M@n@gement
2015, vol. 18(4): 282-308

The Role of Advisors and The Sequence of Their Actions in Sibling Team Succession

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Abstract. Succession is one of the most-studied topics in family firm research. However, research into succession to more than one child remains scarce despite the practice being common. Based on six case studies of successions in small and medium-sized enterprises (SMEs) showing strong growth, our exploratory research identifies the advisors involved in sibling team successions; it then investigates the impact of family and non-family advisors on succession to siblings. Our findings show that the advisors work at three levels: business, family and individual. We propose a new categorization of advisors and pinpoint the timing of their actions. Our results bring to light the importance of the hidden advisors who are, for the most part, the most trusted.

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As early as 1871 in his book *L'Organisation de la famille*, Frederick Le Play asked whether firms should be transferred to all the founder's children or to just the first-born son. Today, in the context of transferring a family business from one generation to another, multiple family members leading a firm is common practice (Cater & Justis, 2010) and considered by 42% of owners of family firms that have to transfer (Mass Mutual, 2007). If it is well managed, it can result in the smoothest succession process (Aronoff, 1998; Brockhaus, 2004). Yet, in the extensive academic literature on family business succession (Dalpiaz, Tracey, & Phillips, 2014; Gilding, Gregory, & Cosson, 2013), the topic of family firm succession to several children is not well covered (Cater & Justis, 2010; Farrington, Venter, & Boshoff, 2011; Gersick, Davis, McCollom Hampton, & Lansberg, 1997; Rutherford, Muse, & Oswald, 2006). Even in Long and Chrisman's literature review of management succession in family firms (2014) there was not a single text looking at collective family successions, let alone specifically at siblings.

Towards the end of the 1990s, Aronoff and Astrachan (1997) and Nelton (1996, 1997) pointed to the difficulty of a succession to siblings (transmitting leadership from one predecessor to several successors) and the obstacles for successors governing a family firm together; they recommended surrounding the actors in the succession process with advisors. More recently, Reay, Pearson, and Dyer (2013) explained there was a lack of clarity regarding both what family firm advisors really do and how they bring value to the firm. This can be linked to the fact that advising focused on succession appears to represent just 2% of family firm advising (Ward & Handy, 1988). Advisors are nonetheless often first to broach the subject of succession (Montgomery & Sinclair, 2000). We know they assist in planning, implementing and determining the best timing of the succession process; they can also provide support after the succession (Salvato & Corbetta, 2013). Advisors influence important decisions and try to anticipate the future and prevent succession problems (Strike, 2013). It is worth noting that, even in Strike's literature review of advisors in family firms (2012), there is no mention of any text looking at collective family successions or sibling succession.

We have thus identified a gap in the literature. We know that advisors are involved in family businesses and the succession process, but we know little about their role in sibling team succession. In our study, we focus on advisors involved in sibling team succession of the second or third generation of the business family (transfer of leadership by a predecessor to more than one of their children). In this way we aim to increase the body of knowledge on advising within family successions, determining who the different advisors in sibling succession are and how they are involved. Our study makes four important contributions: it identifies the sequence of actions by advisors in the succession process we redefine; categorises advisors according to the level at which they act, be it family, individual or firm; identifies non-family most-trusted advisors (MTAs); and finally it presents the hidden role of the predecessors' spouses.

We begin with a short review of literature focused on advisors who are specific to family firms and family successions. The chosen methodology then provides a comprehensive framework for understanding our exploratory, qualitative research. We base our methodology on Gioia, Corley, and Hamilton's approach (2013), gradually building a grounded model of the sequence of actions of each and every advisor during the sibling team succession process. After this we present the results of the six case studies; they are articulated around newly identified variables of the succession process: catalyse, structure, engage and consolidate.

THEORETICAL FRAMEWORK

Almost all literature on family business succession looks at the relationship between the predecessor and successor solely from a one-to-one perspective. That said, several authors (Aronoff, 1998; Cadieux, 2007; Cadieux, Lorrain, & Hugron, 2002; Cater & Justis, 2010; Gersick, et al., 1997; Sonfield, et al., 2005) point out there may be cases where more than one successor is involved, although they do not research them. The literature presented below describes advisors who are present in family firms without specifying which participate in the succession process.

