



## **Meaning and Practice of Tradition within Long-lasting Family Businesses: a Phenomenographic Enquiry**

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### **Resumo/Abstract**

The study investigates tradition as a practice in the context of long-lasting family firms. Our main goal is to explore how managers give meaning to tradition and, consequently, how they practise it. We apply a phenomenography methodology, a qualitative interpretive approach, our data were obtained through 11 interviews with family members or non-family members of family businesses who are at least in the second generation. Our data show variance in the way tradition is understood and practised. The study theoretically contributes to family business literature unveiling four different understandings of tradition: tradition as a company feature; tradition as a family feature; tradition as a brand feature and tradition as a relational feature. The study shows practical implications for business families: understanding the different ways in which tradition could be managed and practised could help next-generation family members in exploiting the advantages of tradition according to the specific way in which they are experiencing it.

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### Abstract

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**Keywords:** Tradition; Family business; Phenomenographic; Innovation; Management.

### Resumo

O estudo investiga a tradição como prática no contexto de empresas familiares de longa duração. Nosso principal objetivo é explorar como os gestores atribuem significado à tradição e, conseqüentemente, como a praticam. Aplicamos uma metodologia fenomenográfica, de abordagem qualitativa interpretativa, os nossos dados foram obtidos através de 11 entrevistas a familiares ou não familiares de empresas familiares que se encontram pelo menos na segunda geração. Nossos dados mostram variações na forma como a tradição é compreendida e praticada. O estudo contribui teoricamente para a literatura sobre empresas familiares revelando quatro diferentes entendimentos de tradição: tradição como uma característica da empresa; a tradição como característica familiar; tradição como característica de marca e tradição como característica relacional. O estudo mostra implicações práticas para as famílias empresárias: entender as diferentes maneiras pelas quais a tradição pode ser gerenciada e praticada pode ajudar os membros da família da próxima geração a explorar as vantagens da tradição de acordo com a maneira específica em que a vivenciam.

**Palavras-Chave:** Tradição; Empresa Familiar; Fenomenografia; Inovação; Gerencial.

### 1. Introduction

Within the family business literature, tradition is conceived as a foundational element for family business success, considering that the organisation can take advantage of the creation, maintenance, and transmission of traditions to obtain a competitive advantage in the market in which it operates (De Massis et al., 2016; Erdogan et al., 2020; Salvato et al., 2010; Suddaby and Jaskiewicz, 2020). Tradition can be defined as “consciously transmitted beliefs and practices expressing identification with a shared past” (Dacin et al. 2019, p. 356) and it can be handed through storytelling, physical objects embodying values, shared meaning, legacy and rituals (Lumpkin et al., 2008).

In particular, tradition has been especially important to long-lasting family firms, allowing them to reinforce values, norms, beliefs and practices that define a unique brand identity (Micelotta and Raynard, 2011). Lumpkin et al. (2008) discuss tradition as a key characteristic of family systems and one of the five key dimensions of the Family Orientation



(FO). Tradition is also of critical importance for business continuity but could be manifested in different ways, either positive or negative, both for the continuity of the business and the socio-emotional wealth of the family members (Salvato et al., 2010). On one side, tradition may support the harmony of the family business, moderating family conflicts entailed by the emotional attachment of family members to shared beliefs and practices (Davis, 1983; Lumpkin et al., 2008; Reiss, 1981). Tradition might play the role of a trigger for strategic renewal through the legitimization of future-orientated values thereafter fostering business continuity (Salvato et al., 2010). On the other, it could represent a source of rigidity, that could be interpreted by the next generations as a liability that creates obstacles to change (ibid). In this view, tradition might also push a problematic succession grounded in conservatism and stagnation (Miller et al., 2003).

As a matter of fact, within the real-world context we can observe heterogeneous approaches to tradition: concerning innovation activities, certain managers leverage tradition and past knowledge for product development – i.e., innovation through tradition strategy (De Massis et al., 2016). Others preserve the *status quo*, operating in niche markets by acting exactly as previous generations did, without innovating and preserving their unique manufacturing processes, i.e., as millennial Japanese companies (Ito et al., 2014). Recently, Erdogan et al. (2020) investigated how family firms manage the paradox between tradition and innovation, defining four types of strategies through which family firms manage such paradox. This contribution is particularly relevant because is an attempt to examine the role of tradition in family firm innovation.

However, tradition plays an important role not only in innovation but also in others management activities. For instance, concerning marketing-related activities, certain family organisations build unique brand identities by exploiting family history and tradition as guarantors of quality and uniqueness (Micelotta and Raynard, 2011), others do not associate their brand with the family, they even do not communicate that they are a family business and the family, and its traditions are “subordinated” to the business (ibid).

Whether the tradition is perceived as a resource or as an obstacle to business continuity and longevity, we currently do not have a deep understanding of how and why certain family firms perceive tradition as a source of competitive advantage, while others as a constrain. Family business literature also offers a limited understanding of the different ways in which managers of long-lasting family businesses practise tradition. Current family business literature misses explaining how managers give meaning to and practice tradition. Questions such as what does tradition mean to managers? How do they act with respect to tradition? How they understand tradition? are still unexplored.

