

# Relevant Factors in the Process of Socialization, Involvement and Belonging of Descendants in Family Businesses

FACTORES RELEVANTES EN EL PROCESO DE SOCIALIZACIÓN, VINCULACIÓN Y PERTENENCIA DE DESCENDIENTES EN EMPRESAS FAMILIARES.

**RESUMEN:** Esta investigación busca identificar los factores que se involucran en el proceso de socialización, vinculación y pertenencia inicial de descendientes en empresas familiares, así como los vínculos entre dichos factores. A través de un estudio de caso detallado de corte cualitativo aplicado a cuatro empresas, los autores proponen un modelo que incorpora factores previamente identificados en otros estudios, junto con nuevos factores producto del presente trabajo. Los hallazgos de esta investigación confirman la dependencia específica de cada etapa en las fases posteriores; la etapa de socialización influye en la de participación, la cual, por su parte, tiene influencia en la etapa de pertenencia de los descendientes en una empresa familiar. Se encuentra además una presencia marcada de factores como el conocimiento, el liderazgo, el modo y el momento de ingreso y la motivación. Aquellas personas responsables de orientar a sucesores potenciales pueden analizar estos hallazgos, con el fin de optimizar su trabajo de preparación y apoyo a los recursos humanos de una familia, en procura de la continuidad de este tipo de organizaciones.

**PALABRAS CLAVE:** sucesión, sucesores, socialización, vinculación, empresas familiares.

FATORES RELEVANTES NO PROCESSO DE SOCIALIZAÇÃO, ENVOLVIMENTO E PERTENCIMENTO DOS DESCENDENTES NOS NEGÓCIOS FAMILIARES

**RESUMO:** Esta pesquisa procura identificar os fatores que se envolvem no processo de socialização, vinculação e pertencimento inicial de descendentes em empresas familiares, bem como os vínculos entre esses fatores. Por meio de um estudo de caso detalhado de corte qualitativo aplicado a quatro empresas, os autores propõem um modelo que incorpora fatores previamente identificados em outros estudos, junto com novos fatores produto do presente trabalho. As descobertas desta pesquisa confirmam a dependência específica de cada etapa nas fases posteriores; a etapa de socialização influi na de participação, a qual, por sua vez, tem influência na etapa de pertencimento dos descendentes numa empresa familiar. Entretanto, além disso, uma presença marcada de fatores como o conhecimento, a liderança, o modo e o momento de rendimento e a motivação. Aquelas pessoas responsáveis por orientar a sucessores potenciais podem analisar essas descobertas, com o fim de otimizar seu trabalho de preparação e apoio aos recursos humanos de uma família, à procura da continuidade desse tipo de organizações.

**PALAVRAS-CHAVE:** sucessão, sucessores, socialização, vinculação, empresas familiares.

FACTEURS PERTINENTS DANS LE PROCESSUS DE SOCIALIZATION, D'IMPLICATION ET D'APPARTENANCE DES DESCENDANTS DANS LES ENTREPRISES FAMILIARES

**RÉSUMÉ:** Cette recherche vise à identifier les facteurs impliqués dans le processus de socialisation, d'implication et de l'adhésion initiale des descendants dans les entreprises familiales, et les liens entre ces facteurs. Au moyen d'une étude de cas détaillée et qualitative appliquée à quatre entreprises, les auteurs proposent un modèle qui incorpore des facteurs préalablement identifiés dans d'autres études, ainsi que de nouveaux facteurs produits au cours de ce travail. Les résultats de cette étude confirment la dépendance spécifique de chaque étape dans les phases ultérieures; l'étape de la socialisation influence celle de la participation, qui, à son tour, influe sur l'étape d'adhésion des descendants dans une entreprise familiale. On trouve, également, une forte présence de facteurs tels que les connaissances, le leadership, le mode, et l'heure d'entrée et la motivation. Les personnes qui soient responsables de guider les successeurs potentiels pourront analyser ces résultats, afin d'optimiser leur travail de préparation et d'appui aux ressources humaines d'une famille, en vue d'assurer la continuité de ce genre d'organisations.

**MOTS-CLÉ:** Succession, successeurs, socialisation, lien, entreprises familiales.

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**ABSTRACT:** This research works toward the identification of the factors that comprise the process of socialization, involvement and initial belonging of descendants in family businesses and the key relationships between them. By means of a qualitative detailed study of four cases, complemented by a quantitative survey of 274 Colombian family businesses, the authors generate a new model that takes into account both factors explored in previous research as well as others identified in this study. Findings confirm the specific dependency of each stage on the subsequent ones; socialization influences involvement, which in turn influences the belonging of the descendants to the family business, with a strong presence of factors such as knowledge, leadership, mode, timing, and motivation. Those responsible for the orientation of potential successors may examine these findings in order to optimize their preparation efforts and support of family human resources for the continuity of the business.

**KEYWORDS:** Succession, successors, socialization, involvement, family business.

## Introduction

In family businesses the owner family frequently exercises control over the company and is involved in its administration; features that have been central to the continued interest in this topic as a field of study for research (Casillas & Acedo, 2007; Debicki, Mattherne III, Kellermans & Chrisman, 2009; Chrisman, Kellermans, Chan & Liano, 2010; Parada, Nordqvist & Gimeno, 2010; Pérez & Basco, 2011). Succession is one of the crucial issues that have been analyzed in literature concerning family businesses (Longenecker & Schoen, 1978; Wortman, 1994; Sharma, Chrisman & Chua, 2003; Astrachan & Shanker, 2003; Venter, Boshoff & Maas, 2005; Anderson, Jack & Drakopoulou, 2005; Cadieux, 2007; Haberman & Danes, 2007; De

Massis, Chua & Chrisman, 2008). Nevertheless, while issues concerning the performance of successors have received great attention, few studies have been dedicated to prior stages. This research proposes three such stages here designated as the *process of socialization, involvement and initial belonging* of descendants in family businesses.

The central research question presented in this paper is: Which causal relationships are evidenced among the factors which comprise the three stages of the process of socialization, involvement and belonging of descendants?

