

1-1-2006

Women's leadership journeys in family firms: preliminary results from a qualitative study

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Barrett, Mary and Moores, Ken: Women's leadership journeys in family firms: preliminary results from a qualitative study 2006.

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Keywords

leadership, family, firms, results, qualitative, study, journeys, women, preliminary

Disciplines

Business | Social and Behavioral Sciences

Publication Details

Barrett, M. & Moore, K. (2006). Women's leadership journeys in family firms: preliminary results from a qualitative study. Proceedings of the 51st International Council for Small Business Conference (ICSB) Melbourne: Royal Melbourne Institute of Technology.

Women's leadership journeys in family firms: preliminary results from recent case-based research

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Acknowledgement

The authors gratefully acknowledge BDO Chartered Accountants and Advisers whose financial support has made this project possible.

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In an earlier book (Moore and Barrett, 2002) we found that successful family firm CEOs encountered a series of unique paradoxes. Exploring, understanding and perhaps managing these paradoxes took them on a learning journey to leadership in which they progressively *learnt business (L1)*, *learnt our business (L2)*, *learnt to lead our business (L3)*, and *learnt to let go our business (L4)*. Because the sample we used for that study did not include many female CEOs, our present study focuses on women in leadership roles in family businesses to better understand their experience. Our objectives extend those of Dumas (1998) who sought to understand the pathway to leadership in family firms that women travel. Based on interviews with an international sample of women prominent in family businesses, our preliminary results indicate that there are indeed some characteristic journeys that women leaders take to leadership of family firms. We have tentatively labeled them as *long march*, *short journey*; *swimming against the tide*; *high roads and low roads*; and *traveling companions*. This paper focuses on the *long march*, *short journey* cases and what can be learned from them.

Introduction

Family firms have long been important cogs in the engine rooms of private enterprise economies. Their stability and continuity coupled with their innovation and rapid decision-making have provided reassurance for those seeking sustained growth and development of regional and national economies (Allouche and Amann, 1997; Anderson and Reeb, 2003; Astrachan and Shanker, 2003; Blondel, Rowell and Van der Heyden, 2002; de Geus, 1997; Kleiman et al, 1996; La Porta et al., 1999; McConaughy, Matthews and Fialko, 2001). To better understand the economic contribution of family firms, researchers are seeking to understand entrepreneurship as practised by families in business (Allen and Langowitz, 2003; Barnes, 1988; Cole, 1997; Drozdow, 1989), and also the leadership roles women play in these family firms (Dumas, 1992; Iannarelli, 1992; Salganicoff, 1990; Vera and Dean, 2005).

This research is directed primarily at the second topic. We are interested in the career progression of women leaders in family firms, specifically how they progressively learn skills and competencies. In an earlier book (Moore and Barrett, 2002) we found that successful family firm CEOs went on a learning journey to leadership in which they progressed through four stages: L1 *learning business*, L2 *learning our business*, L3 *learning to lead our business*, and L4 *learning to let go*. That sample consisted mostly of men. To widen our understanding, we now seek to establish what kinds of pathways to leadership women in family business take. Our objectives thus extend those of Dumas (1998) who sought to understand how women participate in leadership of family firms. Because some women CEOs find themselves taking over the family business by default, rather than consciously or unconsciously directing themselves towards leadership as men generally do, we thought there would probably be differences.

Dumas (1998) and Sharma (2004) point out that so far the family business literature has not devoted much attention to female vantage points. This contrasts with the considerable attention given to women entrepreneurs in general, supported by public policy initiatives at national and international level. Given the importance of women business owners to the national and international economy, researchers are studying the characteristics of this new entrepreneurial force, including how women entrepreneurs' needs and interests may differ from those of their male counterparts. Beginning around 20 years ago, researchers have investigated such issues as whether and how women business owners' management styles differ from those of men (eg Chaganti, 1986; Dobbins and Platz, 1986; Folker and Sorenson, 2000), whether women business owners are more risk-averse than men (e.g. Carland and Carland, 1991; Carter, 1989; Fagenson, 1993; Fischer, 1992), whether they are less interested than their male counterparts in growing their business quickly (Cromie, 1987a, b; Hisrich, 1986), and to what extent they are more interested than men in fitting their businesses into their existing lifestyle (e.g. Hisrich and Brush, 1983).

In the family business context, one question suggested by these issues is whether women founders behave differently from women who succeed to leadership in a family business created by a

male family member. Verheul, Uhlaner and Thurik (2004) recently observed that at the macro level female and male entrepreneurs differ with respect to the type of entrepreneurial activity they engage in and the way in which they manage this activity. They found that women selected different activities to men, choosing those that both genders view as less entrepreneurial. Women also view themselves as less entrepreneurial. What are the implications of this for women who undertake leadership roles in a family business created by a man? Will they manage it differently from a male relative? Will they perpetuate an entrepreneurial orientation in the business culture? These issues clearly relate to the longer-standing research agenda on women entrepreneurs, but what has not been closely studied is the potential *link* between women entrepreneurs and family business. Even the extent to which women are being groomed for leadership in family business is unclear (Vera and Dean, 2005).

Poza and Messer (2001) and Curimbaba (2002) provide an indication of the varying roles that women adopt in family business. However they do not explain the reasons for their adopting such roles or the effect of these roles on firm performance. Curimbaba distinguishes three typical roles for daughters ('heiresses') in family businesses: 'Invisible', 'Professional' and 'Anchor', which are greatly influenced by the woman's birth position and the number of men in the same generation.

According to Curimbaba, the '**Invisible**' family business woman is typically part of a large nuclear family, with many sons. The daughters are in the middle and have older brothers, so that the daughters are not seen as necessary to include in the successor managerial staff. They have not been prepared for a professional career in the business and tend to care more about the job itself than the business, which makes it difficult for them to identify with managers or entrepreneurs. For them, the company is a stock of previously accumulated wealth which they should not be kept from enjoying. Their invisibility gives them flexibility which means they are free to leave and come back as they wish. They can only move away from being invisible by filling roles in which women's 'feminine traits' are seen as value-adding.