Recently, Suddaby and Jaskiewicz (2020) provide some theorization on two family business tensions derived from traditions (i.e., the need to maintain the business or to innovate, the need to honour the founder’s vision or to adapt to the vision), however, empirical evidence is still incipient. Therefore, there is still limited knowledge regards how managers’ understanding of tradition determines the way tradition is practised, namely is tradition perceived as a marketing or innovation asset or both? Have all the managers and business families the same understanding of “preserving tradition”? Are behaving differently as they differ in the way they give meaning to tradition?

We hypothesise that a manager that is proud to be part of a long-standing family business, would more likely leverage tradition to gain competitive advantage, while a manager that perceives tradition as a pressure or an obstacle to change, would more likely hide the history of the family in the brand identity, rejecting stories, objects, memories. In other words, managers are increasingly aware that tradition has the potential to be exploited as a source of



competitive advantage, but not all managers *understand* and *practice tradition* in the same way and for the same purpose.

With the aim to - at least partially - address these questions and explore “tradition in practice”<sup>1</sup>, we will analyse the argument through a phenomenographic lens, by describing and explaining how managers of long-lasting family firms give meaning to and practice tradition. Answering the call of Murphy et al (2019), which encourage scholars to employ approaches that build new knowledge on complex family business phenomena based on experiences and everyday life of those who are involved in that world, we selected phenomenography as a proper research methodology to stay close as possible to the experiential world of research participants (ibid). We also justify our choice of phenomenography, as it is a well-established variance qualitative method in education (Alsop and Tompsett, 2006) and is increasingly applied in management (Angel et al., 2018; Lamb et al., 2011; O’Leary and Sandberg, 2017), allowing to capture variance in people’s ways of experiencing reality.

By unveiling four different ways in which managers of long-lasting family businesses understand resilience, we complement prior literature that investigated the role of tradition in family businesses by i) systematically exploring what tradition means for family firm actors, ii) capturing variance in the ways tradition is practised in a family business and iii) developing a practice-oriented framework of long-lasting family firms’ tradition. The four understandings are *tradition as a company feature*; *tradition as a family feature*; *tradition as a brand feature* and *tradition as a relational feature*.

In the next sessions, we introduce the literature review, research design, findings and discussion of this study. We also address limitations and avenues for further research.

## 2. Literature Review

### 2.1 Tradition conceptualization

Despite its foundational and powerful role for organisations, the concept of tradition has been weakly theorised; in Suddaby and Jaskiewicz’s (2020, p. 234) words “traditions are a frequently invoked but rarely defined construct in management theory”. Hence, before exploring the literature on the consequences and implications of tradition for family business it is first important to navigate the conceptualizations of tradition (Dacin et al., 2019; Suddaby and Jaskiewicz, 2020).

Dacin et al. (2019, p. 356) define tradition as “consciously transmitted beliefs and practices expressing identification with a shared past”. First, ‘consciously transmission’ indicates that tradition is consciously defined and articulated, which differentiates tradition from only customs or habits (Dacin et al., 2019) which are commonly conceptualised by culture theorists (Schein, 1985). In addition, “consciously transmission” implies that traditions are manifested over time and are longstanding, considering that they are transmitted over. Second, the term ‘expressing identification’ conveys that tradition has a symbolic meaning, which is shared by collective actors and social groups (Shils, 1981) through institutionalised practices (Dacin and Dacin, 2008). Third, the expression ‘shared past’ denotes that tradition presumes a temporal order in which beliefs are created and preserved from some past (Dacin et al. 2019).

In a recent editorial, Suddaby and Jaskiewicz (2020, p. 234) define traditions as “patterns of belief, customs, and symbolic practices that are transmitted from generation to generation”. This definition recognizes that beliefs and values are imprinted by founders in formation stages and that they perpetuate over time and among generations of the family

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<sup>1</sup>We define “practise” the set of different people’s activities (e.g., doing or saying), organised according to understandings (O’Leary and Sandberg, 2017; Schatzki, 2012) and knowing (Feldman & Orlikowski, 2011).



(Lumpkin et al., 2008; Erdogan et al., 2020). A long-lasting family business may be endowed with traditions which are fundamental in developing the so-called organisational identity (Erdogan et al., 2020). In particular, the family can be considered a fundamental component of tradition, since “belonging to a family, legitimacy of a belief and/or practice handed down or inherited over time is an inner characteristic of tradition” (Erdogan et al., 2020, p. 23). Thereby, tradition is crucial for creating identity and stimulating unity among family members and different generations of the family (Dacin et al., 2019). Lumpkin et al. (2008) propose a construct named family orientation (FO) to discuss the value of family involvement, from which they identify tradition among the formative dimensions of FO. They argue that traditions tend to persist over time in a way that they perpetuate family beliefs and preserve unique family culture (Lumpkin et al., 2008; Reiss, 1981).

In the view of Suddaby and Jaskiewicz (2020) traditions are formed by hybrid structures which encompass what is transmitted between generations (the *traditium*) but also how this process of ‘consciously transmission’ unfolds (the *tradere*) (Shils, 1981). Different instruments can be used to transmit tradition over generations such as storytelling (Kammerlander et al., 2015) and physical objects and rituals (Fiese et al., 2002).

