Doctoral thesis

From Professional Interactions to Relational Work

Investigating Relationships around Non-Family CEOs in Family Firms

Matthias Waldkirch
Acknowledgements

Dear Reader,

When you hold this document in your hand it means that I have nearly made it – that I may introduce myself as Dr. Matthias Waldkirch to you soon. After five years of reading, writing, collecting empirical material, questioning myself and my work, struggling, failing, hoping and succeeding, I have finally come to the finish line. Given that this dissertation will refrain from using colloquialisms, I feel it is due time to use one in my acknowledgements:

Whoop whoop! (the sound of a happy, soon-to-be ex-PhD student)

I have learned an astonishing amount of things during the last five years and I have become a better researcher, teacher and person in the process. Yet, one of the main things I learned during my PhD is to regularly, systematically overthink things. When I first contemplated about whom to include in the acknowledgements for this dissertation, I had the following line of reasoning going through my head: Should I go for a systematic or rather a classic narrative approach?

Yeah, you do learn to overthink things.

But then I had another thought: Why not go down the rabbit hole and outline the methodology behind why I include you in my acknowledgements?

• **Acknowledgment objective:** Collect, organize & thank everyone that has been part of my journey and has helped, challenged and supported me during my dissertation. Furthermore, the acknowledgements aim to build good future relations with all of you.

• **Boundaries of the review:** Privately- and professionally built relationships.

• **Inclusion criteria:** Everyone included has had a measurable impact on me and my dissertation process. And yes, I only include those with an IF above 1.

• **Sources:** Facebook, Outlook, pictures, and the brain of Yours Truly.

• **Search terms:** Friends, family, frenemies colleagues, co-authors, JIBSers, supervisors, professors, PhD students, Anna Maria, CeFEO, SCANCORians, opponents.

• **Initial number of hits:** Well, you are welcome to count below!

• **Final number after reading the abstract:** Now, this is just getting out of hand…
As this dissertation centers on relationships, and relating is something that I highly value, I will take this space to thank everyone that has been part of my journey and who has, in one way or another, supported me.

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PS: Despite this being a professionally wife-reviewed document, I cannot claim to not have forgotten someone important. If I have forgotten you, I apologize and hope you will still think highly of me the next time we meet. Also, I owe you a drink.
Abstract

Relationships constitute a central and persistent part of our lives and give meaning to who we are, what we do and where we belong. Relationships matter especially in the workplace as they form the very foundation on which organizations are built. They provide meaning to work, create connection, and ultimately shape organizations. Despite their importance, workplace relationships have remained implicit in how we conceptualize organizations and the individuals working in them. This dissertation adds to the growing interest in workplace relationships by studying relationships around the chief executive officer (CEO) in an organizational form that is inherently built upon relationships: the family firm.

Focusing on the introduction of a non-family CEO, this dissertation investigates the meaning of relationships for non-family CEOs, the work they perform, and the organizations they reside in. The four papers in the compilation build upon a diverse set of relational perspectives and utilize conceptual approaches and in-depth longitudinal case research to investigate workplace relationships around the non-family CEO.

The first paper reviews, organizes and extends the literature on non-family CEOs. It builds upon a framing of gap-spotting and assumption-challenging to both extend current research as well as to challenge its underlying assumptions. The paper questions the depiction of non-family CEOs as inherently different from family CEOs and the assumption that non-family CEOs are negative for a family firm’s socioemotional wealth. It further challenges the depiction of relationships between the non-family CEO and family members through purely formal mechanisms and introduces a relational view on interactions into this body of literature.

The second paper builds on the affect theory of social exchange to study how relationships affect whether non-family CEOs leave or stay in family firms. The paper conceptualizes the relationship between the non-family CEO and the current and next generation as an exchange triad to study how affect to the triad comes into being. Building on this conceptualization, the paper argues under which conditions non-family CEO turnover is likely and thus contributes to human resource literature and social exchange research in the context of family firms.

The third paper builds on a longitudinal single case study, following a family firm for more than 10 years through multiple waves of professionalization. The paper builds on the literature on institutional practice adoption to study the introduction of professional practices to the family and business system. These practices encompass the introduction of non-family CEOs and changes to the family and business governance. The findings
outline that family firms utilize four different modes of professionalization. The paper casts a critical view on professionalization and shows how family firms ‘overprofessionalize’, outlining the meaning of professionalization for the family and business systems. The paper thus contributes to the research on professionalization in family firms and the broader conversation on how organizations adopt and adapt institutional practices.

The fourth paper builds on an in-depth 16-month single case study of a family firm going through a reorganization and CEO succession. Building on the literature on job design and job crafting, the paper investigates how managerial job systems change during a reorganization. The findings show that job systems change through a contestation process between job design and crafting. This process unintentionally creates a framework for an emerging job system, which becomes stabilized as it is used by employees to accomplish work. The paper thus contributes by outlining the implications of the interplay between job design and job crafting, introduces job crafting as a managerial perspective, and adds to the growing literature investigating the interplay of formal and informal structures.

In overall, the dissertation makes three distinct contributions. First, it introduces relational work as a core aspect of a CEO’s work and shows how relating becomes work. Second, it extends the knowledge on non-family CEOs in family firms by investigating and conceptualizing their relationship with the owner family. Further, the dissertation shows how relationships are constituted by, and constitutive to, the organizational context in family firms. Third, the dissertation challenges the common understanding of professionalization in several ways. Instead of seeing professionalization as an absence of family or a formalization, the dissertation proposes to depict professionalization through professional relational ties. Last, the dissertation contributes to practice by providing guidelines for structuring relations between family owners and (prospective) non-family CEOs.
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“To work is to relate” (Hanoch Flum, 2001: 262)
1. Introduction

1.1. On the pervasiveness of relationships

Relationships constitute a central and persistent part of our lives and give meaning to who we are, what we do and where we belong (Berscheid, 1999; Dutton & Ragins, 2007a). From the first time we inhale to the last breath that leaves our lips, we are connected to the people around us – we are, inherently, ‘social animals’ (Perlman & Vangeli, 2006). Going beyond isolated interactions, relationships take a holistic quality that encompasses all areas of life. Relationships can provide advice, encouragement and friendship and enable individuals to accomplish outstanding feats. Positive relationships explain why people repeatedly seek out one another (Casciaro & Lobo, 2008), continue working with each other others (Lawler, 2001), and even start new ventures together (Francis & Sandberg, 2000). Relationships can also be toxic, cause anxiety and be ‘life-depleting’ (Dutton & Heaphy, 2003). Yet, no matter whether positive, negative, ambivalent or even indifferent (Methot, Melwani, & Rothman, 2017), relationships matter.

While relationships are core to our personal and social lives, they do not stop at the boundaries of organizations. Indeed, relationships at work “have come to form the very foundation of organizations” (Ferris et al., 2009: 1379). Individuals spend a large amount of their time in organizations interacting and relating to each other, especially given that work in organizations has become “more interdependent and relationships are a more important part of the work context” (Colbert, Bono, & Purvanova, 2016: 1199). How individuals relate to one another has important implications for their happiness and how they accomplish work (Methot et al., 2017; Sluss & Ashforth, 2007). Wrzesniewski et al., (2003: 94) highlight that the meaning of work in particular is affected by ‘interpersonal episodes’ that employees have with each other. For instance, whether and how employees voice concerns or new ideas depends on the relationships they have built with people in the organization (Wang & Hsieh, 2013). The decision to remain or leave an organization is also influenced by connections in the workplace (Mitchell, Holtom, Lee, Sablynski, & Erez, 2001). Relationships are an important element of one’s professional life as they also provide instrumental and emotional support, and “constitute the environment in which we live our professional lives” (Gersick, Dutton, & Bartunek, 2000: 1026). They fulfil a plethora of functions for individuals and play a key role in understanding why and how employees flourish (Colbert et al., 2016).

The meaning of relationships is foundational for organizations since organizations depend on individuals to “interact and form connections to accomplish the work of the organization” (Dutton & Heaphy, 2003: 263). The
way relationships play out at work has an important impact on organizations. Relationships enable organizations to coordinate work (Okhuysen & Bechky, 2009), facilitate citizenship behavior (Settoon & Mossholder, 2002), and influence the structure of an organization (Barley & Kunda, 2001; Gittell & Douglass, 2012). At the same time, workplace relationships may be at odds with organizational goals and can have negative consequences for an organization such as reduced knowledge sharing (Pillemer & Rothbard, 2018). Hence, relationships matter for individuals, the work that they perform and the organizations they reside in.

Relationships are inherent to organizations and everyday organizing. Yet, they often remain implicit in how we conceptualize organizations and the individuals working in them (Dutton & Ragins, 2007a; Emirbayer, 1997; Kyriakidou & Özbilgin, 2006a). Several researchers even claim that current theorizing about organizations has been “effectively marginalizing interpersonal relationships” (Ashforth & Sluss, 2006: 8). Over the last decade, there have been several calls to bring relationships back at the “front and center” of research about organizations and the people in them. (Dutton & Ragins, 2007b: 4; see also: Ashforth, Rogers, Pratt, & Pradies, 2014; Emirbayer, 1997; Ferris et al., 2009; Kyriakidou & Özbilgin, 2006a; Methot et al., 2017; Sluss & Ashforth, 2007).

My dissertation is situated in the growing stream of research on workplace relationships. While such relationships have been mostly regarded in the context of lower-level employees (Ferris et al., 2009), my dissertation focuses on the actor at the top of an organization – the chief executive officer (CEO). While CEOs’ relationships have recently become a research focus (Ma & Seidl, 2017; McDonald & Westphal, 2011), knowledge about the meaning of relationships for CEOs and their work remains limited. Given the importance of a CEO’s position, the relationships around this actor may have profound implications for the organization that the CEO leads and the individuals working for that organization.

As a fitting empirical context, I study these phenomena in an organizational form that is inherently built on relationships: the family firm (Hall & Nordqvist, 2008; Sanchez-Famoso, Akhter, Iturralde, Chirico, & Maseda, 2015). While relationships are an inherent part of all types of organizations, they are particularly vital and pervasive in family firms. Given the overlap of family and business ties, relationships in family firms are often stronger, emotionally laden and highly visible throughout the organization (Brundin & Härtel, 2014; Gómez-Mejía, Cruz, Berrone, & De Castro, 2011a; Long & Mathews, 2011). Accordingly, family firms are a prime context in which to study relationships. Methodologically, my dissertation builds on two in-depth case studies of family firms that are run by non-family CEOs. In both cases, I followed the organizations and their actors over a long period of time to capture time, context and changes within these organizations (Langley,
1999). Being close to the actors allowed me to investigate the meaning of relationships for individuals, the work that they do and the organizations that reside in. In doing so my dissertation heeds the call to take relationships actors in organizations seriously and contributes to our knowledge of workplace relationships in organizations, the CEO as a relational actor and the meaning of relationships in family-owned businesses.

1.2. Towards relationships as front and center of organizational research

Already Max Weber (1968) outlines social relationships and interactions as foundational blocks of organizations, a proposition which was also echoed in the work of the ‘human relations school’ (Barnard, 1938; Roethlisberger & Dickson, 1939). Defining social relationships, Weber (Weber, 1968: 27) argues that a relationship encompasses “a minimum of mutual orientation of the action of each to that of the others. Its content may be of the most varied nature: conflict, hostility, sexual attraction, friendship, loyalty, or economic exchange.” Like Weber, Hinde (1979: 15) too shows that relationships consist of interactions between two individuals and involve behavioral, cognitive and affective aspects. Depending on whether such relationships are positive, negative or ambivalent, they have a varying impact on individuals which ranges from supportive to life-threatening (Dutton & Heaphy, 2003; Methot et al., 2017).

Given how much time we spend in contact with others in an organization and how pervasive relationships are in everyday work, workplace relationships are meaningful and influential for individuals and the organizations they belong to (Ferris et al., 2009; Perlman & Vangelisti, 2006). Hence, it does not come as a surprise that many theoretical concepts build on relationships at work. Relationships are an inherent part of organizational theorizing, be it on topics such as social exchange (Blau, 1964; Cropanzano & Mitchell, 2005), organizational culture (Schein, 1990) or mentoring (Gersick et al., 2000). However, while relationships are inherent to these concepts, they often remain implicit and hardly take the front stage of theoretical and empirical work (Dutton & Ragins, 2007a; Kyriakidou & Özbilgin, 2006a; Sluss & Ashforth, 2007). Over the last decade several authors have criticized the existing theorizing of relationships.

In his manifesto for a ‘relational sociology’, Emirbayer (1997: 281) outlines a fundamental issue that researchers studying the social world face: “whether to conceive of the social world as consisting primarily in substances or in processes, in static ‘things’ or in dynamic, unfolding relations.” Emirbayer (1997: 284) maintains that sociology is caught within substantialism and the depiction of actors as “self-propelling, self-subsistent entities that pursue internalized norms given in advance and fixed for the
duration of the action sequence under investigation.” Instead, he proposes a focus on trans-action, which entails viewing relations as “preeminently dynamic in nature, as unfolding, ongoing processes rather than as static ties among inert substances” (Emirbayer, 1997: 289). Emirbayer’s call for a relational sociology has resonated well with organizational theorists who too have made similar observations. While Emirbayer is not directly referring to workplace relationships, his work has been an important driver for this stream of research. Kyriakidou and Özbilgin (2006a: 1) refer to Emirbayer’s work by arguing that large parts of organizational research studies organizational phenomena “without depicting organizational reality in dynamic, continuous and processual terms”. Ferris et al. (2009) also note that research on work relationships is limited in scope and consists of many scattered inquiries. Going beyond depicting action as atomized, they propose a move towards a relational perspective. Sluss and Ashforth (2006; 2007) argue that by focusing on either the individual or the collective level of analysis, the space in between actors, the interpersonal level, has received too little attention by organizational researchers. By focusing on positive relationships at work, Ragins and Dutton (2007b: 4f.) also call for refocusing on relationships, since they “represent not only the essence of meaning in people’s lives, but they also reside deep in the core of organizational life; they are the means by which work is done and meaning is found in organizations.”

Building on the criticism of how relationships are depicted in empirical studies and in theoretical conceptualizations, several authors maintain that there is a need to develop an organizationally specific ‘relationship science’ to take relating as a fundamental aspect of organizing more seriously (Dutton & Ragins, 2007a; Kyriakidou & Özbilgin, 2006a; Methot et al., 2017). In line with early work in organizational theory, which was built on close observations of how actors accomplished their work (Barley & Kunda, 2001; Roethlisberger & Dickson, 1939), relationships have been reintroduced both as a topic worth investigating and as a means of theorizing. For instance, the re-emerging literature on professions outlines relating as one of the core lenses through which to investigate professions and what professionals do (Anteby, Chan, & DiBenigno, 2016). Sluss and Ashforth (2007, 2008) have developed the concept of relational identities as an extension of the identity literature, which explicitly encompasses identifying through relating. The fast-growing literature on ambivalence in organizations draws on relationships to explain both the sources and the impact of ambivalence for both individuals and organizations (Ashforth et al., 2014; Methot et al., 2017). The movement of positive organizational scholarships has paid close attention to positive relationships, which are prominently highlighted in this stream of research (Cameron, Dutton, & Quinn, 2003; Dutton & Ragins, 2007a). These are examples of research that has re-focused on relationships empirically and conceptually. It is thus fitting and a good sign that Methot et al. (2017: 1)
remark that the “study of workplace relationships is becoming a cornerstone of management research.”

While the study of workplace relationships has advanced over the last decade, interest in relationships has yet to fully take advantage of research on workplace relationships (Colbert et al., 2016; Methot et al., 2017; Rothman, Pratt, Rees, & Vogus, 2017). First, as Methot et al. (2017) outline, existing research has not captured the dynamic nature of relationships over time well, especially those that are neither fully positive nor negative. Given how relationships may change from one day to another alternating between love and hate (Pratt & Doucet, 2000), it is curious that time is largely absent from the study of relationships. This is partly due to the theoretical framing of relationships through economic models of social interactions (Dutton & Ragins, 2007b), which reduce relationships to an input-output system. It is also partly due to the nature of empirical material. For instance, literature on leader-member exchange often ignores time and process (Shamir, 2011), which does not allow an understanding of the dynamics apparent in workplace relationships. Given that relationships are breathing entities that develop, change, dissolve and even reconnect over time (Thompson & Korsgaard, 2018), it is important to take a processual perspective when researching relationships. It is thus not surprising that several studies which capture relationships best are based on in-depth, longitudinal qualitative work and ethnographies (DiBenigno, 2017; Gersick et al., 2000; Kellogg, 2009; Pratt, 2000).