THE NEED FOR ADVISORS TO SUPPORT BOTH PREDECESSOR AND SUCCESSORS

Succession within a family firm is difficult, partly due to the numerous actors affected by the process — both within the family and the organizational system (Brockhaus, 2004; Cadieux, 2007; Le Breton-Miller, Mille & Steier, 2004) — and partly because of the transfer of leadership and ownership. Moreover, there are psychological aspects that make the succession process challenging (Gersick, et al., 1997; Kets de Vries, Carlock, & Florent-Treacy, 2007); these are linked as much to the predecessor as the successor(s). Succession to siblings could be a solution for treating children equitably, without privileging some to the detriment of others, thus ending the law of succession to the first born (Nelton, 1996). But this issue of equality (versus fairness) is a significant factor of tension and conflict within the scope of family successions (Aronoff & Ward, 1992; Ayres & Lansberg, 1989; Chrisman, Kellermanns, Chan, & Liano, 2010; Gersick, 1996). The inherent complexity of the process increases in collective successions because it is not simply the leadership of the firm that changes: there is also a fundamental change to the decision-making process and the way in which authority is exercised.
The literature shows that during the succession process, both predecessors and successors change and adjust their roles (Handler, 1990). The predecessor moves from leader at the beginning to mentor or advisor for the successors at the end (Cater & Justis, 2010). They have to work through the mourning process

associated with rites of passage as they move from one role (head of the firm) to another (former head). Ashforth (2001) speaks of psychological and physical disengagement. In parallel, the successor goes from student to leader, passing through the roles of helper and manager (Cater & Justis, 2010). Within a sibling team succession, the additional question of collective management is raised. Managing together slows decision making (Aronoff, Astrachan, Mendosa, & Ward, 1997) and creates confusion over authority (Reid & Karambayya, 2009). Aronoff, et al. (1997) suggest abandoning "I" in favor of "we, members of the management team" while maintaining a level of responsibility that legitimises success within an identified and respected function (Aronoff & Ward, 1997; Handler, 1991; Hitt, Miller & Colella, 2006; Lansberg, 1988, 1999). Since all these adjustments are difficult, Salvato and Corbetta (2013) criticise the dyadic vision of succession that is limited to predecessor and successors, with the role of the former fading as that of the latter grows. For these authors, this vision does not take into account the actors who surround the succession and make an essential contribution to establishing the leadership of the successors. Indeed, given the emotional aspects of the role transition, it seems that both the predecessor and the successor(s) need someone beside them: to support them in the succession process, help them take decisions and also help them organize the collective succession.

Schjoedt, Monsen, Pearson, Barnett, and Chrisman (2013) believe that relationships are more important than diverse competences when building a management team. While succession within the family limits conflicts, hostility and rivalry (Morris, Williams & Nel, 1996), these negative elements should not be ignored. Advice from a third party — providing some distance from a problem or helping maintain good relations — seems to Schjoedt, et al. (2013) to be a key success factor and Salvato and Corbetta (2013) see external advisors as essential in changing the leadership role. The advisors become the sounding board of the new leader(s); they facilitate both the questioning and construction of the role and also, to an extent, its full assumption by the successor(s). Indeed, the advisors specifically influence how the successors view themselves as leaders and affect how others see them (Salvato & Corbetta, 2013: 250). The role of the advisors is to make the transition to this new role easier.

The literature discussed above shows how much predecessors and successors need advisors to support and help them in adjusting their roles but does not mention anything about advisors supporting sibling teams.

