the personal experience of family business members, researchers may gain a unique opportunity to understand the depth and the complexity of family businesses.

Research Question

The research question “How do family business members experience working in their family businesses?” was purposefully broad to allow for a wide range of information to be generated regarding the meaning of experience for the subjects in the study.

Methodology

Philosophical Orientation

This research was designed and carried out using qualitative epistemological and ontological assumptions. The logic of inquiry, methods of data collection, and techniques of data analysis were based on the philosophical perspective that reality is subjective and that knowledge can be achieved and shared through the interpretation of experience (Langton, 2000).

Logic of Inquiry

An analytic induction logic of inquiry generated information regarding organizational and interpersonal dynamics of family businesses based on the meaning of experience for those working and living in family businesses. This logic was chosen because it allowed for salient themes to arise from the data and supported the generation of emergent hypotheses about the experience of working in family businesses (Marshall and Rossman, 1995; DiMola, 2000).

Sample

Selection of subjects for the study was based on critical thinking regarding the population and the particular characteristics relevant to the study topic (Silverman, 2000). Membership in a family business was the primary parameter used within the population to create a purposive sample. Secondary consideration was the lifecycle stage of the business and relationship of family members active in the business. Ten subjects were requested to participate in the study; seven of those asked were able to do so. (See Table 1: Family Business Purposive Sample.)

Family Business Purposive Sample

Type of Business	Number of Subjects	Life Cycle	Family Members
Pipe and Fitting Distributor	1	Third Generation	Male Siblings
Social Work Agency	2	First Generation	Husband and Wife
Optician and Eyewear Retailers	3	Second Generation	Father, Son, Daughter
Plumbing Contractor	1	First Generation	Male Siblings

Table 1: Parameters of Study Sample

Data Collection

The choice of a data collection method for the study was based on the researchers' epistemological position that a legitimate way to generate data regarding social reality is to interact with people through talking, listening and gaining access to their accounts and articulations (Mason, 1996). Loosely structured and interactive, the qualitative interview created a shared understanding of experience between the researchers and the subject (Rubin and. Rubin, 1995). Throughout the interview process, the researchers attempted to stimulate discussion on the thoughts, ideas, opinions, activities, interactions and relationships experienced by the subject when working in a family business. The process began with the general research question, "Can you tell me what it is like for you to work in a family business?" Subsequent prompts were based on sensitizing concepts that provided direction for the study (Blumer, 1969). These prompts guided subjects to share their experiences regarding the perceived rewards and challenges of working in a family business; the processes used to make decisions and manage conflicts; the use of outside information resources; and the existence of succession strategies. Interviews were tape-recorded and taped information was transcribed for use in the data analysis phase of the study.

Method of Data Analysis

Interview information was transformed into data through an inductive spiral (Creswell, 1998). See Figure 4.