De Massis et al. (2016) claim that the concept of tradition is linked to the temporal search process, considering that it refers to the stock of knowledge, symbolic figures and micro-institutions that are perpetuated across generations. These authors depict firm tradition and territorial tradition as sources of past knowledge. In their model, these sources of past knowledge are shared as codified knowledge (i.e., manufacturing process, product signs) and tacit knowledge (i.e., basic assumptions and beliefs) (De Massis et al., 2016), which can be inferred as tangible and intangible artefacts. Hence, tradition encompasses both tangible (objects, books) and intangible resources (beliefs, stories, rites) that build coherent identity over time (Erdogan et al., 2020; Suddaby and Jaskiewicz, 2020).

## **2.2 Tradition manifestations in family business studies**

There is increasing interest from family business researchers in exploring the phenomenon of tradition and its consequences for family businesses (De Massis et al., 2016; Erdogan et al., 2020; Lee and Shin, 2015; Lumpkin et al., 2008; Suddaby and Jaskiewicz, 2020). Prior studies have been focused on understanding whether tradition is a resource or a liability for firm innovation (De Massis et al., 2016; Erdogan et al., 2020). On the one hand, tradition may nurture harmony among family members and emotional attachment through shared beliefs and practices and, in that way, tradition is expected to avoid family conflicts (Lumpkin et al., 2008). In addition, tradition might trigger a family firm’s strategic renewal by legitimising long-term values (Salvato et al., 2010). On the other hand, tradition could represent a strait jacket for next generations leaders of family firms, because it creates obstacles to changes and to innovation. In other words, tradition can lead firms to conservatism and stagnation as well (Miller et al., 2003).

Suddaby and Jaskiewicz (2020, p. 234) argue that due to their unique characteristics, “family business tensions are often intergenerational in character and, thus, rest on the family business’s capacity to integrate past, present, and future”. Based on that reasoning they theorise two main tensions that emerge from managing traditions. The first tension opposes the need to maintain the business and the innovation needs, which debate was referred “innovation paradox” (De Massis et al., 2016) and Theseus Paradox (Suddaby and Jaskiewicz, 2020). The Theseus paradox refers to whether the family business needs to perpetuate a foundational identity but also needs to meet the demands of an increasingly changing market. All types of organisations face this paradox, although it is more pronounced in family businesses since



maintaining the vision and values of the founding family nurtures and gives meaning to the family business essence. As suggested by De Massis et al. (2016), the family business behavioural pattern is that the values of maintenance and continuity of traditions often stand out over change; however, these authors at the same time provide evidence that despite being constrained by their deference to tradition, family businesses can be also innovative (De Massis et al., 2016; Erdogan et al., 2020). De Massis et al. (2016) addressed these contradictions and provide evidence that long-lasting family businesses can leverage innovation through tradition, in which tradition can be seen as a special capability that extremely innovative firms are attached to. They show that tradition enables long-lasting family businesses to take advantage of temporally distant knowledge to develop new products.

Erdogan et al. (2020) also investigated the strategies adopted by long-lasting family businesses to manage the above-mentioned tradition and innovation paradox. According to the family imprinting perspective, they discussed “how the long-lasting legacy of previous family generations shapes different approaches to innovation and tradition depending on the content imprinted on the current family generation” (Erdogan et al., 2020, p. 20). This study revealed two approaches to tradition: the preservation and the revival approaches. The preservation approach refers to family firms that show commitment and honour the founder's or incumbent generation's beliefs and values. The revival approach denotes family firms that seek for recovering and reviving tradition since these elements have been lost over time (Erdogan et al., 2020).

The second tension discussed by Suddaby and Jaskiewicz (2020) refers to the ‘Oedipus Paradox’, which opposes the need to honour and perpetuate the founder’s vision and to adapt this vision based on the next generations (ibid). While the discourse involves an exchange between generations, the vision of the founding or incumbent generation normally prevails. In other words, the flow of information and visions is expected to be unidirectional, moving from the incumbent to the next generation (Garcia et al., 2019). Suddaby, Coraiola, Harvey, and Foster (2020) suggest that the next generation's capacity to reinterpret the purpose and meaning of the founders’ vision can be seen as a capability for family businesses' success.

Other studies in the family business literature investigated how tradition is linked to business strategies and family firm’s constructs such as cultivating the organisation’s brand identity (Micelotta and Raynard, 2011; Lee and Shin, 2015) and sustaining family members' socioemotional wealth (Brinkerink and Bammens, 2018; Salvato et al., 2010).

### **3. Research design**

#### **3.1. Phenomenography as research design**

In this study we adopt the phenomenographic approach (Marton, 1981, 1986) to explore how managers understand tradition and how this understanding determines the way tradition is practised. While phenomenography is well-established in a range of disciplines, it is only at its early stage in family business studies. Phenomenography is a qualitative methodology, aiming at capturing the possible qualitative variation in people’s understanding of different aspects of reality (Sandberg and Targama, 2007). We argue this research design is the one that could better answer the research question of the study, which is about capturing the different ways in which tradition is understood and practised. The phenomenographic analysis inductively unveils the understanding of a certain phenomenon, namely ‘people’s ways of experiencing or making sense of their world’ (Sandberg, 2000). Understandings address the relationship of an individual with their own reality and respond to questions about ‘What’ is a phenomenon, ‘How’ it works, and ‘Why’ it is so (Sandberg and Targama 2007). Outcomes are categories of understandings.