Within the succession process, the socialization to which the potential successor is exposed is essential (Ward, 1994; Morris, Williams & Nel, 1996; Morris, Williams, Allen & Avila, 1997; Cabrera, De Saá, García & Rao, 2001). This first stage is sometimes referred to as the *formation and development stage* (Cabrera *et al.*, 2001), lasting from infancy until the moment when the possibility of entering into the business is considered by the potential successor. Second, in the field of succession the concept of *involvement* is also essential. Although it has been treated in a unidimensional manner in literature, our research provides sufficient evidence for involvement being considered a stage itself. Few authors have contributed to the issue of involvement (Longenecker & Schoen, 1978; Ward, 1994; Dumas, Dupuis, Richer, St.Cyr, 1995; Aronoff & Baskin, 1998; García, López & Saldaña, 2002; Lambrech, 2005), and those who have only focused on specific factors that comprise it in isolation. The third stage is the *belonging* stage. Authors who have addressed this concept, without fully exploring it, refer to *business career, successor performance, or succession transition* (Murray, 2003; Cadieux, 2007). In regards to this stage, the main aspect identified and analyzed in this study is the experience of successors in their first full-time jobs in the family business, or their *initial belonging*.

Qualitative data gathered in the first phase of this research makes possible to organize the factors that comprise the process of socialization, involvement and initial belonging. Quantitative data gathered in the second phase attempts to identify key causal relationships among these factors, supporting on the theoretical framework of succession in family businesses (Sharma *et al.*, 1997; Chrisman *et al.*, 2003; Chrisman *et al.*, 2005; James, Jennings & Breitkreuz, 2011).

### Conceptual Framework

Although no theory on family businesses is specifically recognized to date, substantial progress has been made toward achieving one (Chrisman *et al.*, 2003; Chua *et al.*, 2003; Pieper & Klein, 2007; Casillas & Acedo, 2007; Debicki *et al.*, 2009; Moores, 2009; James *et al.*, 2011; Litz, Pearson &

Litchfield, 2012); furthermore, within this current literature the topic of succession is always present.

### Socialization Stage

The theoretical model of succession from the parent to the child in the leadership of the family business considered in the long term (Longenecker & Schoen, 1978), outlines a seven stage process that begins in childhood and culminates at the time of maturity of the successor's performance. This model states that "[...] parent-child succession involves a long term socialization process, in which the child is gradually prepared for leadership through learning experiences" (Longenecker & Schoen, 1978, p. 1). On the other hand, Ward and Aronoff (1991) demonstrate important reasons to hire children in summer jobs before they enter the business as full-time employees. Additionally, Ward (1994) further explains that the process must be initiated at home, in what is directly taught through parental guidance and behavior during childhood. García *et al.* (2002), state that the socialization process consists of two stages: Primary socialization, also called *preparation* by Gersick, Lansberg, Desjardins & Duna (1999), covers everything related to the acquisition of knowledge and values; whereas secondary socialization entails the acquisition of specific knowledge and is assumed to have been preceded by primary socialization.

A review of the literature on the socialization stage reveals the presence of four relevant factors identified by various authors: *Values* (Wortman, 1994; Koiranen, 2002; Lozano, 2003; García & López, 2001, 2003; García, 2005), *leadership ability* (Turner, 1995; Drennan, Kennedy & Renfrow, 2005; Craig & Moores, 2006), *formal education* (Goldberg, 1996; Howort & Assaraf, 2001; Lambrech, 2005; Venter *et al.*, 2005); and *transmission of tacit knowledge* (Polanyi, 1966; Nonaka & Takeuchi, 1995; Cabrera *et al.*, 2001). Each of these individual factors may be influenced by the family, the business, the industry, or individuals themselves.

### Involvement Stage

This stage represents the transition between the socialization stage of successors and their performance in their first full-time jobs as employees in the family business. Stavrou and Swiercz (1998) found that between the pre-admission moment and the effective admission moment into the family business, descendants may make a decision that may lead their parents to simultaneously evaluate their potential successor. The decision is usually made when descendants are between 18 and 22 years; the time when many of them are in college. The successor can decide between looking



for employment outside the family business or working at it. In this regard, Longenecker and Schoen (1978), Birley (1986), Davis and Tagiuri (1989), and Handler (1989) propose that when the successor decides to work in the family business the reasons frequently taken into consideration for such a decision are family-based, personal, social, business-related, or market-related. These findings can additionally be complemented with others from studies on career choice intention (Zellweger, Sieger & Halter, 2010; Schoröder, Schmitt-Rodermund & Arnaud, 2011).

### The Initial Belonging Stage

In the existing literature, little research is specifically related to the first jobs of potential successors in the family business full-time. In contrast, the current study places importance on this stage and relates it to the concepts of satisfaction and commitment.

In the concept of satisfaction, Sharma *et al.* (2001) examine the issues that influence initial satisfaction with succession processes in family businesses. The continuation of this

work (Sharma *et al.*, 2003) emphasizes that successful succession has two dimensions in family businesses: Satisfaction with the succession process and satisfaction with the business performance. As for the concept of commitment, it is necessary to highlight the work of Lansberg and Astrachan (1994), who emphasized family commitment to the business, which contributes to family cohesion in the planning of succession and training of the successor as an important factor. On the other hand, Chrisman *et al.* (1998) and Sharma and Rao (2000) found that integrity and commitment to the business are the most important performance attributes of the successor, which suggests the need to emphasize them early in the succession process.

In order to conduct the research for this study it was necessary to adopt a definition of family business, since no general consensus presently exists for one (Chua *et al.*, 1999; Upton, Teal & Felan, 2001; Astrachan & Shanker, 2003; Cabrera, 2005). Therefore, for the purposes of the current research, the definition provided by Cabrera (2005) was adopted with minor adjustments: A family business is one in which 51% or more of the ownership is in the

hands of the members of one family, who have the intent of controlling its ownership and possibly its management, and into which a second or later generations have been incorporated. For this article, we define a second or later generation as the descendants of the founder(s) and their corresponding descendants, referred to as *descendants* or *potential successors*.

The four case studies which constitute the first part of the empirical work in the investigation and examination of literature allowed for the construction of a theoretical model of the socialization, involvement and initial belonging of potential successors to family businesses.

This conceptual model that arise from the theoretical analysis and the four cases about the socialization process, involvement and initial belonging of potential successors to the family business, dynamically linked these three stages and points out the factors that constitute them. In this sense, the model has similarities with the general features of the models proposed by Longenecker and Schoen (1978) and Matthews, Moore and Fialko (1999). Also, has similarities with the integrated model by Le Breton-Miller, Miller and Steier (2004), oriented at an effective succession in family businesses. The derived model is illustrated in figure 1. Additionally, the derived hypotheses are explained below.

The model proposes a dynamic structure process considering flexibility to evolve over time, in order to facilitate the study of factors during different times and circumstances

and taking into account that the stage of socialization influences the stage of involvement, which, in turn, influences the stage of belonging. The model defines a number of these factors and identifies others that emerge as a consequence of taking into account and integrating related concepts that other authors had addressed in isolation in their precious work. The relationships among the constructs of these three dimensions led to proposing several hypotheses derived from the qualitative study and the reviewed literature. These hypotheses will be presented below.