'**Anchors**' are women who came from families with predominantly female offspring, with few men. With great visibility inside the family business, they became essential for its continuity, despite passing through phases that tend to reduce their significance. Nevertheless, they are never considered completely unnecessary. They readily adopt the company's spirit but occasionally become confused between their own objectives and those of the company, although the company tends to be the primary object of their energies. They value the family business setting as one where being a successful executive does not require them to give up their conception of femininity.

'**Professionals**' work in mature family companies with complex ownership structures, where a reasonable number of men, but not an overwhelming majority, also work. They typically join the family company as the result of an opportunity where they can make a particular contribution to it. Their participation is often initially a way to resolve some type of conflict in the family part of the system, but after that no-one intervenes to push their careers further. They are extreme adherents to 'professionalism', always trying to separate family from business, and are convinced by the idea that

merit is something universal, valid and clear in all contexts. This means they sometimes fall foul of political tactics used by others, particularly men, to advance.

It is possible for women to move between the various roles, although some movements are more explicit and recognised by the family, such as the movement from being an 'Invisible' to a 'Professional' or an 'Anchor'. Other moves are subtle and occur more discreetly over time, such as an 'Anchor' who has lost importance and becomes 'Invisible', or an 'Anchor' who has become more of a 'Professional', or a 'Professional' who has become 'Invisible', perhaps as a result of viewing her role in the family business as a market position.

METHOD

To better understand the roles of women in family business, Sharma (2004) calls for theoretically oriented, large-sample studies. While such large studies will no doubt be undertaken in due course and provide many important insights, we suggest it is valuable at this early stage of theoretical development to continue with smaller, case-based studies. As Eisenhardt (1989) points out, the case study is a research strategy that focuses on gaining an in-depth understanding of the dynamics present within single settings. It allows researchers looking at new topic areas to develop useful, inductive strategies for building theories that are novel and testable, especially if previous research results are equivocal. Yin (1989) and Silverman (1985) point out the value of case studies for providing a close-up, detailed and meticulous view of lived experience. This makes case-based research especially appropriate for examining family business, a relatively new topic area. It is even more appropriate for examining women's leadership in family business, a still newer topic.

Our case-based approach is presented below using the framework as recommended by Eisenhardt (1989). Her eight steps are: getting started, selecting cases, crafting instruments and protocols, entering the field, analysing data, shaping hypotheses, enfolding literature, and reaching closure. To show the relationship between these eight steps and the conventional research paper format, we have dealt with the first four steps in the 'Method' section, 'analysing data' in the 'Analysis' section, 'shaping hypotheses' in the Results section, and the remaining two steps, 'enfolding literature' and 'reaching closure', in 'Conclusions, Implications and Further Research'. Since our analysis also involves comparing data – as well as results – with previous findings in the literature, some literature is also 'enfolded' in earlier stages.

Getting started: This phase is about defining the research question and possible constructs, but doing so tentatively, maintaining as much as possible 'a clean theoretical slate' (Eisenhardt, 1989, p. 536). Whetten (1989) suggests that the essential ingredients of a value-added theoretical contribution are explicit treatments of Who, What, Where, When, Why and How. Our research agenda is based on 'What' and 'How' questions: 'What entrepreneurial and leadership roles do women play in family firms?' Further, related questions are: 'How do women acquire the skills and competencies for family business leadership?' and 'What is the journey to leadership like for them?'

Further analysis, and comparisons with previous research findings, will move us towards answers to 'Why' and other basic questions.

Selecting cases: To probe these questions we examined the self-related case histories of women who occupy a range of family business roles and who are at different stages in their occupancy of them. We approached participants at family business and other conferences and through formal business networks, as well as through the incidental networks of both researchers. Our sample includes women from such diverse backgrounds as Canada, the U.S., Hong Kong, Saudi Arabia, Lebanon, the U.K., New Zealand, as well as Australia.

Consistent with a case approach, our sample included founders and non-founders, CEOs and non-CEOs. This meant we could examine various polar extremes in terms of an interviewee's role in starting the firm, from founder CEO to non-founder, non-CEO, as well as other firm and personal characteristics. Including CEOs who had succeeded to this role enabled us to address the traditional focus on succession in family business studies. We also included instances of generational succession: both mother-son succession and mother-daughter succession.

A snapshot of our sample, categorised by founder/ non-founder, and CEO/non-CEO status of the participants, appears in Figure 1. The sixteen participants were drawn from fifteen firms.¹ They include two third-generation firms (Sue, Felicity), six second-generation (Andrea, Gloria, Ingrid, Jan, Robyn/Deborah, Hanna), and seven first-generation firms (Brenda, Cass, Ellen, Olivia, Miriam, Leah, Nancy).

They include large firms employing more than 100 people, (Brenda, Robyn/Deborah, Sue, Cass, Andrea, Jan, Ingrid) and medium enterprises, between 20 and 100 people (Felicity, Gloria, Leah), with the remainder being small firms (fewer than 20 people employed). The two founders who are non-CEOs have both been succeeded by a family member, in the one case a son and in the other a daughter. The daughter is Robyn, listed in Cell 3. The founders who are also currently CEOs (Cell 1) include women both with and without a family business background.

¹ Founder Deborah and her successor daughter, Robyn, were both interviewed.

Figure 1: Sample characteristics²

	CEOs	Non-CEOs
	Cell 1	Cell 2
Founders	Leah, Ellen, Miriam, Nancy, Hannah	Brenda, Deborah
	Cell 3	Cell 4
Non-founders	Robyn, Ingrid	Felicity, Sue, Gloria, Olivia, Cass, Andrea, Jan

The sample selection was purposive in that we sought out individuals whom we expected to be instances of the phenomenon we wanted to examine, that is, women who demonstrate the skills and competences of leadership within a family business setting. In deference to the case approach, which requires cases which ‘stretch’ or ‘contest’ existing ideas to be included in the sample (Silverman, 1985), we also included cases of women working in family business who were neither founders nor CEOs, or who had deliberately avoided entering the family business. This enabled us to see to what extent their roles encompassed similar or different learning experiences from those who held these roles, and the extent to which their occupants could also demonstrate leadership competencies.

