1. Frequently asked questions in qualitative family business research and some guidelines to avoid risky paths
Nadine Kammerlander and Alfredo De Massis

Abstract

Qualitative research is increasing in relevance for management in general and family business research in particular. Family businesses present an especially rich and interesting context to study processes and mechanisms in a qualitative manner. Yet qualitative research comes with many challenges and risks for which no practical guide is at hand. The purpose of this chapter is hence to provide some thoughts and guidelines to avoid common traps and mistakes of qualitative research. To do so, the authors build on their experience as authors, editors and reviewers as well as interviews with renowned qualitative scholars from the management field.

INTRODUCTION

Looking at conference presentations and journal submissions, one can clearly conclude that researchers, both senior and junior, show an increasing interest in conducting qualitative research. This trend is also mirrored in the research interests of PhD students, who are eager to carry out qualitative projects given their close contact with the 'real world' and the prospect of interesting, in-depth insights in the business world that cannot be obtained by any other means. Investigating phenomena with qualitative research methods typically provides one with relevant knowledge about thus far unexplored mechanisms. As such, qualitative research is often ranked highly by reviewers, evaluators and scholars with regard to relevance (Amabile et al., 2001; Leonard-Barton, 1990), and generating or elaborating theories providing the mainstream management field with groundbreaking insights.[1]

But what about the rigor dimension? As journal editors and reviewers, we see a large proportion of submitted manuscripts being rejected due to lack of rigor in either the empirical or the theory building part. Examples include an unwarranted mixture of approaches, inappropriate research questions or poorly designed data collection methods. Many of these flaws would have been avoidable if the researchers had known about the typical pitfalls in qualitative research. Indeed, qualitative research is often carried out without proper training. We observe two root causes for this unfortunate phenomenon. First, qualitative training is still scarcely offered at universities. Second, many researchers falsely perceive qualitative research as 'easy to do' and 'simple', as it is mostly about 'talking nicely with people', as they describe it. It surely is not. Many researchers tend to ignore the best practices of this research method and just 'get going', realizing during the review processes what they should have done differently.

While these observations hold true for many management disciplines, they are even more important for family business research. Family firms offer a particularly rich context for qualitative research (Fletcher et al., 2016). Given their multiple goal dimensions (Berrone et al., 2012) and wealth concentration, family firms are characterized by idiosyncratic emotions (Bertschi-Michel et al., forthcoming; Labaki et al., 2013), sensemaking (Strike and Rerup, 2016), attention (Kammerlander and Ganter, 2015), long-term orientation (Diaz-Moriana et al., forthcoming), paradoxical (Erdogan et al., 2019) and Janus-faced (Miller et al., 2015) behavior. Such complex processes at some interdependent levels and their microfoundations (De Massis and Foss, 2018) are particularly suited to studying through a multitude of qualitative methods. At the same time, qualitative research on family firms can also inform a broader audience of management scholars: family business research is rooted in traditions ranging from sociology (Martinez and Aldrich, 2014) to anthropology (Stewart, 2014), family science (Jennings et al., 2014), business history (Colli, 2012) and psychology (Von Schlippe and Schneewind, 2014). Moreover, informants of family firms often have superior, in-depth knowledge about their firms, as well as a plethora of stored, archival material (chronicles, letters, press announcements, newspaper ads, photos, biographies . . .), which allows researchers to dig deeply into not only their contemporary but also their historical dynamics.[2] This enables interesting analyses of longitudinal patterns that would not be possible for any other type of firm.

What makes qualitative work 'difficult' is the lack of a 'standard template' of how to collect, analyze and report data. While there are recipe-like approaches of how to analyze quantitative data in a regression (for example, YouTube tutorials on SPSS and STATA), qualitative research relies more on implicit, tacit rules and norms. Put differently, qualitative data collection and analysis methods are not standard (research is conceived rather as 'art' than as a 'craft'), and there is also a lack of established conventions for data reporting. The reason is that the research design needs to be closely adapted to the specific research question and setting, so that deviations from standards might be necessary or even beneficial. Moreover, the data collection and analysis process is often iterative and non-linear, requiring imagination, creativity, and potentially also common sense and good judgment. Despite its more tacit character, qualitative research seems to converge towards two often-used templates: Eisenhardt's (1989), which allows for the exploratory analysis of multiple cases, and Gioia et al.'s (2013), which allows for building new theory through inductively developing and linking concepts to explain thus far misunderstood mechanisms.

However, those two templates are not the only ones, and we encourage qualitative scholars in the family business field to think 'outside the box', and be open to creative, novel research questions and designs. In the remainder of this introductory chapter, we aim to shed some more light on the difficulties in conducting and publishing qualitative work, and offer some tentative solutions.

With this *Handbook*, we aim to provide researchers at all career levels, and educators of qualitative research methods, with insights on how to conduct – and publish – qualitative research in order to help qualitative family firm research take a step forward. This innovative *Handbook* draws together the specific methodological challenges that family business scholars likely face when undertaking qualitative research projects. With a practical, hands-on approach to methodological aspects, the *Handbook* raises concerns specific to family business scholars, and provides valuable insights on a whole range of qualitative research aspects by offering best practice examples as well as elaborations on specific qualitative research

methods. More precisely, the first part of the book deals with the trends and prospects in qualitative family business research, the second part focuses on case study research, the third part explains narrative-based qualitative research, and the fourth part provides insights on alternative approaches, such as fsQCA. Lastly, the fifth part dives into the publishing aspect and provides thoughts on how qualitative methods can support engaged scholarship, and vice versa. As this overview and Table 1.1 show, many esteemed scholars and colleagues from different countries and at different stages of their career have contributed to this book project. We would like to thank them all, as well as the many reviewers who voluntarily provided developmental feedback and suggestions for each chapter.

Despite the various calls for improvements in the use and communication of qualitative research approaches in family business research (Chenail, 2009; De Massis and Kotlar, 2014; Nordqvist et al., 2009; Reay and Zhang, 2014), the potential of qualitative research methods in the family business field has not yet been fully realized (Fletcher et al., 2016), and we hope that this *Handbook* will contribute to taking a step forward in this regard. Having profound knowledge about qualitative research will help authors to conduct research projects that are valued highly amongst reviewers, editors and fellow scholars along three relevant, interdependent dimensions (see Figure 1.1): phenomenon, data quality and theoretical contribution. Indeed, the most cited, interesting and novel studies are often those that build insightful theory based on rich data gathered on a timely phenomenon.