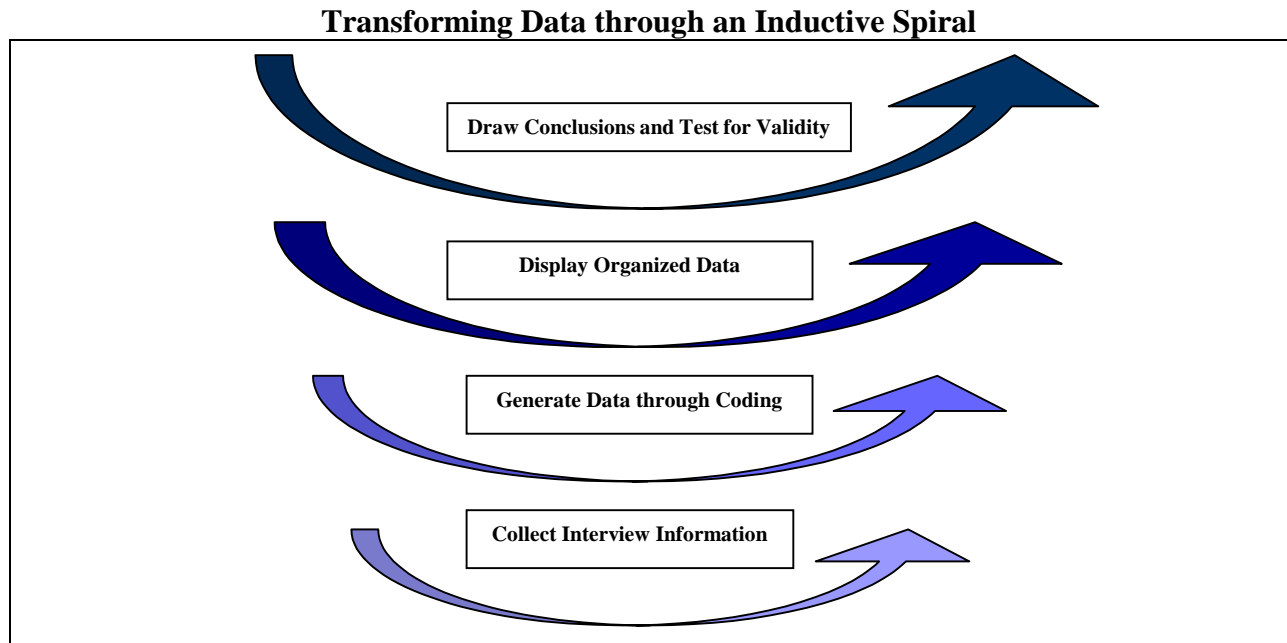


Figure 4: The Inductive Spiral

Activities in the spiral included collecting information, generating data through the interpretive process of coding, displaying the data in an organized format, developing conclusions regarding patterns in the data, and testing the validity of provisional conclusions.

The data analysis process is summarized below using the Miles and Huberman model of “data reduction”, “data display” and “conclusion drawing and verification” (Miles and Huberman, 1984)

- **Data Reduction:** “selecting, focusing, simplifying, abstracting, and transforming...raw data.” (Miles and Huberman, 1984). This process guides decisions regarding initial focus of the analysis effort (Silverman, 2000). Interview transcripts were read three times prior to any reduction activities allowing the researchers to get a clear idea of data coverage and scope prior to further analysis (Mason, 1996). This iterative process guided decisions regarding what data to focus upon. The analytic process of “open coding” was used to identify specific ideas found within the interview text (Strauss and Corbin, 1998). Codes that were represented with some regularity within most of the interviews were then chunked into

conceptual categories. Once this process was completed manually, data were loaded into the Ethnograph 5.0. (A discussion regarding the use of this software is found in the “Discussion” section of this report.)

- Data Display: assembling and organizing data into displays such as charts, matrices or graphs in order to clarify the direction of the analysis (Miles and Huberman, 1984; Strauss and Corbin, 1998). Conceptual categories of data were displayed using the “family tree” function of the Ethnograph 5.0 software. These “trees” displayed the parent category and the child codes that made up each category.
- Conclusion drawing: “beginning to decide what things mean, noting regularities and patterns, explanations, possible configurations, casual flows and propositions” (Shweder, 1980; Miles and Huberman, 1994). Based on this definition of “conclusions” the following patterns emerged from the data:
 - ❑ family business members used positive phrases to describe feelings regarding the family business career
 - ❑ family business members used discussion as a common technique to make decisions and to manage conflict;
 - ❑ family members’ contributions to the organization were organized into distinct work roles; this separation of duties based on personal strengths was described as a contribution to the business
 - ❑ family members reported using limited external resources to help them manage their businesses
 - ❑ family members placed little or no emphasis on next generation succession issues.
- Verification: testing provisional conclusions for validity (Shweder, 1980; Miles and Huberman, 1994). Validity refers to particular events or processes that could lead to invalid conclusions rather than generic variables that need to be controlled (Maxwell, 1996). The potential threats to validity related to description, interpretation, and the use of theory in this study are described below:
 - ❑ Description. The threat of inaccurate and incomplete data was addressed through the audio recording of interviews and the verbatim transcription of recordings. (Maxwell, 1996)
 - ❑ Interpretation. Attempts were made throughout the research process to limit the imposition of the researchers’ framework of meaning on the interview process, data analysis, and conclusion development.
 - ❑ Researcher bias. “The threat of conclusions based on the selection of data that fits the researchers’ existing theory or preconceptions and the selection of data that ‘stand out’ to the researchers” (Maxwell, 1996) was controlled through extensive use of researcher-assessment exercises designed to raise these issues to consciousness. Ongoing discussion with colleagues about the research process served to stimulate researchers’ reflections regarding this potential problem. Some researcher bias was inherent in the study as the researchers chose the topics to be included in the interview prompts.