Second, given its strong connections to movements, for instance, in psychology (Berscheid, 1999; Kelley, 1979) or organizational behavior (Luthans, 2002), it is not surprising that research on relationships has moved towards a rather positivist depiction of relating in organizational life that obscures the “fluid and uncertain quality of relationships” (Duck, West, & Acitelli, 1997: 3). Instead, relationships take an existence of their own, which ironically enough repeats the problems of an atomistic investigation. Relationships take a utilitarian quality that is interested in their effects and outcomes for individuals and organizations (Ferris et al., 2009; Pillemer & Rothbard, 2018), instead of asking what they mean for these actors and the organizations that they work for. As Wrzesniewski et al. (2003: 97) argue, relationships give meaning to work and connections in organizations since “employees attend to and interpret what others do to them and what they do to these others.” However, we know little about the meaning of CEOs’ relationships for these actors themselves, the individuals around them and for their organizations. Thus, investigating the meaning of relationships may illuminate aspects such as why actors value some relationships over others, how they relate the way they do and how they continuously make sense of their own and other relationships.
Lastly, while relationships are constitutive for organizations (Dutton & Heaphy, 2003), the organizational context also influences the way actors relate. Relationships are inherently nested within the context of smaller and larger social systems, encompassing dyads, teams and organizations and also the institutional environment (Perlow, Gittell, & Katz, 2004). Such structures influence relating in various ways. They provide templates of interacting, highlighting for instance which types of relationships are acceptable between organizational members (Sluss & Ashforth, 2007), or how new organizational members are to be introduced and socialized in organizations (Ashforth & Mael, 1989). Further, organizations provide structures in which relating can take place. Formal meeting places are a powerful predictor of communication (Srivastava, 2015), shape the ways in which employees interact on an everyday basis (Gulati & Puranam, 2009), and set social foci around which actors meet and stay in contact (Dahlander & McFarland, 2013). However, while several authors have argued that the organizational context plays a key role in workplace relationships (Ashforth et al., 2014; Methot et al., 2017), the interplay of organizational context and workplace relationships over time provides several opportunities for research (Perlow et al., 2004).

As the growing research on workplace relationships shows, studying relationships matters not just from a relational perspective but also for understanding organizations and the people inside of them. Given the pervasiveness of relationships, they matter on every level of analysis. On an individual level, relationships are an important element for understanding aspects like wellbeing and why employees thrive in some organizations and suffer in others (Gittell & Douglass, 2012; Grant, Christianson, & Price, 2007). They are important on a group level for understanding issues like how cohesion forms and teams continue to work together (Ferris et al., 2009; Lawler, 2001). On a relational level, relationships form new patterns that may exist next to formal structures and bolster them in times of change (Gulati & Puranam, 2009). On an organizational level, relationships come to form the foundation of important aspects such as the culture, support networks and political structures (Gersick et al., 2000; Schein, 1990), and may even influence the actual shape of the organization (Cohen, 2016; Gittell & Douglass, 2012). Even on an institutional level, relationships form the basis of institutional change as part of what is usually referred to as ‘institutional work’ (Lawrence, Suddaby, & Lea, 2009). Thus, the study of workplace relationships matters and is meaningful.

Opportunities for researching workplace relationships become especially apparent as we go further up in an organization. While research on work in organizations has been historically close to its participants and their actions and interactions (Abbott, 1993; Barley & Kunda, 2001), such research is by and large absent in studies on executives, especially CEOs (Berns & Klarner, 2017). Further, while research on strategy-as-practice (Jarzabkowski & Spee,
2009; Johnson, Langley, Melin, & Whittington, 2007) has re-focused attention on what managers do and how they enact strategies in their everyday work, the perspective of relating and the meaning of relationships for accomplishing work has received little attention. As I argue, the depiction of CEOs remains a-relational, thus obscuring the social dynamics around these important organizational actors.

1.3. Towards CEOs as relational actors
The chief executive officer has received more attention than probably any other actor in the business realm (Berns & Klarner, 2017; Kesner & Sebora, 1994). Often depicted as “generally the most powerful individual in the organization” (Busenbark, Krause, Boivie, & Graffin, 2016: 258), research on CEOs focused on CEOs as ‘heroic’ leaders of organizations for a long time (Barnard, 1938; Cannella, Finkelstein, & Hambrick, 2008). While our view on CEOs has certainly become more nuanced, especially due to qualitative inquiry (for instance: Mintzberg, 1973), research on CEOs still “overemphasize[s] the capacity of leaders to dominate their organizations” (Denis, Langley, & Pineault, 2000: 65). Most research assumes that CEOs have the power to shape organizations to their liking, for instance, by replacing members on the board and management or by installing new structures and processes that shape the organization (Barron, Chulkov, & Waddell, 2011; Ma, Seidl, & Guérard, 2015). Such arguments place CEOs outside the organizational social system, depicting them as atomistic actors who shape organizations at arm’s length.

Several researchers have argued against such an under-socialized view of CEOs. For example, using a social network approach, Cao et al. highlight the relationships that a new CEO builds, arguing that a new CEO’s success is to a large extent determined “by relationships that the CEO maintains both within and outside the firm” (Cao, Maruping, & Takeuchi, 2006: 564). Zhu and Shen (2016: 1) argue that relationships are a “key factor” for new CEOs, especially those with members on the board. McDonald and Westphal (2011: 661) also highlight that there is a “marked increase in theory and research on social relations among corporate leaders.” Diverse issues, such as a CEO’s interaction with top- and middle-managers (Patel & Cooper, 2014), other CEOs (Westphal, Boivie, & Ming Chng, 2006), the strategic leadership constellation (Ma & Seidl, 2017) and the chairman of the board (Krause, 2016; Quigley & Hambrick, 2012; Roberts, McNulty, & Stiles, 2005; Zhu & Shen, 2016) have been at the center of interest. While the focus on relationships around CEOs is certainly commendable, the conceptualization and empirical work around their relationships has remained shallow.

Research on CEOs often depicts their relationships as premediated by internal dispositions (Cannella et al., 2008). Based on the tenets of upper
echelon theory (Hambrick, 2007; Hambrick & Mason, 1984), relationships are captured through easily measurable individual factors, such as age, tenure and industry experience. Such factors influence the cognition of managers and, in turn, their relationships. However, not capturing relationships conceptually and empirically leads to a largely superficial view on relationships. For instance, Westphal, Boivie and Chng’s (2006) study on informal linkages between executives in different companies provides an intriguing analysis of resource dependence. Using a network analysis, the authors show how CEOs reconstitute ties to reduce their company’s resource dependence. However, the authors depict friendship ties as one-dimensional constructs which are reconstituted at the whim of the new CEO. Given the complexity of friendship ties regarding how they are built and maintained (Perlman & Vangelisti, 2006; Wrzesniewski et al., 2003), such a depiction obscures important interpersonal dynamics between executives. The board-CEO relationship has also been criticized for a simplified depiction of relationships. Roberts et al. (2005) maintain that new theoretical and methodological approaches are necessary for advancing research on management and governance practices. The authors highlight the “value and indeed necessity for qualitative primary research on the dynamics of governance relationships” (2005: 20) to gain an understanding of the inner workings of relations in the board. Pye and Pettigrew (2005) take this point further when they argue that not only is it important to focus on such relationships, but that they should also be seen through a processual lens using a stronger contextualized view. Such a view focuses on how actors perceive relationships and the meanings they attach to them, thus helping to “explicate these inter-relationships of individual directors, boards, organization and wider context” (Pye & Pettigrew, 2005: 33). Trying to explain why such research has not been done, Kakabadse and colleagues (2006: 135) argue that the “historical legacy of agency theory and rationalist models of organisational functioning” have discouraged research on relationships due to the predictive nature of such theories. The authors take a specific look at the dyadic relationship between the CEO and the chairman of the board, arguing that many studies that look at such relationships “stop short of entering into in-depth analysis identifying the critical components which determine the nature of this dyadic interaction” (2006: 134). A recent example of this is the work by Krause (2016) on the chairman’s orientation toward the CEO, in which he builds a dichotomy of controlling or collaborating orientation. While it certainly is important to move beyond the depiction of chairmen as purely controlling, we still do not know how CEOs and chairmen build their relationships, how they balance private and professional ties and how they overcome disappointments and struggles.

Further, research on CEOs and their relationships lacks focus on process and context (Berns & Klarner, 2017). As various studies point out (Friedman & Saul, 1991; Grusky, 1960; Haveman & Khaire, 2004; Marcel, Cowen,
Ballinger, 2013; Zhang & Rajagopalan, 2010), a new CEO can often be a strong disruption for the organization, potentially leaving the organization with “deep and lasting scars” (Wiersema, 2002: 70). In their effort to change organizations, new CEOs tend to adjust internal structures and strategies, which has wide-reaching implications for work within organizations (Denis et al., 2000; Romanelli & Tushman, 1994). However, there is little research on the underlying dynamics of how CEOs and their interactions shape organizations. While Denis et al. outline the process of integrating a new CEO as a mutual adjustment process, they maintain that most literature “remains silent concerning the dynamics of leader integration” (Denis et al., 2000: 1065).

An important reason why we know little about these processes is the lack of qualitative inquiry into CEOs’ work and relationships (Berns & Klarner, 2017). Due to difficulties in getting access to the upper echelons of organizations, there is little research getting close enough to CEOs and the people around them. Emirbayer’s (1997) argument about conceiving the social world in substances or processes is well-reflected in the way we think about executives, especially CEOs. Often, we conceptualize relationships following a variance-based approach (Van de Ven, 2007), as existing variables which take on an instrumental function in explaining individual and organizational outcomes (Ferris et al., 2009). While it certainly is worthwhile to study the effect of relationships, such a perspective obscures the meanings that such relationships take for individuals and the organization, and their everyday constitution in interactions and emotions (Methot et al., 2017).

To further our knowledge about CEOs, the relationships around them and their organizational context, my dissertation focuses on CEOs in the context of family firms. Given that family firms are “one of the most vital and fertile grounds for the development of strong relationships” (Sanchez-Famoso et al., 2015: 1714), they provide an excellent context in which to study relationships.

1.4. Studying relationships around non-family CEOs in family firms

Family firms are inherently relational organizations, since they are built on one of the most intimate set of relationships: family ties. Research on family firms has grown in both size and scope over the last decades (Gedajlovic, Carney, Chrisman, & Kellermanns, 2012; Sharma, Melin, & Nordqvist, 2014), and covers a wide range of topics. Depending on the definition used, family businesses represent up to 90 percent of the companies worldwide (Aldrich & Cliff, 2003). Since its inception, research on family firms has highlighted the interplay of family and business systems as a defining feature of family firms (Tagiuri & Davis, 1992; von Schlippe & Frank, 2013). In contrast to publicly-listed companies with dispersed ownerships, the regular
context for most research on CEOs (Bagby, 2004; Berns & Klarner, 2017; Busenbark et al., 2016), family firms are built upon close relationships, which has been outlined as the biggest strength and largest obstacle for family firms (Habbershon & Williams, 1999; Kellermanns & Eddleston, 2004; Kets De Vries, 1993). Relationships in family firms are closer, more intimate and take on a larger role in how the organization functions (Hall & Nordqvist, 2008; Handler, 1991). At the same time, the repercussions of failing relationships are more severe in family firms. Conflicts between family members and even with non-family members tend to plague family firms, and are in some cases felt for decades (Barnett & Kellermanns, 2006; Kellermanns & Eddleston, 2004; Kets De Vries, 1993; Levinson, 1971). In short, relationships in family firms can be defined as being especially ‘genuine’ (Hall, 2003). Such prominence of relationships is the driving factor for why family firms are an excellent context for studying the meaning of relationships in the CEOs’ work.

The close relationships in family firms often go beyond members of the family (Karra, Tracey, & Phillips, 2006; Zahra, Hayton, Neubaum, Dibrell, & Craig, 2008). Many family firms are able to build strong relations with their employees, frequently resulting in increased commitment towards the firm (Miller, Le Breton-Miller, & Scholnick, 2008; Sieger, Bernhard, & Frey, 2011). It is not uncommon that the values of the family are also shared by employees (Miller & Le Breton-Miller, 2005) and lead to a feeling of inclusiveness (Long & Mathews, 2011) as well as constituting a ‘pseudo-family’ (Tan & Fock, 2001). Indeed, the affective commitment of family owners can be contagious to non-family employees (Zahra et al., 2008). Family firms can profit from such increased commitment especially in times of crises (Minichilli, Brogi, & Calabrò, 2016).

It has become increasingly common that family firms are led by non-family members. Anderson and Reeb (2003) show that 55 percent of the 141 large family business enterprises in the S&P 500 are managed by non-family CEOs. Other studies underpin this trend and show that an increasing number of family firms plan to keep ownership in the family, but pass business leadership to a non-family CEO; these numbers have, on a global scale, increased over the last years (PwC, 2012a, 2014, 2016). Family firms not only strive for financial gains but they also want to preserve and gain socioemotional wealth (Gómez-Mejía, Haynes, Núñez-Nickel, Jacobson, & Moyano-Fuentes, 2007), which naturally influences non-family CEOs’ scope of work.

The introduction of a non-family CEO represents a change in the relational system of a family firm. When studying interpersonal relationships and their meaning for individuals and the organizations they are in, studying non-family CEOs in family firms becomes intriguing for several reasons. Hiring a non-family CEO presents a “very significant decision for family firms”, and the decision to do so is regularly highlighted as one of the main concerns that family firms face (Chang & Shim, 2015: 1297; Chua, Chrisman, & Sharma,
Family firms are concerned about how an ‘outsider’ may shape the business and may initially not trust the non-family CEO (Blumentritt, Keyt, & Astrachan, 2007). Thus, family owners remain close to non-family CEOs (Hall & Nordqvist, 2008; Miller, Le Breton-Miller, Minichilli, Corbetta, & Pittino, 2014), making their relationships more prominent and easier to observe. Moreover, non-family CEOs usually represent the first step in ‘professionalizing’ a business and establishing more formalized structures (Howorth, Wright, Westhead, & Allcock, 2016; Schein, 1983; Stewart & Hitt, 2012). Hiring non-family CEOs is often seen as a strategic change or ‘renewal’ to facilitate organizational transformation (Fletcher, 2002). Thus, the hiring of non-family CEOs often coincides with further structural changes in family firms and is therefore a highly relevant question for family firms (Blumentritt et al., 2007; Chua et al., 2003; Dekker, Lybaert, Steijvers, & Depaire, 2015; Stewart & Hitt, 2012).

What is more, relationships in family firms take on an even higher importance for the work of non-family CEOs. While relationships with their fellow executives and regular employees are important, non-family CEOs also need to actively engage with members of the owner’s family; ignoring this relationship is virtually impossible and, if done, is usually an indicator of severe conflict (Blumentritt et al., 2007; Hall & Nordqvist, 2008). Lastly, it is common that members of the owner family and a non-family CEO come from divergent backgrounds, which prescribe different ways of relating. Non-family CEOs are often socialized into what is usually referred to as ‘professional management’, built on the notion of managing publicly listed firms with diffused ownerships (Anteby et al., 2016; Dyer, 1989; Stewart & Hitt, 2012). However, family firms are built like relational organizations (Gittell & Douglass, 2012), and show less interest in clearly delineated governance structures (Berent-Braun & Uhlaner, 2012). My dissertation provides new insights into non-family CEOs in family firms while also using the context to study workplace relationships and their meaning.

1.5. Purpose and research questions

My dissertation incorporates workplace relationships into the research on CEOs, with a special focus on non-family CEOs. Family firms are a rich context for studying relations and allows us outline important implications for family firms in particular and for organizations in general. Thus, the purpose of my dissertation is to investigate the meaning of relationships for individuals, the work that they perform and the organizations they reside in by studying non-family CEOs in family firms.

The focus on workplace relationships, CEOs and family firms places my dissertation at the intersection of organizational theory, human relations and the field of family business research. My dissertation adds to the growing
literature on workplace relationships and provides a processual view on relationships and the context in which relating occurs.

To fulfill this purpose, my dissertation follows an in-depth, interpretivist and processual qualitative approach (Dyer & Wilkins, 1991; Gioia, Corley, & Hamilton, 2013; Langley & Abdallah, 2011; Pettigrew, 1997). So doing, I am able to capture the dynamic nature of relationships and interactions and study their interplay with organizational structures over time. I aim to cast a dynamic view of relationships on the research on non-family CEOs that aims to answer the following three broad research questions:

A. How do relationships tie family and non-family actors to one another?
B. What is the meaning of relationships for the work of non-family CEOs?
C. How do workplace relationships shape, and are shaped by, the organizational context over time?

The first research question (A) investigates the meaning of relationships for individuals by investigating the relationships between family and non-family members in an organization. In answering this research question, I hope to add a novel perspective to relationships and their meanings for actors at the top of the organization. Answers to this research question thus contribute to general research on relationships in organizations and our knowledge about non-family CEOs in family firms. The second research question (B) investigates the meaning of relationships in the work that non-family CEOs accomplish in family firms. It thus aims to overcome the shortcomings of depicting CEOs as non-relational. Answers to this research question contribute to our understanding of CEOs, especially non-family CEOs and the dynamics of relating. The third research question (C) investigates relationships and their context, and how both mutually constitute each other over time. This research question thus aims to create a better understanding for the contextualization of relationships and their situatedness in and meaning for organizations. Answers to this research question contribute to our understanding of workplace relationships and also cast light on the relationships of new CEOs and how these relationship form, and are formed, by organizational structures.

My dissertation consists of four papers that investigate the overarching topic from different perspectives to fulfill the purpose of the dissertation. Such a ‘compilation’ approach allows me to incorporate several different perspectives to fulfil my research’s aim. All four papers have distinct research questions that drive them. At the same time, each paper contributes to the three overarching research questions outlined before.

**Paper 1.** What is the current state of knowledge about non-family CEOs and especially their relationships with members of the owner family?
**Paper 2.** How do relationships in the triad between non-family CEO, current and next generation members affect whether non-family CEOs stay in or leave a family firm?