Crafting protocols: One or both of the researchers visited each participant at their business premises, their home, or some other private area such as a private meeting room at a conference venue. In each case, we explained that we were interested in the experiences of women as they learnt their roles within a family business. We asked each interviewee simply to tell us her story, how she had got to where she was. In that way we avoided ‘priming’ the participant in one thematic direction or another. We included the information that we had studied this issue previously with a predominantly male sample, and wanted to include women’s experiences to ensure our understanding was complete.

² These are fictitious names and bear no relationship to the real identities of our interviewees.

Consistent with the case study approach which is to empathize with the actor(s) in the stories being examined (Silverman, 1985), we tried to understand how each participant saw her own story and her place in the family business, and to empathize with her view of the extent to which she had (or had not) reached a position of leadership.

Entering the field: The interviews, which lasted between 1.5 and three hours, were tape-recorded, then transcribed and entered into the NVivo program, a software tool for analyzing qualitative data. In so doing, we adopted a ‘grounded theory’ approach. That is, following Strauss and Corbin (1990, 1994) we used an inductive approach in our examination of the data, aiming to build rather than test theory. We coded the case histories according to the issues which participants raised in their stories, making links between the various coded text segments, and testing or ‘theorizing’ about the ideas which emerged by constantly comparing segments of text with each other, and with previous findings in the literature.

ANALYSIS

Analysing data Close analysis revealed more complexity in family business women’s roles and experiences than the literature suggests. We found considerable variety in participants’ views about, for example, whether the business should continue for the sake of the family, the value of mentoring inside the business as compared with outside learning, and traditional ‘female’, support roles in the business. We also found that our interviewees did not always have a shared understanding of certain terms, nor did they necessarily understand them in the same way as the academic literature. In fact it was the interviewees’ *varying* understanding and experience of specific concepts, such as ‘visibility’, ‘innovation’, even ‘leadership’, which led us to examine and re-examine these terms closely in the context interviewees had used them.

We first categorized all the cases according to factors that might inform an answer to our question about what entrepreneurial and leadership roles women play in family firms. These factors included whether the interviewee had a family business background or not, whether she had founded a business or was a potential or actual successor, the roles she had occupied, and learning stages she had achieved (after Moores and Barrett, 2002). We tabulated these factors, looking for patterns based on differences and similarities. We then used the patterns to cluster together cases that suggested common ‘journeys’ to leadership roles in family business. Next we mapped our ‘journeys’ onto the cases as they appeared in the cells in Figure 1. Comparing like with like and unlike with unlike factors, exposed interesting thematic similarities and differences within and between the cases. For example, we found unexpected similarities in the experiences of some non-founder, non-CEOs (Cell 4), and some founder CEOs (Cell 1), as well as between founder, non-CEOs (Cell 2) and non-founder CEOs (Cell 3). We also saw instances of contrasting and similar experiences within a single cell. All this suggests there are ways women can participate in family business leadership even if they don’t found a

business and never become the CEO of an existing family business. This echoes and extends the findings of Dumas (1998) about women's participation in family business leadership.

RESULTS

Shaping hypotheses Analyses of these similarities and differences, as well as comparisons with key constructs from the literature, provided an understanding of particular pathways towards or away from leadership. We propose these pathways be tentatively labelled: *long march, short journey; swimming against the tide; high roads and low roads*; and *traveling companions*. The proposed labels do not constitute hypotheses in the strict 'if-then' sense. Rather, they serve to sum up our findings about the experiences of our participants and to link them to prior research. This provides a sharper, more differentiated focus on the phenomenon of interest: women's experience of family business leadership. We now examine one of the pathways: '*long march, short journey*', which encompasses the experience of Brenda, Ingrid, Gloria and Robyn.

Long march, short journey: In reading through the case histories, we were struck by how the 'long march' experience of some participants whose journeys to leadership of their family business had lasted for decades, and been subject to many detours, debacles and even sabotage, nevertheless bore a strong resemblance to some of the 'short journeys', that is, where the move into leadership had been sudden, drastic and unexpected. In the Ingrid case, the participant had fought her way to the top, often opposed by other family members. In the Brenda case, the interviewee had been plunged into leadership of the business she and her husband had started as a result of her husband's unexpected death. But despite the obvious contrast in the time taken for the journey, Ingrid's 'long march' looked and felt similar to Brenda's 'short journey': both of them were non-strategic, uncertain and difficult. In other cases, again regardless of whether the journey was short or long in chronological terms, progress towards leadership seemed relatively smooth, measured and predictable.

What makes these long marches and short journeys resemble each other at a fundamental level? Does it have to do with how the participants deal with the four learning stages of family business we previously discerned with a predominantly male sample? When considering the themes emerging from the case history data, it seemed to us that both the four learning stages, and also elements of Curimbaba's (2002) typology of women's roles in family business were crucial to understanding what was going on.

In our sample, the fact that we included first generation women, that is, business founders as well as second generation women (daughters) means that we cannot always rely on issues of birth order and number of available men in the same generation to explain the dynamics of our participants' roles in the business. However, other elements of the I, A and P typology seemed to operate, as well as another role, that of 'Entrepreneur', which sometimes followed one or more of the I, A or P roles. The relationship between all four in a particular family business woman's journey says a good deal about

what made some journeys to leadership (whether long or short) difficult, bumpy, convoluted and hazardous, and others (which also could be long or short), smooth, clear and predictable.