Capturing the experiences and practices of qualitative researchers, and reflections from senior academics on crafting rigorous and insightful qualitative studies, we hope that this *Handbook*, designed for use in family business, entrepreneurship, family science and other branches of social science, will help to increase scholars' knowledge about, and confidence in, using qualitative methods and publishing papers based on such approaches.

THE CHALLENGE OF QUALITATIVE INQUIRY IN FAMILY BUSINESS

In the following, we aim to share some insights on the qualitative research process from start (idea generation) to end (publishing in journals). We thereby build on our own experiences as authors, reviewers and editors. Moreover, in the course of preparing this introductory chapter, we were able to collect wisdom from five internationally renowned qualitative researchers who generously shared their insights with us: Kathleen Eisenhardt, Dennis Gioia, Mike Pratt, Davide Ravasi and Eero Vaara. We elaborate on the insights below. Table 1.2 summarizes the challenges of qualitative inquiry in family business and guidelines to avoid 'risky paths' along the research process that we recommend for family business scholars. Indeed, although there is no one 'right way' to write up qualitative research, some paths might be more promising or more effective than others.

Identifying an 'Interesting Research Question' and Assessing Whether it is Worthwhile Being Answered

Before starting a qualitative research project, an interesting and appropriate research question needs to be identified. Research questions appropriate for qualitative research

Table 1.1 *The chapters of the* Handbook of Qualitative Research Methods for Family Business

	Title	Authors	Brief summary
Chapter 1	Frequently asked questions in qualitative family business research and some guidelines to avoid risky paths	Nadine Kammerlander and Alfredo De Massis	Qualitative research is increasing in relevance for management in general and family business research in particular. Family businesses present an especially rich and interesting context to study processes and mechanisms in a qualitative manner. Yet qualitative research comes with many challenges and risks for which no practical guide is at hand. The purpose of this chapter is hence to provide some thoughts and guidelines to avoid common traps and mistakes of qualitative research. To do so, we build on our own experience as authors, editors and reviewers as well as interviews with renowned qualitative scholars from the management field.
PART I: TRENDS AND PROSPECTS IN FAMILY BUSINESS QUALITATIVE RESEARCH METHODS			
Chapter 2	Qualitative research in family business: methodological insights to leverage inspiration, avoid data asphyxiation and develop robust theory	Evelyn Micelotta, Vern L. Glaser and Gabrielle Dorian	The authors echo prior calls for a more pervasive and varied use of qualitative methodologies in family business research. They start with an overview of current empirical qualitative work in the family business domain in order to understand the methodological preferences of family business scholars and the methods they have gravitated towards. Having established the key difference between methods and methodologies, and the importance of linking analytical approaches to the building of theory, they discuss three exemplars of qualitative methodologies in the general management literature. The final section of the chapter elaborates on opportunities for deeper engagement with these methodologies in the family business domain, and suggestions for enriching the qualitative toolkit of family business research.
Chapter 3	Full-cycle research in family business contexts: combining qualitative case studies and quantitative methods	Kimberly D. Elsbach and Ishita Ghai	The authors outline how theorizing in family business research might benefit from combining qualitative case studies with quantitative methods (for example, surveys, experiments, quantitative field studies) to provide 'full-cycle' research (Cialdini, 1980). First, they introduce full-cycle research approaches (that typically explain how researchers may move between qualitative theory-building methods and quantitative theory-testing methods) offered by organizational scholars. Next, through an examination of recent qualitative case studies in family business contexts, they identify some of the common questions these studies have answered and not answered. Based on this analysis, they suggest how research that combines qualitative case studies and quantitative methodologies might help family business researchers to more completely theorize phenomena of interest. In this way, they provide a set of exemplars for performing full-cycle research in the family business arena.

Chapter 4	Ethnography: a much-advocated but underused qualitative methodology in published accounts of family business research	Denise Fletcher and Rocky Adiguna	In parallel with the growing interest in qualitative research methods in family business, many family business scholars advocate the greater use of ethnographic methods to advance the field further. This endorsement rests on at least two arguments. On the one hand, there is a need to widen, extend or deepen our perspectives to better understand the 'boundary-crossing' nature of families in business; on the other hand, the majority of proposals to extend ethnographic research aim to tap into the important yet underexplored complex tacit processes of family firms. However, the authors found that ethnographic research in family business settings remains rarely published. This chapter reviews a set of family business studies that have used ethnographic methods and been published in business and management journals in order to examine their orientations, main findings, techniques adopted, and epistemological and ontological stances. Looking forward, the authors end this chapter with a brief discussion on how the practice of ethnography is changing with reference to the visual and virtual applications of ethnographic principles.
Chapter 5	Historical methods in family business studies	Andrea Colli and Paloma Fernandez Perez	The authors broadly discuss the use of historical analysis and methods in family business studies. They start by providing an overview of how (business) historians have approached the topic of family ownership. In the following section, they discuss the issue of sources and their meaning and role in historical research, discussing also in detail the advantages and pros in what they define as 'longitudinal' analysis. The subsequent section discusses the qualitative versus quantitative approaches in business history, while a discussion about some current topics in family business studies that would particularly benefit from a historical approach concludes the chapter.

PART II: CASE STUDY RESEARCH

Chapter 6	The evolution of case study methodology in the study of family enterprises	Giacomo Laffranchini and Frank Hoy	The authors extend recent research efforts by mapping the knowledge about family enterprises generated through case study methodology and its evolution over time. Their aim is to point scholars toward relevant knowledge gaps that can be effectively bridged through case study qualitative research. To accomplish this, the authors employed the methodology of science mapping through bibliometric analysis (specifically, co-word analysis and bibliographic coupling), and charted the intellectual structure of the field along with its conceptual building blocks. In an effort to guide future qualitative research efforts, their chapter also discusses the main objectives that case studies have served in the family business research domain, the best practices that scholars should adhere to, and indicate the most receptive outlets for qualitative case-based study. Their analysis of the literature suggests that case studies will continue to be a powerful methodology for theory-building and theory extension; nevertheless, only research efforts able to adhere to the highest standard for empirical rigor should be accepted in the field.