Consistently with the phenomenographic approach, the primary goal of our research is to dive into managers' 'understanding' and practice of tradition, looking for their uniqueness and peculiarity, instead of similarities and common patterns of generalisation. In doing so, phenomenography outlines the variance in the way tradition is understood by managers, that behave rationally but differ in their rationalities (Sandberg, 2000) and – therefore – in how they put tradition into practice.

### ***3.2. Context of analysis and sampling criteria***

We chose the context of long-lasting Italian and Brazilian family businesses as a fruitful field for the empirical investigation. Firstly, the longevity of these companies offers a wide temporal range to analyse tradition. Second, a cross-cultural study maximises variance and allows the appraisal of local-specific effects on the practice of tradition. The two contexts have cultural similarities - centenary Brazilian family firms still have bonds with Europe due to immigration in the nineteenth and twenty centuries - but they also face different market competition, local and national cultural aspects, and new generations' education/values.

The sampling procedure in phenomenographic study aims at maximising the variation of data. We consider heterogeneity at both individual and firm levels, considering aspects like the socio-demographic background of respondents (education, gender, age, and their role within the company), industry and country. Following a set of purposeful sampling criteria (Patton, 2014), we selected as knowledgeable informants family and non-family members with key management responsibilities of organisations that i) correspond to the definition suggested by Chua, Chrisman and Sharma (Chua et al., 1999, p.25) according to a family business is an organisation “governed and/or managed with the intention to shape and pursue the vision of the business held by a dominant coalition controlled by members of the same family or a small number of families in a manner that is potentially sustainable across generations”; ii) are Small or Medium Enterprises according to the European definition of SME<sup>2</sup> ii) are owned at least at the 50% by descendants of the founder, iii) are managed at least by the second generation, ensuring the family business has already built its own traditions.

After a preliminary screening of the companies the authors have already connections with, including only those corresponding to the sampling criteria and those available to take part in the study, we currently include in the study 11 family businesses, 5 Italian e 6 Brazilian. The sampling procedure in phenomenographic studies is an iterative process since, sample structure and size are not defined prior to data collection (Lamb et al., 2011). Our sample is currently evolving and we aim to reach approximately 20 cases and consequently interviews (half Italian and half Brazilian). We will follow also best practices proposed by international research teams, especially considering the translation of transcripts for data analysis (Shepherd et al., 2020). Table 1 presents key figures and facts from selected companies and key data of the informants.

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<sup>2</sup> SMEs are defined by the European Commission as enterprises with less than 250 persons employed and an annual turnover of up to EUR 50 million.



**Table 1**  
*Cases and informants*

Case code	State	Emplo yees	Found ation year	Industry	Informant	Generat ion	Gende r	Age	Role in the family	Mode
TT	IT	12	1965	Wine	Caterina*	3rd	F	30-40	Family Member	On site
MS	IT	14	1893	Wine	Enrico*	3rd	M	40-50	Non Family Member	On site
GU	IT	12	1876	Food refiner	Giuseppe*	5th	M	50-60	Family Member	Online
IC	IT	62	1969	Manufact uring	Luigi*	2nd	M	50-60	Family Member	On site
IT	IT	35	1959	Textile	Fiorella*	2nd	F	70-80	Family Member	On site
WA	BR	142	1951	Wheat Mill	Alisson Weiss*	3rd	M	60-70	Family Member	Online
MF	BR	750	1966	Metallurg y	Maria de Fátima*	3rd	F	40-50	Family Member	Online
WK	BR	205	1918	Manufact uring	Wilson Kevin*	5th	M	40-50	Family Member	Online
FP	BR	650	1949	Manufact uring	Felipe Policarpo*	2nd	M	20-30	Family Member	Online
LT	BR	110	1981	Manufact uring	Luis Tavares*	2nd	M	20-30	Family Member	Online
DT	BR	45	1970	Weaving	Dalton Tedesco*	3rd	M	30-40	Non Family Member	Online

Note: (-): Codename to preserve the anonymity; IT: Italy; BR: Brazil; F: feminine; M: masculine.  
 Source: Research data.

### 3.3 Data collection

Primary data have been collected through semi-structured interviews with family and non-family members in charge of management responsibilities and triangulated with secondary data to outline – by way of a phenomenographic analysis – several different understandings by which managers simultaneously understand and consequently practice tradition. Before starting the data collection phase, the international team agreed in designing a shared interview protocol. Informants from both countries were informed about the aim and scope of the research project as well the ethics implications before getting interviewed. They all were asked to sign a consensus agreement, stating that they were aware of the implications of the study and agreed in being recorded. We also asked if they prefer their company name to be anonymous. For all the companies and informants, we published names we received a formal consensus. Interviews took place both online through VoIP technology, and on-site (when possible, we tried to prefer on-site and in-person interviews, because it is easier to establish a more personal and emphatic connection with the informant, plus usually the interview is coupled with a visit to the plant).

Interviews last one hour on average. We started with preliminary questions, asking to briefly sum up the story of the company and describe their role and responsibilities. We then asked: "What is tradition for you?", "What do you think tradition is about?", "What does tradition mean for your organization?", "How do you integrate tradition into your organization?", "How do you practice tradition in your organization?", "What is critical of practising tradition?". "What are the advantages and disadvantages?". We also probed with follow-up questions such as "What do you mean by that?", "Can you explain that further?", "Can you give an example?".