Short journey, difficult terrain (the Brenda case): Brenda succeeded to the leadership of the family business when her husband died suddenly. She was not from a family business background, and had worked in jobs requiring 'feminine' skills such as sewing rather than in business oriented jobs: *I was once the sewing advisor for M [name of a major Australian department store]*. She particularly felt a gap in financial skills when her husband died and she took over the running of their heavily geared motor dealership business. She emphasizes that she had never expected to run the business, and her husband had never expected her to either; she had always seen herself as a support person. Brenda thus filled an 'Invisible' role, but her husband's death quickly changed her to an 'Anchor', where her identity soon becomes that of Entrepreneur. Her induction into the Anchor/Entrepreneur role is short, sharp and difficult. She experienced overt discrimination from both men in business, and their wives, who regarded her as a personal threat. As she says:

Brenda: *I look at myself and the ostracizing I had, and you will never know how I was laughed at. Wherever I went it was, 'Why don't you go home and look after your kids? Do you really think you can run a motor dealership? Of course you can't'.*

Even her friends told her to 'go and get some nice little job somewhere'. Within the business, she knew what was needed, debt reduction and growth, but had little idea of how to achieve it in the context of the business:

Brenda: *I had debts to pay and wages to meet, the overheads were high. Ummm... [I] had the opportunity of encouraging them (the staff) to get a bigger bottom line and discussing, how can we do it? Where can we cut corners....*

Interviewer: *Where did you learn those things? Did you have a specific idea of what they should do?*

Brenda: *No I didn't.*

Brenda's approach was to build on her feminine skills as a housewife where, as she says 'You become a bit of an economist' and introduce a participative approach to staff management at a time when this was very unusual in the motor industry. She both asked the staff what should be done to reduce costs and improve profitability, and what sorts of rewards they would want for achieving it. Nevertheless, it was a long time before Brenda had the confidence of the supplier organisation, and she denies that there was ever a time even as CEO that she could say, 'I don't need to worry about these bastards anymore. I'm on top of this.'

In terms of the four learning stages of Moores and Barrett (2002), Brenda's learning path was both highly condensed and carried out in a different sequence from the one we found in our earlier work was typical, at least for family business men. She had 'learnt business' (L1), which includes the personal disciplines for business, such as self-discipline, being accountable to someone for results, well before she and her husband were in business. However she had to learn the technical skills of the first learning stage, such as finance, as the leader of the business rather than as an employee of

someone else's business. She 'learnt *our* business' (L2), not by absorbing the culture of the family business before having a leadership role in it, but by creating that culture – through her unusual relationship with the staff – as she went along. She did this at the same time as she learnt the skills of *leading* our business, developing a 'helicopter', strategic view of it (L3). Her strategy was to build equity in the business faster than other dealerships were doing.

Interviewer: *Were you paying the debts back quicker than you had to?*

Brenda: *Yes, yes.*

Interviewer: *So you were therefore taking the profits and putting them into debt reduction.*

Brenda: *That's right, and growth. [...] I thought to myself well this is great because that property has got to grow into something that's worthwhile. If I had bigger equity I was going to... If I wanted to grow, I had a better chance of getting another loan. [...]*

Because there was more equity in the business that I had. So, it worked. It worked with finance companies who then wanted to know me. For five years there, it was touch and go, but they could see that I was too proud, far too proud to let anybody believe that I was going to back out.

According to Brenda, staff "found the solutions and then they owned the idea of the solutions." Their solutions included having the staff decide when a member of their team should be sacked, and actually doing the sacking – a 1970s precursor of the philosophy of self-managed teams that only came into general use in the 1990s with the quality movement.

Brenda has successfully completed the first three learning stages of family business leadership, though in an unconventional order, with overlaps and gaps. In a separate part of the research, *traveling companions*, we compare her experience of L4, learning to let go, with that of the only other founder, Deborah, to have passed the business to the next generation. Brenda's rapid learning process is similar in terms of its trauma to the journey of the other bumpy rider, Ingrid. Ingrid's journey was extraordinarily long and drawn-out, but shares Brenda's unconventional sequence of learning stages.

Long march, difficult terrain (the Ingrid case): Ingrid is now the CEO of a very large agricultural machinery and real estate business in the U.S., but her journey has taken many years, with frequent exits and re-entries to the business. There was a period of over seven years between her final re-entry for good, and her move to the top job. Like many family business leaders, she recalls spending time on the business premises as a child. This introduced her to the business, but initially put her off it, because she associated this time with limited interaction with her father and lack of access to the machinery side of things, which she loved:

Ingrid: *In 1956 I was born, the first of five children. Five children in five years and my mother basically stayed at home raising the children. My father went to work. In the mornings he was still sleeping when we went to school and in the evenings he wouldn't come home until after we were in bed. Sometimes we saw him on the weekends. If we did he often brought us down to the family business and we would go through the parts department, try the typewriters, telephones, whatever, and he was back in his office working. Sometimes he'd drop us off at a rock pit and let us play for a while. We didn't have much interaction. [...] That pretty well continued until 1967 when I was about 11 or 12 years old. [...]*

My mother said that I needed to find a job because when I was at the company I would say to her that there's got to be a better career than this. I did not want to be in the family company. [...]

It was, in my opinion, a very conservative, staid company. I loved the equipment and I wanted to ride on the tractors when I was a little girl. I wanted to operate it and drive it, but my dad wouldn't let me.

Although Ingrid found learning easy, her education is fraught with conflict with her father, especially over whether she should focus on business. She eventually enrolled in a computer systems degree but dropped out, and would only complete her business education much later, following one of her several exits from the family business in the early years. The job she gets as a result of the conversation in the quoted extract is in the hotel business, an industry that several of our participants had gained early experience in, and which is easy for women to enter. Even later, and like Brenda, she relied on that experience after definitively entering the family business. Also like Brenda, her training in business skills such as finance is postponed.

In Curimbaba's terms, the fact that Ingrid has two brothers would make it difficult for her to be considered for the top position, and this indeed is what happened. Her move – or rather moves – into the family business were marked with conflict with both brothers as well as her father, as well as conflict between every possible combination of the other family members. She had a mentor at one point, but this person was a consultant to the business rather than a family member, and is no longer associated with the business. Rather than learning *our* business in terms of appreciating the value of that particular family business, Ingrid had to be enticed into it with various financial 'lures', and always maintained the possibility of working elsewhere, such as back in the hotel business.