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Table 1.1 (continued)

	Title	Authors	Brief summary
Chapter 7	The case study in family business: current perspectives and suggestions for the future	Tanja Leppäaho, Emmanuella Plakoyiannaki, Katerina Kampouri and Eriikka Paavilainen-Mäntymäki	Despite the potential of qualitative case research (QCR) to embrace novel research questions and practices, it is frequently reduced to a single methodological template, namely that of qualitative positivism. The authors review and analyze case study practices in family business (FB), drawing insights from 88 articles published across various academic outlets. Their results indicate the impact of the positivistic template as the most commonly used one with 75 articles, but, interestingly, identify alternatives captured by interpretivist and critical realist perspectives. They conclude with a discussion by problematizing the use of templates in FB case research. They contribute in four ways. First, they discuss, deconstruct and codify case study practices drawing on exemplars from FB literature. Second, they discuss common practices among the scholars of the qualitative positivist template and explain its potential for FB scholarship. Third, they discuss and outline the potential of alternative case study perspectives of interpretivism and critical realism. Fourth, they discuss the potential of multiple methods and the epistemological alternatives for enriching all the case study practices currently used.
Chapter 8	Religion and business families' philanthropic practices	Navneet Bhatnagar, Pramodita Sharma and Kavil Ramachandran	Family firm philanthropy is the voluntary donation of monetary or non-monetary resources by these enterprises for the betterment of society. Research suggests that while some business families engage in philanthropy with expectations of economic gains such as tax benefits, others are driven by non-economic motivators such as reputational or political influence gains. This chapter highlights another understudied set of intrinsic philanthropic triggers: a controlling family's religious or spiritual beliefs. To understand the influence of such beliefs on philanthropy, the authors focus on the Indian context, for three reasons. First, India is a fast-growing economy dominated by family enterprises. Second, this subcontinent is home to one-sixth of the world's population, characterized by peaceful co-existence of the world's major religions and theologies. Third, the 2013 changes in corporate philanthropic laws provide an excellent opportunity to explore the effects of religious beliefs on philanthropic activities of business families. This research employs a comparative case study of two remarkable social ventures launched by business families that are located in geographically diverse regions of this subcontinent. As both these families follow India's dominant religion, Hinduism, this study enables the authors to shed light on other factors that influence the focus and geographic scope of philanthropic activities pursued. While each venture varies in its developmental trajectory, the founder's indelible influence is evident in both cases. Exciting research opportunities are revealed.

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| Chapter 9 | How can qualitative research advance the understanding of family firms' internationalization? A multiple case study of family firms internationalizing into China and India | Claudia Pongelli and Andrea Calabrò | It is widely acknowledged that the internationalization of family firms differs from that of firms with different ownership and governance structures, and that there is a great variety of international behaviors within the universe of family firms. To better grasp the actual processes family firms face when they move towards international markets, the academic debate is increasingly encouraging qualitative studies in this field. Using a research project aimed at advancing understanding of the dynamics and processes behind family firms internationalizing into China and India as an example, this chapter intends to make a critical reflection on the adoption of the multiple case study method. Moreover, it aims at pointing out some key tenets and tips related to this inquiry approach as a guide for junior researchers approaching the topic of family firm internationalization. |

PART III: USING NARRATIVE-BASED APPROACHES AND INVESTIGATING INTERPERSONAL RELATIONSHIPS

Chapter 10	Mapping narratives in family business studies: a guideline for researchers	Michela Floris, Cinzia Dessi and Angela Dettori	Narratives are fascinating creations that allow us to collect, analyze and interpret the stories people tell. Their high potential as an interpretive phenomenon is broadly acknowledged in different disciplines, even when their use appears fragmentary and insufficient. In organizations and management fields, scholars have used narratives to gather and qualify data. Furthermore, they appear quite appropriate for studying family businesses. Via a systematic literature review of top-notch family business articles with narratives during 1999–2018, the authors create a guideline for researchers who use this approach for their studies.
Chapter 11	Growth through innovation and internationalization: exploring the role of family business identity through narrative analysis	Alexandra Dawson, Maria José Parada Balderrama and Alberto Gimeno Sandig	The aim of this chapter is to illustrate the value of narratives both as a means through which family business identity is created and as a research methodology that allows us to uncover individual and family-level processes in family businesses. The authors present a unique case of a family business that has combined innovation and internationalization strategies in a fiercely competitive industry, creating a dynamic virtuous circle that has allowed the business to grow quickly and become successful. Through narrative analysis of the case study, they illustrate how the organization's collective identity has been shaped by internal factors (low family goal diversity and high family cohesion) and external factors (presence of non-family members on the advisory board and presence of international networks). They find that the idiosyncratic combination of these factors has contributed to creating a unique family business identity that has spurred the organization along its growth trajectory through innovation and internationalization.
Chapter 12	Illuminating the space between: investigating interpersonal	Matthias Waldkirch	Interpersonal relationships represent a core element of the fabric of organizations, since they provide meaning for individuals and structure work. Especially in family firms, interpersonal relationships can have long-lasting implications for individuals and the organization. Studying those relationships thus gives new and revealing insights into the

Table 1.1 (continued)

	Title	Authors	Brief summary
	relationships in family firms through qualitative inquiry		family firm. The purpose of this chapter is to provide qualitative approaches through which to understand, conceptualize and investigate workplace relationships in family firms. Drawing from the broader streams of organizations studies, organizational behavior and human relations, the chapter shows how researchers can: (1) create and analyze narratives of relationships; (2) illuminate and investigate patterns formed by workplace relationships; and (3) investigate the meaning of workplace relationships. To illustrate these three points, the chapter relies on empirical material from a longitudinal single case study.