It is widely accepted that leadership continues to be one of the most recognized disciplines within the organizational field (Sorenson, 2000; Abell, 2006; Rodríguez & Rodríguez, 2006). In the literature, it is not only relevant in the training of family business potential successors, but also associated with the development of autonomy and the ability to make decisions (Turner, 1995; Kambil, 2010).

When leadership training is most influenced by the family-business system, the successor acquires the ability to examine how his or her involvement in the family business will take place. The intention of young adults to get involved and later manage the family business can be influenced by their potential power to make decisions (Stavrou, 1998), which is closely related to leadership development within the family-business system (Lozano, 2006). Additionally, García *et al.* (2002) and Dunemann and Barret (2004) underline the importance of a gradual formation of the successor, who initially shares predecessor's perspective on

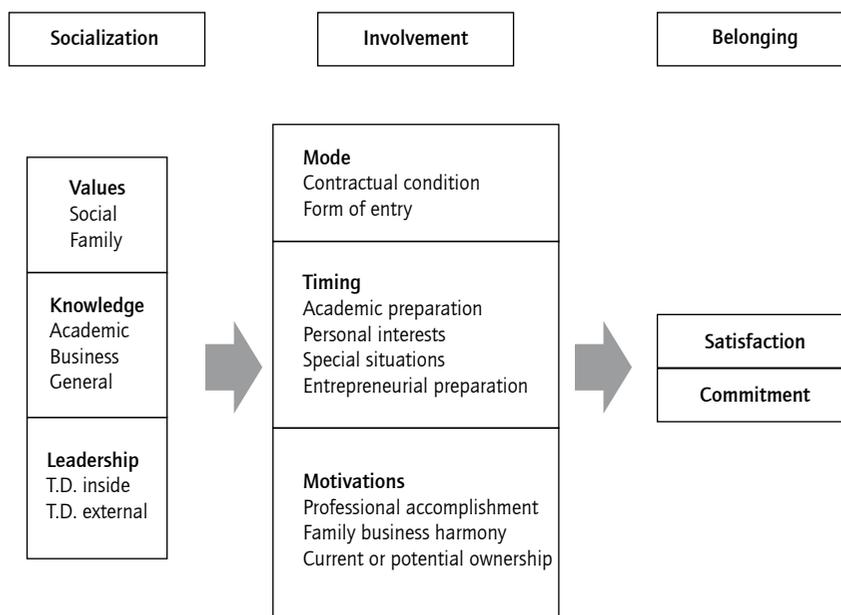


Figure 1. Proposed model for the process of socialization, involvement and initial belonging. Source: Own elaboration.

the business; eventually acquiring the autonomy that will allow him or her to exert influence over the way of joining to the family business in a full-time job.

In contrast, if the leadership development is more influenced from outside the family business system, it entails that the successor will operate in landscape that separates him/her, to some degree, from the daily routines of the family business, forcing him/her to be more independent and to determine the best timing to join the business full-time. For Stavrou and Swiercz (1998), the importance of the family dimension suggests that family dynamics, values, relationships, needs and desires can drive children out of the family business if they tend to disengage from their parents' traditions and explore their own career options. In concordance with this, Pasi (2001) argues that many managers of small and medium-sized family businesses lack high level training and formal education, which could mean they entered at the wrong time and had not evolved professionally at the same rate as the business. This leads to the following hypotheses.

**H1:** *In family businesses, leadership training for decision-making within the family business system positively influences the mode of involvement of the descendants.*

**H2:** *In family businesses, leadership training for decision-making outside the family business system positively influences the timing of involvement of the descendants.*

The manner in which the successor joins the family business can be primarily determined by the conditions of the job contract and by the manner of entry. Frequently, the job contract terms of potential successors to the family business are proposed by the parents and are generally welcomed by their descendants; even if not considered fair, with the hope that job conditions will improve in the future, something that does not always happen.

In their study on the father-son relationship, Davis and Tagiuri (1989) found seven factors that strongly influence the quality of any work relationship. Among these factors, two stand out: The agreement between the two people over the formal intention of their work relationship, and the costs and benefits that each person perceives in the relationship. In family businesses, these two aspects commonly remain vague or inconclusive when pacts of involvement are made with potential successors. This then influences the level of satisfaction of the successors with his or her first job. Yet, even if when joining the potential successors know the rules to abide (Lozano, 2006) and the initial contract is not attractive, in some cases, the family identity, trust, personal connections and monitoring functions provided by family relations encourage better

incentives for success than explicit formal contracts. However, Ibrahim, Soufani and Lam (2001) found that some family businesses establish guidelines and clear policies regarding the involvement of relatives in the business. In any case, the expectation of seeking better conditions later on after entering the family business can generate a certain level of satisfaction with the initial job. The generated hypothesis is presented below:

**H3:** *In family businesses, the contractual condition of involvement positively influences the satisfaction of the potential successors with their first job.*

Dunemann and Barret (2004) state that families face a dilemma when the potential successors are not sufficiently prepared, since they may undermine and jeopardize the business. In line with this, academic preparation reinforces the capacity and the beliefs to contribute to the family business and, thus, the voluntary self-commitment to the family interests. If the potential successor obtains higher academic preparation, the perception of power to face bigger challenges increases, which in turn fosters a tendency to set goals of major commitment.

In reference to commitment, Sharma and Irving (2005) recommend the commitment of potential successors to the business. Harvey and Evans (1994) propose that the goal of an organization is to attract qualified members, while Chirico and Salvato (2008) highlight the importance of integrating specialized knowledge possessed by the family to be successful in dynamic markets. That is to say, within a family that owns a company, the preparation of all its members is profitable if their knowledge and skills are combined with their application to the company. These arguments lead to the hypothesis presented below:

**H4:** *In family businesses, the academic background when joining the company, positively influences the commitment of potential successors in their first jobs.*

The motivation of descendants to engage in the family business full-time can have its roots in the perceived possibilities for professional accomplishment (Stavrou, 1998). This motivation encourages them to involve themselves with the tasks of their first jobs and feel satisfaction when fulfilling them. Similarly, when potential successors perceive these possibilities for professional accomplishment in family businesses, it is more likely for them to demonstrate their commitment and more willingly undertake their tasks efficiently.