- ❑ **Reactivity.** The influence of the researchers on the subjects in the study was inevitable in this qualitative interview process (Maxwell, 1996). In such the objective of the researchers was to understand this influence not to eliminate it. However, some general guidelines were followed to minimize unnecessary reactivity. The researchers did not reveal personal information until the end of the interview; avoided value-laden reactions to interview dialogue; and allowed subjects to lead the discussion as much as possible.

Analysis Summary

The analysis process described above allowed the researcher to use the recorded thoughts, experiences, perceptions and feelings regarding subjects’ work life to generate general themes. Boundaries of the study, specifically the researchers’ experience with the qualitative process, resulted in interesting, albeit limited, results. Limitations of the study are addressed in the “Discussion” section of this paper. Emergent patterns in the data included descriptions of interpersonal relationships that served both the business and the family; methods of strategic planning and process implementation accomplished through democratic decision-making; open and effective processes for managing conflict; the existence of a generally positive organizational culture; the development of work roles according to family member strengths; and a limited focus on succession planning. (See Table 2: Emergent Patterns in the Data.)

Emergent Patterns in Data

Patterns in Data
• Family Business Members Were Content With The Family Business Career
• Discussion Was A Common Technique Used To Make Decisions And To Manage Conflict
• Family Members’ Contributions To The Organization Were Maximized Through Distinct Work Roles
• Family Members Used Limited External Resources To Help Them Manage Their Businesses
• Little Or No Emphasis Was Placed On Next Generation Succession Issues

Table 2: Emergent Patterns in Data

Some patterns that emerged from the study were consistent with the literature. None of the subjects had formal succession plans; three out of the four businesses believed that the

current generation was the last for the business. Each of the subjects described work and family as separate entities; though most also spoke of the interrelated nature of the two systems. They also described the importance of limiting any negative impact of business dynamics on family relationships.

Family business members described their work using positive adjectives and reported feeling “grateful”, “lucky”, and “fortunate” to work in a family business. Most subjects described a generally sanguine atmosphere where employees (including themselves) enjoyed positive interpersonal relationships within a productive work environment. Some subjects mentioned conflict; however, strategies to minimize the effect of the conflict on relationships both within the business and the family were described. The subjects described the use of discussion in the form of “collaboration,” “discussion,” and “talking” to limit conflict and to manage decision-making. Research regarding forms of decision-making and conflict management does appear in organizational literature; however, it is not treated extensively in family business research. One strategy consistent among all subjects was some delineation of work roles based on personal strengths or professional experience. All subjects also described an interdependent working relationship with other family members in the business. None of the subjects used field literature resources extensively, though each expressed different strategies for obtaining needed information for the business. These activities included attending conferences, accessing demographic and industry trend information, and using internally generated data.

Additional findings, specific to the family business members from businesses older than one generation, described the transfer of knowledge from the first generation to the second through stories and accounts of experience. Emphasis was placed on the importance of not forcing the next generation into the business. Attitudes regarding the importance of high quality

products and customer service were emphasized. These multi-generation business subjects also stressed the impact of positive family system values on the culture of the business.

Other patterns within the research were evident but did not exist within the majority of interviews. Examples included discussions regarding trust, intuition, and communication among family members; the sacrifice of family time for advancement of the business; and the development of mature personal relationships between parent and child that may not have developed outside of the business.

Discussion

Fulfillment of Research Purposes

The purposes of this qualitative research study were fulfilled. A methodological contribution to the family business body of knowledge was accomplished through the completion of an inductive examination of the subjective reality of members of family businesses. The findings are rich with examples of how family business careers are experienced by those who work in them. The interviews and subsequent analysis provide myriad opportunities for additional research related to the attitudes, values, business strategy and culture of these unique businesses as perceived by family business members themselves.

Limitations of the Study/Suggestions for Improvement

The greatest limitation to this study was the researchers' evolving knowledge of the qualitative research process. This limitation affected data collection methods, data analysis, and report writing.

1. **Data Collection.** During the early phase of the interview process the basic principles of qualitative interviewing were totally unstructured and contained information unrelated to the research question. This limitation was improved by revising the research design to include a set of standard interview prompts for use in all remaining interviews.