PART IV: ALTERNATIVE METHODS AND METHODOLOGIES

	Title	Authors	Brief summary
Chapter 13	Reasons, opportunities and methods for a visual analysis of organizational tensions in family business	Mara Brumana, Attilia Ruzzene and Katerina Vasilevska	This chapter examines the potential of visuals as a manifestation of organizational beliefs and values, and of visual analysis as a novel and promising methodological approach to exploring how the tensions among such beliefs and values are managed by firms. The idiosyncratic features of family firms and, in particular, the complexity associated with the intersection of the family and the business systems that characterize them, make family firms fertile ground for such an investigation. The authors offer a comprehensive description of the methodological paradigm of visual analysis. They conclude by illustrating how visual analysis unfolds when applied to examples of Italian family business websites, so as to describe the method and its potential for contributions to the family business research field.
Chapter 14	The fsQCA method in family business research	Daniel Pittino, Francesca Visintin and Giancarlo Lauto	The proper understanding of the family business phenomenon requires the adoption of a methodological approach that embraces the complex intertwinement of different social systems. The configurational approach is particularly appropriate for this aim, and within this approach, Fuzzy Set Qualitative Comparative Analysis (fsQCA) is a technique that has great potential for the description, explanation and interpretation of family firms' characteristics and dynamics. In this chapter, the authors illustrate the main features of the fsQCA technique within the configurational approach, and discuss its range of applications to the family business field.
Chapter 15	Treating non-family managers like family: new insights from a re-analysis of pre-existing qualitative interview data	Jennifer Jennings, Albert E. James and Elizabeth A. Tetzlaff	This research takes a second look at data collected by the second author during his dissertation research to address a recognized gap in family business research: the lack of empirically grounded research on the quality of relationships between owning family members and non-family managers, and the consequences of the relationship quality. In doing so, the authors address three questions that remain in extant literature: (1) What aspect of the relationship between non-family managers and family owners tends to be imbued with especial significance?; (2) How do non-family managers tend to respond to the

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presence or absence of this aspect in their relationships with owning family members?; and (3) What interactions tend to be perceived as either contributing to or detracting from this salient and influential relational aspect? Their findings point to the significance of family-like relations between non-family members and family owners. They also offer insight into the types of interactions with family owners that tend to foster or thwart the development of family-like relations, distinguishing and elaborating instantiations of single critical incidents and recurring small gestures. In sum, their study advances understanding of how the quality of relationships between non-family managers and family owners can be strengthened or diminished, providing scholars with at least suggestive insight into a topic that is of documented concern to the leaders of family firms.

| Chapter 16 | Research methods on emotions in family business | Rania Labaki |

This chapter is intended to guide scholars in their qualitative research journey on emotions in the family business by crafting a roadmap around theoretical, empirical and methodological considerations. After showing the relevance of going 'back to the basics' by studying emotions rather than emotional constructs in the family business, it sets the stage with a review of the developments and trends in the literature that make up the science of emotions, from the origins and impact to the management of emotions. Then, it suggests empirical considerations in undertaking research on emotions in the family business field in terms of comprehensive measurements, multi-level analysis and relation between quantitative and qualitative research. With a focus on qualitative methods, it explores the designs, data collection techniques, analysis and presentations relative to emotions in family business. For an effective research journey toward publications, this chapter suggests three additional considerations during or after the emotions research process. These include the choice of the theoretical framework from a selection of theories on emotions to be integrated and adapted to the family business field, a series of *sine qua non* conditions to abide by, and pitfalls to avoid. Lastly, the conclusion looks to the future by calling for cross-disciplinary collaborations and the combination of qualitative and quantitative methods on emotions to better inform and serve family businesses and the academic community.

PART V: PUBLISHING QUALITATIVE FAMILY BUSINESS RESEARCH AND ADDRESSING PRACTICAL ISSUES

| Chapter 17 | Why do so many qualitative studies of family businesses get rejected? Confessions of a recovering associate editor of the *Family Business Review* | W. Gibb Dyer |

Many qualitative studies of family businesses get rejected by reviewers. These rejections are often due to: (1) poorly framed research questions; (2) the contribution not being clear; (3) a poor description of the research methods; (4) data that is presented poorly; (5) a failure to differentiate between description and prescription; (6) trying to test rather than build theory; and (7) the inability to answer the 'So what?' question: 'Why is this study important?' This chapter gives examples of 'good' qualitative studies and suggestions for how to improve qualitative studies of family businesses.

Table 1.1 (continued)

|	Title	Authors	Brief summary
Chapter 18	Engaging practitioners in qualitative family business research: an engaged scholarship approach	Judith van Helvert-Beugels, Mattias Nordqvist and Leif Melin	The authors argue for more engagement with practitioners in qualitative family business research. They explain how and why an engaged scholarship is helpful to study complex social phenomena in the family business context, and provide an overview of the engaged scholarship approach. They elaborate on the research activities involved, as well as the various levels of engagement between the stakeholders who participate in research projects, among which are scholars. They discuss the relevance of the engaged scholarship approach to build relevant understandings of family business topics, and they go through the dilemmas and challenges of using an engaged scholarship approach. The final section of the chapter provides some thoughts on how to practice an engaged scholarship approach in family business studies, dealing with some of these challenges.
Chapter 19	Bridging communication, building trust: the art and science of getting access to informants and preparing them for in-depth qualitative inquiry	Leilanie Mohd Nor and Mohar Yusof	The task of obtaining access to a family business is often challenging for researchers, especially qualitative researchers. In this chapter, the authors focus on accessing informants, highlighting how researchers and respondents can prepare for in-depth qualitative inquiry. Subsequently, they discuss two important factors in bridging communication between researchers and family business: fostering good relations and building trust.
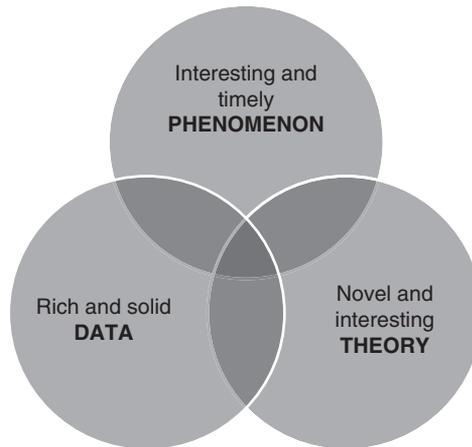
Figure 1.1   Relevant dimensions of high-quality research projects

include 'How?' and (even more importantly) 'Why?' questions, whereas questions such as 'What effect does x have on y?' or 'How many?' are typically better answered in quantitative settings (Yin, 2008). Researchers should carefully consider their research question before starting to design their study. Indeed, not every question fits every qualitative research approach. For an exploratory study aiming to understand variance, a multiple case study approach based on thoughtful theoretical sampling might be the most appropriate. However, if aiming to understand a process, too many cases could be detrimental rather than beneficial. Moreover, if the desired outcome of a qualitative study is a process model, researchers need to ensure they have access to sufficient longitudinal data; cross-sectional interviews are likely inappropriate to design a process model given the danger of retrospective bias.