**Paper 3.** How do family firms adopt professional practices and adapt them to the underlying systems of family and business, and what do these practices mean for both systems?

**Paper 4.** How does the managerial job system change during a reorganization, and how do interactions shape this process?

The first paper gives an overview of the context of the dissertation by investigating and structuring current knowledge about non-family CEOs. Relying on a systematic literature review on non-family CEOs in family firms, the paper investigates the status quo of our knowledge and develops a research agenda. The review pays special attention to the importance of relating while casting a critical view on its shallow treatment in literature (Fletcher, 2014). Building on the idea of questioning underlying assumptions (Alvesson & Sandberg, 2011), the paper critically investigates the depiction of non-family CEOs and executives and provides several ways to move beyond such depictions.

The second paper investigates relationships on an individual and triad level. It builds on the idea that affect between actors may lead them to stay in or leave the organization and highlights the importance of workplace relationships for this (Holtom, Mitchell, Lee, & Eberly, 2008). While previous research has mainly focused on investigating financial and performance aspects when studying CEO turnovers (Giambatista, Rowe, & Riaz, 2005; Kesner & Sebora, 1994), the paper conceptualizes the role of interpersonal relationships. The paper uses a conceptual approach to provide insights into how different types of relationships affect CEO turnover.

The third paper addresses one of the most common demands that family firms face: the call for ‘professionalizing’ their operations (Stewart & Hitt, 2012). Professionalization is understood as the “unique transition from an entrepreneurial family business, often owner-managed, to a more formalized, structured, and institutionalized corporation” (Dekker et al., 2015: 516), encompassing various changes like those in management, governance and human resource systems (Stewart & Hitt, 2012). Relying on literature on practice adoption (Ansari, Reinecke, & Spaan, 2014; Gondo & Amis, 2013), Paper 3 conceptualizes professionalization as the adoption of ‘professional practices’. Building on a 12-year longitudinal single case study of a company that has gone through several waves of professionalization and which has introduced multiple non-family CEOs, the paper shows how professionalization in family firms unfolds and how family firms adapt practices to the business and family systems.
The last paper studies relationships and interactions within the formal structures of an organization by investigating how job systems shift during a reorganization (Cohen, 2016). I followed a family firm during its reorganization and CEO succession, building on in-depth insights gathered over 16 months through interviews, observations and secondary data. Building on literature on job design and job crafting (Cohen, 2013; Hornung, Rousseau, Glaser, Angerer, & Weigl, 2010; Parker, Van den Broeck, & Holman, 2017), Paper 4 outlines how interactions between the top management team and board of directors reshape a destabilized job system as a contestation process. The findings outline how this contestation process inadvertently created a new job system, contributing thus to the growing stream investigating the interplay between formal and informal structures (Cohen, 2013; McEvily, Soda, & Tortoriello, 2014; Parker et al., 2017; Sandhu & Kulik, 2018).

1.6. **Four perspectives on relationships, structures and non-family CEOs**

Even though the four papers investigate different elements, they represent a cohesive approach for studying relationships and their interplay with organizational structures. Firstly, the dissertation builds on a coherent context by focusing on non-family CEOs and their work within family firms. All the four papers investigate the relationships between family and non-family
members and focus on the tensions and possibilities arising out of these relationships. In the cases presented in Papers 3 and 4, the companies under study went through several CEOs in their move towards non-family CEOs. Therefore, the empirical material for this dissertation was collected in comparable settings.

The four papers investigate the purpose of my dissertation on different levels of analysis (see Figure 1) and contribute to answering the different research questions (RQ A, RQ B & RQ C). The first paper provides a contextual overview of knowledge about non-family CEOs, focusing in particular on their relationships with the owner families. The paper highlights the current status quo, while providing ways forward. The second research question builds on the findings of the first paper, which highlights the lack of insights in relationships between a non-family CEO and members of the current and next generation (Blumentritt et al., 2007; Daspit, Holt, Chrisman, & Long, 2016). The first paper draws out the current knowledge on the meaning of relationships and casts a critical glance at how relationships tie actors to one another (RQ A).

Using a conceptual approach, the second paper focuses on the relationships between the non-family CEO, the current and next generation, and conceptualizes their relationships as an exchange triad. It focuses on the micro-level, studying interactions and their influence on turnover of non-family CEOs. The second paper theorizes how relationships link family and non-family members and how such attachments affect whether they will continue to work together (RQ A). This paper adds to our knowledge of how changing micro-social structures, such as the balance in the triad between the current and next generation family members and a non-family CEO, influence relationships between actors in family firms (RQ C).

Papers 3 and 4 take a wider look at relationships and structures. The third paper spans individual, organizational and institutional contexts by investigating the process of professionalization, seeing it as the adaption of institutional practices (Ansari et al., 2014). Professionalization is rooted in institutional norms of what is understood to be ‘professional’ business conduct (Dekker et al., 2015; Stewart & Hitt, 2012), which is implemented through professional practices, such as new HR systems or reward structures (Visintin, Pittino, & Minichilli, 2017). For example, ‘professional’ conduct for owner families is often understood to entail regular meetings in purposely created arenas, such as family councils (Melin & Nordqvist, 2007). The third paper also allows to understand the meaning of relationships and contributes to the purpose of the dissertation by highlighting how the meaning of relationships as part of the work of family and non-family members changes over time (RQ B). It also highlights how adopting new practices influences relationships over time (RQ C). Such new structures change the way work is accomplished in an organization and often move family firms away from relational ways of
organizing towards more formalized structures (Daily & Dollinger, 1992; Schein, 1983; Stewart & Hitt, 2012).

In the fourth paper, I investigate how job systems change during the reorganization of a family firm. This paper shows that workplace relationships not only matter as distinct entities, but that they also provide cues to employees about the actual distribution of tasks and responsibilities among managers, owners and board members (RQ A). Furthermore, paper Paper 4 also highlights how relational work becomes a crucial factor in the work of executives, to the point that their non-relational work moves to the background (RQ B). By focusing on the interplay between job design and job crafting as a contestation process (Hornung et al., 2010; Wrzesniewski & Dutton, 2001), Paper 4 shows how interactions constitute new structures and further contributes to understanding the interplay of formal and informal structures (RQ C; see also: McEvily et al., 2014; Sandhu & Kulik, 2018).

These four approaches underline the potential of a compilation approach because it allows to study a phenomenon from different angles to gain a more comprehensive understanding. The cohesion of the dissertation is established through a coherent theoretical frame (Chapter 2) and a consistent methodological approach (Chapter 3).
2. **Relational perspectives on non-family CEOs**

2.1. **Theoretical perspectives**

One of the advantages of writing a compilation dissertation is the possibility of using several theoretical approaches. Generally, theories are *ways of seeing* (Nordqvist, Melin, Waldkirch, & Kumeto, 2015) and in studying a multifaceted phenomenon such as relationships it is vital to take different perspectives. Therefore, to fulfil the purpose of this dissertation and to answer the previously outlined research questions, I draw on several theoretical perspectives that help me understand interpersonal relationships. Such an approach also enables me to investigate the topic from several different angles, moving from dyadic and triadic relationships towards the influence that institutional practices have on structures and relationships.

2.1.1. **Challenging assumptions**

The first paper is a systematic literature review that investigates the existing knowledge about non-family CEOs. In particular, it focuses on the relationships of a non-family CEO and the owner family from both a formal and informal point of view. To overcome a simplistic depiction of relationships inherent in classic theories used when studying CEOs, such as agency theory, the paper is built on the notion of ‘challenging assumptions’ introduced by Alvesson and Sandberg (Alvesson & Sandberg, 2011, 2013). While their approach is not a theoretical perspective per se, it allows me to cast two different views on the existing body of literature on non-family CEOs and enables me to contribute in both incremental and more challenging ways.

Alvesson and Sandberg (2011, 2013) highlight two ways of formulating good research questions. Starting with a body of literature, a researcher can either engage in ‘gap-spotting’ or in ‘challenging assumptions’. For the former, a researcher can scan literature to find and to construct gaps that need to be filled. For instance, a researcher can create competing explanations, search for overlooked areas or contexts and scan for theories that have not been used in particular literature. Research questions then arise to fill such gaps. Alvesson and Sandberg (2011, 2013) criticize such a way of creating research questions as it does not challenge the existing body of literature and because it also lacks creativity and novelty. The latter approach, which they present as a (superior) alternative is built on problematization. As Fletcher (2014: 137) argues, theorizing in the context of family firms often “remains at the level of insight, exposure and illumination of family business issues/problems, rather than at the level of critique.” Therefore, relying on the notion of challenging assumptions enables me to cast a critical view on a body of literature. For doing this, a researcher first needs to find an existing body of research to identify and articulate underlying assumptions in the literature.
Then the researcher needs to evaluate and eventually challenge such assumptions to develop an alternative assumption that may bring the particular body of research forward. While Alvesson and Sandberg criticize gap-spotting, it is nevertheless important in moving fields forward. Hence, it is vital to develop a strong fundament for theories so that interesting theories can develop into powerful theories. In a sense, this back and forth between novel and incremental research is similar to the entrepreneurial process of exploration and exploitation. While exploration “entails the development of new knowledge”, exploitation “hones and extends current knowledge” (Andriopoulos & Lewis, 2009: 696). It is clear that we need stronger forces of exploration in current research practices. However, the value of exploitation activities like theory refinement, repetition studies and transfer cannot be discounted.

I use the framework of ‘gap-spotting’ and ‘challenging assumptions’ to build a review that on the one hand extends current research by showing ‘blind spots’ in the research on non-family CEOs and on the other hand, the review identifies and questions assumptions that underlie literature on non-family CEOs and problematizes the depiction of relationships as framed exclusively through formal mechanisms. This approach creates an overview of the current literature and also allows me to be critical of its underlying assumptions at the same time. For instance, it allows me to challenge the underlying assumption of many studies that family and non-family CEOs are inherently different. How would research questions look if we assumed that they were the same? In this way, the review enables me to make incremental contributions in line with current research and also question the overall impetus of this body of literature. This, in turn, allows me to introduce a more relational perspective in literature.

2.1.2. Affect theory of social exchange

Methot et al. (2017) highlight that relationships are constituted by two building blocks that define them -- interactions and emotions. The second theoretical perspective, which underlies Paper 2, captures both dimensions of relationships and thus fits well with the purpose of my dissertation. The original idea for Paper 2 was derived from qualitative material collected during my master’s thesis (Pinhack & Waldkirch, 2013) on non-family CEOs and members of owner families. Together with my supervisor, who had also gathered empirical material from family firms run by non-family CEOs and turned this data into a well-cited and influential article (Hall & Nordqvist, 2008), we were fascinated by the relational dynamics between family and non-family CEOs and how little of it was captured in current research. The next generation of family owners in particular was often left out of the conversation, even though their ties to the non-family CEO are important for the future of a family firm. Moreover, we agreed that research often did not
capture the diverse facets of relationships. Thus, our idea was to write a paper that considered both positive and negative relationships in the triad between the non-family CEO and the current and next generation of family owners and their meaning for the actors relating.

Originally planned as an empirical paper and presented as my first paper at the EIASM Conference in 2014, serendipity struck. Going through some articles for Paper 3, I came across a contribution from a sociological journal that ended up being the basis of Paper 2 – ‘An affect theory of social exchange’ by Edward Lawler (2001). Around the same time, I saw the call for a special issue on human resource practices in family firms in a journal that only accepted conceptual work. Thus, three important factors came together: a research idea, a theory to frame it and an outlet that would (eventually!) publish it.

Rooted in the sociological work on social exchange and emotions (Blau, 1964; Emerson, 1962; Weiner, 1985), the core of the affect theory of social exchange is explaining how social exchanges in a triad lead to feelings of attachment or detachment (Lawler, 2001; Lawler, Thye, & Yoon, 2008). How do groups of actors grow closer or further apart, and how do their interactions influence such attachment? The affect theory thus brings the focus on both interactions captured in its depiction of four different types of social exchanges and emotions which are captured through attachment to the exchange group or the lack thereof. Lawler and his colleagues argue that social exchanges create emotions. Different social exchanges, such as reciprocal or productive exchanges, create more or less emotional attribution for the group depending on how interdependent such exchanges are. Depending on whether exchanges are successful or not, actors experience various emotions that they attribute to a social unit, that is, the triad between a non-family CEO and the current and the next generation of family owners. We link this theoretical perspective to an understudied topic in family business research – why non-family CEOs stay or leave family firms. We conceptualize how emotional attachment to the triad created through exchanges influences the turnover of non-family CEOs, arguing that more attachment leads to non-family CEOs staying longer and vice versa. Our theorizing thus encompasses diverse relationships and highlights the factors that influence relationships by looking at changes in the balance of the triad.

2.1.3. Practice adoption

The third theoretical perspective that I use in my dissertation is rooted in literature on institutional theory (DiMaggio & Powell, 1983; Greenwood, Oliver, Sahlin, & Suddaby, 2008; Scott, 1995). The starting point for the paper was a case study that I wrote together with my supervisor Mattias Nordqvist for his class on ‘Family business development’. After visiting the firm, we were both struck by its ongoing professionalization efforts that had taken it to
write extensive governance documents and hire many non-family professionals as executives and board members. Leif Melin, who was also involved with the case company, joined the project shortly thereafter. We were surprised how deeply rooted the owner family was in its institutional environment. The main owner had been the chairman of a professional association and family members regularly attended workshops and ownership education programs and even presented their governance structure at research conferences. Thus, we were hooked by its process of professionalization, and how it was influenced by external forces and internal dynamics. Therefore, from the outset we saw the story as having both an institutional and a local element (Melin & Nordqvist, 2007).

Our theoretical frame draws on literature that investigates how practices are adopted by organizations and how they change in the process (Ansari, Fiss, & Zajac, 2010; Ansari et al., 2014). Given that practices carry an institutional meaning they have structural, cultural and political implications that make them fit either more or less well to an organization (Canato, Ravasi, & Phillips, 2013). In some cases, such practices might fit to the underlying system, whereas in other cases there is conflict when new professional practices are introduced. Hence, the practices may need to be adapted or else they can change the organization (Ansari et al., 2014). Such changes happen both consciously and unconsciously (Gondo & Amis, 2013). We combine this stream of research with the context of family firms by focusing on family firms as heterogeneous organizations consisting of family and business systems (Gedajlovic et al., 2012; Tagiuri & Davis, 1996). We conceptualize professionalization as the adoption of institutionalized, commonly accepted best practices (i.e. ‘professional practices’) in the family and business systems. We show that depending on whether the adoption is practice- or system-driven, family firms utilize different modes of professionalizing. As we show, family firms can ‘overprofessionalize’ when they adopt practices too extensively, with too much fidelity and too quickly. Our longitudinal approach allows us to draw out implications for the family and business systems and allows us to show how professionalization may endanger the family system.

2.1.4. Job systems and the interplay of formal and informal interactions

In the last paper of my dissertation, I investigate the interplay of workplace relationships and organizational structures by studying formal and informal relationships through a job perspective. Several authors have made a distinction between formal and informal interactions in organizations. Sluss and Ashforth (2007) distinguish between formal, role-based relationships and informal, personally-driven relationships. Ferris and colleagues (2009: 1397) highlight how “work relationships are fundamental to behavior in organizations, where employees must interact formally or informally in the
process of getting work accomplished”. I investigate the meanings that such interactions have for an organization by investigating their role in destabilizing and stabilizing job systems (Cohen, 2016).

The data collection for the fourth paper followed the succession of a non-family CEO in a family business. My initial idea was to observe and understand how relational dynamics at the top of the organization unfold over time, and how such dynamics influence individuals and the organization. However, after some time in the company, I was puzzled about the lack of importance that organizational members seemed to ascribe to their CEO. Instead of talking about the succession, interviewees referred to the lack of alignment between the board and the management and the incoherent changes happening in the firm. At the same time, I also observed actors entering the organization without clear formal roles and experienced and heard about actors circumventing the hierarchy to get work done. Thus, to understand these phenomena I shifted my perspective to the organization and began to depict relationships as constituted by, and constituting to, organizational structures.

The framing for this paper builds on the literature on formal job design and informal job crafting (Hornung et al., 2010; Parker et al., 2017; Wrzesniewski & Dutton, 2001) and investigates their interplay during the reorganization. The findings outline how job system changes unfold as a contestation process that inadvertently creates a new job system. Thus, this theoretical perspective allows to understand interactions and relationships in their organizational context and conceptualizes them “as instantiations of each other” (Pozzebon, 2004: 251). The paper adds to the understanding of the implications of job crafting and outlines how actors in the upper echelon engage in job crafting. It further shows how informal interactions can, over time, constitute new formal structures and contributes to research investigating how formal and informal organizational structures interact (Diefenbach & Sillince, 2011; McEvily et al., 2014; Sandhu & Kulik, 2018).

2.2. Family firms as a relational context

2.2.1. The role of relationships in the emergence of family business as a field

Family firms are the oldest and most pervasive organizational form in the world (Anderson & Reeb, 2003; Sharma et al., 2014). Yet, it was not until the late 1980s that research on family firms started and it took until much later for it to blossom (Gedajlovic et al., 2012). It is interesting to note that the focus of my dissertation coincides with why family firms as an organizational form were ignored for a long time and why they are now such a fast-growing field of study. Relationships in a family and their meaning for a family firm were
for a long time framed as ‘pathologic’ and family ownership was seen as a transient state of ownership that would transform into a publicly listed firm with dispersed ownership (Chandler, 1977). Levinson’s (1971: 98) argument that the “wisest course for any business, family or non-family, is to move to professional management as quickly as possible” was a widespread notion as research focused solely on the dark sides of a family’s involvement and its relationships (Kets De Vries, 1993). Schein’s (1983) notion of contrasting ‘family management’ with ‘professional management’ paints a rather dysfunctional picture of family members, their relationships with each other and their ties with the organization.