A constant search for professional accomplishment leads to finding a job that satisfies individual preferences. In this respect, Dumas *et al.* (1995) found evidence that successors worked in family businesses because it allowed them to apply their professional degrees and interests, increasing

their belonging. De Massis *et al.* (2008) argued that if the tasks assigned to the potential successors did not fulfill them, their motivation decreased and they felt neither satisfied nor committed, which eventually may lead to their abandoning of the business. The opposite will occur if the activities undertaken are found to be fulfilling and interesting. In addition to the aforementioned, Venter *et al.* (2005) highlight the importance of matching the personal needs of the potential successor with the type of work performed in the family business. The arguments expressed lead to the following hypotheses:

**H5:** *In family businesses, the possibility of professional accomplishment when joining, positively influences the satisfaction of potential successors with their first job.*

**H6:** *In family businesses, the possibility of professional accomplishment when joining, positively influences the commitment of potential successors to their first job.*

Dumas *et al.* (1995) found that descendants value not only stress-free work, but also the freedom to choose, as well as the opportunity to feel comfortable in a congenial environment. Meanwhile, Handler (1992) determined that the level of mutual respect and understanding between generations is a relevant factor. On the other hand, Eckrich and Loughhead (1996) indicate that the more conflicts successors of family businesses have with their parents, the less likely they are to commit to a career in those businesses.

A good working environment and harmony among the family members is one of the major attractions for new personnel joining the business. In the context of the family business, when relations between employees and family members are harmonious, these relations become a motivation for the potential successors to involve themselves full-time (Lozano, 2006). In addition to entering an affable environment when family harmony exists, successors come to feel satisfaction with their tasks.

Family harmony is a subject which frequently appears in research on family businesses (Dunn, 1999; Venter *et al.*, 2005; Lozano, 2006; Björnberg & Nicholson, 2007; Edleston & Kellermans, 2007). Recently, De Massis *et al.* (2008) highlighted the factors of the relationship between groups or individuals deeply associated with the process of succession. Hence, the following hypothesis was derived:

**H7:** *In family businesses, harmony at the timing of joining, positively influences the satisfaction of potential successors in their first jobs.*

In order to recognize the relevance of ownership for family businesses, several authors point out its clear relationship to the succession process (Williams, 1992; Ward & Dolan,

1998; Westhead, Cowling & Howorth, 2001; Habbershon & Pistrui, 2002). On this topic, De Massis *et al.* (2008) indicate that the possibility of losing shareholding control or the absence of sufficient attraction for additional investments could become an impediment for succession to be implemented with members of the owning family.

To be a current or potential owner grants power over the control of the family business, therefore this can become a motivation to join it full-time. The feeling of ownership is a condition of privilege if compared to the large number of people not in that position. More specifically, the condition of being the owner or potential owner appears to contribute to a clear propensity for commitment to the first full-time job. Similarly, Chrisman *et al.* (1998) assert that a successor can be involved in the family business through holding shares, which implies a proclivity on his or her part for the responsible completion of their tasks. The arguments expressed lead to the following hypothesis:

**H8:** *In family businesses, the possession of actual or potential ownership positively influences the commitment of potential successors in their first full-time jobs.*

## Methodology

### Case Studies

As succession of family businesses is a complex social phenomenon. Case studies have become a valuable research tool used by some academics within the field. (Yin, 1994; Handler, 1994; Chetty, 1996; Kirby & Lee, 1996; Sharma *et al.*, 1997; Cabrera, 2005).

Yin (1994) argues that the case study is the most appropriate research strategy in those situations the researchers are based on the "how" and/or "why" types of questions, on a set of contemporary events, or when it has recently occurred. In fact, on those the researcher has little or no control. Therefore, the case study is also an ideal method to in-depth identify and understand the features that characterized the stages and their relationships, as well as other concepts leading to advance knowledge of the phenomenon.

The four cases used for this research were constituted with two large and two medium-sized family enterprises, where a total of 12 informants were interviewed in order to collect the data. Additionally, an interview protocol based on both the literature review and the succession theory was designed for obtaining the necessary information, guaranteeing the covering of all relevant parts of the study. Table 1 summarizes the description of the companies.

**Table 1.**  
*Enterprises of qualitative sample.*

Enterprise	Size	Starting year	Informants	Last generation involved
A	Large	1945	2	Second
B	Large	1957	4	Second
C	Medium	1959	4	Third
D	Medium	1946	2	Third

Source: Own elaboration.

For the case studies that constitute the qualitative phase of research for the current study, four businesses were selected based on the following criteria: i) medium or large-sized business; ii) at least ten years old and have second or later generation members involved; and iii) at least one family member from the youngest generation must be working in the business full-time. This sample size complies with the minimum number of cases advised by several authors for a qualitative study (Lambrech, 2005; Eisenhardt, 1989), although there is no precise guide for an exact number (Perry, 1998).

Yin (1994) recommends both the application of multiple sources of data in compliance with the principle of triangulation, thus applying his criteria for the validity and reliability of the research, and applying an interview protocol in order to obtain the necessary information; these guarantee a full coverage of all relevant parts in the study. The sources of information for this study were, first, interviews with potential successors belonging to the youngest generation involved, as well as with other key family informants; second, direct observation through visits paid at business facilities; and, third, documents of interest to this research.

In any scientific research, quality and objectivity are measured by the criteria of validity and reliability. Regarding the validity of its construction, three tactics were applied for this qualitative research. On one hand, multiple sources of evidence were used, as mentioned in the preceding paragraphs. In each particular case, as many informants as deemed necessary were included in order to contrast the different versions of events. In the four cases, siblings or cousins belonging to the last generation full-time involved in the business were interviewed in order to verify and complement the information. On the other hand, a chain of evidence was established, so it was possible to follow the derivation of any conclusion of the case studies from the research questions and through analysis of the evidence. Subsequently, descriptive reports of events for each of the cases were drafted and then reviewed by the involved descendants considered as key informants. In order to clarify the confusing points, these reports also included information deemed contradictory.

Regarding internal validity, this is intended to ensure that inferences of the variables are correct, that all the explanations have been considered and that the evidence converges with the explanation the researcher provides. To do this, a review of the pertinent literature was taken as a starting point, along with the definition of research questions and theoretical development. An explanation of the phenomenon under study was now articulated, based on the analysis of the evidence, on the review of the research questions and on a new iterative study of the evidence.

External validity concerns the scope of the study findings. This generalization is analytical in nature, *i.e.*, it is based on a particular set of results to sketch a broader theory, not a statistical generalization to make inferences about a population or universe based on data obtained from the sample. In this qualitative approach the main factors of the process under study were thus determined, so that it was possible to verify in each case whether a replication of the theoretical premises would follow.