2. **Data Analysis.** The analytic coding process was limited to very basic concepts. This occurred due to the researcher's inexperience with the coding process; a decision to focus on only a few key areas of family business experience; and a lack of familiarity with the open-ended nature of analytic induction. This limitations could be improved by choosing sensitizing concepts at the beginning of the study, allowing more time for the interview information to be analyzed (over and over and over,) and exercising patience regarding the emerging nature of the data generation process.
3. **Report Writing.** An extensive knowledge of the qualitative research process, the theoretical underpinnings of the research question and nuances of subjective data should improve the final report of future inductive analysis projects.

Sources of Bias and Error

There were several sources of bias and error in this study. First, the researchers intentionally chose issues of focus for the study. This created the potential validity issue of researcher bias. Researcher bias was also surfaced in a discussion with colleagues regarding the researchers' own experience in a family business and the expectation to hear accounts of conflict from the subjects. Second, the interview process changed dramatically as the researcher gained skills in conducting qualitative interviews. A greater volume of data and a higher number of subject areas were evident in interviews that were conducted at times when the subjects were relaxed and had no time constraints; this format was accomplished with only half of the interviews. Third, the selection of a sample based on the broad characteristic of membership in a family business resulted in extremely diverse representations of experience. A sample of subjects representing businesses at similar life-cycle stages or representing similar family management structures may have improved the potential for even limited generalization of the findings.

Use of Software

A potential limitation of any qualitative research study is the use of computer software to assist in the data analysis process. Assumptions regarding the researchers' skill and comfort level with technology, the type and functions of specific programs, and the researchers'

expectations regarding the role of the software in the analysis process must be considered. For this study data analysis was accomplished through a combination of both manual activities and computer-assisted activities. This allowed the researchers to control the data analysis process while gaining experience using a qualitative research computer assisted analysis program. The program was most helpful in creating displays of data. The program had the capability of additional functions that were not accessed during this research project.

Surprises

There were several surprises in this research process. The most profound surprise was the complexity of the qualitative research process. Other surprises included the consistently optimistic and positive views that the subjects espoused regarding their work experiences and the confirmation that limited succession planning is actually done among family business. Three out of four of the firms represented in the sample verbalized beliefs that the business would naturally end after the current generation-a cessation strategy of choice, not the unexpected outcome of a business or family problem.

Conclusions and Recommendations for Future Research

This paper summarizes the process and content of a qualitative research study on the experiences of members of family businesses. The research was designed to achieve a realistic objective: design a limited study that used an inductive logic of inquiry, practice using qualitative methods of information generation and data analysis, and gain an understanding and appreciation for the process of qualitative research.

Through the active process of listening to family business members' detailed accounts of experiences, feelings, relationships and other subjective realities, the researchers gained a shared understanding of their worlds-a perspective that is underrepresented in current research. The

absence of rigorous research grounded in the personal voice of family business members may be one reason why so few family business members use field literature as a resource for their businesses. Interestingly, the one subject in this study who did discuss reading some family business stated that the only type of literature that he found useful was that which offered “stories” of other people’s experiences.

As research in the field evolves, it has the potential to serve two purposes. It can be a source of knowledge specifically written for outsiders to the system who work *with* family businesses-an ontology currently reflected in the literature. Or, it can also be a source of knowledge for family members who work *within* family businesses-the ontology advocated by the results of this study. This study makes a small but important methodological contribution to research in the field of family business.

Calls for continued research in the field of family business are extensive. Much work is needed to answer myriad research puzzles that exist throughout the family business community. Many of the family business member experiences raised in this study-but not included in the analysis due to scope limitations-are worthy of continued research. Examples of these experiences include: the matter of trust among family members and how this impacts roles and performance in the business; the role of intuition regarding business strategy and communication processes; the way stories are used to transfer knowledge from one generation to another; how each successive generation of a family business makes its mark on the firm and contributes toward the evolution of a family asset; the business advantages in the “all for one, one for all” unity of some family cultures; and the anxiety of a parent generation regarding the legacy of rewards and challenges he or she leaves to the inheriting generation. All of these issues emerged within the data from this study. Continued qualitative research in these areas will serve to

interpret the meanings of these experiences for both the business and the family. The resulting knowledge can serve both those who work within these systems and those who work to support them.

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