Initial research on family firms, driven by several researchers with experience as consultants in family firms, started challenging the largely dysfunctional depiction of relationships in family firms and their impact on family businesses. Early research considered the effects of intra-family relationships on the success of the succession process (Handler, 1994; Lansberg, 1988) as well as on conflict in a family firm (Davis & Harveston, 1999; Kets De Vries, 1993). Research streams further looked at dyadic relationships in a family business, such as father-son (Davis & Tagiuri, 1989), spouse and family (Poza & Messer, 2001), father-daughter (Haberman & Danes, 2007), sibling relations (Handler, 1991), and relations among cousins (Gersick, Davis, McCollum Hampton, & Lansberg, 1997). Such research took a multifaceted view of relationships in family firms and was able to point out their potentially positive impact on what happens in and to organizations. Habbershon and Williams’ (1999) work on the concept of ‘familiness’ conceptualized the notion of the positive impact of interactions between family members and the business; the authors defined familiness as a “unique bundle of resources a particular firm has because of the systems interaction between the family, its individual members, and the business” (1999: 11). Thus, relationships matter for understanding why family firms excel or fail.

Methot et al. (2017) outline four types of relationships based on their underlying affect. Positive and negative relationships are characterized through high positivity and high negativity whereas indifferent relationships are low on both and ambivalent relationships are high on both dimensions. As shown earlier, research on family firms has tended to look at positive and negative relationships in particular. While positive and negative relationships can be found in all types of firms and organizations (Dutton & Heaphy, 2003; Dutton & Ragins, 2007a), they are likely to be more extreme in the context of family firms since family firms may differ from non-family firms and other organizations in the quality of emotions (Brundin & Härtel, 2014). The involvement of family ties is an important ground for shaping deep and long-lasting relationships (Hall, 2003). At the same time, closeness often breeds long-lasting and extreme conflicts that go beyond what non-family firms experience (Davis & Harveston, 1999; Eddleston & Kellermanns, 2007).
Thus, when relationships do not work out and break, the repercussion are often severe and can be felt for generations (Kets De Vries, 1993; Litz & Turner, 2013). While there is little research on indifferent relationships (Methot et al., 2017), they seem intuitively less common in the context of family firms. However, research has shown that the emotional connection between the business and family members may diminish through generations (Cruz & Nordqvist, 2012; Gersick et al., 1997), leading to potentially indifferent relationships. Lastly, ambivalence seems to be an inherently common type of relationship in family firms since love and hate often reside in close vicinity (Brundin & Sharma, 2012; Gersick et al., 1997).

As the field of family business has slowly reached maturity (Gedajlovic et al., 2012; Sharma & Melin, 2015; Sharma et al., 2014), researchers have increasingly looked beyond family members and have become interested in investigating non-family members working in family firms (Tabor, Chrisman, Madison, & Vardaman, 2017). Research has shown that strong relationships between a family often encompass non-family members and that over time non-family members may turn into quasi-family members (Karra et al., 2006; Zahra et al., 2008). At the same time, non-family members are affected by negative relationships in a business and are often treated worse than family members (Barnett & Kellermanns, 2006; Barnett, Long, & Marler, 2012). Overall, family firms are an excellent context to study relationships as they may be more easily observable and have a more palpable influence on what happens in a business. Furthermore, relationships matter to family firms and their actors, which is why it is especially important to understand the better. In my dissertation, I focus on a specific group of actors and the ties around them: non-family CEOs. Given their importance for the fate of the business (Cannella et al., 2008) and accordingly also the socioemotional wealth of the owner family, relationships between the CEO and the owner family are inherently important.

### 2.2.2. Non-family CEOs as relational actors

As I highlight in my first paper, there has been an increasing interest in non-family CEOs. The existence of non-family CEOs in family firms is very common, especially in Western countries (Block, 2011), and current numbers show that the trend of hiring non-family CEOs is increasing (PwC, 2014, 2016). Non-family CEOs often join family firms as part of what is referred to as ‘professionalization’. Research highlights that family firms with non-family CEOs tend to behave differently than family firms with family CEOs in areas like performance (Anderson & Reeb, 2003b; Miller et al., 2014), risk-orientation (Huybrechts, Voordecker, & Lybaert, 2013) and internationalization (Banalieva & Eddleston, 2011). Non-family CEOs may bring more formalization to a firm and can facilitate the transformation of “dynamic, creative entrepreneurial ways of working into more formal,
regularised and ‘professional’ practices” (Fletcher, 2002: 404). Moreover, non-family CEOs are shown to influence family matters like the process of succession (Daspit et al., 2016; De Massis, Chua, & Chrisman, 2008) or ownership transition (Wiklund, Nordqvist, Hellerstedt, & Bird, 2013).

The depiction of CEOs as self-interested actors in management literature is very pervasive and also extends to the depiction of CEOs in family firms (Block, 2011; Cannella et al., 2008; Ghoshal, 2005; Miller et al., 2014). However, such a depiction of CEOs in family firms in particular only covers a small part of the work of non-family CEOs. While CEOs in non-family firms often have the power to change the organization and the team around them (Cannella et al., 2008; Ma et al., 2015), such structures in family firms may be much more difficult to change (Fletcher, 2002). Often, structures in family firms have grown over decades and are not just influenced by the predecessor, but also by the long-deceased founder of the firm (Davis & Harveston, 1999; Pieper, Smith, Kudlats, & Astrachan, 2015). For instance, Mullins and Schoar (2016: 26) propose that non-family CEOs often face a discrepancy between their new ideas “and how empowered they are to actually implement them.” Building on the idea of cultural organizing, Fletcher (2002) shows that non-family CEOs may receive an ambiguous mandate for changing an organization without having the power to do so.

Further, unlike non-family firms, ownership in family firms is often concentrated and follows a different logic (Brundin, Florin Samuelsson, & Melin, 2014). Accordingly, non-family CEOs often have to deal extensively with business owners outside the board context (Blumentritt et al., 2007). Accordingly, in addition to more ‘rational’ competencies, soft factors and interpersonal capabilities may be especially important for non-family managers in the context of family firms (Hall & Nordqvist, 2008). Several author highlight that non-family members are socialized into the ways of the family over time (Dyer, 1989; Visintin et al., 2017), which is why internal successors may have more positive implications for families prioritizing socioemotional wealth (Minichilli, Nordqvist, Corbetta, & Amore, 2014).

Non-family CEOs often deal with family owners (actual and potential) in all types of arenas. Family members are usually members of the board of directors and function as the CEO’s bosses thus sitting above the CEO (Miller et al., 2014). At the same time, family firms generally employ members of the family in executive positions (Patel & Cooper, 2014). Such family members therefore sit beside the CEO. Members of the next generation tend to start in lower operational positions, thus sitting below the CEO. Moreover, family members may sit at several points simultaneously. I collected data from one case in which the owner’s daughter was part of the finance department in an entry-level position, yet she was also a member of the board of directors. Therefore, dealing with both family issues and business questions is cognitively complex in family firms and non-family CEOs have to be aware
of the family (Mitchell, Morse, & Sharma, 2003). Non-family CEOs thus have less options to be non-relational and efforts to do so often result in early CEO turnover (Hall, 2003; Hall & Nordqvist, 2008). Hence, non-family CEOs represent an excellent context for investigating the meaning of relationships for individuals, their work and the organization they reside in. I now introduce the theoretical perspectives that I use to investigate relationships in the context of non-family CEOs.

2.3. *From theoretical perspectives to a relational approach*

2.3.1. *Creating cohesion among the theoretical perspectives*

As highlighted earlier, a compilation dissertation enables me to investigate relationships from several theoretical angles. Such approach allows for diversity. It, however, runs the risk of leading to a fragmented theorization. Therefore, it is important to bring together theoretical perspectives that complement each other well to produce a theoretically cohesive dissertation. I have already alluded to how interactions and relationships feature in the theoretical perspectives that I use in my dissertation. Taken as a whole, I argue that they can be united under different umbrella terms such as ‘relational sociology’ (Emirbayer, 1997), ‘relationship science’ (Berscheid, 1999; Methot et al., 2017) and ‘relational perspectives’ (Kyriakidou & Özbilgin, 2006a). The words ‘theory’ and ‘science’ often carry the connotation of a fully-developed model that allows predicting certain outcomes and thus becomes rigid. In our introduction to the book *Theoretical Perspectives on Family Businesses* we talk about theoretical perspectives as a “somewhat more relaxed term that also includes frameworks, interrelated concepts and language, propositions and models that may constitute a way of seeing and understanding phenomena without necessarily meeting all the formal qualifications of being a theory” (Nordqvist et al., 2015: 4). Given my proclivity for the term *perspective* as a way of seeing, I choose to follow Kyriakidou & Özbilgin (2006b) by framing my theoretical perspectives as ‘relational perspectives’ that allow me to “study how organizational settings and organizational members influence each other and are influenced in turn” (Kyriakidou & Özbilgin, 2006a: 2). Given that the purpose of my dissertation is to understand the meaning of relationships for individuals, the work that they perform and the organization that they are in, such a frame allows me to create coherence in my theoretical approach.

In my first paper I use Alvesson and Sandberg’s (2011, 2013) ideas to introduce a relational perspective into the literature on CEOs in family firms. By questioning assumptions regarding the relationality of non-family CEOs, I put focus on their relationships with key actors in family firms and outline the implications of such relationships and their meaning for non-family CEOs,
owner families and their businesses. The affect theory of exchange, which I use in my second paper, is discussed by Kyriakidou and Özbilgin (2006a) as a relational perspective to study behavioral processes of relating (Yoon & Lawler, 2006). As highlighted earlier, combining interactions and emotions makes for a fitting addition to my ‘relational perspectives’ and is very much in line with the purpose of my dissertation. The approach of institutional practice adoption and a focus on systems in the family firm in Paper 3 help me introduce an institutional perspective of relating in family firms as new practices influence interactions between family members and between family and non-family members. Over time, as the family negotiates the institutional and local logics, the relations between family and non-family members change, as does the meaning of such relationships for both the sides. While, for instance, earlier non-family CEOs saw their relation to the family owner as a nuisance later CEOs view this relationship as being pivotal in their success in the firm. Thus, this perspective also fits well in a relational approach by linking interactions and changes in organizational structures over time. Lastly, the focus on job systems and how they structure relationships in organizations (Cohen, 2016; Parker et al., 2017) provides a compelling perspective of workplace relationships as constituting to and being constituted by organizational structures. A focus on the interplay between formal and informal interactions (McEvily et al., 2014) further provides a new perspective to help better understand the organizational implications of relating.

2.3.2. A short reflection on the ‘leftovers’

Looking back at my research proposal, it is both entertaining and insightful to see what I thought would happen in my dissertation (but evidently did not), and what actually did happen instead. Of all the five theoretical perspectives introduced in my proposal, only one has made it into this manuscript, and I considered several other theoretical perspectives along the way, which I later discarded or kept for other projects. To follow the process of arriving at these relational perspectives, I now give a concise overview of the ‘leftover’ perspectives that I did not use.

For Paper 3, we initially started working with institutional logics as a perspective (Thornton, 2004; Thornton & Ocasio, 2008; Thornton, Ocasio, & Lounsbury, 2012). The institutional logics perspective is concerned with the influence that societal-level institutions have on the cognition, goals and behavior of individual and societal actors. It highlights the interplay between society, organizations and individuals with “individuals competing and negotiating, organizations in conflict and coordination, and institutions in contradiction and interdependency” (Friedland & Alford, 1991: 240 f.). Our initial idea was to frame parallel professionalization in line with these divergent institutional logics. However, this perspective did not help us
understand how the logics per se changed and framed the paper in a simplistic ‘family versus business’ dichotomy. It thus did not enrich the paper and instead made it superficial.

The perspective of relational identity resonated well with me when it came to the main data collection; it still does, as my numerous references to Sluss and Ashforth in my dissertation show (2006; 2007, 2008). The concept of relational identity incorporates person- and role-based identities, and is defined as “the nature of one’s role-relationship, such as manager-subordinate and coworker-coworker”; relational identification is thus “the extent to which one defines oneself in terms of a given role-relationship” (Sluss & Ashforth, 2007: 11). Initially, I thought this perspective would allow me to understand how non-family CEOs create their identity in relation to owner families and other non-family members. However, as my data collection moved towards an organizational focus, the idea of relational identities vanished from the project. For Paper 4, I also considered the perspective of ambivalence. I came across the idea of using ambivalence as a lens after an informal evening of data collection, when a manager took me aside and told me the following: “you know, in our company it’s all about love and hate and how to balance them.” Defined as “simultaneously positive and negative orientations toward an object” (Ashforth et al., 2014: 1454), ambivalence has received increasing attention in organizational theory and management studies since it is a highly pervasive phenomenon (Methot et al., 2017; Rothman et al., 2017). Ambivalence may derive from organizational changes and the pressure on individuals to “balance contradictory demands, uncertain situations, and complex interpersonal relationships on a daily level (Rothman et al., 2017: 33). Yet, when analyzing my data I did not find ambivalence to be as pervasive as my initial thinking indicated. Instead, it seemed to be the result of all processes happening in the case company. My thoughts on ambivalence can thus still be found in my writing on incoherence and its meaning for the organization.

As this short reflection shows, all these perspectives were important in how I developed my thinking about the empirical material, and remnants of them remain in my writing till today. I consider the time I spent in finding fitting theoretical perspectives as one of the most important learnings in my dissertation process.
3. Methodology

3.1. Research philosophy

As a PhD student at Jönköping International Business School, I had the privilege of receiving an education about the philosophy behind the research we do, and why it matters to pay attention to it. This knowledge has served me well in many instances but has also been met with incomprehension. On several occasions, other researchers wondered why it was important to consider the underlying stance of one’s own research. In this part, I aim to unearth my own philosophical stance and try to explicate my own assumptions, showing why philosophy matters. As Alvesson and Sköldberg (2009: 10) argue, spending time on philosophy for its own sake is a waste of both the author’s and readers’ time. However, as many authors have shown, the underlying philosophical stance drives the type of research that is done as also the findings of such research (Denzin & Lincoln, 2011; Latour, 2002; Morgan & Smircich, 1980; Tracy, 2010; Van de Ven, 2007).

The starting point of arguing about philosophy lies in the understanding of ontology and epistemology. Ontology is concerned with “theories of being, theories about what makes up reality” (Blaikie, 2003: 768). It deals with questions such as whether social structures or even physical objects have an existence outside the consciousness of their observer. Epistemology on the other hand is concerned with the nature of knowledge, with questions about what we can know and how can we know it. Views on what constitutes reality and how we can enquire into it have been heavily debated for decades and its proponents have – more often than not – taken diametrical stances on it. Taken from natural sciences, positivism has gained an increasing followership since the 1960s in social sciences. Focused on building “true impersonal images of reality” (Bunge, 1967: 4), researchers following this tradition see reality as a concrete structure in which facts exist that a researcher can find. While classic positivism hardly exists anymore in social sciences, a slightly lighter version of post-positivism continues to be a strong force in social sciences (Denzin & Lincoln, 2011).

The idea of reality existing ‘out there’ is contested by several research philosophies. While critical realists agree on an external reality, they propose a much more constructivist idea about epistemology. Bhashkar (1975) sees science as an approximation of reality trying to come closer to reality by developing plausible mechanisms that reflect the underlying patterns as accurately as possible. Thus, a truth may exist, but we will most likely never find it, and have to seek increasingly accurate approximations of it. Bhashkar (1975: 16f.) acknowledges the constructed nature of knowledge, seeing knowledge as a “social product, produced by means of antecedent social products”; it is thus a “produced means of production.” While critical realism
uses a constructivist perspective on epistemology, classic social constructivism goes a step further by seeing reality itself as socially constructed (Berger & Luckmann, 1967). Reality depends on the person or group constructing it; hence, to understand reality a researcher has to delve into the interpretations that actors have about their context and the meanings that they attach to it.

As general research on organizations and management drifted strongly towards a positivist understanding of reality and knowledge, proponents of a constructivist approach were increasingly denied publication opportunities; as the focus was on ‘measurable’ research, this paradigmatic change was accompanied by a stronger focus on quantitative inquiry at the cost of qualitative research. These conflicts led to what was eventually described as the ‘paradigm wars’ in the 1980s (Denzin, 2008; Guba & Lincoln, 1994; Hatch, 2006; Latour, 2002). Positivist research came under heavy criticism from postmodernist researchers who questioned the paradigm through feminist deconstruction (Ahl, 2004; Calás & Smircich, 1992), discursive approaches (Knights & Morgan, 1991; Vaara, Kleymann, & Seristö, 2004) and critical theory (Alvesson & Ashcraft, 2009; Willmott, 1987). In making a case for good non-positivist approaches to research, Lincoln and Guba (1985) rephrased the classic quality criteria for quantitative research as qualitative criteria. These efforts helped set a strong foundation for qualitative inquiry (Denzin & Lincoln, 2011), which ironically continued the conflict between positive and constructivist approaches (Dyer & Wilkins, 1991; Eisenhardt, 1989a).