Ingrid's stance is always that of the 'Professional', seeking to separate family from business, and work out the most meritorious solution for the business problems she saw had developed from the multiple family conflicts. Her brothers rather than Ingrid embody aspects of the supposedly female 'Invisible' role. They regard the business as a source of wealth they should be able to draw on at will, even embezzling it, and coming and going from it at will. As a result of the many political struggles in the business, and like many 'Professionals', she has difficulty moving from this role to the 'Anchor' position and its Entrepreneurial orientation. She entered the business only with a kind of L4 mindset – as someone who is letting it go, who was taking it on '*only as a steward for the next generation*'. Her case data reveal a vision for the firm, but one which is not yet tested or implemented with certainty of success. The outcomes of her planned changes, while promising and sufficient to win the approval of the supplier, were still unclear at the time of the interview.

Ingrid: *I was running things more and more on the business end and I was seeing big changes that needed to occur, so I started literally thinking about what I was going to do for those changes and what was going to be right for the business. I met with [name of the supplier company for which Ingrid's firm is a network dealer] in 2002. They were beginning to see that maybe I wasn't so bad after all. In 2003 I started making the changes. It took me a good year and half to two years to figure out what I wanted to do and once I got all the property side stuff settled and was able to focus more on the machinery side, I then realised what I needed*

to do to make the changes. So I started making the changes in 2003. I'm making the last change as we speak. It will be announced on January 1. It's the final change. I've put a whole new leadership team in place, a new vision statement, and a new mission statement, and we've started the changes. [The supplier] are liking what they see and I now have completed their approval process and I am approved. So from the fall of 1997 when they first put me forward, it has been a seven and a half year struggle to finally have the approval.

Like Brenda, Ingrid has had to deal with the third learning stage, the skills of leadership, while in the leadership role, and in fact she is still learning them. Even more than Brenda, and despite the extended time she has had in managerial role in the business, she is still fighting for recognition as CEO from other family members.

Short journey, smooth terrain (the Gloria case): Gloria's journey is another example of a very rapid journey towards business leadership. However it is far less difficult than the journeys of Brenda and Ingrid. Even now, having entered, expanded and left the family business to start her own firm which is now a listed company, she is still only in her early thirties. The first few sentences of the interview summarize her rapid progress through life and business:

***Gloria:** I was involved with the family business [a large plastic moulding injection company in Hong Kong], for about 15 years, then I was promoted to a senior managing director position. Later on I felt that my personal vision was slightly different and I would like to pursue something different than spending the rest of my life running a family business. So I started my own business and now I'm the founder of a listed company as well. I still provide some advice for my father's company. I think I've already passed the stage of leaving the business.*

Like Ingrid, Gloria spent time in the business as a child, but in her case, this meant spending lots of time with her father, even participating in demonstrating the innovative capacities of the business:

***Gloria:** He was very advanced and did a lot of things that people didn't do at that time. He used new technology. Everybody thought his machine looked strange. I have a strong memory about this. When I was four years old my father wanted to show people how safe his machine was, so we (the young children) had to go and do the moulding. We were too young to be scared but apparently he was very confident. I can remember we were moulding a footplate: a clear plastic footplate. So that's how he started his business. He had a tough time in 1973 but we were too young to really know what he went through.*

She remembers tough times in general, but says that she and her siblings (she was one of seven children) 'grew up with the factory' and that her mother and father 'started it together and grew with it together'. So, in contrast to Ingrid, her early knowledge of the business is acquired against a background of family harmony. She studied mechanical engineering which, though not a business discipline, is clearly related to the family business.

Like Brenda and Ingrid, Gloria as a middle, female child had never been expected to enter the family business, though this had been broached with her brothers and also her oldest and youngest sisters. She recalls the distress her older sister, who was working in the business, felt at sometimes having to lay people off. Instead of joining the business early, she was able to 'go outside' to acquire the skills necessary for business, a vital part of L1 in the Moores and Barrett framework. She went to the U.S., where she studied, worked, had a serious accident and decided to return to Hong Kong 'to be

able to spend time with her father'. So, like Ingrid, Gloria enters the business as a 'Professional', having recognised an opportunity, but not, as in Ingrid's case, to try to sort out a difficulty in the family part of the system, a frequent feature of how 'Professionals' enter the family business.

Gloria's position as a middle child with brothers who could take senior roles should, in Curimbaba's terms, have made her an 'Invisible', not necessary as part of the succession arrangements. Unlike Brenda and Ingrid, Gloria was never under pressure to join the business, though her father was happy when she did. He later recognised her talent, saying that if any of his children were to start their own business, Gloria was the only one who would have survived. As for being invisible, Gloria's experience is quite different from Curimbaba's discussion of it. For Gloria being invisible was simply part of her 'Professional' role in the business. She recalls a seminar campaign she mounted to increase brand awareness by 'packaging' her father's adventurous story as a self-made man, a refugee from the Kuomintang. In telling the story she places herself firmly in the background and denies any suggestion that there would have been any interest in her own story:

Gloria: Then I started packaging my father. I started having interviews for him - he was very shy at that time. He's a very humble good person. I packaged how he started, how he came from the army, how he was very poor. He became a legend in Hong Kong. He received an OBE from the Queen of England, the Hong Kong Government gave him the Grand Bauhinia Medal. [...] I started telling people the story, probably twenty percent made up by me, to make it interesting. I started telling newspapers, customers. I was almost like his spokesman. I will never have a fascinating story like his. What can I tell people about me? Nothing. Nobody would be interested in a young girl. If you want the company to have a legend, you need an older person, some history, something people will think about.