The reliability criterion aims to check whether a second researcher, performing the same case study described by a first researcher and, following the same procedures for the recovery of the data described, would come to the same findings and conclusions. Thus, reliability refers to the internal consistency of the analysis that provides stable and consistent results. Therefore, the objective is to minimize errors and biases in the study. The study protocol described before was developed for this purpose, and a database of interview transcripts and relevant selected texts was built; these can be accessed on the hermeneutics unit Atlas/ti, the qualitative data analysis assistance program used by the researcher. In addition, this was complemented by the file with field notes and documents collected in each of the four cases. Furthermore, questions related to each other were made in the same interview, contributing to confront and verify the information obtained.

For information analysis, recommendations on inductive analysis (Marshall & Rossman, 1995) and deductive analysis of the data (Miles & Huberman, 1994) were taken into account. An iterative methodology was implemented, supported by the use of the Atlas/Ti program, by means of which the transcripts of the interviews and field notes were read and reread. With this information, categories and codes were constructed (Strauss & Corbin, 1990; Miles & Huberman, 1994). Subsequently, relationships between the categories were sought and matrixes were constructed (Miles & Huberman, 1994) when deemed necessary for the analysis.

In the results, the generated list of codes and categories for the socialization stage showed three dimensions

(values, knowledge, leadership) and five influential elements (family, company, market, descendants, society), as shown in table 2.

**Table 2.**  
*Codes and Categories of Socialization Stage.*

soc Codes	Socialization Categories
socv	<b>Socialization of values</b>
socv: FAM socv: SOC	Family behavior Social behavior
socK	<b>Socialization of knowledge</b>
socK: ACA socK: EMP socK: GEN	Academic Entrepreneurial General (Social)
soCL	<b>Socialization of leadership</b>
soCL: IN soCL: EX	Decisions internal coexistence family/ company Decisions external coexistence family/ company

IF Codes	Categories of Elements Influencing Socialization
IFFAM	<b>Family</b>
IFFAM: MOT IFFAM: FAT IFFAM: SIB IFFAM: OTH	Mother Father Siblings Other relatives
IFCOM	<b>Company</b>
IFCOM: FAT IFCOM: WOR IFCOM: CON	Father Workers and supervisors Context y dynamics of company
IFMARK	<b>Market</b>
IFMARK: REL IFMARK: NRE	Related Not related
IFDES	<b>Descendant</b>
IFDES: PRI IFDES: PEI	Professional interests Personal interests
IFSOC	<b>Society</b>
IFSOC: INS IFSOC: COE	Institutions Information and facts of daily coexistence

Source: Own elaboration.

From literature, and particularly from case studies, three new dimensions are identified and confirmed as pillars for the involvement stage: *mode*, *timing* and *motivations*, as illustrated in table 3, with its codes and categories.

Similarly, based on literature and cross-analysis, two major dimensions are confirmed for the initial belonging stage: satisfaction and commitment. The corresponding codes and categories are shown in table 4.

**Table 3.**  
*Codes and categories of involvement stage.*

INVOL Codes	Involvement Categories
INVOL: MOD	Involvement mode
INVOL: MOD CON INVOL: MOD ENT	Contractual condition Entry mode
INVOL: TIM	<b>Involvement timing</b>
INVOL: TIM AB INVOL: TIM PI INVOL: TIM SS INVOL: TIM EB	Academic background Personal interests Special situation Entrepreneurial background
INVOL: MOT	<b>Motivations for involvement</b>
INVOL: MOT PD INVOL: MOT FC INVOL: MOT OW	Professional development Family-company Harmony Current or potential ownership

Source: Own elaboration.

**Table 4.**  
*Codes and categories of the initial belonging stage.*

Codes Position	Categories of Initial Belonging
PPOSITION: SAT	Satisfaction
PPOSITION: COM	Commitment

Source: Own elaboration.

### Quantitative Study

The theoretical model derived from the case studies was subject of an empirical contrast with the formulated hypotheses. The information obtained from the quantitative sample provided the necessary input to perform the statistical procedures and contrasts by means of structural equation techniques.

Empirical support was provided by a sample of 274 family businesses located in the Cali-Yumbo region, in Valle del Cauca department, Colombia. A directory generated from data gathered by the 56 Chambers of Commerce of Colombia was consulted for selecting the sample. Several filters were applied to this database, resulting in the identification of 900 large, medium and small-sized family businesses in the region before mentioned. A measuring questionnaire designed for quantitative research was distributed to these businesses, obtaining responses from 292. Out of the 292 responses obtained, 274 were correctly and completely filled. The final sample reached a 30.4% of responses, stemming from the proportion 274/900.

The questionnaire was designed in four blocks consisting of 88 items in a five point Likert scale. It ranged from a

value of 5 (completely agree) to 1 (completely disagree). Through this method, questions were posed about the experiences of the second generation or later descendants before entering the family business full-time, as well as about their process of engagement and the degree of their belonging to the family business in their first jobs.

In designing the questionnaire, the conceptual model derived from qualitative research. The analysis and conceptualization of the literature reviewed on family businesses related to the area of succession were also taken into account. The initial version of the questionnaire was then reviewed by several experts who suggested a series of adjustments. Subsequently, a pilot test leading to further improvements was performed.

In tables 5, 6 and 7, the definitions of factors or variables are presented, with key sources being indicated. Both the definitions and the sources of information for establishing the items were taken into account in the design of the questionnaire. In addition, Cronbach alpha statistics

are shown for each variable, extracted from calculations meant to evaluate the reliability of the variables or constructs used in the models.

The constructs initially proposed were analyzed to determine the correlation of its variables and to make the appropriate filter. This process also included the constructs with low values of Cronbach's alpha with some disparity into its variables.

The exploratory procedure of validating the measuring scale shows that the three large dimensions (socialization, involvement and initial belonging) have relatively high Cronbach alpha coefficients, suggesting a proper degree of internal consistency. The socialization dimension has the highest value (0.83), followed by belonging (0.82) and involvement (0.74).