Records of the interviews have been verbatim transcribed within 24 hours. For each case, field notes have been reorganised in the form of a short report in which researchers taking part in the interviews noted all their preliminary reflections about the case. Interviews carried out in Brazil took place in Portuguese, while those in Italy were in Italian. Consequently, transcripts are in Portuguese and Italian.

### 3.4 Data analysis

The international research team met monthly, sharing updates about the data collection process and preliminary ideas about the data analysis process, creating a shared table - in English - in which we described each case, the industry, and the history of the cases. We followed the phenomenographic analytic procedure and guidelines for phenomenographic analysis suggested by Sandberg (2000), Lamb et al. (2011) and O’Learly and Sandberg (2017).

After the familiarisation with the cases and the transcripts, in the first phase of the coding process, we looked for the *What* question, namely what tradition means for the informants. We underlined in the text key sentences and added key quotes translated into English to the shared table coupled with our personal interpretation of the understanding of tradition. In this phase, the Brazilian side of the team confronted internally the interpretations of the theorisation, as well as it did the Italian side of the research team, then the teams confronted their reciprocal preliminary meaning-focused descriptors (e.g., tradition as a static pillar; tradition as a dynamic push; tradition as a tangible asset; tradition as an intangible asset; tradition as family-based; tradition as business-based; tradition to innovate; tradition to be resilient). We then compared the descriptors to underline differences and similarities within and across the transcripts and discussed them again among the teams. So, we found that participants could be divided into four groups based on the dominant orientation of their understanding of tradition, that is whether company-oriented, family-oriented, brand-oriented, or relational-oriented.

These groups differ along two variables that are i) the orientation of tradition, from being more internally oriented (e.g., tradition is a set of values and beliefs that resides within the boundaries of the company and it is owned by the family) to more externally oriented (e.g., tradition is the set and values and beliefs that characterised the company brand and is communicated and shared outside the company to costumers and stakeholders); ii) the identification of tradition as an intangible (e.g., tradition is the way you relate to customers, tradition is the set of values and beliefs shared with e employees and customers) or tangible (tradition is the quality of a product; is the way a product is produced) asset. See the illustrative examples in Table 2.



**Table 2**  
*General understandings of tradition*

<b>Understandings of tradition</b>	<b>Representative statements</b>
<p>Relational understanding of tradition</p>	<p>“I believe that tradition is dedication and commitment, to anything and everyone.”</p> <p>“To form a tradition, to have a tradition, you must be committed and dedicated to something.”</p> <p>“Without tradition, you don't get to be 40 years old without a lot of commitment and dedication to your business, right?”</p> <p>“Perpetuating it and keeping it alive, it's this idea of why it started, of what it was like, this idea of serving the customer in the best possible way, of having an economically viable product, the company as a whole.”</p> <p>“Another is the issue of honesty with our customers, with our employees and our suppliers, it is also always a company tradition, the company has always been like this, always very honest, so we have to always move forward, right, this culture.”</p> <p>“So you need to set an example, and this is the example of tradition.”</p>
<p>Brand understanding of tradition</p>	<p>“I think that tradition is like this, usually linked to a long period of something, right, so it is, and usually linked to quality, so it's a point that always comes to mind when we think of tradition.”</p> <p>“And bringing it now to our reality, it is seen today as a very traditional company, in the segment in which we operate, from the marketing point of view, and from the brand point of view, and this is very positive, we built this image of tradition linked to the quality and this is what allows us to sustain the position that we have.”</p> <p>“Tradition has a positive aspect, it is something that is perpetuated because it is good, because of the quality, whether it is the historical quality of the product or the performance, the service, or the combination of those factors that brings a tradition of always serving well and meeting the needs.”</p> <p>“It is reliability, that this product will not give any problem, any problem that may eventually occur, I can count on fast service, this tradition is allied to this issue of reliability.”</p> <p>“Good tradition, it's something that goes back to good things. It's one, let's say, we have a tradition of bringing quality products, of delivering quality products, merging quality technical assistance, of one of our technicians to solve a certain problem, to present products.”</p>
<p>Company understanding of tradition</p>	<p>“With the entry of Doctor [family member's name], this modernity only increased, right, because he brought new ideas, a younger mind, right, but without abandoning those traditions that are the principles that his father even left it to us, right, and he managed to add that, bring the tradition that is practically our foundation here, but giving this upgrade to more current things, you know?”</p> <p>“The tradition for me is those basic concepts on which the company was founded. [...] It represents a path to be followed, right, a guide even for us to reach an expected objective or according to what the organization asks of us.”</p> <p>“It's the [Company's] name, it's been known all over Brazil since forever and we've always taken great care of that name, right, serving customers very well, serving with quality, so tradition, [Company] tradition for me is synonymous with representativeness in the Marketplace.”</p>



Family  
understanding of  
tradition

“I will take tradition to the side of values, right? The important values that we hold and that brought us here. They are very strong here at [company’s name], everyone who works here and there are many people who have worked for more than 20 years, 30, 40 years and today the oldest employee who works here, he works 47 years. And so the people who are here share the same values that came there, right at the beginning, from our grandfather and were always shared by our parents, and continue to be shared by us.”

Source: Research data.

In the second phase of the data analysis process, we looked at the text to answer the *How* question, namely how tradition is practised by the managers of the selected organisations, and which the actions informants undertake when incorporating tradition in the company. Again, we noted in the shared table the actions and key quotes translated into English. The iterative process and confronting similarities and differences allowed to categorised statements into overarching dimensions that capture the main actions for practising tradition, which are: inheriting, preserving, validating, and sharing tradition.