In principle, there are two sources for obtaining research ideas: first, from detecting a theoretical gap in the literature; second, from identifying a thus far unexplained real-life phenomenon. Interestingly, the experts we interviewed predominately rely on the second approach. Taking a more systematic approach to answering this question, Kathy Eisenhardt provides four sources as starting points for potential research questions: (1) unanswered real-life problems; (2) an intriguing or novel organization or process; (3) using a different lens for studying a phenomenon (for example, venture creation from a social business perspective); (4) further unpacking a process with a different focus (such as studying what is learnt in the learning process instead of how; for example, Bingham and Eisenhardt, 2011).

Dennis Gioia shared that he typically has the following questions in mind when it comes to research ideas: 'Is the way we currently understand the phenomenon really the only way to understand it? Is it the best way to understand it?' He sees himself as a discoverer and always asks: 'What is it that we do not know enough about?' When searching for interesting research ideas, he also has the academic audience in mind, knowing that researchers need to 'market' their ideas in the publishing process.

Researchers often underestimate the amount of time and effort they will spend with the research questions that they have chosen to answer. Hence, researchers might also

Table 1.2   Some challenges of qualitative inquiry in family business and guidelines to avoid 'risky paths'

Challenge	Suggested guidelines to avoid 'risky paths'	Key questions to be answered early on
1 Identifying an 'interesting research question' – and assessing whether it is worthwhile being answered	- Spend substantial time reflecting on your research question and challenging its value before starting the design of your study. - Assess the theoretical and practical relevance of your research question: does it address a theoretical gap in the literature? Does it explain a thus far unexplained real-life phenomenon? Will your study still be interesting in couple of years (for example, when technologies in the industries have changed. - Assess what is novel about your research question and its originality and persuasiveness as well as what counter-intuitive insights you might expect. - Clarify why and how your research question is particularly suitable to be addressed through qualitative research methods. - Check that the evidence you expect to have access to will be enough to address the research question. - Do not underestimate the amount of time and effort you will spend with the research question. - Be open to further improvement ideas and never forget about the 'theoretical contribution' of your work.	- What elements of the phenomenon are not yet answered by extant literature? - What is the community of researchers that is most likely most interested in your study (for example, in terms of AOM divisions)? - What is your 'desired' output? Is it a process model, a table showing variance . . .?
2 Collecting data – from the right people in the right way	- Identify an appropriate research setting. - Motivate informants to dedicate time to your research project by adopting appropriate strategies (for example, be 'as painless as possible', encourage them to talk about themselves, and promise something in return, such as expert knowledge or a research findings dissemination workshop). - Plan about 30 minutes for each interview but block half a day as the time will increase. - Gain trust from your informants (reserve five minutes for friendly small talk and 'easy' questions regarding the interviewee's job position or career, to make your interviewees feel more comfortable with sharing insights without social desirability bias). - Ask very open, broad questions at the beginning, and narrow these down during the course of the interview. - Prioritize face-to-face discussions rather than phone interviews. - Ask follow-up 'Why/why not?' and 'What would have happened if . . .?' questions to increase the depth of insights gained through the interviews.	- How many cases to study? - How many interviews per case? - Which cases to study (theoretical sampling; variance across cases; 'talking pigs')? - Which additional material to collect? - Do you need to collect longitudinal data? - How much, and which, literature should you have read to feel prepared for the first interviews?

Table 1.2   (continued)

Challenge	Suggested guidelines to avoid 'risky paths'	Key questions to be answered early on
	• Ensure obtaining a multitude of perspectives by, for example, interviewing multiple stakeholders rather than stakeholders from only one narrow group. • Allow informants to speak rather than asking them leading questions. • Let your informants speak their own language and be aware that using specific 'research terms' in interviews makes your informants use those same terms. • Stay open-minded throughout the entire data collection process and be open to changing your mind. • Adopt a fluid research design that adapts to the changing demands of the research situation. • Gather as much data as possible, as 'thin' data is unpublishable. • Complement interview data with additional material such as archival data (that is, for triangulation) as this allows probing and potentially rejecting one's theorizing, digging deep into the data, getting to the bottom of things, or realizing the limits of the available data. • Be prepared for the unforeseen, as qualitative work in the field hardly ever works out as planned. • Show data wisely (for example, power quotes, proof quotes[a]). • Be aware of the risks of inappropriately mixing inductive and deductive strategies (for example, random sampling in an inductive study). • Do not quantify qualitative data. • Always follow ethical guidelines and define up front the data collection process confidentiality, anonymity, data storage and usage aspects.	
3 Analyzing data – in light of, but going beyond, extant theories	• In data coding, consider and assess the trade-offs between adopting an open-minded approach versus analyzing data with a theory in mind. • Differentiate the important from the unimportant elements. • Engage in discussions with fellow colleagues (have people read and make comments). • Constantly probe your data and emergent findings (for example, 'Why did they do that?' and 'What would have happened if . . .?'). • Deeply familiarize yourself with the different literature streams associated with the phenomenon under investigation, and draw on a theoretical logic in the data analysis.	• Will you work with coding schemes (based, at least partly, on extant literature) or with (purely inductive) data structures? • What literatures will inform your analysis? • How will you record the individual steps of

Table 1.2   (continued)

Challenge	Suggested guidelines to avoid 'risky paths'	Key questions to be answered early on
	• Serve as 'the messenger' who reports how interviewees describe their experiences. and be creative when labeling, re-labeling and connecting constructs emerging from your data. • Achieve the right level of abstraction in theorizing, neither too abstract (that is, oversimplification) nor too concrete (that is, overwhelming the reader with the immensity of real diversity to the detriment of generalization). • Make sure you have understood data analysis templates before applying them. • Carefully explain how you went from codes to a theoretical figure or model, that is, the journey you followed to reach your findings. • Train yourself properly (for example, read methods books and research methods papers, attend methods courses (for example, Consortium for the Advancement of Research Methods and Analysis, CARMA) or sessions (for example, Academy of Management, AoM). • Make sure your methods section includes the basics and rigorously describes not only the data collection but also the data analysis process. • Be transparent about your methods (better to cite methods sources than empirical examples).	data analysis to increase transparency? • What steps will you take to increase validity and reliability?
4 Writing up the paper – within the journal's length constraints	• Check that your manuscript's introduction 'sets the hook', provides a rationale for why it is important to fill the research gap identified, and captures the reader's interest. • In the theoretical background, do not be verbose and include only those aspects of prior research that are necessary to understand the remainder of the paper. • Make sure you include those theoretical assumptions that will likely challenge your study. • Finalize the theoretical background once the emergent theory from the findings section has been finalized. • Avoid talking about data without showing it. • Avoid showing too much data, but not interpreting it. • Be aware that much of the theoretical and empirical work that has been done for your research project might not make it into the final paper. • Streamline your writing and reduce unnecessary or redundant information to respect the journal's length constraints (however, less stringent than for quantitative papers).	• What published study could be a valuable 'template' for your own manuscript? • What is the one most interesting finding of your study? • If you only had one slide, what would your main figure or main table look like? • How should readers change their thinking after having read your manuscript?