This quantitative phase of the study is based on the developing of a structural equations model (SEM). The first to be taken in account was the structural sub model of the constructs of descendants' socialization and involvement

**Table 5.**  
*Operationalization and Reliability of Socialization Variables.*

Variable	Conceptual Definition	References	Operationalization of Multiple Indicators	Cronbach Coefficient
Family values	Beliefs focused on the family which guide the action of a person or group of persons.	Beach (1993); Lumpkin, <i>et al.</i> (2008); Chrisman <i>et al.</i> (2003); García <i>et al.</i> (2002); Morris <i>et al.</i> (1996); García (2001).	Derived from the qualitative research and from Birley (2001); García <i>et al.</i> (2002).	$\alpha = 0.733$ This value corresponds to the estimates in the reliability analysis.
Social values	Beliefs focused on social concerns which guide the action of a person or group of people.	Chrisman <i>et al.</i> (2003); García <i>et al.</i> (2002); García (2001).	Derived from the qualitative research and from García <i>et al.</i> (2002).	$\alpha = 0.8049$ This value corresponds to the estimates in the reliability analysis.
Academic knowledge	Organized body of information formally studied and learned from institutions, chosen intentionally.	Morris <i>et al.</i> (1996, 1997); Venter <i>et al.</i> (2005); Le Breton-Miller <i>et al.</i> (2004).	Derived from the qualitative research.	$\alpha = 0.3006$ This value corresponds to the estimates in the reliability analysis.
Business knowledge	Organized body of information formally or informally learned through experience with family businesses or outside businesses.	Venter <i>et al.</i> (2005); Barach <i>et al.</i> (1988); Stavrou (1998).	Derived from the qualitative research and from Stavrou (1998); Birley (2001); Sharma <i>et al.</i> (2003).	$\alpha = 0.5729$ This value corresponds to the estimates in the reliability analysis.
General knowledge	Body of information from daily routines whose basic concepts have been learned, not necessarily intentionally.	Steier and Ward (2006).	Derived from the qualitative research and from Steier and Ward (2006).	$\alpha = 0.7302$ This value corresponds to the estimates in the reliability analysis.
Leadership inside the family business system	Capacity for responsible autonomous decision-making in the family business scenario.	Abell (2006); Turner (1995); Ireland and Miller (2004).	Derived from the qualitative research and from Barach and Ganitsky (1995).	$\alpha = 0.5501$ This value corresponds to the estimates in the reliability analysis.
Leadership outside the family business system	Capacity for responsible autonomous decision-making in experiences outside the family business scenario.	Abel (2006); Ireland and Miller (2004); Barach and Ganitsky (1995); Ward (1997).	Derived from the qualitative research and from Ward (1997).	$\alpha = 0.6368$ This value corresponds to the estimates in the reliability analysis.

Source: Own elaboration.

**Table 6.**  
*Operationalization and Reliability of Involvement Variables.*

Variable	Conceptual Definition	Literary Source	Operationalization of Multiple Indicators	Cronbach Coefficient
<b>Contractual condition</b>	Formal agreement prior to beginning full-time work.	Harvey and James (1999).	Derived from the qualitative research and from Harvey and James (1999).	$\alpha = 0.7297$ This value corresponds to the estimates in the reliability analysis.
<b>Form of entry</b>	Pre-conditioning format prior to beginning full-time work.	Birley (2001); Harvey and Evans (1994).	Derived from the qualitative research and from Birley (2001); Harvey and Evans (1994).	$\alpha = 0.4132$ This value corresponds to the estimates in the reliability analysis.
<b>Academic background</b>	Level of study achieved or formal exchange programs carried out intentionally.	Harvey and Evans (1994).	Derived from the qualitative research and from Harvey and Evans (1994).	$\alpha = 0.5582$ This value corresponds to the estimates in the reliability analysis.
<b>Personal interests</b>	Manifestation of personal desires that defines the initial work involvement.	Derived from qualitative research and from Stavrou and Swiercz (1998); Stavrou (1998); Stavrou (1999).	Derived from the qualitative research and from Stavrou (1998)	$\alpha = 0.7252$ This value corresponds to the estimates in the reliability analysis.
<b>Special situations</b>	Infrequent instances in life that influence decision-making in the work involvement.	Derived from qualitative research.	Derived from the qualitative research.	$\alpha = 0.3989$ This value corresponds to the estimates in the reliability analysis.
<b>Business preparation</b>	Level reached with personal experience in business topics.	Boyd <i>et al.</i> (1999); Morris <i>et al.</i> (1996); Stavrou (1999); Sharma and Rao (2000).	Derived from the qualitative research and from Morris <i>et al.</i> (1996).	$\alpha = 0.5143$ This value corresponds to the estimates in the reliability analysis.
<b>Professional fulfillment</b>	Feeling of attraction for opportunities in the family business potentially fulfilling professional expectations.	Stavrou (1998); Stavrou (1999); Le Breton-Miller <i>et al.</i> (2004).	Derived from the qualitative research and from Stavrou (1998).	$\alpha = 0.5931$ This value corresponds to the estimates in the reliability analysis.
<b>Family business harmony</b>	State of satisfaction and good understanding in relations among family members, in and out the businesses.	Morris <i>et al.</i> (1996); Morris <i>et al.</i> (1997); Le Breton <i>et al.</i> (2004); Lee (2006).	Derived from the qualitative research and from Lee (2006); Björnberg and Nicholson (2007).	$\alpha = 0.788$ This value corresponds to the estimates in the reliability analysis.
<b>Actual or potential ownership</b>	Current or potential ownership in the business, which carries the power to vote and to control its management.	Ward and Dolan (1998); Williams (1992).	Adapted from Birley (2001).	$\alpha = 0.6965$ This value corresponds to the estimates in the reliability analysis.

Source: Own elaboration.

**Table 7.**  
*Operationalization and Reliability in the Variables of Belonging.*

Variable	Conceptual Definition	Literary Source	Operationalization of multiple indicators	Cronbach Coefficient
<b>Satisfaction with the first position</b>	Feeling of pleasure with experiences lived during the execution of the first full-time job.	Sharma <i>et al.</i> (2001); Sharma <i>et al.</i> (2003); Lee (2006).	Derived from the qualitative research and from Becker (1992); Sharma <i>et al.</i> (2003).	$\alpha = 0.7262$ This value corresponds to the estimates in the reliability analysis.
<b>Commitment to the first position</b>	Strength of the successor that induces him to relevant actions, to achieve beneficial objectives for the family business during the first full-time job.	Becker (1992); Dunham <i>et al.</i> (1994); Barach and Ganitsky (1995); Meyer and Herscovitch (2001); Herscovitch and Meyer (2002); Sharma and Irving (2005).	Derived from the qualitative research and from Becker (1992); Dunham <i>et al.</i> (1994).	$\alpha = 0.7884$ This value corresponds to the estimates in the reliability analysis.

Source: Own elaboration.

dimensions, which focuses on the relationships among the different factors of the socialization dimension (measured through exogenous constructs of value socialization, knowledge socialization and leadership socialization) and the three factors of the dimension of descendants' involvement (measured through the endogenous constructs of mode, timing and motivation for involvement). Then, the structural sub-model of the constructs of the descendants' involvement and belonging dimensions was taken into account. This sub-model seeks the relation among the aforementioned factors of the involvement dimension with the factors of the initial belonging dimension (measured through the satisfaction and commitment endogenous constructs).