Gloria had first thought of herself as 'too big, too intelligent and too well-educated' for the business, an idea she long ago dismissed as childish. She respects her father's innovativeness, and believes that 'she only has the education'; she could never do as well as her father and Dr P., who were both important mentors for her in the business. If Gloria was never an 'Anchor' in the family business, it was not for lack of an entrepreneurial approach. Her boundless self-confidence, which both Brenda and Ingrid lacked while they were learning L3 skills, was rocked only momentarily when preparing for exhibitions. These, under her influence, were on a scale greater than the business had ever contemplated before:

Gloria: I'm a hardworking person. That's my personality. In the company, although I thought it would do nothing for me [a reference to her early view of herself as 'too big for this business'], I was still hardworking. There was an exhibition and that was the time everybody turned around and looked at me and said "wow" because I wanted to show three newly designed machines. I was leading a team and nobody believed I could do it because there was only four days before the show when my parts started coming in to make a big machine. I worked in the factory for seven days and nights without going home and probably slept for one hour per night. I even cried in the toilet because of the stress and I was scared. Normally the company spent \$10,000 per show and I forced my father to spend \$80,000 for the show, but we sold a lot of machines. After I joined the company [she was 21 years old], the first year the turnover was up to \$98 million.

Gloria has learned leadership and entrepreneurial skills. This is demonstrated by the 'packaging Dad' episode, her 'way with customers', and 'her ability to deliver'. She learns them after L1, learning business (at least the personal skills needed), and after L2, learning the value of *our* business. Unlike Brenda and Ingrid she learns both of these before taking a CEO role, which she achieves by starting her own business rather than by succeeding her father. When she decides to leave the family business it is on her terms: to allow her younger siblings a chance to work in the business. She has in a sense also achieved the L4 stage of 'letting go' the family business, as her current advisory role in it suggests. So in terms of the Moores and Barrett learning stages, Gloria has done things in the conventional sequence, though at a very rapid pace. In particular, the 'personal discipline' part of L1 is done outside. However, like the two 'difficult terrain' journeys, she learns the technical skills of business, especially finance, later, ('*gradually*', in Gloria's words) on the job. Her measured, relatively untroubled introduction to leadership skills via dual mentors, her father and his partner Dr P., means, paradoxically, that she is able to move very fast from the family business into an Entrepreneurial role of her own.

Long march, smooth terrain (the Robyn case): Deborah, Robyn's mother and the founder of the business in which Robyn has lately become CEO, sums up Robyn's progress as much slower than Gloria's in getting to a leadership role:

Deborah: She learnt about business and management outside, then she came in and she started to understand more about the family business. Then she worked alongside me for seventeen years and learnt to lead the business in the direction she wanted to go.

Despite this, however, Robyn's long march ends up looking rather like Gloria's short journey because of the relatively smooth terrain they cover, and the orderly sequence in which they undertake the learning stages. Like Ingrid, early in life Robyn had not wanted to enter the family business, a nationwide house-cleaning and general help service her mother had established as a result of the difficulties she had experienced when Robyn herself was born. This was not for any specific, negative reason, but simply because she had already spent so many afternoons and school vacations there, like Ingrid and Gloria, absorbing what went on. As Deborah relates it:

Deborah: She (Robyn) said, 'I am going to be the only one of your daughters that is not involved in the business'. So I said, 'Great, who cares. I mean, I didn't care. I wasn't building an empire. I was doing what I had to do. I was not building an... um... an empire to hand on to my children. It was my own thing. I was doing it on my own. If my kids were interested that was fine. If they weren't interested that was fine too.

In this respect Robyn's journey was smooth, like Gloria's, because there was no pressure to enter the family business. When she did so, and neither Deborah nor Robyn can exactly remember whose idea it was, it was to be on a temporary basis during a period when she wanted to find out her long term life direction. She did not have the inflated confidence of Gloria; in fact her mother felt she had had to encourage her daughter's belief in herself. Robyn seems to have had more self-knowledge and confidence in her abilities than her mother gives her credit for, however, as this interchange shows:

Robyn: *I did very averagely at school, very average. But I... um... was very sporty so I focused very much on my sport and I always thought I was very average.*

Deborah: *She thought she was dumb.*

Robyn: *No, I thought I'd scrape through. I just got through and I didn't really want to go on to university. I wasn't that keen a student and I thought, I'm not going to push myself that way if I'm not that way inclined. I don't want to fail. No, I've got through and I'll just see where I am heading. I knew I was good with people and I knew I could manage things.*

It is interesting that the qualities Robyn knew she had, being good with people and able to manage things, are often cited as the 'street smarts' needed for good business management. She later mentions being a good listener, and part of learning to be a family business leader (L3) is taking the time to listen to her mother's staff, develop rapport with them, and think and develop solutions to their problems. For example:

Robyn: *As I said I'm a good listener and I listened to what the coordinators were saying. [I thought] 'Gee that doesn't sound quite right.' And I would go and sit with them and I would talk to them about their procedures and their trying to streamline... There was a lot of paperwork and I mean we were used to a manual system then anyway. It was a card system and there were things that they were doing that were going round in circles. And I thought if they could cut out a few procedures but yet get the information that they needed...*

Robyn's is a slow, patient progress to leadership rather than a rush to the top like Gloria. She starts at the bottom and works in the operations side of the business, enjoying the freedom the income from the business gave her, another quiet lesson in the benefits of business leadership. Unlike the jobs of the 'Invisibles' in Curimbaba's typology, however, Deborah makes it clear that Robyn's job was never going to be a sinecure:

Deborah: *She needed money too. She knew I wouldn't give it to her, I'm not the sort of parent that gives money to my children because they look pretty. [But] if they're prepared to roll their sleeves up and show me that they're serious, they can ask me for anything.*