Table 1.2   (continued)

Challenge	Suggested guidelines to avoid 'risky paths'	Key questions to be answered early on
	● Think about telling a story and organizing figures; pay attention that you tell one story, not multiple stories. ● Consider two strategies useful to respect the page limit: describe the emergent theoretical framework rather than each case by itself; make use of content-rich tables. ● Do not use deductive 'shorthand' terminology. ● Know your publication outlet before submitting.	● How do your findings extend, enrich or challenge current knowledge?

Note: As explained by Pratt (2008), quotes can have two purposes: power and proof. 'Power quotes' are where the informant is concise and insightful, or has captured the essence of what the data shows. 'Proof quotes' are used to reinforce a point, using, for instance, a number of short quotes from other informants to show similar patterns across a study's findings.

ask themselves whether they feel truly passionate about closing this research gap. As Davide Ravasi put it: 'I usually start with a setting that I find fascinating. I do not do boring cases. Life is too busy to waste time on settings that I do not genuinely want to learn more about.'

Given that research ideas might pop up anywhere, in business and private interactions, curious and open-minded researchers can come up with a plethora of different ideas. Just as with innovation ideas in organizations, those research question ideas must then be filtered. Citing Jim March, Eero Vaara concluded that most ideas are bad ideas. Hence, to filter out the best ones, one needs to test and re-test them, just as in an entrepreneurial or innovation management process. Indicators that an idea is a good one could include the following: contributing to a vibrant, scholarly discussion; a counter-intuitive element; fellow scholars getting excited about the idea; still being excited about the idea after telling and re-telling it. Very likely, ideas will be shaped and adapted throughout the idea development process. As such, it is recommendable to not inertly stick to one's initial thoughts, yet to remain open to further improvement ideas. As Mike Pratt put it, managing the selection and development process might require some experience or an 'inner compass' guided by some fundamental organizing questions and things that are happening around us (for example, in the news, organizations we encounter, and so on).

Importantly, even when starting with an interesting research phenomenon, researchers should not forget about the 'theoretical contribution' of their work. As editors, we often note diligent data collection on an important topic, combined with a rather descriptive presentation of findings, or a model that can be (almost) fully explained by extant theory. Good qualitative work needs to challenge extant theory; it must, for instance, explain findings that cannot be explained by current theories. An important value of qualitative research is its potential to build new theory when prior theory is absent, underdeveloped or flawed, and to capture the individuals' lived experiences and interpretations as well as the human interactions that constitute real-life organizational settings in order to understand complex issues.

Collecting Data – From the Right People in the Right Way

As with any academic research project, the guiding principle of qualitative research should be that the method follows the research question. In other words, once a research question or idea has been settled on, the researcher needs to think about which qualitative research approach would be the most appropriate. To do so, it might be a good idea to work in a team, share the workload and build on each other's strengths, as Eero Vaara confirmed.

In qualitative studies based on interviews, first an appropriate research setting (for example, one or more case companies) needs to be identified. This can be a major challenge and might require quite some time and effort, as Dennis Gioia noted in our interview. Once the case companies have been identified, the next step is to gain access to the organizational members. Yet, how to convince organizations to dedicate time to a research project? Dennis Gioia typically promises to be 'as painless as possible', and encourages interviewees to talk about themselves; a strategy that clearly pays off. He also explained that getting in is a hurdle, but once you are in, it is easy. According to Eero Vaara, giving something back is key, for example, expert knowledge. Most companies are indeed curious to learn about their standing and the generalized findings from the research. At the institute of family business at WHU – Otto Beisheim School of Management and the Centre for Family Business Management of the Free University of Bozen-Bolzano, Italy, we have had good experiences with organizing half-day workshops with practitioners after the end of the data analysis to provide insights and discuss these with the participants. Practically oriented white papers or short videos on practical implications based on the research projects might also help researchers and universities to build a reputation in the family firm world. Sharing some of his best practices, Dennis Gioia suggests asking for a 30-minute interview, but blocking an hour of time just to be safe. In many cases, it is difficult to actually stop the interviewees talking, as most individuals enjoy sharing insights on their (business) life and perspectives.

With regard to guiding the interview, gaining the interviewees' trust is crucial. From our own experience, we know that the first roughly five minutes should be reserved for friendly small talk and 'easy' questions regarding the interviewee's job position or career. Only after having talked for a while will interviewees feel more comfortable with sharing insights without 'social desirability bias'. Dennis Gioia describes this approach as asking very open, broad questions in the beginning, and narrowing these down during the course of the interview. Sometimes, PhD students ask us whether it is possible to conduct case interviews over the phone. In our experience, this should only be a last resort. Individuals tend to speak more openly in face-to-face discussions. Moreover, to obtain useful and rather unbiased insights, one needs to 'politely probe their assertions, ask for concrete exemplification, delicately pointing to potential contradictions in their statements' (Davide Ravasi). Probing might also include building on prior insights ('Prior interviews have shown . . .') as Dennis Gioia explained. Moreover, asking follow-up 'Why/why not?' and 'What would have happened if . . .?' questions might increase the depth of insights gained through the interviews.

Two further recommendations that Kathy Eisenhardt has for qualitative researchers are: (1) ensuring obtaining a multitude of perspectives by, for instance, interviewing multiple stakeholders rather than stakeholders from only one narrow group; and (2)

allowing informants to speak rather than asking them leading questions. Dennis Gioia echoed the latter aspect and shared an intriguing story on how using specific 'research terms' (such as 'threat' versus 'opportunity') in interviews made the interviewees use those same terms. In a later discussion, he noted that the organizational members preferred to talk about political versus strategic issues. We should never forget that managers are mostly well-educated and smart individuals who easily adapt to the academic interview setting. If we want to gain deep insights and understand their meaning, we need to let them speak their own language.