In the third phase, we simultaneously considered the actions they undertake when practising tradition and the understanding of tradition, examining how each general understanding is expressed through the actions. We re-read the transcripts several times, not focusing on stand-alone statements but checking if our interpretations were confirmed throughout the whole manuscript. Through the iterative process, we found that managers practice tradition through the same four actions (inheriting, preserving, validating and sharing), but the meaning they associate with these actions and how they practice them vary according to how they understand tradition. We labelled these understandings: company perspective understanding; family perspective understanding; brand perspective understanding; experience perspective understanding.

We validated our interpretations through the validity and reliability criteria commonly used in interpretive and phenomenographic research (Sandberg, 2000, Sandberg, 2005), which are communicative validity (i.e., during the interview we tested the mutual understanding between the researcher and the informant, for instance asking them to elaborate more on their answer and ask for specific examples); pragmatic validity (i.e., during the interview we tested the knowledge production in action by asking follow-up questions, by checking if what they were telling was true, for instance by triangulating with secondary data); transgressive validity (i.e., we voluntarily searched for inconsistencies and discrepancies in the transcript, looking for contradictions and other possible meanings of tradition other than that we elaborated); and reliability as interpretive awareness (i.e., we challenged our taking for granted assumptions, confronting monthly and led by our preconceived ideas about tradition within the field of family business research).

#### 4. Findings

The literature has acknowledged the level of heterogeneity between family businesses, and how managers understand tradition can be positioned as one important characteristic to distinguish them. The family involvement in the business is not only expressed in the way the company will act in the market or the people will behave in their daily activities, but primarily in how values and beliefs the family gives meanings and how they are preserved within the company and the family or shared outside with customers and stakeholders. From the data analysis process emerges variation in the way managers give meaning to tradition, specifically we inductively unveil four understandings of tradition. They vary along two dimensions: the



orientation (inward vs outward) and the asset (tangible vs intangible). The four understandings are:

- (1) Tradition as a company feature (*company perspective understanding*)
- (2) Tradition as a family feature (*family perspective understanding*)
- (3) Tradition as a brand feature (*Brand perspective understanding*)
- (4) Tradition as a relational feature (*experience perspective understanding*)

This variation in how the managers understand tradition is also reflected in the way they consciously organised and practised tradition in the company, highlighting its conceptual complexity and richness. Table 3 illustrate the distribution of the sample according to each understanding. In the following sections, we will describe each understanding and provide illustrative examples.

**Table 3**  
*Sample's understanding of tradition.*

Case	Country	Understanding of tradition
GU	IT	Company
TT	IT	Family
IC	IT	Company
MS	IT	Brand
IT	IT	Relation
LT	BR	Relation
FP	BR	Brand
WA	BR	Brand
DT	BR	Company
MF	BR	Family
WK	BR	Company

Source: Research data.

#### **4.1 Tradition as a company feature (*company perspective understanding*)**

For this group, tradition is represented by a set of tangible attributes that are preserved within the boundaries of the company. Tradition from a company perspective is about innovating by integrating knowledge from the past into the present and owning a set of key characteristics that define the innovative competitive advantage of the business.

Tradition is defined through the core set of competencies and knowledge that allow the company to preserve its competitive advantage and are passed from one generation to another. As a Brazilian manager asserted:

*[...] When you think about a company, values are mixed with tradition, right, there's ethics, innovation, and results, and all the values that are going to be preserved, they stay at the base. The base is becoming more and more solid and this is guiding the company's tradition, right? So, these values are the roots of tradition and the longer these stay, more solidified that no one has broken these cycles of tradition, the solid it becomes, so it's a basis that I refer to determine a tradition, right? (WK)*



Tradition means also the way production processes are carried out and how tradition can be leveraged to develop innovative products and processes. As WK entrepreneur asserted:

*Tradition is not something antiquated and old. And that is not the opposite of innovation, as this is something that the company considers important. To maintain tradition, it is important to always innovate (to be always adapting).*

In the view of both Brazilian and Italian managers that have a company perspective, tradition is also understood as a dynamic rather than a static tangible asset of the business, which means that tradition is seen as key to fostering business continuity.

*Tradition must not represent a limit, conversely, it fosters a natural change, it's like the North Star that guides the company towards the future. (IC)*

*Tradition allows the product to survive over time, even though does not have to represent a limit in innovating and improving the product, which must adapt to the evolving market. We innovate the tradition so that the cheese is not old but evolves with time". (GU)*

According to them, tradition is about innovating the past in the present and owning a set of key characteristics that define the competitive advantage of the business. Tradition, for this group, it is related to how activities and processes are carried out or designed within the company (inward orientation). For instance, when asked about a practical example of tradition they stated:

*Tradition is about maintaining our core business but adapting the ageing cells for the cheese and investing in new technologies. (GU)*

#### **4.2 Tradition as a family feature (family perspective understanding)**

For managers that give meaning to tradition from a family perspective, family is central to tradition. Compared to those with a company-based understanding, they share the same inward orientation of tradition, namely, tradition is at the core both of the business and the family, but they define tradition as an intangible asset proper of the owning family. For them, tradition means responsibility, heritage, education, handover, and a philosophy that guides the way they manage the company based on family values and history. Tradition represents also a legacy, a duty towards which they perceive a huge sense of responsibility:

*I don't want to be the one responsible for its failure, it's my turn to preserve and pass the winery to the generation to come, even though I don't know who the successors will be, I don't still have children, nor my brother has. (TT)*

Within this group, family and business are inextricably related. Manager perceives their role in maintaining the business they have inherited, they maintain unchanged the identity of the family that is reflected in the identity of the company. The family is the key pillar of the business and tradition is practised by perpetuating a close relationship with all the family members that work in the company. A Brazilian manager told:

*We are a family business, which results from a very strong centralization among family members, the traditional practices are focused on what the family constitutes in the company, that is, to be an example to our employees, working all the days very close to the collaborators. (FY)*



As the employees become “family members”, the practice of tradition passes also through constantly engaging them and promoting a familial atmosphere at work. By so doing, they can strengthen the employees' sense of belonging to the organisation, so that they can act mainly for the best of the organisation like the owners themselves.

#### **4.3 Tradition as a brand feature (Brand/product perspective understanding)**

In the third understanding, managers give meaning to tradition as a brand characteristic to preserve and maintain a solid business image, especially of the business brand. In particular, when practising tradition, managers emphasise tangible attributes such as quality and excellence of the product brand:

*[...] it is seen today as a very traditional company, in the segment that we operate, from a marketing point of view, from a brand point of view, and this is very positive, we built this image of tradition linked to quality [...]. (FP)*

For this group, associating the brand with attributes like credibility and excellence in the field in which the company operates, strengthens the relationship with customers and the positioning in the market (outward perspective). Tradition from a brand perspective is a point of difference - to distinguish the brand from competitors - shared with customers and the market. As in the case of a Brazilian manager, tradition is about the positioning in the market niche:

*Even you should know that it is not a positioning in price, but a positioning in quality, and we only sustain this because of the image of tradition, reliability, support that we give to the shopkeeper, right, so like that, is an essential point for us. (FP)*

From the perspective of this group, tradition allows to strengthen the loyalty of customers towards the product brand, it especially assures reliability:

*It is the reliability that this product will not cause problems, any problem I may have, I can count on quick service, and tradition is allied with this issue of reliability. (WA).*

In this way, tradition is recognized by customers and shared, denoting an outward orientation of their understanding of tradition. These managers perpetuate the same operating processes, focusing on product details to meet customer expectations for excellence. For example, compared to Understanding 1, in which managers leverage tradition to innovation, this group sustains that tradition is about not changing the production processes or product characteristics, conversely, they put maniacal attention to details be aware to always offer the same product to the market. For instance, the manager of the Italian Winery MS, told us that the six bottle boxes are still made of the same - quite expensive - thicker carton and the labels are manually stuck to the box because customers “expected” always the same packaging, which is a trademark of the winery.

Practising tradition from a brand perspective is also understood as preserving clients' relationships by telling stories about the brand. Nevertheless, managers underline that to maintain such a high quality and the leading position in the niche, they don't follow customers' requests, conversely, they maintain their “stability” and solidity. In his perspective, the customer must adapt to MS and not vice versa, because the wine has its own “stamp”, its tradition that means a “uniqueness” routed in the past.



#### **4.4 Tradition as a relational feature (experience perspective understanding)**

In the fourth understanding, tradition is understood as a relational feature, the meaning given by managers is that of a shared experience. For this group, tradition is practised by sharing intangibles like the history and values of the company, through managers' dedication and commitment to transmit family (intangible) and business-related values. A Brazilian manager points out that tradition is how he and his family members behave towards employees, customers, and stakeholders. Tradition is “an attitude” and is how they carry out the business by relying on family and company intangible values and beliefs.

*I believe that tradition is dedication and commitment to anything. [...] Because tradition, for you to generate it, you need commitment and dedication, but you also need to nurture it, right? You need to show people why they are here, what they are doing [...] (LT).*

Tradition is about always remembering which are the key values of both the family and the business, especially when relating to others, both employees and customers. In this regard, managers within this group understood tradition as the way they behave:

*The presence of the management board, I think it is very important to maintain the tradition because the owner has to be one of the first to arrive and you have to be one of the last to leave and be an example. (LT)*

*Another is the issue of honesty with our customers, with our employees and our suppliers, it is also always a company tradition, the company has always been like this, always very honest, so we have to always move forward, right, this culture. (LT)*

For the Italian owner of a textile company, tradition is a set of intangibles, for instance how she and her family relate to others. She specifically underlines the relational and intangible aspect of tradition that is transmitted to others among and outside the family.

### **5. Discussion and Theoretical contribution**

In this work, we question the positivist assumption according to tradition might be univocally defined and understood. In particular, we argue the source of high heterogeneity in managers' understanding of tradition stems primarily from the inherent contradiction underpinning the concept of *tradition*, according to tradition is frequently evoked but rarely defined (Suddaby and Jaskiewicz (2020).

Consistently with the principles and guidelines of the phenomenographic analysis (Sandberg 2000, 2005), our results show that tradition cannot be univocally defined, conversely its definition is shaped by the meanings given by those managers operating in long-lasting businesses, characterised by a shared past (Dacin et al., 2019). The understandings matrix presented in Figure 1 shows the four understandings in which tradition is conceived by managers of the analysed cases. Our research advances the family business literature by defining and systematically organising the multiple ways in which tradition can be understood and categorising them as a tangible or intangible asset of the company, and through an inward or outward perspective.