Even though the paradigm war happened well before I ever thought about investigating relationships, it has a surprisingly large impact on my research. In their essay on bringing back ‘work’ to the focus of organizational theory, Barley and Kunda (2001) make an poignant observation about the nature of organizational research. Early research on management and organizations focused extensively on how actors accomplished work. For instance, Taylor (1914) closely observed everyday work of employees; his focus on work went as far as observing the effects of changing the size of the spade handle. Similarly, the famous Hawthorne studies (Roethlisberger & Dickson, 1939) consisted of observations of changes in worker behavior. Built upon the close observation of how actors accomplished their work, relating used to be a visible element of organizational research (Barley & Kunda, 2001; Barnard, 1938). However, as organizational theory increasingly focused on studying systems, processes and the impact of institutions and the environment, driven by a paradigmatic change towards replicating the natural sciences (Kuhn, 1962), relationships drifted out of focus since they were not apparent in numerical data. Thus, my dissertation in a nutshell provides an illustration of why research philosophy matters.
It has probably become apparent from the discussion so far that my philosophical inclination is much closer to the tradition of constructivist and interpretivist research. I see reality as constructed through everyday interactions of actors in organizations and their sensemaking of what they observe and encounter. Therefore, my aim is to investigate and understand how actors make sense of their everyday being in organizations and how they create organizational realities. Such type of qualitative research is especially fitting when studying family firms and actors in their socio-cultural contexts (Fletcher, De Massis, & Nordqvist, 2016).

During my master’s thesis, Annika Hall described philosophy as something inherent in what we do and how we interact with the participants of our research. According to her, a philosophy is not like a hat that one can simply take off and exchange for another. For a long time, her description of philosophy stuck with me, and it still rings true today. I do, however, not understand different stances as an excuse to not engage with researchers from other paradigms and even produce research that fits under another hat. Instead, I think it is crucial to be aware of the multitude of ‘hats’ that are out there and of making your research speak to several of them. I thoroughly enjoyed Pozzebon’s (2004) discussion on the danger of striving for ‘purity’ in research. While I agree that consistency in one’s approach is vital, Pozzebon’s emphasis on understanding other points of view and entering in a dialogue with them is how I aim to continue my academic life: “I do not intend to embark on the incommensurability debate. In fact, I acknowledge that different, sometimes competing, points of view exist and they can enter into some degree of dialogue. Commensurability (or simply communicability), I believe, depends more on speakers’ and hearers’ openness to each other’s views than on the ‘paradigms’ themselves” (Pozzebon, 2004: 249).

Pozzebon (2004) does not refer to philosophy as something fixed and immovable but depicts it as an ‘ontological affinity’. My affinity lies with social construction and meaning creation of actors in organizations, which has clearly influenced my choice of theory and method. To me, being constructivist is not boundary-less and I understand it as being tied to the purpose of my study. Thus, I do not go as far as deconstructing the meaning of masculinity, because it has, at least according to my understanding, little to do with what happens in my cases. For instance, in Paper 4 I understand structures in accordance to Weick (1995) to be constructed through shared sensemaking; this thinking was triggered by interactions among employees and observations in monthly meetings. When the understanding of such a structure is shared, it takes on an existence of its own. As Weick (1995: 13) argues, people “generate what they interpret.” In order to gain such an understanding, I can inquire about actors’ understanding through interviews, especially after I have gained their trust and also through observations of how they act. Therefore, from a philosophical perspective, I align myself mostly
with an interpretivist stance and the idea of verstehen (Weber, 1968), trying to interpret the meanings that actors assign to their everyday work in organizations and to their relations.

Given such an inclination, my choice of focusing on a qualitative in-depth approach is consequential. At the same time, however, I also chose to adopt the affect theory of social exchange (Lawler, 2001; Lawler et al., 2008) for one of the papers in the dissertation, a theory that seems somewhat misaligned with my philosophy. However, when writing conceptual pieces, I appreciate the simplicity that adopting such a theoretical perspective provides me. While my qualitative research invites complexity, conceptual approaches profit more from clarity (Weick, 1989). Doing so forced my co-authors and me to simplify our arguments so that we could address researchers with a different ‘ontological affinity’. The affect theory of social exchange proved to be an excellent vehicle for making our arguments and introducing complexity without overloading the conceptualization thus contributing to an area that would have been cut-off had we stuck to an interpretivist approach. Therefore, I do not see using social exchange as a ‘violation’ of my philosophy, and instead see it as an opportunity to communicate beyond my own ‘ontological affinity’.

3.2. On studying the meaning of relationships

In line with my ontological affinity, I chose to study the meaning of workplace relationships in the context of non-family CEOs. Investigating meaning is essentially different from an ‘essence-focused’ research approach that aims to study knowable order and structure in organizations by looking for effects and their underlying factors (Fletcher, 2014; Gioia et al., 2013). Studying meaning allowed me to go beyond a variance-based view of relationships. The concept of ‘meaning’ is central in the writing and thinking of constructivist research and symbolic interactionism (Berger & Luckmann, 1967; Blumer, 1969). Symbolic interactionism places meaning at the center of attention by arguing that human beings act on things on the basis of their meaning for the acting individual (Blumer, 1969). Such meaning is created through the actors’ interactions and is interpreted by individuals. Meaning is therefore not a stable concept but is interpreted differently by every actor. As Berger and Luckmann (1967: 33) argue, everyday life “presents itself as a reality interpreted by men [sic] and subjectively meaningful to them as a coherent world”, and relationships are an important aspect of this world. Relationships are a pervasive and meaningful aspect of the social world and are constantly interpreted by actors partaking in them or observing them among others. The meaning of relationships thus encompasses several facets that are of interest for my dissertation.
On an individual level, relationships represent social acts that individuals imbue with meaning; on a basic level, our conception of who we are in our relationships with others derives from the meaning we derive from the relationships (Berscheid, 1999; Dutton & Ragins, 2007b). Organizational actors continuously interpret behavior towards them and create meaning for themselves. Relationships thus come to mean belonging and attachment (Lawler, 2001), affect and support (Casciaro & Lobo, 2008), confirmation and flattery (Westphal & Stern, 2007) and bullying and harassment (Fletcher & Watson, 2007; Wang & Hsieh, 2013).

CEOs’ relationships with the chairmen of the boards can take different meanings for them. A CEO may interpret the actions of and relation to the chairman as overly controlling. The meaning of such a relationship will thus be vastly different from a relationship in which the CEO interprets the relationship with the chairman as supportive (Kakabadse et al., 2006; Krause, 2017). While in the former case, the relationship might come to take the meaning of stress, anxiety or fear, in the latter case the relationship may take on the meaning of support, empowerment and even friendship. The meaning of relationships matters also in how actors perceive their work. In the context of family firms, relationships are highly pervasive and may thus play a more important role in how work is accomplished (Gómez-Mejía, Cruz, Berrone, & De Castro, 2011b; Hall, 2003; Hall & Nordqvist, 2008).

Lastly, the meaning of relationships and how they are perceived, utilized and interpreted has implications for an organization as a whole. As Denzin (2004) argues, the meaning that individuals interpret from their environment is likely to be shaped, and it in turn shapes, the organization. An organization in which interpersonal relationships are discouraged will, for instance, develop a different informal structure than an organization that places high value on workplace relationships (see for instance: Pratt, 2000). Relationships as social acts are thus meaningful in themselves and formative for the organization.

All papers in my dissertation capture the meaning of relationships in various ways. While the first paper outlines the absence of a meaningful view on relationships, the second paper shows how relationships come to mean belonging, affect, attachment and how such an attachment may drive a non-family CEO’s decision to remain in a family firm. The third paper shows how the meaning of relationships in the family changes as the company adopts professional practices in its governance system. The last paper shows how contested interactions change the meaning of relationships over time and may lead to employees avoiding certain job ties to accomplish their work, thereby enacting a new structure.
3.3. Research approach

The methodological approach for my dissertation is two-fold, focusing on both conceptual and qualitative insights from case studies. The first paper follows the outline of a critical literature review (Huff, 2008), synthesizing the status quo of our knowledge on non-family managers and paving the way for new research. The second paper is conceptual in nature and relies on the affect theory of social exchange (Lawler, 2001; Lawler et al., 2008). It outlines the conditions under which the turnover of non-family CEOs is more or less likely. The third and fourth papers follow a longitudinal, in-depth qualitative approach, which allows the reader to get closer to the topic under study and is therefore often regarded as especially interesting and impactful (Pratt, 2009). For focusing on an in-depth understanding of the process and the creation of meaning I rely on a single-case approach.

3.3.1. On doing longitudinal single-case study research

For my dissertation, I have chosen to rely on a longitudinal, processual case study approach. The method I follow in Paper 4 closely resembles the so-called ‘Gioia-method’ (Langley & Abdallah, 2011), which is related to the work by Dennis Gioia and his colleagues (Corley & Gioia, 2004; Gioia & Chittipeddi, 1991). Instead of starting with a prescriptive article outlining how to employ a certain method as done by Eisenhardt’s multiple case study approach (1989a), the Gioia method emerged over time. Explicated for the first time by Langley and Abdallah (2011), Gioia and his colleagues engaged in retrospective sensemaking to explain their methodology and success only after the fact (Gioia et al., 2013). In this sense, the emergence of this ‘methodology’ shows similar patterns to the methodology itself.

In contrast to multiple case studies, which often tend to be more positivistic (De Massis & Kotlar, 2014; Dyer & Wilkins, 1991; Eisenhardt, 1989a; Yin, 2014), the Gioia method is built on a constructivist approach. Following in the footsteps of classic inductive research (Glaser & Strauss, 1967), inductive case studies are flexible in nature and start with few preconceived notions of theoretical concepts. They are thus not interested in testing or confirming existing theories and are instead concerned with developing new concepts and “understanding the essence of the organizational experience” (Gioia et al., 2013: 13). In line with my own beliefs outlined earlier, the focus is on studying the experience of organizational actors and their construction of organizational reality. Like a reporter, a researcher initially inquires into organizations and actors trying to gain insights into how individuals construct their reality in everyday interactions. As a researcher my aim is to capture “how, through language, linguistic processes, signs or rhetoric, people (either individually or interactively) come to constitute meaning in relation to context” (Fletcher et al., 2016: 21). The approach relies on the notion of knowledgeable actors who actively construct their reality, and on
knowledgeable researchers who are able to form patterns out of such processes of construction (Gioia et al., 2013).

To gain an in-depth understanding, such research often relies on a single case study approach (Langley, 1999; Pratt, 2009). Single case studies lend themselves to an understanding of processes and developments (Langley & Abdallah, 2011; Siggelkow, 2007) as they allow “catching reality in flight; and in studying long-term process in their context” (Pettigrew, 1990: 268). Following one organization over time allows a researcher to get a firm grasp on organizational processes and the actors’ sensemaking thus allowing to capture stories as they unfold (Dyer & Wilkins, 1991). Accordingly, single case studies often rely on extreme and revelatory cases (Langley & Abdallah, 2011). However, Pettigrew (1990) cautions that while it is important to understand the ‘drama’ inside organizations, it is just as important to understand the regular routines. In-depth qualitative research enables me to grasp both the mundane, everyday being in organizations as well as the more dramatic changes that happen inside and to organizations and their actors.

Following an in-depth, processual single-case approach has several advantages. First, it allows a grasp over time, processes and changes. In line with Pettigrew (1997: 338), following processes, the “sequence of individual and collective events, actions, and activities unfolding over time in context”, allows an understanding of how relationships and interactions shape actors and the organizations they reside in. For example, in Paper 4 I was able to follow the process of a reorganization and CEO succession within a family firm over 16 months. I was there to witness how the social reality of the organization changed and unfolded in everyday interactions. This approach allowed me to understand how phenomena evolved over time, and why they evolved in a specific way (Langley, 1999). For instance, in Paper 4 I do not capture structure as being stable and existing independently, but as constructed and shared reality among actors that changes over time (Berger & Luckmann, 1967). Second, in-depth qualitative research is very susceptible to the organizational context (Pettigrew, 2012). Spending prolonged time in an organization and talking to organizational actors allows getting an embedded understanding of action within the organization. For instance, by being aware of mundane routines, it is much easier for a researcher to grasp continuity and change (Pettigrew, 1990). Becoming familiar with the context and the organizational actors allowed me to understand contextual cues better, such as how the visibility of actors in open arenas changed over time, and which of the actors in the firm were heard (Fletcher & Watson, 2007). Further, contextual factors such as industry, organizational history and the local cultural context can be made visible by this type of research (Burgelman, 2011). Last, an in-depth approach allows a researcher to get close to the actors in an organization and to convey to the reader “the world through the researcher’s eyes, which often captures the informants’ experiences” (Bansal
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& Corley, 2011: 235). As Tracy (Tracy, 2010: 843) argues, good qualitative research – obviously the point of this dissertation – has the ability to “delve[…] beneath the surface to explore issues that are assumed, implicit, and have become part of participants’ common sense.” Spending prolonged periods of time in organizations has several positive implications for qualitative research. An in-depth approach is vital in the context of family firms for building trust with actors, as good contact with the family “might lead to the revealing of experiences, thoughts and emotions which individuals would normally not voice” (Nordqvist, Hall, & Melin, 2009: 304). By following organizations over time, a researcher captures a broad range of “interactions/dialogues/conversations/interrelationships in situ, [which] is often the way that we can observe organizing processes unfolding and how people come to make sense of their everyday life in the organization” (Fletcher et al., 2016: 21). Such intricate detail is often lost in comparative approaches (Dyer & Wilkins, 1991).

3.3.2. On choosing in-depth qualitative research

Throughout the process of working for my PhD, I did not find quantitative, ‘variance-based’ approaches interesting (Van de Ven, 2007). While I have come across many excellent quantitative articles (Fauchart & von Hippel, 2008; Pe’er & Vertinsky, 2008; Rao, Monin, & Durand, 2003; Sharkey & Bromley, 2015; Wang & Soule, 2012), I am at heart a qualitative researcher. A more positivistic approach would thus be inconsistent with my research philosophy and my purpose of understanding the meaning of relationships. However, I did consider several other qualitative approaches.

The first alternative was adopting a multiple case study (De Massis & Kotlar, 2014; Eisenhardt, 1989b; Stake, 2006), as I had previously done in my master’s thesis (Pinhack & Waldkirch, 2013). However, to gain insights into the meaning of relationships I needed in-depth insights into the context and into the “deep structure of social behavior” (Dyer & Wilkins, 1991: 615). Given the limited possibility of collecting in-depth data from several companies, a multiple case study approach would have resulted in more superficial empirical material. Using a multiple case study approach would have thus run the risk of only gaining superficial insights. Further, Dyer and Wilkins (1991: 615) ask an intriguing question: How much deep structure have we seen if we look only at what is common?

The second alternative was adopting a narrative approach for studying non-family CEOs and relationship (Czarniawska, 1998, 2004; Gabriel, 1991, 2013). The initial data that I collected for Paper 4 indicated that narratives could have been an interesting way of understanding the meaning of relationships for CEOs in family firms. My earliest interview with a former non-family CEO highlighted his thoughts on his relationship with the owner as being similar to a failed marriage. I was curious to investigate such
dynamics further but despite these initial findings, the case study developed in another way, and these initial findings did not evolve into a pattern. In the future, I will likely return to the idea of narratives to further investigate relationships, but for this dissertation, I chose to focus on other aspects of my case. The last option that I considered was an ethnographic approach (Barley, 1990; Kellogg, 2009; Pratt, 2000; Van Maanen, 1988). An ethnographic approach has the advantage of creating direct and sustained contact with the actors being studied to make in-depth observations of what goes on in an organization. However, the context of my study made following a fully-fledged ethnography approach problematic. Studying the upper echelons of an organization, such as CEOs, executives, board members and owners, means studying fluidity; these actors know little routine as they travel constantly, work a lot and are internationally active. During my data collection, I did five interviews in one week via Skype with managers sitting in five different countries on three different continents. Thus, my focus on the upper echelons and the nature of the firms I study did not allow me the stability to make repeated observations of similar processes over time, such as what Barley (1990) and Kellogg (2009) did in the context of hospitals. In their context, the actors that they were interested in were at the same place every day and they were absent only as an exception. In my context, it was the other way around; the actors I studied were usually absent from the company and only came together for special occasions. Taking part in monthly meetings, I was able to at least adopt elements of an ethnographic approach, such as in-depth observations and field notes, which greatly improved the density of the data that I collected. Thus, it made sense to focus on longitudinal single case studies that allowed me to study the phenomenon that I was interested in over time.

3.3.3. Sampling
Stake (1995) highlights that the purpose of sampling is maximizing what we can learn. For single case studies such sampling is usually done in a purposeful manner (Rapley, 2014). Single cases are often chosen for their revelatory potential and the researcher’s ability to collect rich empirical material (Langley & Abdallah, 2011). As Patton (2002: 230) puts it: “logic and power of purposeful sampling lie in selecting information-rich cases”. Yin (2014) outlines five distinct rationales for doing single case studies, encompassing critical, extreme, common, revelatory and longitudinal rationales, or a mix of these.