Another important piece of advice here is to stay open-minded throughout the entire data collection process, especially if assumptions start to emerge early on. Mike Pratt explained that he asks himself questions such as 'What would I need to see or hear for me to change my mind?' in order to keep this openness throughout the process. Qualitative research design should be fluid and adapt to the changing demands of the research situation. As Gephart (2004) put it: 'Qualitative research is often designed at the same time as it is being done . . . it is open to unanticipated events.' Similarly, Mike Pratt stated in one interview with us:

> I do a lot of field work and that is always challenging as things rarely go perfectly (for example, people who are advocating for your research quit the organization, the organization has a crisis and has to stop data collection, etcetera). So you have to be very adaptable but at the same time knowing when it is best to terminate a project. For example, if I was doing a grounded theory study and the place I am studying says, 'You can interview as many people as you like, but you can only do it over these two days.' I would probably say 'no' to that as I would not be able to reflect on what I was learning and change my interviews to do a deeper dive into the more interesting elements I am finding. I would probably get data that was very 'thin' and thus unpublishable.

Hence, in this context, it is also important to be prepared for the unforeseen. Indeed, Mike Pratt recommends being prepared to adapt. It might even make sense to stop a research project at an early point in time if the researchers feel that the organization's restrictions would decrease the study's rigor.

Another challenge throughout the data collection process is gathering as much data as possible, which is both a time-consuming and demanding task. However, the additional material allows for probing and potentially rejecting one's theorizing, and as Eero Vaara explained, digging deep into the data, getting to the bottom of things, or realizing the limits of the available data. Davide Ravasi points to the limits of interview-based data. In many cases, it is actually archival data that provides the infrastructure to support one's arguments. As such, researchers might think early on about which additional data to collect and how to access it. Further important issues throughout the data collection process that need to be agreed upon up front are confidentiality with regard to the case(s) chosen, the anonymity of interviewees, and also more specific questions regarding data storage and usage. Following ethical guidelines is key in this regard.

Analyzing Data – In Light Of, but Going Beyond, Extant Theories

Data analysis is surely one of the most challenging parts of the qualitative research process. One key question that keeps popping up throughout discussions (for example,

at conferences and doctoral seminars) is: should we have a theory in mind when starting to code the data? The answer to this question depends on the precise research question. In many cases, an open-minded approach may yield more interesting or novel insights. Of course, such an approach is 'risky', as it might require a great deal of reading and re-reading, and potentially also re-engaging in data collection. Still, it is an absolutely worthwhile approach to truly gain new insights and advance our knowledge.

When analyzing the data, the first task is to differentiate the important from the unimportant elements. Davide Ravasi described this challenge as follows: 'One needs to separate those actions, events, etcetera that really affected certain outcomes, from those that just happened to happen at the same time. Not everything that goes on during a change process affects its outcome.' This can be an overwhelming task in case of rich data collected, and may take much time. From our own experience, despite the risk that comes with presenting early-stage research, we feel that engaging in discussions with fellow colleagues (for example, in research seminars and conferences) might help in crafting a convincing story. Moreover, constantly probing your data, asking questions such as 'Why did they do that?' and 'What would have happened if . . .?' might help to distinguish the important from the unimportant elements. Moreover, as Kathy Eisenhardt noted, having a strong theoretical logic in mind and probing data with questions such as 'Why did that happen?' might help to avoid presenting those events and activities that occur randomly. As such, it is important that researchers – when analyzing the data – know the respective literature very well (although the relevant literature might change substantially throughout the data analysis process). As noted earlier, this is likely a time-consuming task, as a qualitative research analysis might require deeply familiarizing oneself with different literature streams.

A major challenge is to come up with the right categorization of concepts. Indeed, Dennis Gioia described 'miscategorization' as one of the major flaws in qualitative data analyses, and Davide Ravasi explained the difficulties but also the opportunities that come along with categorization:

> Often, intuitively, I can see what informants' words point to, but I cannot find the right words to express that meaning. In the end, qualitative research is interesting if it gives us a new, different view of a phenomenon – often by giving us new words to describe reality in a more nuanced way.

To achieve this goal, Dennis Gioia sees his job as 'the messenger' who reports how interviewees describe their experiences. He recalled that, some time ago, we would go to a big conference room with all the themes written on cards placed around the conference table and try to manually shift them until they made sense. Indeed, we believe that this creative, iterative and non-linear intellectual work of labeling, re-labeling and connecting constructs is at the heart of any qualitative research.

Another important challenge that Kathy Eisenhardt raised in her comments was the right level of abstraction in theorizing. Theorizing that is too abstract or too concrete might not add to the ongoing academic conversations (Huff, 1999). This challenge also relates to the continuing debate on heterogeneity among family firms. For a long time (maybe too long), we have treated all family firms as largely the same, merely distinguishing between family and non-family firms. In the last decade, family firms have been recognized as differing substantially with regard to size, industry, family influence, goals, structures and resources. Hence, scholars are increasingly calling for studying

heterogeneity among family firms. As with almost every subject, 'the dose makes the poison'. As Constantine (1993: 40–41) outlined in the context of families, there are two 'easy' answers to the question 'How many kinds of family are there?' One answer is 'that families are families' (ibid.: 41), neglecting the potential heterogeneity and very close to the old 'family versus non-family firm' perspective. The other 'easy' answer is that 'every family is unique, [and] the number of different "kinds" of families is potentially infinite' (ibid.: 40). While this second approach might be useful for practice – such as consulting or family therapy – it is less useful to obtain generalized findings, as we aim to build them in case study theorizing. Constantine (1993: 41) concludes that, 'good theory, like good practice, builds theory somewhere in the middle ground between blurring all distinctions in oversimplification and overwhelming us with the immensity of real diversity'. This finding from theorizing on families likely also holds true for theorizing on family firms.