## Results and Discussion

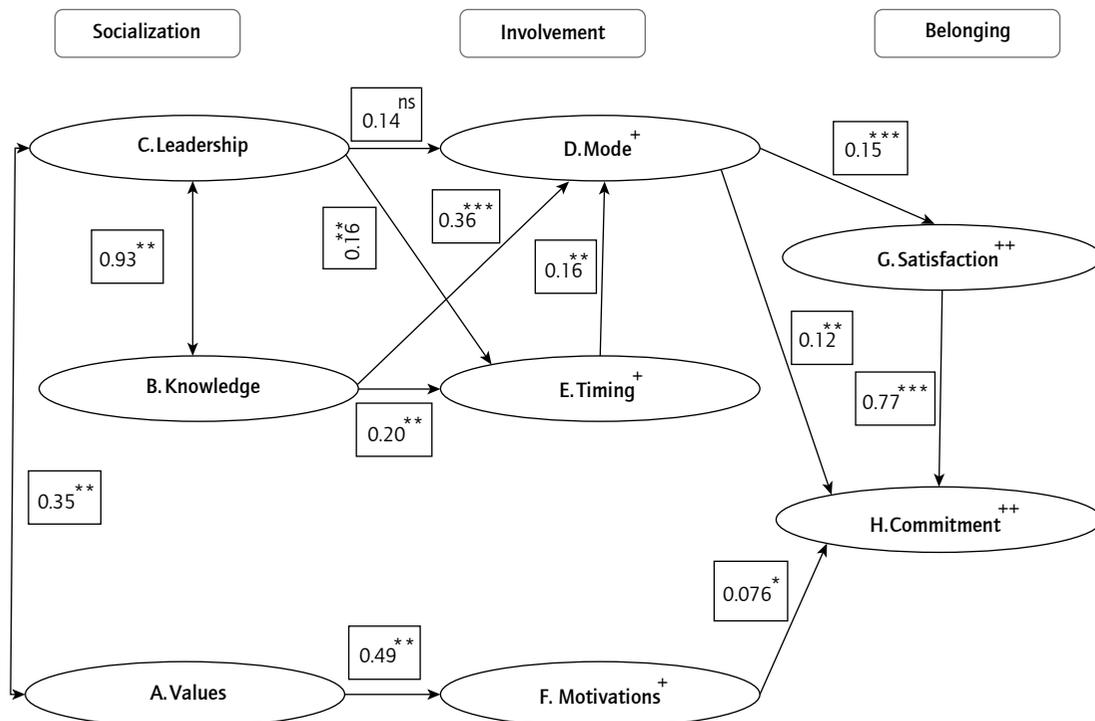
The results of the different structural sub-models (the socialization-involvement and involvement-belonging) allow to contrast the proposed hypotheses, taking as a starting point the estimating of sub-models of measurement and the explicit relationships between constructs.

The quantitative analysis phase of this study confirmed the conceptual model constructed in the qualitative study. The relationships among relevant factors were established, which allowed for the derivation of the equations model. The proposed focus for analysis was adequate considering it was dedicated to relating the factors of the socialization

dimension with the factors of the involvement dimension with a model goodness-of-fit index (GFI) of 80%, and an adjusted variance (AGFI) of 67%. Similarly, the factors of the involvement dimension were related with the factors of the initial belonging dimension with a model goodness-of-fit index (GFI) of 65% and adjusted variance (AGFI) of 61%.

The general model of the final route of relationships is presented in figure 2. The relationship Leadership-involved Mode is shown with dotted line since is not to be significant, as the results of direct effects relationships standardized coefficient is 0.140 and the *p* value 0.593, higher than the significance a level. Thus leadership socialization has not a significant impact on the mode of involvement of the descendants.

According to the findings, several strong relationships are revealed in the model. Values socialization is a strong factor that both shows the strength of values in the socialization of descendants and is closely related to the motivation for joining the family business (significant standardized estimate of 0.49). At the same time, the strong correlation between these motivations and the commitment of potential successors to their first job is confirmed with a 0.076 standardized estimate. Similarly, there are strong relationships between knowledge training and both mode (highly significant 0.36 coefficient) and the timing of involvement (standardized significant 0.20 coefficient), as well as between leadership training and the timing of



**Figure 2.** Route Analysis of the Socialization-Involvement- Belonging Process. Note. *p*: significance level. Significant at the 5% (\*\*); 0,1% (\*\*\*); ns: (no significant). Source: Own elaboration.

involvement (significant standardized 0.16 coefficient). Also noteworthy are the strong relationships between the mode and the factors of initial belonging (satisfaction and commitment) with highly significant and significant values of 0.15 and 0.12, respectively.

Based on findings, neither Hypothesis H1, with a highly significant standardized coefficient of 0.75, nor Hypothesis H2, with a standardized significant coefficient of 0.15 are rejected. The significant relationship between the leadership developments (Turner, 1995) centered on the capacity for decision-making and the mode and timing of involvement shows that the descendants gradually improves their capacity and autonomy for making decisions, continuing to acquire the clarity to define the appropriate timing for incorporation into the family business. If the individual is subject to contractual or other pressures at the timing of his decision, his involvement will become less likely if those pressures go against his or her own wishes. Pressures by predecessors could influence the decision; however, job continuity of the potential successor in the long term is placed in danger. These pressures may be exhibited, albeit with the best of intentions, because, according to Ward (1987) and Royer *et al.* (2008), the predecessors are eager for the business to continue in the hands of family, especially their own children. It is clear in the qualitative results that the gradual improvement of the capacity to make decisions was fundamental in helping to define the timing of involvement to full-time commitment, even though, with respect to the mode of entry, there may be some uncertainty considering as concealed pressures that were influencing some of the successors in the cases studied.

Hypothesis H3 is not rejected as its standardized coefficient was significant with a value of 0.15. This result suggests that a clear contractual agreement on job functions, goals and salary appeared to be of great significance for the satisfaction that successors experience in the performance of their first full-time jobs; which would result in potential leaders looking for mutual understanding before being hired contractually. In the literature on family businesses, no studies scientifically explore the relationship between the contractual condition and satisfaction, although James (1999) places importance on the contractual relationships in an owning family. The result of this hypothesis supports the presence of satisfaction on the part of successors when they formally begin work. This result is supported by results of the qualitative case studies in which the contractual conditions with the successors were clearly defined; even when some were established verbally and not in written form and, in some cases, the salary, although agreed to be paid, was never defined with

a concrete value. In these cases, the repercussions were minimal as the agreements were respected.