Corresponding to Gloria's identification with her father, Deborah and Robyn share a closeness which they say 'borders on the eerie': they often know what the other is thinking and finish each other's sentences. In this, and in their appreciation of the values of this family business (part of the L2 stage), they contrast themselves with another of Deborah's daughters, who 'wanted to be the boss very quickly', and had a superior, tough attitude in her dealings with the staff. Her attitude indicated to Deborah that this daughter would not be suited to the business long term. In contrast to Ingrid, who when we talked to her was still struggling to become a true 'Anchor', and even Gloria, who skipped this stage altogether in the family business, it was clear that Robyn became an entrepreneurially oriented 'Anchor' quite smoothly and steadily. The business had been expanding while Robyn was there, and the thought of her leaving made the founder nervous:

Deborah: *Sure, that was the whole thing. I was very nervous about handing things on because I was taking on more and more and I thought well I have to be aware of this, but... Yeah, I mean I couldn't handle at that time any more than the five offices...*

Robyn: *It wasn't a rapid expansion anyway. We did it very, very slowly and we would do a little bit at a time...*

Deborah: *But it was rapid for me [compared to] before you came...*

The smooth terrain continues into the handover from mother to daughter. Deborah herself had always planned for the event as an inevitability, on the basis that 'No-one is here forever.' Deborah announced the handover in a ceremony with all the most long-serving staff present. Later, in private, Robyn told us that by the time of the handover she had in fact been managing the operations side for ten years, knowing her mother would eventually recognize that she was becoming frustrated by continuing to handle the detail of the business. However Robyn had left it to her mother to decide the right moment to leave. Robyn, like Deborah herself, has the patience needed for the long march. This, as well as taking the journey in the regular sequence of learning stages, smooths the terrain.

CONCLUSIONS, IMPLICATIONS AND FURTHER RESEARCH

Enfolding the literature and reaching closure: At this stage of our work, where we are still discerning similarities, differences and lessons from four general leadership journeys, Eisenhardt's 'reaching closure' phase might be better termed 'approaching closure'. We set out to explore 'What entrepreneurial and leadership roles do women play in family firms?', 'How do women acquire the skills and competencies for family business leadership?', and 'What is the journey to leadership like for them?' The answers to these questions are embodied in an understanding of the different journeys our participants took. To construct the journeys, we compared 'like with like' and 'unlike with unlike', drawing on key contextual factors such as the participants' backgrounds and whether they had started a business, as well as their perceptions of their own leadership learning. Figure 2 below illustrates our approach.

Figure 2 to be inserted here.

We further enriched our understanding of the journeys by enfolding previous literature, such as our own 'Four Ls' to understand what learning stage each participant had been reached. Using Curimbaba's typology allowed us to see various interviewees as occupying Invisible, Anchor and Professional roles. However our analyses added richness to previous understandings of these roles. For example, we have expanded the understanding of invisibility by showing how some participants used it in a positive way to improve their family firm. We also added another role, that of Entrepreneur, which is occupied not only by founders, but those who participate in leadership in other ways. While 'starting a new venture is quite different from assuming a leadership position in an already established family enterprise' (Vera and Dean, 2005, p. 323), both activities can call for leaders to perform entrepreneurial roles. This was particularly evident in the Robyn and Gloria cases.

Our observations echo the finding by Vera and Dean (2005) that women in family businesses are not being groomed for future leadership roles. The orderly and predictable sequence of gaining skills that the male-oriented 'Four Ls' sets out, is often not adhered to. Retrospectively however, we

could see from the competencies they had gained that many interviewees had passed through these learning phases however unplanned and erratic the journey had been.

The journeys we have examined so far have revealed both similarities and differences within the group of representative cases. Brenda's short journey to leadership, precipitated by calamitous circumstances, turns out to resemble Ingrid's long, tortuous march. This is because of the similar roles the travellers occupy and the irregular sequence of the learning stages they pass through. Similarly, because of the way they are mentored in the firm, and the confidence invested in them, Gloria's rapid, unstoppable and confident rush to leadership looks similar to Robyn's slow, calm and steadily inevitable rise to the top.

The early implications of our findings thus far are that those family firms that project a learning presence are likely to engender successful journeys to leadership, however long they might take. The learning presence produces confidence that the journey is worth persisting with. As Birdthistle and Fleming (2005) point out, linking the literature on the learning organisation with the structural and people characteristics of family businesses, family businesses have an inherent disposition to be learning organisations. Nevertheless for various reasons including a lack of resources for training and development at individual, team and organisational levels, some family firms, particularly micro firms, may not exhibit the characteristics of learning organisations. Our inquiry into the leadership journeys of women members of family businesses will provide an opportunity to examine this issue at close hand. The 'long march, short journey' pathway suggests a learning presence could be located in an individual, such as the incumbent, the potential successor, an independent mentor, within a team, or even within the family firm as a totality. Preliminary considerations of other journeys are that a learning presence – or absence – helps determine the journey's outcome. The practical implication of this insight is that a learning presence needs to be fostered and developed. How to do this needs more exploration.