Again, staying open minded is key in the data analysis process. Constantly challenging emergent findings 'keeps me from seeing something in one or two examples, and then "wishing" too much that they occur in others', as Kathy Eisenhardt explained. A lack of such probing often leads to what we as reviewers and editors later criticize as thin data. Lastly, no matter what specific analysis is used, Mike Pratt warns about using templates that are not fully understood. Indeed, creating tables or figures with a certain number of columns is not a qualitative research analysis by itself; the researchers need to fully understand what they are doing. We found Mike Pratt's words particularly enlightening when he emphasized this point:

> For data analysis, being aware of the choices you are making during your analysis is key. People often try to apply a template without really understanding what goes behind it. For example, for grounded theory, people know that you code close to the data, then abstract from these to create broader codes, and then figure out how these codes go together. However, creating a figure with three columns in it is not your analysis – it is the product of your analysis. Unless you know more about grounded theory, you are not likely to know what you should have been doing that resulted in these three columns. Moreover, people often are not good at explaining how they went from codes to a theoretical figure or model they are creating.

In addition to readings books and research method papers, scholars can attend Consortium for the Advancement of Research Methods and Analysis (CARMA) short courses or sessions at the Academy of Management's (AoM) Annual Meeting in order to avoid subsequent frustration.

Writing up the Paper – Within the Journal's Length Constraints

So how to write a qualitative paper? The introduction, as for any scholarly paper, needs to 'set the hook', provide a rationale for why it is important to fill the identified research gap, and capture the reader's interest. With regard to the theoretical background, this section should only contain those aspects of prior research that are necessary to under-stand the remainder of the paper, as Davide Ravasi emphasized. Moreover, as he stated, researchers need to ensure that they include those theoretical assumptions that they will ultimately challenge with their qualitative study. Dennis Gioia added that it often makes sense to write and finalize this section of the manuscript once the emergent theory from the findings section has been finalized. Moreover, as Eero Vaara pointed out, much of

the theoretical and empirical work that has been done in the course of a research project might not make it into the final paper.

One particular challenge in writing up qualitative papers is to keep the length of the paper manageable, typically not more than roughly 40 pages. Our scholars agree that journals are often somewhat more generous when it comes to qualitative work. Davide Ravasi explained that his first submissions are typically 40–42 pages long (excluding references, tables and figures), and might increase by three to a maximum of five pages during the review process. Still, authors need to make every possible effort to streamline their writing and reduce unnecessary or redundant information. Kathy Eisenhardt offers two strategies for how to stay within the length limit. First, she suggests thinking about describing the emergent theoretical framework rather than describing each case by itself. She explains: 'Then, it is possible to use the cases to illustrate the points of the theory and to use consistent language to do so.' Second, she suggests making use of content-rich tables. In our own work, we have also had good experiences with making use of tables and online appendices to include rich and interesting, yet non-core information (e.g., Kammerlander et al., 2018; Rondi et al., 2018). An interesting organizational research methods article by Michael Pratt (2008) provides some further insightful suggestions on how to present all the required information in a single paper in a convincing way, as well as an overview of the criteria editors and reviewers adopt to assess qualitative manuscripts.

In Figure 1.2, we summarize the core parts of the qualitative research process, whereas Table 1.2 provides a list of important decisions to be made in the qualitative research process in family business, detailing key challenges, suggested guidelines to avoid "risky paths" and key questions for qualitative researchers.
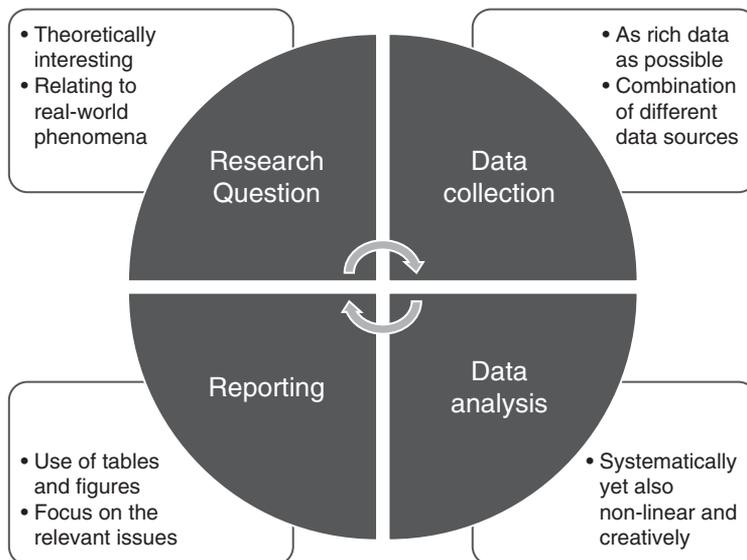

Figure 1.2   Core parts of the qualitative research process

CONCLUSION

Qualitative research is complex and time-consuming, yet it is also a worthwhile path to follow given the potentially rich and insightful knowledge that researchers can learn throughout the journey. Moreover, in the family business field there are a number of topical areas where a more intensive use of qualitative inquiry would be particularly useful, such as exploring the contextual and industry-specific aspects of family business behavior, the execution and implementation of family business processes, the psychological foundations of management of family enterprises, and the paradoxes and tensions arising from the interactions between the family and the business systems at the individual, group, and firm level. Dennis Gioia speaks convincingly about qualitative research, revealing the interesting elements of businesses and organizations, rather than showing mere effect sizes; which actually motivated him to start a qualitative research career himself. This is mirrored in the high proportion of qualitative articles among the best papers of top journals such as the *Academy of Management Journal* and *Administrative Science Quarterly* (despite the relatively low percentage of qualitative articles published in those journals). At the same time, it is not an easy task, and especially positivist reviewers may keep stating, 'That is interesting but where is the evidence?'. The answers of our renowned scholars, the insights provided in this book, as well as the growing body of qualitative studies published in high-quality journals, might help junior and senior family firm scholars to continuously learn and improve their qualitative research and writing skills. All in all, the criteria for publishing qualitative research in the leading management and social sciences journals are the same for all research: contribution to theory, well-reasoned methods, rich body of evidence and good writing. However, how scholars achieve these criteria in qualitative research differs, and we hope that this *Handbook* will contribute to increasing the willingness and ability of scholars to conduct qualitative inquiry in family business.

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NOTES

1. Most qualitative research aims at generating or elaborating theories (Lee et al., 1999). Testing theories through qualitative research is less common, and often carried out through a multi-methods research design.
2. Qualitative research drawing on 'historical research methods' (Argyres et al., 2019) can be particularly useful to enrich theoretical explanations of phenomena in a context-specific manner by allowing to incorporate in a more fine-grained, nuanced and interpretivist way period effects and historical contingencies into the theorizing process.

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