The sampling for my dissertation was built on several boundary conditions. First, the companies under study had to be family businesses. What sounds like a trivial requirement, and often is for a qualitative researcher – if it sounds like a family business, acts like a family business, and says it’s a family business, it probably is a family business – has sparked long-lasting
discussions. Definitions of what constitutes a family firm vary widely and have been an extensively debated issue since the inception of the field (Astrachan, Klein, & Smyrnios, 2002; Chua, Chrisman, & Sharma, 1999; Litz, 1995). Even today, around 30 different definitions are used to describe what makes a firm a family firm (O’Boyle, Pollack, & Rutherford, 2012) Chrisman, Chua and Sharma (2005) outline two elements of family business definitions. The components approach captures the numerical involvement of the family, which especially in quantitative research represents an important inflection point of when a firm becomes a family firm. Family firms are thus characterized by the level of involvement of the owner family through ownership stakes, governance roles and management functions (Astrachan et al., 2002). Moreover, such inflection points vary widely between private and publicly-listed family firms (Fang, Randolph, Memili, & Chrisman, 2016; Gómez-Mejía, Núñez-Nickel, & Gutierrez, 2001). The essence approach highlights that involvement per se is not enough, as it needs to lead to family-specific behavior. The socioemotional wealth perspective, defined as the “non-financial aspects of the firm that meet the family’s affective needs” (Gómez-Mejia et al., 2007: 106), provides dimensions of what such essential family business elements can be (Berrone, Cruz, & Gómez-Mejia, 2012). Socioemotional wealth encompasses family control and influence, identification of family members, binding social ties, emotional attachment of family members and renewal of family bonds through dynastic succession.

For the purpose of my dissertation, I define family businesses as organizations that are characterized by high levels of involvement of the owning family which is also active in shaping the vision and goals of the business through involvement in governance and/or in operational roles. By focusing on both the component and the essence approaches, this definition provides a good basis for qualitative empirical work. Both case companies in my dissertation fulfil the definition, as they are 100 percent owned by one family, have several family members involved in the firm and the vision and goals of the company are clearly influenced by the family.

The second boundary condition was that the case company needed to be run by a non-family CEO, as this is the focus of my dissertation. The third boundary condition was involvement of the owner family in either operations or board functions, so that there was ongoing interaction between family and non-family members. The last boundary condition, that applies to Paper 4, was that the succession should be ongoing. I overfulfilled the fourth criterion by entering the organization even before the CEO succession started. As research on CEO succession shows, it is very uncommon to be able to follow this process from the beginning; researchers mostly get in touch with organizations after changes have already been made (Berns & Klarner, 2017; Denis et al., 2000; Gabarro, 1979). Thus, such access represents a unique strength of my empirical material.
The single case studies are based upon the study of two medium-sized Swedish family-owned businesses. Both companies have gone through several non-family CEO successions and have frequently changed their organizational structures. The third paper draws on empirical material collected during the period 2006-17 by my co-authors and myself. We gathered in-depth interviews with key actors and gained insights through informal contacts between the authors and the case company. Collecting empirical material over such a long time allowed us to trace processes and investigate institutional influences on the family and business systems. Moreover, such longitudinal research also allowed us to meaningfully show outcomes of processes for both family and business systems, thus answering calls to show how processes drive organizational outcomes (Johnson et al., 2007). The TACT case is thus both revelatory and extreme. It is revelatory because the phenomenon of professionalization is very clear and it is extreme because the company has effectively ‘overprofessionalized’ both family and business governance (Waldkirch, Melin, & Nordqvist, 2017).

While the third paper is based on empirical material that was collectively gathered, the fourth paper draws on empirical material that I collected independently. Originally sampled as a typical or common case (Patton, 2002; Yin, 2014), the data collection unveiled the uniqueness of the case, as is shown in Paper 4.

3.3.4. Empirical context
The empirical context for my research is family-owned firms in Sweden. Family firms have a long history in Sweden, as well-known entrepreneurial families such as the Wallenbergs and Bonniers highlight (Hägg, 2013). They are the most common type of firms in Sweden (European Commission, 2008), making up more than 75 percent of all businesses in the country (Bjuggren, Johansson, & Sjögren, 2011). In Sweden less than 10 percent of the family firms are managed by non-family members (European Commission, 2008). However, current numbers indicate that this figure will increase drastically over the next decade. As in most other European countries, in the Swedish setting too around 30 percent of the family firms will face a change in ownership over the course of the next five years, which will bring an increasing number of non-family CEOs to Swedish firms (PwC, 2010, 2012b).

My dissertation builds on two longitudinal single-case studies, family businesses TACT and Lingon, which are both anonymized. The first case (on which Paper 3 is based) follows the efforts of a family firm to professionalize its family and business governance. Currently, TACT is a second-generation family firm that employs around 170 people, is internationally active and has a turnover of more than 50mio€. Founded in the early 1970s in southern Sweden, TACT entered the chemical industry developing technology-intensive, customer-oriented solutions. TACT was able to use the changes in
the market by being customer-driven and delivering innovative and tailored solutions. TACT grew quickly and was featured among the Gazelle firms both in Sweden and in Europe. Its founder has won several prestigious prizes as an entrepreneur and has become well-known in Sweden because of his involvement in professional associations. Since the late 1990s, the company has engaged in several professionalization practices, such as starting a family council, writing a family constitution, hiring a non-family CEO and bringing in experienced non-family board members. We follow the case over time as the company went through highs and lows, hired and fired CEOs, experienced severe conflicts with external professionals, was able to turn the firm around and experienced family conflicts. Working with such rich data we examined how the parallel professionalization of family and business governance unfolded over time.

The second case on which Paper 4 is based follows Lingon through its succession to a non-family CEO and a reorganization of its operations. Even though it has been in existence for more than 150 years, Lingon started growing only when the 5th generation took over operations in the late 1980s. Acting like an entrepreneur, the owner changed the company with an aggressive sales strategy, which saw it becoming firmly established in Scandinavia in the 1990s. The company recorded consecutive years of over 25 percent growth and was awarded several prizes for its growth, export and marketing activities. During this time, the company also expanded outside Scandinavia and started operation in Germany and the Netherlands. Lingon’s business model at that time was built on wholesale selling of luxury products to independent retailers. This was mostly done as a shop-in-shop solution (for example, selling Apple products in a Best Buy), but Lingon also has branded stores, which nowadays can be found in prominent locations such as Beverly Hills, Los Angeles and 5th Avenue, New York. While its business model led to high growth during the 1990s and early 2000s, it left the company vulnerable when the financial crisis hit. Lingon went from a healthy profit and growth in 2007 to losses in 2008. Having lost control over the situation, the owner-manager stepped down and hired the company’s first non-family CEO in 2010. In the years that followed, the company went through several changes in management in search of renewed success. Currently, the company employs around 250 people worldwide, is active in more than 40 countries and has a turnover of around 60mio Euro. I first got in contact with Lingon in February 2016 and followed the process of CEO succession and reorganization from March 2016 till July 2017.

3.4. Data collection
Denzin and Lincoln (2011: 3) describe qualitative empirical material as a “series of representations, including fieldnotes, interviews, conversations,
photographs, recordings, and memos to the self”, all of which aim to make the social world visible. Such different naturalistic methods bring “different nuances and can help to explore, examine or be alert to interpretations, relationships, conversations, interactions, situated meanings, sensemaking processes as they occur in situ or context” (Fletcher et al., 2016: 10). The data collected can encompass a broad range of material, each telling a story in its own way. As Stake (1995: 49) sees it, data collection for a case study already “begins before there is commitment to do the study”, thus encompassing everything from early impressions to concluding conversations. I now outline the empirical material collected for my dissertation.

3.4.1. A short note on the nature of empirical material
The empirical material that I collected and the way I analyzed it reflects my underlying philosophy. My stance is opposed to post-positivism that depicts data as an objective entity through which you can test and create theory. Such an approach builds on the idea that researchers create an unbiased dataset that “closely mirrors reality” (Eisenhardt, 1989b: 547). To me, such an approach does not reflect the created nature of empirical material; my material reflects as much my participants as it does reflect me as a person and researcher. While I agree with the importance of not being suggestive in interviews and not influencing interviewees, such depiction negates the space in-between the researcher and the object of study. Alvesson and Sköldberg (2009: 23) argue that the claim of and over-reliance on pure ‘data’ results in a “neglect of the constructed nature of empirical material”, adding another dimension to what constitutes ‘facts’ and ‘data’ by taking into account the researcher as a focal point of the data collection process. Palmer (1969) goes one step further by highlighting the bias already inherent in a study’s design. According to Palmer (1969: 23), “method and object cannot be separated: method has already delimited what we shall see”; thus the “selection of relevant tools is already an interpretation of the task of understanding.”

As my dissertation highlights, relationships matter and create meaning between people, even if it is just for a fleeting moment. Thus, I do not believe that interviews are repeatable; even if I gave my interview guides to someone else, I believe the interview would be different. The space in-between can be influenced by external factors, such as the location, the stress that either the researcher or the interviewee have and the timing of an interview. Internal factors also matter; no matter how objective you try to be, there is an inherent connection between the researcher and interviewees. I found a connection immediately with some interviewees and this connection fostered more intimate conversations. With others it took time to build such a connection. Again, to other interviewees I did not manage to build a connection at all, and the interviews stayed relatively superficial. Interviewing is in a sense similar to the process of painting as illustrated by Leon Kossoff:
“Every time the model sits everything has changed. You have changed, she has changed. The light has changed, the balance has changed”

To reduce my personal bias, I tried to engage in reflection about the interviews I led. To me, reflexivity is thus a concept of both relief and caution; relief, because it allows me to question myself and to “become challenged, surprised, bewildered, and confused” (Alvesson & Kärreman, 2011: 60) by my own research. Caution, because I need to partly mistrust myself as a researcher; why am I thinking what I’m thinking? Isn’t there another way to interpret my empirical material and experience? Reflection thus encourages me to ‘interpret my interpretations’, and to view my empirical material from different perspectives.

3.4.2. Interviews
The core element of my data collection are semi-structured interviews with key actors in the organizations. Interviews allow to gain insights into a range of views about what happens in an organization, and thus pave the “road to multiple realities” (Stake, 1995: 64). Interviews are probably the most common way of collecting qualitative material since conversations with other human beings are one of the oldest ways of obtaining knowledge (Kvale, 2007). There are several types of interviews, ranging from the structured, survey-like interviews to completely unstructured approaches. For my study, I relied on semi-structured interviews that combined a certain set of questions and issues to be covered with freedom for me to lead the conversation and follow up interesting issues. According to Kvale (2007: 8), such interviews follow the purpose of “obtaining descriptions of the life world of the interviewee with respect to interpreting the meaning of the described phenomena.” Getting interviews right can be extremely difficult as the researcher has to ask the right questions to the right participants without steering the interview too much, while simultaneously also being a good listener. Moreover, ethical considerations also play a role as the researcher has to take into account which information to use for example as a source for further inquiries, thus potentially intruding into issues of participants’ privacy.

A particular strength of my dissertation is the longitudinal nature of my interviews. In both cases, I interviewed core actors over time thus gaining both in-depth insights and a process perspective of how their ideas about the organizations and its actors developed over time.

The interviews for the TACT case study (Paper 3) were done during 2006-17. Originally, the case study was part of a research project on strategic planning in which the second and third co-authors were involved; I joined the project in 2014. As Klag and Langley (2013) argue, serendipity is an important aspect in making conceptual leaps; this case is a good example for studying a company from one perspective, while later realizing that another perspective
yields new insights. In overall, we draw on 19 in-depth interviews with family members, board members and executives in the company.

The interviews for the Lingon case study (Paper 4) were done between March 2016 and July 2017. I led the first interviews before the new CEO joined the organization and interviewed key actors over time. I interviewed the CEO and his two predecessors, the main owner and other family members, external board members, top management team members, middle managers, regular employees of the sales, production, marketing and R&D departments and external partners. This resulted in 67 semi-structured interviews with 26 actors. Except for one participant, all interviews were conducted in English. All interviews were recorded and subsequently transcribed for analysis.

3.4.3. Observations
I also collected observational data, especially in the case of Lingon. Observations “provide a social context for what people say in the field about themselves and others” (Marvasti, 2014: 359), allow the research to get in-depth insights and an understanding of the research context and fulfil two functions in my research. First, the observations in the field often facilitated the interviews. Being in the field allowed me to compare my observations with those of the interviewees thus enabling me to go beyond the narratives of organizational members collected in interviews. I often used my observations as cues to dig deeper during the interviews. My observations thus allowed me to probe certain events in the organizations or the actions of certain individuals. Further, many interviewees felt comfortable discussing sensitive events in the organization since I had ‘seen’ such events as well.

Second, observations are an important source of empirical material in the Lingon case that add richness. Through observations, it is possible to see interactions unfold on an everyday level and to better grasp the changing everyday organizational reality. As opposed to hearing about events, I was often a part of them; I was able to see and hear for myself who was heard and who was not (Fletcher & Watson, 2007). For instance, I took extensive notes about who was sitting with whom during meetings and how actors commented on presentations. A particular strength of my fieldwork is the largely unrestricted access to company meetings and gatherings in the company’s headquarters in Sweden. I was aided again by serendipity, since the company started monthly meetings that brought members of the sales organization, top managers, board members and members of the owning family to the headquarters. While under normal circumstances it would have been difficult to gather extensive observational data, these meetings allowed me to regularly visit the company and attend meetings. Further, the time in-between and after official and formal parts of the meetings also gave me a chance to take part in informal meetings, such as occasional evenings in the local pub or a game
of bowling. When studying CEO succession and reorganization such a level of in-depth access is not common (Berns & Klarner, 2017).

During the meetings, I wrote extensive notes covering what was said, how it was said, how people reacted to what was said and how the people interacted in the breaks between the meetings (Miles, Huberman, & Saldaña, 2014). I also recorded several audio files with my unfiltered observations from the meetings and my own feelings of being part of what was happening in the company. These functioned both as a reflexive element (Alvesson & Sköldberg, 2009) and as a chronology of how my thought about the case developed.

3.4.4. **Secondary data**
In both the cases, I also relied on secondary data. In the case of TACT, the secondary data consisted of newspaper articles, company presentations and documents on family governance. While presentations per se were not particularly interesting, they contained several reflections about family governance and self-image of the presenting party. Thus, they added richness to my analysis and provided insights into periods of time for which we did not have formal interview data.

In the case of Lingon, the secondary data consisted of different material. I was part of several e-mail exchanges, members of the organization shared graphs with me, I was allowed access to notes on board meetings and had access to the archives of old international newspaper articles. Moreover, I received the same material as the employees during the monthly meetings, such as notes, printouts and popular business books. This data provided further richness to my analysis.

3.4.5. **Gaining and sustaining access**
An important aspect of qualitative research is gaining and sustaining access (Bondy, 2013). In the case of TACT, the second and third co-authors had a long-standing relationship with the company which allowed me to gain access. In the case of Lingon, contacts and timing fostered my access to the case. The owner of the company joined one of the courses I taught as a guest lecturer. During lunch before his lecture, we came to the topic of his planning to hire a new CEO. We thus got into conversation about the topic, which resulted in my first visit to Lingon in March 2016. Simultaneously, a senior professor who knew both the owner and me championed me, which created additional trust in me as a researcher. In both cases, the formal gatekeepers (Reeves, 2010) were family owners and my affiliation to JIBS and its professors proved to be vital for gaining access. I am grateful for the trust put in me by the researchers at JIBS and the owners of the companies. Thus, I cannot help but agree with Barley’s (1990: 228) notion that “despite an academic's proclivity
to think otherwise, whom one knows is often far more practical that what one knows.”

I profited from good relationships with family members and managers in Lingon which further championed me. During the first meeting, I was introduced as a researcher who was there ‘to help the company become better’. While the owner allowed me access to all members of the organization, I was initially met with skepticism since these members were not sure about my role and whether I was a consultant who would report back to the owner. However, I was informally championed by several members of the organization who introduced me and made it clear that I could be trusted. Being out with the group for a drink for the first time, I was met with caution and one person in the group openly stated that they couldn’t talk anymore since I was with them. A middle manager reacted by patting me on the back, saying that ‘ah, you can trust this guy’, and then shared a story that could severely compromise him in the company should I ever retell it. Such small actions created legitimacy and trust. Over time, I was treated as a regular member of the monthly meetings and was met with warmth and interest whenever I went to the organization.

Another aspect of sustaining access was my knowledge about the case and the situation the company was in. Often, I was asked my interpretations of what was going on in the firm. While I was able to maneuver around answering several times, it still left me in a challenging situation. In several instances, I was given privileged information and in one case I even knew about an executive being fired before he did. Thus, I had to be careful with what I revealed. Moreover, I did not want to influence the members of the organization by sharing my thoughts about the company. Simultaneously, I realized that people expected me to share some insights as a form of reciprocity. Thus, I adopted a practice of what I call sharing the ‘hidden obvious’. I would tell them about certain observations in the company, thus proving that I was aware of the intricacies and trusted them. Through many conversations I knew that an understanding of these issues was widely shared in the organization, so I was not giving up anything crucial. Sharing something that was ‘hidden obvious’ allowed me to continue several conversations and build additional trust within the organization without compromising my situation or hurting the company and its members.

3.5. Data analysis

An analysis of the data and the way it is presented is pivotal in showing rigor in qualitative research (Gioia et al., 2013; Pratt, 2008; Tracy, 2010). My data analysis, especially in Paper 4, was strongly influenced by the so-called ‘Gioia’ method (Gioia et al., 2013; Langley & Abdallah, 2011).