In the first one, labelled “tradition as a company feature”, we identify that tradition is characterised by an inward orientation and defined as a tangible asset, which means that tradition concerns innovation activities and it is leveraged by innovation managers for product development (De Massis et al., 2016). Long-lasting family businesses whose managers belong to this understanding can successfully manage the paradox between innovation and tradition, thus building an innovative competitive advantage based on the knowledge rooted in the past.



In this case, tradition is not a core rigidity, a source of resistance that leads to inertia, but an opportunity to be exploited to meet new market needs and expectations. This finding confirms the *innovation through tradition* stream of literature, according to which tradition is a non-costly, highly idiosyncratic tangible resource, which can determine strong competitive advantages, both in the value creation and capture phases of the innovation process (ibid).

For those managers belonging to the second group (tradition as a family feature), tradition is about a set of intangibles proper of the owning family that are transmitted from generation to generation. Business and family are inextricably related. For this group, preserving these patterns of belief is key to perpetuating the company in the market and guaranteeing its survivability. The family perspective on tradition contributes to the FO (family orientation) stream of literature (Lumpkin et al, 2008), that asserts the family is a fundamental component of tradition and of the organisational identity, since “belonging to a family, legitimacy of a belief and/or practice handed down or inherited over time is an inner characteristic of tradition” (Erdogan et al., 2020, p. 23).

The third group focuses on the marketing and branding aspects of tradition. For these companies, tradition is a tangible marketing asset, a point of difference to be univocally positioned in the market. It allows the family business to be clearly identified and it is one of the key attributes that define a unique brand identity (Micelotta and Raynard, 2011). This result contributes to the family business marketing literature by confirming the potential opportunities of leveraging corporate heritage and tradition in branding strategies. We confirm that family businesses “are in a unique position to leverage family-based corporate brand identity to gain competitive advantages” (ibid, p. 199).

Finally, the fourth group understands tradition from a relational point of view, which means they understand tradition through a behavioural lens. Contributing to the family business stream of literature that explores family firms from a psychological perspective (Sharma et al., 2020), tradition is here understood as how family members behave, how they interiorise the legacy of their ancestors, parents and relatives in terms of the social capital they develop within and outside the family firms. It is about how their behaviour imprints firms’ outcomes and performance. The managers of this group perceive tradition as deeply rooted in their attitudes and it shapes the way they behave towards employees, but especially customers and stakeholders.





**Figure 1**  
 Matrix of tradition understandings

	Tangible	Intangible
Owned (Inward orientation)	Tradition as a company feature (company perspective understanding)	Tradition as a family feature (family perspective understanding)
Shared (Outward orientation)	Tradition as a brand feature (Brand/product perspective understanding)	Tradition as a relational feature (experience perspective understanding)

Source: Research data.

Summing up, this study has significant theoretical implications: it sheds new light on the heterogeneity of ways tradition is defined and contributes to the debate by discussing how past knowledge and expectations about the future are differently recombined through alternative managerial models that are determined by the ways managers understand tradition. The study also contributes to succession family business studies (Miller et al., 2003), highlighting the role played by tradition in intergenerational succession processes, ownership transfer dynamics, transgenerational entrepreneurship and generational renewal (Jaskiewicz et al., 2015).

## 6. Conclusion, limitations and avenues for further research

The study sheds light on tradition as a practice in the context of long-lasting family firms. By using a phenomenography methodology, we explore how managers give meaning to tradition and, consequently, how they practise it. Our data show variance in the way tradition is understood and practiced, which allows us to question the positivist assumption that tradition might be univocally defined and understood. Using data from 11 companies (Brazilian and Italian) gathered through interviews we summarize four different understandings of tradition: tradition as a company feature; tradition as a family feature; tradition as a brand feature and tradition as a relational feature. In particular, the study contributes theoretically to tradition definition by exploring the different understanding and practices of tradition in family business.

Additionally, the study also contributes to succession and management aspects in the family business by discussing the role played by tradition in intergenerational succession



processes, generational renewal, and how tradition can be used in order to shape the way the company behaves towards employees, customers, and stakeholders to achieve the family objectives.

The study presents three limitations. Firstly, it is a work in progress, we are still in the data collection phase. As a consequence, as stated in the methodology section, further cases must be identified, and data collected. We aim to reach at least 20 cases as common practice in phenomenographic studies (see for instance Lamb et al., 2011), or at least as many cases as needed to reach theoretical saturation. Further cases and data will allow digging more into the practice of tradition and how the practice of tradition varies according to each understanding. The second limitation might be represented by the cultural differences among the cases of the sample. Despite selecting family firms from two different countries could represent a source of heterogeneity and that is strongly suggested in phenomenographic studies (ibid), further analyses might explore if the nationality of the informant affects its own understanding. The preliminary distribution of the sample we illustrated in Table 3, seems to confirm that nationality is not a variable to be considered in the way managers form their understanding. The data show that both Brazilian and Italian managers belong to the same understanding and the nationalities are equally distributed.

Finally, a third limitation of the study is represented by the industries in which selected cases operate. They all belong to the manufacturing and agro-food industries. Further studies might explore how managers operating in different industries, characterised by a higher technology intensity, understand tradition.

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