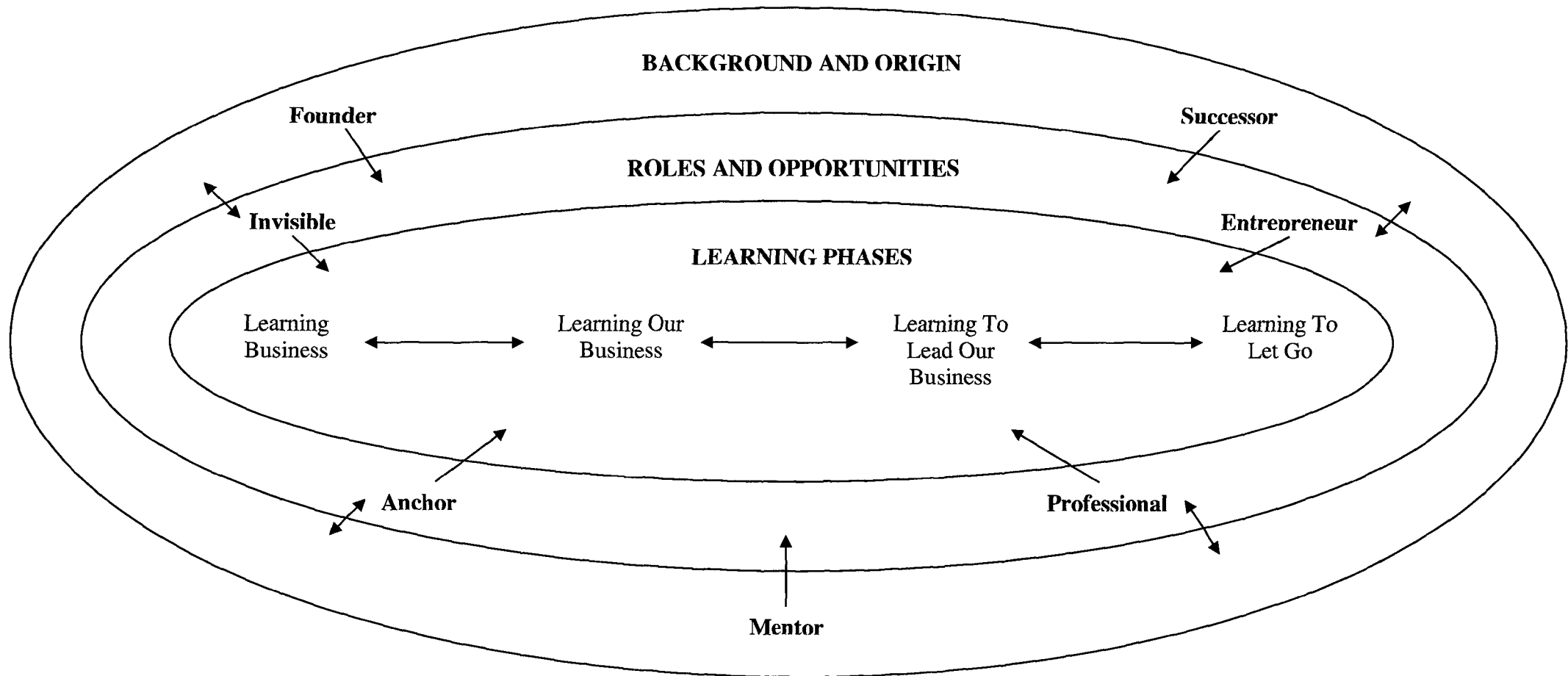
Another implication is that the contextual factors of each participant's journey will need to be considered more deeply as well as the roles and learning stages already discussed. Taken together, they define different pathways towards or away from family business leadership. For example, in the cases we have called *swimming against the tide* we examine how leadership seems to have been achieved against over the very toughest terrain. In *high roads and low roads* we look at how unexpected views of leadership prevail or, by contrast, leadership seems doomed never to get started. In *traveling companions* we consider the varying approaches to business partnerships of our women interviewees. The whole body of cases will help us throw light on what makes it possible for women to 'take the wheel' or at least share the driving, during the journey towards leadership of the family business.

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Figure 2: Factors affecting Learning Journey



**2006 FAMILY ENTERPRISE RESEARCH CONFERENCE
MANUSCRIPT EVALUATION FORM**

Manuscript Title: Women's leadership journeys in family firms: preliminary results from a qualitative study

REVIEWER #1

Strengths

The topic of leadership journeys of women in family business is an interesting one that merits study and is likely well-served by a case-approach for the reasons outlined by the author(s).

The move from discussing the literature on women business owners generally to the more specific questions of what this means in the context specific to family business is very well done and gives a nice flow to this portion of the literature review.

The author(s) do a good job of explaining the case-study methodology, in particular making clear the benefits that can be derived from this approach to the topic.

The case examples and citations provided throughout the results section are informative and give a good flavor of what the author(s) want to convey with their work.

Suggestions

The author(s) open with a number of statements that should be presented with a citation source.

Also, this first paragraph is too long, and could be split in two at the sentence that begins: "In an earlier book..." In fact, the lengthy paragraph is a problem throughout the manuscript (e.g., p. 6 paragraph could be readily split in two as of "As noted earlier..."), and should be corrected to improve the readability of the text.

It would be helpful if the author(s) provided a summary table of the characteristics they describe of their sample – one that included founder/non-founder information as well as identifying size of business and any other descriptive information about the sample in one place.

It might provide a smoother read if the Curimbaba descriptions were included in the review of the literature, rather than introduced within the body of the results.

While the case illustrations are interesting and informative, the manuscript would be improved if these were tightened somewhat. In particular, the presentation of the 'T' case is hard to follow at times. For example, it is not clear why 'T' came into

the business. On p. 18 it is suggested that 'T' had come into the business to try and resolve a problem relating to family – this does not come across so clearly in the presentation of the material relating to 'T' and should be revised.

Also, a minor point: switch the label for case 'T' to something else as 'T' is often read to mean I, as in 'me,' so a switch to another letter, like K or Z would avoid this!

This manuscript has an abrupt ending and would be meaningfully improved if the author(s) provided some suggestions for empirical quantitative work that could be conducted as an offshoot of the ideas they have brought up in their qualitative approach. In addition, a clear discussion of the results and the implications for practice and research is needed.

REVIEWER #2

The strengths of this sample are:

- *The diverse sample

- *Cases are written in an interesting way

Some recommendations are:

- *In the abstract you mention presentation. You may mean presentation of paper, but I wondered if this was an abstract you sent in for a workshop or some other type of presentation.

- *Some references are needed for the first 9 sentences in the Introduction.

- *Methodology was too vague, especially the analysis section. To mention grounded theory and the constant comparative method without referencing is not academic rigor. Also, it is not clear how you are actually comparing these case studies as you analyze.

- *I got very confused by the table and Curimbaba's 3 categories and had to keep switching back and forth as I read the cases. The addition of Curimbaba's work is important, but it seemed misplaced. I think it may be better placed in the beginning literature review. You could refer back to it with a reminder explanation later on in the text.

These suggestions are not meant to discourage you. I think this will make an interesting article and an important contribution once your analysis is complete.