As proposed by Guba (1981), the starting point of my analysis was an overview of the case and the production of a dense case narrative. This
narrative functioned as a trigger point for understanding what was going on in the case. For instance, in Paper 3 this overview brought us to the idea of ‘overprofessionalization’ a concept which we later returned to, albeit with much more empirical evidence. Such narratives worked well in creating a gut-feeling about the case and about what was crucial. Moreover, they allowed us to create a chronology of events, which made it easier to break the case in chunks of process data, as Langley (1999) proposes doing in process research.

As is common in inductive approaches our data analysis process started during the data collection (Corbin & Strauss, 2008; Langley & Abdallah, 2011). For instance, after visiting Lingon for the third time, I was struck that there were several actors in the company without any obvious formal roles in the hierarchy. They were paid and they did things, but no one knew who they were and how to relate to them. I discussed such early findings with colleagues to figure out what this meant so that I could sort out my thoughts and plan what to look for in relation to the findings. In this way, I was already engaged in open coding to create preliminary concepts in my mind (Corbin & Strauss, 2008). Open coding refers to breaking apart data into smaller entities and creating meaningful concepts out of these chunks. Often, researchers use the informants’ own words in their coding (Gioia et al., 2013; Miles et al., 2014). In my case, the concept of ‘running on incoherence’ derived from a comment in an interview and survived all stages of the data analysis. Open coding worked without a set theory in my mind, but was driven by the research questions, for instance about parallel professionalization in the third paper.

The process of open coding is messy and initially resulted in more than 100 codes. Looking back at my NVivo file on Case 4, I can see that I suffered from what Pettigrew (1990: 282) called “data asphyxiation.” Fortunately, it was not “death by data asphyxiation” as the existence of this dissertation proves. Such confusion is part of the process as Gioia et al., (2013: 20) remark: “You gotta get lost before you can get found.” Over time, I compared my open codes with one another to seek out similarities and differences. For instance, I had labelled three different open codes that stood for the same concept; therefore, I combined them. This process left me with a much more manageable number of codes.

During this process, I had already engaged in what Corbin and Strauss (2008) call “axial coding.” While a written account of how the data was analyzed puts retrospective order in place, in reality these steps are interconnected (Gioia et al., 2013). While creating open codes, I had already thought about how they related to each other. Axial coding asks how the lower-level concepts derived from open coding relate to each other, and how they create higher-level themes. Thus, axial coding is the process of bringing in an additional layer of abstraction that elates the empirically rooted first-order codes to a more theoretical level. During my research visit to Stanford, I discussed several of these second-order themes with colleagues to find out
whether they thought my findings were interesting and made sense. The process of open and axial coding was an iteration, as second-order concepts often brought me back to my interview data to find additional evidence.

In line with the Gioia method (Langley & Abdallah, 2011), I derived a classic data structure that encompasses empirically-rooted first-order concepts and abstract second-order themes that make up the main part of my theorizing and aggregate dimension that bring together second-order themes. However, the data structure is not the end of an analysis. As Gioia et al., (2013: 22) argue, it remains a “static picture of a dynamic phenomenon, and process research doesn’t actually investigate processes unless the static picture—a photograph, if you will—can be made into a motion picture.” To do so, I again took a step back to look at my theoretical themes. How did they relate to one another? The result of this thought process can be found in Paper 4. Looking at it now, I can see how it has evolved and how it will continue to change over the coming months. Even though a dissertation is a big milestone and an end, it is simultaneously also a start and continuation. I will continue to refine the data, go back to my concepts and work on improving the dynamic model. Iteration does not stop just because this manuscript will be defended.

3.6. Ensuring quality

Producing high quality research is always a combination of mind and craft, of creativity and control and “a conversation between rigor and imagination” (Abbott, 2004: 3). The question of what constitutes ‘rigorous’ qualitative research has been extensively discussed and was a prominent part of the ‘paradigm wars’ in the 1990s (Denzin, 2008). The post-positivist rigor asking for quantitative quality criteria, such as validity, fits ill with my underlying philosophy and does not give enough space to “look for surprise” (Daft, 1983: 540). Moving against the post-positivist quality criteria, Guba (1981: 80) argues that for a trustworthy study, a researcher needs to ensure credibility, transferability, dependability and confirmability.

Credibility deals with how truthful the findings of a study are, for instance looking at how plausible the interpretations and conclusions drawn from the empirical material are. To establish credibility, Lincoln and Guba (1985) propose that researchers should spend a prolonged time in the field, outline persistent observations, debrief their material with other researchers and use a multitude of data sources and perspectives. During my extensive data collection I tried to follow this advice by discussing my emerging findings with other researchers; discussing ideas with researchers familiar with the cases and those who did not know about them was particularly useful. Moreover, by being close to the actors and collecting extensive data from various sources, like interviewing all members of the top management, I believe that I created ‘credible’ findings. Lastly, I have presented both the
empirical papers in leading management conferences and workshops at institutions such as JIBS and Stanford to challenge my interpretations.

Transferability is concerned with how well the findings of a study can be transferred to another context. To ensure transferability, Guba (1981) proposes using purposeful sampling as well as thick case descriptions. As I have highlighted earlier, I believe that my sampling fulfills these criteria and has yielded revelatory cases. Paper 3 in particular showcases a dense narrative of how professionalization unfolds. Moreover, it is important to present findings and data in a transparent way so that readers are able to transfer the findings to their own contexts (Pratt, 2009). Doing this in a structured way by using tables and figures adds to both the credibility and the transferability of my findings. The most important part for me is what Pratt (2009) and Dyer and Wilkins (1991) point out: telling a compelling story that allows a reader to transfer the findings to his or her context. I cannot claim to have done so. The only thing I can claim is that I have done my best to do so. Whether I have succeeded in my efforts is up to you to judge, dear reader – and of course up to Reviewer 2 et al. in the future.

Dependability is about the consistency of the findings, allowing other researchers to follow how the study has been undertaken and how to potentially repeat it. Lincoln and Guba (1985) propose that researchers can make use of overlapping methods, stepwise replication and an ‘audit trail’ for dependability. I have tried to do so through method sections that explain the research strategy, data collection and analysis. Moreover, relying on three types of qualitative data has made my findings more dependable. Confirmability deals with ‘neutrality’ in the sense that the findings of a study do not derive from the researcher’s imagination but are clearly linked to the data. Confirmability can be reached through triangulation of data sources, reflexivity and engagement with other researchers. As I have shown in my methodology section, I engaged in such reflexive practices throughout the data collection process and challenged my findings by presenting them at various workshops and discussing the papers in detail with colleagues.
4. From professional interactions to relational work

The foundation of this dissertation is the interest in relationships in the context of non-family CEOs in family firms. The overall purpose of my dissertation is to investigate the meaning of such relationships for individuals, the work that they perform and the organizations they reside in. To fulfil this purpose, my dissertation builds on conceptual and qualitative approaches and uses relational perspectives to study relationships.

4.1. Individual contributions of the four articles

My dissertation has four papers with each paper making distinct contributions to several bodies of literature. As the four papers indicate, the questions that I investigate have become increasingly detached from their empirical context. While Papers 1 and 2 are fully rooted in the context of non-family CEOs, Paper 4, and to a lesser extent Paper 3, investigate broader phenomena and co-contribute to the wider knowledge on organizations beyond the specific family business context (see Table 1). Both types of contributions are important. The question of how to engage with non-family CEOs has been an important issue for family firms for a long time (Chua et al., 2003; Dyer, 1989). The companies I worked with in and around my dissertation were all interested in understanding how to work with non-family CEOs and the non-family CEOs were interested in finding out how to engage with family firms and owner families. Thus, the context itself represented a practically relevant issue, and contributing to it is both theoretically and practically relevant. At the same time, viewing the transition to a non-family CEO as a context allows one to ask different and broader questions. What can we learn from such types of transitions? How does this inform management and organization studies in a broader way?

4.2. Broader contributions of the dissertation

Every paper in my dissertation contributes to a certain body of literature and shows the meaning of relationships in the context of non-family CEOs in family firms. At the same time, as the initial research questions show, the dissertation aims to go beyond the individual contributions of each paper to make several contributions as a whole.
Table 1: Contributions of the individual papers

<table>
<thead>
<tr>
<th>Title of paper</th>
<th>Target journal</th>
<th>Contributions</th>
<th>Field of contributions</th>
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| **Paper 1:** Investigating the impact of non-family CEOs: A review and agenda for future research | Journal of Family Business Strategy  | 1. Using a multi-disciplinary approach, the review collects, organizes and structures the research on non-family CEOs & their impact on family firms  
2. The review uses gap-spotting and assumption challenging to build a research agenda | 1. Non-family CEOs in family firms  
2. Family business research |
| **Paper 2:** CEO turnover in family firms: How social exchange relationships influence whether a non-family CEO stays or leaves | Human Resource Management Review     | 1. Outlining the role of the next generation in relationships and turnover of a non-family CEO  
2. Taking into consideration the state of business and family system when designing relationships | 1. Human resource management in family firms  
2. Social exchange theory in family firms |
| **Paper 3:** Tonic or toxin? Investigating the adoption of 'professional' practices in family firms | Organization Studies Preparing for submission | 1. Outlining four modes of how family firms adopt professional practices and fit the to their family and business systems  
2. Casting a critical view on professionalization by introducing the concept of ‘overprofessionalization’,  
3. Highlighting the importance of finding the right mode and amount of professionalization for both systems | 1. Family firm professionalization  
2. Implications of professionalization for family and business systems  
3. Institutional practice adoption |
| **Paper 4:** Pulled apart but held together: Job system change as a contestation process | Academy of Management Journal Preparing for submission | 1. Depicting changes in the job system as a contestation process and empirically investigating the interplay of job design & job crafting  
2. Outlining job crafting as an activity of upper echelon members  
3. Showing how informal interactions can, over time, construct new formal structures | 1. Job system changes and the interplay of job design and job crafting  
2. Upper echelon members as job crafters  
3. Interplay of formal and informal structures |

4.2.1. Extending knowledge on family firms and non-family CEOs

My dissertation contributes to the literature on family business and CEOs by propelling forward the research on interpersonal relationships. Given their importance for the fate of family firms, several authors have called for more research on non-family managers and CEOs over the last decade (Blumentritt et al., 2007; Daspit et al., 2016; DeTienne & Chirico, 2013; Eklund, Palmberg, & Wiberg, 2012). This dissertation takes up the call by investigating non-family CEOs from an important, yet mostly overlooked perspective: the way they relate with members of owner families and other actors in family firms.
The relational processes are often alluded to in current research on non-family CEOs, such as by linking their impact on the organization to embeddedness or socialization (Daspit et al., 2016; Garcés-Galdeano, Larraza-Kintana, Cruz, & Contín-Pilart, 2017; Gómez-Mejía, Larraza-Kintana, & Makri, 2003; Visintin et al., 2017; Young & Tsai, 2008), without, however, capturing relationships theoretically or empirically. Only a few studies dive into the meaning of relationships between family and non-family CEOs and incorporate them in their theorizing (Blumentritt et al., 2007; Hall & Nordqvist, 2008; Klein & Bell, 2007). By using theoretical frames that explicitly focus on interactions and relationships I place relationships at the center of my dissertation. Hence, my work provides new insights into the work of non-family CEOs in family firms.

As Paper 1 highlights, literature on non-family management resembles the general discourse on managers in as much as it downplays relationships. Building mostly on simplistic assumptions built on agency theory, relations are depicted as a “double contingency of actions lacking an emergent connection” (Donati, 2015: 107). Given the close relationships between the owners and the management in family firms, this depiction is especially problematic in the context of family firms. Paper 1 makes several propositions of how to overcome this theoretically, for instance, by proposing the integration of the growing literature on ambivalence (Rothman et al., 2017). Paper 2 focuses explicitly on relationships conceptualized through social exchange (Lawler, 2001; Lawler et al., 2008) to draw out implications for why non-family CEOs stay or leave a firm. Paper 3 shows how changes in the family and business systems derive from interactions between family members and non-family professionals, and how such changes influence the interactions in these systems. We show that while the business system is able to overcome relational problems, the family system is less sturdy and its relationships are more fragile. Lastly, Paper 4 highlights relationships in family firms as ways of intervening in the business and for circumventing formal structures.

My research also informs the general discussion on relationships in family firms. As the papers in aggregate show, the way family members relate to each other and to members outside the family matter for a company. They matter because patterns of relationships change the organization over time; they also matter because organizational members make sense of the relationships around the owner family (Wrzesniewski et al., 2003). My dissertation indicates the importance of relational patterns to understand how family firms change and become heterogeneous (Chua, Chrisman, Steier, & Rau, 2012; Nordqvist, Sharma, & Chirico, 2014; Sharma et al., 2014). An important factor that several studies highlight are variations in the boundaries of family firms (Distelberg & Blow, 2011), especially regarding their willingness and openness to relationships with non-family members. As Paper 3 in my
dissertation shows, a family that is willing to enter these relationships may profit from external knowledge and will be able to form long-standing bonds with members outside the owner family who understand the company, the family and may be there in times of need. Paper 3 also shows how relationships introduce new norms and logics in a family firm which often happens unconsciously. These norms may lead to conflicts in both family and business systems. Paper 4 shows how employees make sense of the visible contesting interactions between the management team and the board of directors. In order to accomplish work, employees utilize the emergent job system and thus stabilize it over time. Thus, the dissertation outlines the complex relationships of family members with those around them and showcases their meaning for the family, the organization and individuals in the organization.

Lastly, the dissertation also has implications for general research on CEOs outside the realm of family-owned businesses. While family firms are in many ways unique organizations, they are increasingly used as a context to inform broader research (Miller et al., 2014; Patel & Cooper, 2014; Strike & Rerup, 2016). Thus, even though my dissertation deals with CEOs in the context of family firms, it discusses several contextual aspects that have implications for broader research on CEOs.

While in family firms the link to the previous CEOs is often important since they are usually part of the ownership of the firm, even in non-family firms such ties with previous CEOs matter. CEOs groom their successors or ‘heir apparents’ internally (Cannella & Shen, 2001), and it is common that the predecessor CEOs may even stay with the company as members or even chairmen of the board of directors after their operational tenures end (Quigley & Hambrick, 2012). Thus, the upward-built relationships that compose an important part of my dissertation may well be seen in non-family firms as well. For instance, a close working relationship between the chairman and the CEO (Krause, 2016; Pye & Pettigrew, 2005; Zhu & Shen, 2016), as shown in Paper 3, may have important implications for the CEO’s career decisions. While for instance ingratiating behavior has been linked to board appointments (Westphal & Stern, 2006, 2007), the depiction of relationships in my dissertation goes further and covers the work that the triad is doing, the willingness to continue in the relationship and the support offered (Paper 2). Thus, a closer investigation of the relationships that CEOs and chairmen of the boards build and their dynamics over time may allow for new insights.

My dissertation has implications for further research on how CEOs engage with powerful stakeholders in an organization. Most research has designated a CEO as the most powerful actor in an organization who can change structures and people in the organization (Busenbark et al., 2016; Ma et al., 2015). The involvement of owners in family firms is common and they have a naturally powerful position in the organization through their ownership
stakes (Brundin et al., 2014), but such strong factions are also not uncommon in other organizational types. For instance, research on hospitals shows that factions of professionals in hospitals have the power to block or foster changes in the organization and are not easily replaced (Denis et al., 2000; Kellogg, 2009). The papers in my dissertation paint the power of CEOs as derived from relationships to a powerful faction in a company, which may allow CEOs to carry out their work. In Paper 3, relating to the family is a job requirement for the non-family CEO which moves from being implicitly assumed to being openly evaluated in the hiring process. However, while family firms slowly learn to be more open and explicit about their role in the business and their expectations from non-family members (Hall & Nordqvist, 2008), such explicitness of relating is not common in non-family organizations. As Paper 2 highlights, a functional and close relationship with members of a powerful faction is a basic requirement for remaining in the organization and being able to influence it. How CEOs maintain such relationships over time has important implications for understanding their influence on organizations.

4.2.2. From interactions to relational work

My dissertation contributes to the wider research on workplace relationships by investigating their role in accomplishing work in organizations. Relationships are depicted as carriers of affect (Casciaro & Lobo, 2008), and are routinely attributed to the informal aspects of organizing. Growing research on workplace relationships outlines the importance of relating for actors and organizations and shows the impact of positive and negative connections (Dutton & Heaphy, 2003; Methot et al., 2017; Wrzesniewski et al., 2003). Several papers outline friendships as facilitating work, for example in the case of a new venture or resource dependency (Francis & Sandberg, 2000; Westphal et al., 2006). However, how individuals accomplish work is still depicted through role- or job-based interactions, usually attributed to the formal organization (Gulati & Puranam, 2009; McEvily et al., 2014). Formal and informal relationships represent channels for exchanging information but organizing as accomplishing tasks (Puranam, Alexy, & Reitzig, 2014) is usually relegated to formal ties. My dissertation questions this dichotomy. The papers highlight how informal relationships not only support the accomplishment of work, but indeed represent work. My dissertation’s contribution can be seen as an inversion of the quote that opens my dissertation. Flum’s (2001: 262) assertion that “to work is to relate” is a core sentiment of my dissertation, yet, my findings point towards another version of his sentiment: To relate is to work.