Hypothesis H4 is not rejected, as it had a significant standardized coefficient of 0.40. The result explains that feeling prepared with academic knowledge results in successors contributing their knowledge to the business, promotes the application of that which has been learned, and as a consequence, results in a feeling of commitment to help the business. This result is consistent with the ideas of Dunemann and Barret (2004) about the fears of family if potential successors are not prepared. The case studies demonstrate that all of the successors interviewed were committed to the business during the performance of their first job, although some of them had not yet finished their undergraduate degrees upon joining the company. Nevertheless, they already had enough academic backgrounds that could be put into practice.

Hypotheses H5 and H6, with significant standardized and highly significant coefficients of 0.39 and 0.3, respectively, are not rejected. These results show that when descendants perceive potential for accomplishment in the business due to the sector of operation, the salary to be received, the performance of the business, their involvement in making decisions, or the trust placed in them, they feel satisfaction and commitment toward their first jobs. These findings are compatible with the work by Le Breton *et al.* (2004), which emphasizes the search for professional accomplishment of the successors as part of their motivations for joining family businesses. These are also aligned with the approach presented by Schröder *et al.* (2011), regarding the idea that potential for professional accomplishment can result in the potential successor enjoying work in the family business. This also corresponds fairly well to the proposals of Perez-Basco, García-Tenorio, Giménez and Sánchez (2007), who indicate that, among other reasons, expectations of the successors that their needs will be satisfied define their level of commitment. However, there is not an author, including Chrisman *et al.* (1998), Sharma *et al.* (2003), Sharma and Irving (2005), or Perez *et al.* (2007), who refers to satisfaction or commitment with specific reference to the first full-time position in the family business. Regarding the qualitative study, results are compatible with the findings from the family businesses analyzed, in which a majority of the successors were motivated to enter mainly because they perceived the potential for professional accomplishment, which led them to find satisfaction in and commitment to their first jobs.

Hypothesis H7 is not rejected, as its standardized coefficient was significantly high with a value of 0.27. The result of this hypothesis is in line with the not only work of Stafford, Duncam, Dane and Winter (1999), that emphasizes

family harmony as an element of great significance for the performance of the business. This result is also consistent with the studies by Goldberg (1996); Sharma *et al.*, (2001); and Lozano, (2006), who state that a climate of family harmony in labor relations translates into enjoyment in the family business. In the qualitative research, positive relations at the timing of enlistment constituted a motivation for the descendants to work in the family business with other relatives. This led to satisfaction in their work, although a few recognized that occasionally they did not feel comfortable in their first jobs given the high demands and the periodic impositions of their parents.

Hypothesis H8 is not rejected, as it has a highly significant standardized coefficient of 0.25. This result suggests that having ownership or knowing about future ownership constitutes a motivation for the descendants to feel committed to their first jobs within the family business. Although various studies in the literature have focused on the issue of ownership in family businesses (Chrisman *et al.*, 1998; Hoffman *et al.*, 2006), no study has been specifically undertaken with respect to an analysis of the relationship between ownership and commitment to the first position. This result is consistent with the work by Habbershon and Pistrui (2002), who refer to the identification of strategies in a trans-generational search for wealth for families who own businesses. The qualitative research partially verifies these results, inasmuch as it revealed that a significant number of the descendants feel committed to the business due to the perception that they may be seen as current or potential owners. These discoveries are of great significance, as they indicate that ownership is influential in the creation of commitment, but not necessarily in the creation of satisfaction.

## Conclusions

The first conclusion indicates it has been possible to construct a relations model for the socialization, involvement and initial belonging process of descendants in the family business system. Its structure, here conceived, was possible to derive from both the fragmented advances in the literature and the analysis of the case studies of the qualitative phase of the research, which led to relevant findings. This model shows the complexity of the three dimensions (socialization, involvement and initial belonging) while simultaneously facilitating the observation of these factors in an organized manner, so as to establish relations between them. Consequently, it becomes possible, if necessary, to focus on different sections of the structure in order

to undertake specific research, due to the clear location of the factors inside the model, and not on detached pieces.

The second conclusion is the building-up of the involvement stage, demonstrating its existence and establishing itself as a new contribution to the process of succession. This stage is comprised of new factors in its conception (mode, timing and motivations) that demonstrate a high level of consistency between them, provide the stage its own identity, and clearly reveal the transition between successor socialization and the initial belonging to the family business.

The third conclusion refers to the importance of the initial experience of the successors in their first full-time job, considering it is where the first steps are taken toward a definition of their actual interest in continuing in the family business or not. The existence of this initial belonging with its two constructs, satisfaction and commitment, is a finding from this research.

The fourth conclusion points that through the structural equations model it was possible to successfully express the theoretical proposal in a quantitative form, with formulated hypotheses satisfactorily responded.

The fifth conclusion signals the existence of an analysis route between the three large dimensions in the model. Two great flows are evidenced in this route: one that corresponds to values-leadership-knowledge-timing-mode and, from there, continues with satisfaction and commitment; and the other to the values-motivations, continuing toward commitment.

It is evident that it is progressively more difficult for leaders of the family business to impose contractual conditions and the manners of entry of potential successors, which forces them to design strategies to attract them, perhaps, being open to bilateral agreement, reestablishing the procedures and contract requirements, and the manner of involvement. Therefore, families must try their best to ensure that among the motivations for involvement in the family business, good harmony among members and the perception of the potential for professional accomplishment in the family business system are included.

Although involvement of descendants in the business motivated by actual or potential ownership does not seem to influence satisfaction with the first job position, it is influential in successors' commitment. Considering this, the owner family must implement in a clear and decisive way, a trans-generational plan of succession of ownership in order to strengthen commitment toward business.

The combination of qualitative and quantitative methods within this study allowed for a better analysis of the data and advances in knowledge about the succession process

of potential successors. The proposed conceptual model provided a scenario that facilitates observation of the relationships among its variables and was essential in getting unprecedented results.

Limitations of this research must be recognized as well. One limitation within the qualitative phase of the study is that results cannot be generalized beyond the sample cases considered. Likewise, the possible omission of data by key informants regarding some events must be considered, since the study is focused on events in the past, for which not all information can be remembered accurately. As for the quantitative phase, the structural equations model is based on a rigorous set of statistical assumptions, on behaviors demanding rigorous analysis and on sample sizes that guarantee asymptotic properties in the majority of cases are difficult to achieve.

Potential future work of researchers could embrace complementary studies to further adjust the constructs expressed in this study. Data provides a sound foundation upon which to continue developing and attempting to achieve more precise measurement scales. Research questions that might be considered in future studies include: Which factors influence the stage of involvement when descendants decide definitively not to work in the company and additionally inform the family about the decision of not to work in the company in the future? In what way mode, timing and motivations must be oriented in order to increase the probability that good previous successors who were in the business full-time return after quitting? Could the stage of initial belonging explain the level of disposition of the potential successor to build a career within the family business?

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