Even though the notion that “work has become more interdependent and relationships are a more important part of the work context” (Colbert et al., 2016: 1199), relationships still remain outside the scope of organizational work. While certain organizational roles, such as procurement and sales, are
expected to build and remain in relationships with outside parties, everyday relating in organizations is rarely seen as ‘work’. Barley and Kunda (2001), relying on Nadel’s (1957) distinction of relational and non-relational roles in organizations, argue that changes in non-relational aspects of work affect interactions between individuals and shape the organizational structure. However, my dissertation gives primacy to relational roles in work and how they may change non-relational work. Several research studies highlight that only by relating are actors able to accomplish their regular work in organizations. The findings of Paper 3 and the conceptualization in Paper 2 show that without incorporating relationships into their conception of work, CEOs in family firms cannot succeed, and indeed, cannot work. My dissertation thus introduces the notion of relational work as part of understanding the concrete activities that actors accomplish in their everyday being in organizations.

Relating as a common element of organizations and work is well-established but the notion of relational work encompasses how actors accomplish their everyday work in organizations through relating to other actors. Thus, it does not see relationships as establishing work, it seems them as being work that actors accomplish. Relationships are thus not only “the means by which work is done" (Dutton & Ragins, 2007b: 4f.), they become work.

As the second paper shows in certain settings that require close collaboration, such as the triad between a non-family CEO and current and next generation owner family members, relating may be an important part of the everyday work of the CEO. When relations are an important aspect of accomplishing your work, the distinction between work being accomplished through formal relations and affect being transmitted through informal relationships begins to blur. As Hall and Nordqvist (2008) show, such a distinction leads to an overlooking of informal relating as accomplishing work. Paper 4 highlights the shifting balance between formal and informal structures. In this setting, managers’ relational roles begin taking over their non-relational roles; they became preoccupied with dealing with the board of directors over their non-relational work. Thus, a perspective on relational work as a part of the management’s role allows us to go beyond current depictions and paves the way for a better understanding of how relating can accomplish work.

By conceptualizing relational work as part of the work that executives accomplish, relationships take a different meaning. Instead of viewing relationships as a side product of work, they take on a central role in what actors do in organizations. In line with effort to research positive relationships and investigate relational organizations (Dutton & Ragins, 2007b; Gittell & Douglass, 2012), relational works focuses on the way actors build relationships and work through and for them. Relational work sees for
example the relationship with the chairman of the firm neither as a nuisance nor as a means to gain higher discretion (Hambrick & Finkelstein, 1987), but as an element of work which is meaningful in itself. Relational work by non-family executives can also help create collaborative processes of job crafting for family owners (Leana, Appelbaum, & Shevchuk, 2009).

The notion of relational work has deeper-reaching implications for how we see CEOs. Several studies insinuate that family firms and their owners value the interpersonal competency of non-family CEOs, without going deeper into this issue (Blumentritt et al., 2007; Hall & Nordqvist, 2008; Visentin et al., 2017). Going beyond the context of family firms, this opens up several interesting questions: do organizations hire managers based on their competencies to carry out relational work? How do organizations assess such qualifications? In which context will relational work weigh more than non-relational work? Given previous arguments on the importance of relating in non-family organizations, these questions can have wide-reaching implications.

4.2.3. Unraveling what it means to be ‘professional’ in a family firm

Lastly, the dissertation as a whole contributes to our understanding of what it means to be ‘professional’ in a family business. The term of being ‘professional’ arises at the intersection of (non-family) management and family business, yet its depiction in both research and practitioner literature has remained surprisingly one-dimensional. The depiction of what being professional is and what it is not has haunted and often hurt family firms since the inception of the field of research (Chandler, 1977; Dyer, 1989; Levinson, 1971; Schein, 1983). As Paper 3 highlights, the Oxford English Dictionary defines being ‘professional’ entailing the expertise, or the claim to expertise, of a person. Its antonyms – ignorant, incapable and amateurish – have all been attributed to family firms. Even today, being ‘professional’ is routinely associated with as being the opposite of family and family-driven activities (Hall & Nordqvist, 2008). While my dissertation is squarely situated in the discourse on ‘professionalization’ (Dekker et al., 2015; Stewart & Hitt, 2012), it challenges the depiction of ‘professionalization’ in several ways and unpacks what it means to be ‘professional’ in the context of a family business.

First, my dissertation challenges the view that adding non-family management means professionalization. This adds to several other studies criticizing such a depiction (Blumentritt et al., 2007; Hall & Nordqvist, 2008; Klein & Bell, 2007). Even though the introduction of non-family management has been the oldest and most common definition of professionalization (Dyer, 1989; Levinson, 1971; Schein, 1983), my dissertation challenges such a simplification. As Paper 1 shows, literature on non-family CEOs overplays and artificially accentuates the differences between family and non-family
members. Such a binary approach may make for simpler hypotheses, but it does not do justice to both family and non-family actors. Further, Papers 3 and 4 show that the number of non-family actors in management functions has little impact on whether family firms behave ‘professionally’ or not. The number of non-family actors did not differ over time in the cases discussed in Papers 3 and 4 but the organizations did behave differently over time. My dissertation calls for a better understanding of new incumbents, their behavior and the norms they introduce to family firms (Scott, 2008). Thus, it calls for investigating the question of how ‘professional’ family and non-family actors behave further.

Second, my dissertation challenges the view that distancing the family from the business is professionalization. This view has been especially common in early literature on family firms. It argues that “the wisest course for any business, family or nonfamily, is to move to professional management as quickly as possible” (Levinson, 1971: 98). Since family is often equated with ‘unprofessional’ conduct (Schein, 1983; Stewart & Hitt, 2012), a common notion is that a ‘professional’ business is one that downplays the role of the family. As Paper 1 shows, this depiction is especially apparent in theorizing about the heterogeneity of family firms (Lardon, Deloof, & Jorissen, 2017; Michiels, Voordeckers, Lybaert, & Steijvers, 2013; Minichilli et al., 2016). The articles in my dissertation highlight that it is not the presence of family that makes a firm ‘professional’. As seen in Paper 3, it was not professional of the non-family CEO to expect the owner to sign a document that did not allow him to enter the business anymore. Neither was it professional of a family owner to replace a CEO three times in a year, as seen in Paper 4. Yet, none of this was driven by the presence of family or non-family actors, but rather the conduct between family and non-family actors and the business.

Third, my dissertation challenges the view that formalization of the family business is professionalization. Professionalization is commonly associated with formalizing the business, and as Paper 3 shows, even the family system. Thus, one of the most common definitions shows professionalization as a transition towards a “more formalized, structured, and institutionalized corporation” (Dekker et al., 2015: 317). As Papers 3 and 4 show, a more formalized company does not automatically mean a more ‘professional’ organization. Instead, as the analysis in Paper 3 shows, family firms can run the risk of ‘overprofessionalizing’; at its most formal, a family firm may become highly dysfunctional. The paper also shows how formality can be the opposite of how local, idiosyncratic systems of business and family function. Changing systems towards formalization may have unintended consequences that can hurt the family and the business. What is more, as Papers 2 and 4 show, the focus on professionalization as formalization takes the focus away from the informal aspects of family firms and even positions.
professionalization as bringing “objectivity and rationality to an emotional milieu” (Upton & Heck, 1997: 252). My dissertation highlights that being professional in family firms entails an understanding of the informal and interpersonal aspects of work. Without focusing on informal relationships, non-family CEOs are unlikely to succeed in family firms (Hall & Nordqvist, 2008). Further, as Paper 3 shows, professionalization without an understanding of the informal workings of the family may ultimately hurt the family system.

My dissertation points towards another understanding of ‘professionalism’ in family firms. ‘Professionalism’ derives from literature on professions (Abbott, 1993; Wilensky, 1964) and entails a differentiation between occupations and professions. Two aspects are needed to distinguish a simple occupation from a profession: firstly, the job of the professional needs to be technical—based on “systematic knowledge or doctrine acquired only through long prescribed training” (Wilensky, 1964: 138), and secondly the professional person adheres to a set of professional norms. Building on the earlier problematization of what ‘professionalization’ is and considering this definition, we can see that our depiction of ‘professional’ and ‘professionalization’ in the area of family business research is ill-defined and even detrimental to understanding the actors in family firms.

As Hall and Nordqvist (2008) state, the first aspect of technical knowledge that professionalism is based on is used synonymously with formal qualifications and knowledge. This preoccupation with the formal, managerial qualifications that managers bring to a business becomes apparent in Paper 1 through the depiction of non-family managers as resources for the firm who bring new knowledge, expertise and capabilities. This type of ‘professional’ knowledge is important but it has two distinct issues. First, as Paper 3 shows, general business knowledge pertaining to large publicly-listed multinational firms may not be easily applicable in the context of family firms and can be actively detrimental to the organization. The ‘overprofessionalization’ in Paper 3 shows what happens when family firms adopt technical knowledge without adapting it to the local context. Second, the focus on formal qualifications overshadows all other forms of knowledge that non-family actors may bring to a business. As my dissertation shows, professional knowledge can consist of various elements. Paper 3 shows that board members had much more knowledge about the family business in the later stages which allowed them to contribute in meaningful ways, strengthen the family and improve the CEO hiring process. Interviews in Paper 4 highlight that non-family actors found interpersonal knowledge, gained when working with the founders, as especially important for their work in the family firm.

The second aspect of professional norms is a highly interesting note that has received little consideration in the family business field. Early research on professionalization did consider the norms that ‘professional’ managers were
taught at university and in MBA programs (Daily & Dalton, 1992; Dyer, 1989; Schein, 1983). Yet, the field of family business has not led the discussion on how ‘professional norms’ look in family firms. Which norms should non-family CEOs follow in a family firm? How much should the wishes and goals of the family dictate the workings of the non-family CEO? To what extent do family owners and non-family executives need to adapt their conduct? These questions point us towards the need for discussing and defining norms of what ‘professional’ conduct in family firms should be. Creating a shared understanding of ‘professionalism’ between family and non-family actors that transcends the family/non-family dichotomy and the idea of formalization could go a long way for family firms and also for research.

Thus, I propose to depict and understand professionalization not as based on family-membership, distancing or formalization, but instead seeing it rooted in *professional relational ties* in a family firm, both between and among family and non-family members. Such ties are rooted in a mutual understanding of the values of a family firm’s idiosyncrasies and managerial standards, and are characterized by respect, empathy and regard for each other. Professional relational ties can, and should, differ between family firms, but need to be mutually developed; they can thus encompass close, friendship level ties as well as distant relationships. Thus, a family firm that professionalizes is one that is able to adopt professional relational ties in its managerial system and is able to incorporate new members from outside the family firm in a manner beneficial for the firm and its managers.

### 4.3. Practical implications

Besides the theoretical contributions outlined earlier, my dissertation also contributes to practice and the daily work of practitioners within family firms. As a qualitative researcher, I had the privilege to be close to the actors that I studied. This meant that I had to explain why my research did matter in practice. Given the kind of access I received, it seems that I at least partly succeeded. Andy Van de Ven’s (2007) idea of engaged scholarship has always been important for my interactions with practitioners. My close contact with family and non-family members made me appreciate their everyday struggles, and I hope that my dissertation can help ease such struggles. Based on the findings of all the four papers and further work outside the dissertation (yes, there *is* life beyond this manuscript), my thesis has practical implications for family firms, owner families and non-family CEOs.

First, my dissertation shows that relating is an important part of the work that non-family CEOs carry out. It is not just an informal aspect but should be understood as part of the core tasks that come with the job of a CEO in a family firm. Close interactions are not an exception, they are the norm in most family firms. Thus, non-family CEOs aiming to join family firms need to be aware
that they have to build, design, keep up and retain relationships in the family firm. Relating as work of course encompasses interactions with family members, both from the current as well as next generation. Yet, as both the third and fourth papers highlight, relating also matters in contacts with regular employees. Employees in family firms, especially in lower positions in the hierarchy, tend to stay longer in family firms and are used to more personal contact with the management. Thus, TACT (Paper 3) changed towards non-family management, many of the employees were shocked about the changes in interactions that came with the managerial succession. Hence, non-family CEOs need to consider that a more formalized type of interactional pattern may be foreign not just to the family but the organization itself. When adopting new ways of working, non-family CEOs need to consider how to slowly ease the organization into a new pattern of interactions and to what extent they should adopt their own style. The need for relational work also depends on the context of an organization and the stage of the family and business (Paper 2). Family firms are inherently heterogeneous organizations (Sharma et al., 2014), which encompasses the need for relating as well. Some owner families require closer interactions, while others adhere to work patterns similar to larger non-family organizations. Hence, it is important for the non-family CEO and owner family to figure out whether their need for relating as part of the work fit each other already during the hiring process.

Second, my dissertation calls for family firms to better understand what ‘professionalization’ means to them. As the dissertation highlights, integrating non-family managers, especially CEOs is not a simple feat and struggles are commonplace. Papers 3 and 4 highlight that professionalization entails a change in structures, culture, interactions and values. Such changes in the organizational structure change interactions in the organization. Thus, what often seems like a simple hiring decision may have wide-ranging consequences for the organization, especially when the owner family is unclear about what it expects and wants from professionalizing. On the other hand, the dissertation also shows how relationships affect structures in an organization, both on a smaller scale, such as the triad between the non-family CEO, the current and next generation owner family members as well as on a job and organizational level. Therefore, my dissertation calls for caution among family owners in changing their organizational structures and abandoning their local ways of doing things. As Paper 3 shows, institutional forces care little for the idiosyncrasies of the family and their solutions are not tailored to what the business and family need. At the same time, my dissertation also encourages family owners to be consequential when changing their business. As Paper 4 shows, owners that do not adopt their way of working can undermine the very changes that they want to see in the business. This dissertation thus does not speak out against ‘professionalizing’
and hiring non-family members – quite the contrary! – but stresses that family owners need to consider several points when doing so.

Before leaving the position of a CEO, the owner family needs to consider what its position in the business will be. Often family owners relinquish the CEO’s position with the implicit assumption that they can work on things that are more fun without administrative worries. Such assumptions create problems with new CEOs who expect their position to be more than being an ‘administrator’. In such cases, it may be easier to create a position that does not carry the ‘CEO’ title, but represents what the family wants. For instance, family CEOs may create a position of Chief Operational Officer instead of CEO. Such a position from the onset carries less expectations regarding job responsibilities of non-family executives. As Paper 4 shows, executives struggle when they take a position and do not get the power and freedom necessary to work. Such problems may be mitigated by ‘reducing’ the position from the outset, instead of going into a conflict with the non-family members later on. A second way is through moving towards the board of directors. This, however, means that the family will be further away from the business. While it is clear that the family-business tie will not and should not dissolve, constant involvement by the board can undermine the management and hurt the relationship with the new CEO (Papers 2 and 4). Therefore, family owners have to consider how close they want to be to their business and how they should design their involvement without undermining and weakening the newly-hired non-family CEO. An important aspect to consider is the next generation. As highlighted in Paper 2, this relationship is left out of the picture both by researchers and by practitioners themselves. Setting a clear expectation of the next generation’s involvement makes it easier for everyone involved to build professional relational ties. For instance, in Paper 3, the third non-family CEO took the owner’s son under his wing and worked closely with him as a sort-of mentor. To him, it was clear that the son would eventually succeed him. Lastly, as indicated in Paper 4, family owners may engage in active, open job crafting to redefine their position towards the non-family CEO. Job crafting allows members of the owner family to change the tasks they carry out, extend or reduce the relational boundaries of their work, and reconceptualize their work in the family firm. In opposite to the processes outlined in Paper 4, such job crafting should unfold as a collaborative process between the non-family executives and owner family members. Crafting a new position may therefore provide family owners with a meaningful redefinition of their work, while giving space and support to non-family executives.

Apart from the family perspective, the owner family also needs to consider the business aspect when professionalizing. What are the growth goals and to what size should the business grow? It is often assumed that firms want to grow indefinitely and only think about higher revenue and more employees
(Achtenhagen, Naldi, & Melin, 2010). Yet, like the firm in Paper 3, family firms may be comfortable with their size and strategies. The firm in Paper 3 had effectively worked on a niche strategy that was built on being small enough to fly under the radar of its much larger competitors. On the other hand, the firm in Paper 4 was aiming for two-digit revenue growth every year, trying to become the world leader in its market. Such goals are important to discuss early on. Similarly, it is important to think about the values that should remain part of the business. In Paper 3, the family constantly talked about the importance of ‘entrepreneurship’ and ‘flexibility’ as part of the firm’s core elements. Hence, the management team needs to be aware of how important these elements are to the family.

It is also important for the family to understand and define what ‘professionalization’ means. Is professionalization aimed to lead to greater financial outcomes or increased stability and control over a firm? Is it supposed to foster entrepreneurship and bring in new blood for innovation? Is it a means of keeping the family away from conflicts? Is it a way of bridging a period of time until the next family member can take over? Or is it a way of following institutional pressures and gaining legitimacy with external stakeholders? Professionalization opens many paths for family firms and there hardly ever is a wrong path. As this dissertation shows, there are rather wrong paths for a specific family firm. Thus, it is important that family owners are aware of the many different ways and purposes of professionalization and that they draw from blueprints made for companies in a similar situation. Doing so allows family firms, owner families and non-family executives to profit from professionalization.
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