ADVISORS WITHIN FAMILY FIRMS

Lansberg (1988) underscored the influence of advisors on family members, managers, owners and founders: they advise each from the individual's point of view, with respect to the individual's objectives. The literature separates advisors in family firms into different categories. Sharma (2003) focused specifically on external advisors (experts, consultants, friends, clients, suppliers, the state, etc.), who are neither family members, nor involved with the ownership of the firm or with the employees. Strike (2012) classifies family business advisors using the traditional model of three circles used to characterize family firms. Certain advisors fall within the sphere of ownership (lawyers, tax advisors, bankers, wealth managers), others into the sphere of the family (psychologist, coach, therapist) and the remainder into the sphere of business (consultants, accountants, advisory board members, management team members). Strike (2013) further distinguishes between formal advisors (content experts and process consultants) and informal advisors (trust catalysts, spouses and mentors). The author then delves further into the role of advisors in family firms, studying MTAs (advisory board members, vice-presidents of finance, presidents of the firm, family office managers, external advisors). Strike (2013) brings to light the subtle nature of their influence: guiding and directing attention where it is needed. Deschamps, Cisneros and Barès (2014) take a closer look at external advisors in co-successions (equal ownership and equal leadership, co-leadership and co-ownership). These authors differentiate between permanent advisors (accountants and independent members of the advisory board) and temporary advisors (experts invited to contribute their know-how on a particular subject, for example management experts, coaches or leadership advisors). They measure the varying impact of advisors in the creation and functioning of co-successions. They show that some support the predecessor and others the successors. Table 1 summarises the literature on family firm advisors.

Table 1. Categories of advisors

Lansberg (1988)	Different advisors according to the objectives of the clients (owner, founder, manager, family)
Sharma (2003)	External stakeholders
Strike (2012)	Formal versus informal Role related to sphere of ownership, the family or the business
Strike (2013)	Most trusted advisors (MTAs)
Deschamps, et al. (2014)	Permanent or temporary Advisor to the predecessor or advisor to the successor

The literature for family businesses does not really explore the roles of advisors specifically within the process of succession. However, several authors insist on the need for external actors to facilitate the transformation of the organization with the arrival of new leaders, as at the end of the succession process (Aronoff & Astrachan, 1997; Lansberg, 1999; Nelton, 1996). In addition, internal actors, namely the spouses of the predecessors, are also seen to play an important role (Lansberg, 1988). The literature review can thus be said to show that, in family firms, there are advisors, of which some are MTAs, but there is no study that covers advisors within the context of succession. Information about sibling team succession is even scarcer. The gap in the literature is thus clearly identified.

METHODOLOGY

We therefore explore the following overlooked questions: who are the different advisors in sibling succession? How are they involved in the process? For our exploratory study, we used an inductive case-study research project (Eisenhardt, 1989; Yin, 2008) to investigate the role of advisors in sibling successions. Both the nature of our research questions and the lack of literature on this topic supported our use of the grounded theory approach to examine and understand this little-studied phenomenon (Corbin & Strauss, 1990). In addition, our questions led us towards a qualitative approach, to obtain deeper information that could be used to generate the conceptual framework (Miles & Huberman, 1994).

EXPLORATORY QUALITATIVE RESEARCH

Since the current literature overlooks the role of advisors in transferring leadership to multiple children, our exploratory research aims to provide a better understanding of the issues involved (Sekaran, 2003). McCollom (1990), Morris, et al. (1996) and Bird, Welsch, Astrachan, and Pistrui (2002) suggest that to analyze family business issues, qualitative research is appropriate; it allows the researcher both to gain insight into a phenomenon and be able to offer an explanation for it (Lambrecht, 2005). Since these points corresponded to our needs, they legitimised our choice. Many authors recognise family business succession as a complex phenomenon (Birley, 1986; Brockhaus, 2004; Cadieux, et al., 2002; Chittoor & Das, 2007; Lambrecht, 2005; McGivern, 1978; Mickelson & Worley, 2003; Morris, et al., 1996; Sharma, 2004); case-study research is therefore a recommended approach to explore the issues at hand.

THE CASE-STUDY METHOD

The case-study approach is particularly useful in generating knowledge in exploratory situations where there is no clear single set of outcomes (Patton & Applebaum, 2003). Several authors have analyzed family business succession issues using case studies (Cadieux, 2007; Cadieux, et al., 2002; Chittoor & Das, 2007; Ibrahim, Soufani, & Lam, 2001; Lambrecht, 2005; Mazzola, Marchisio, & Astrachan, 2008; Mickelson & Worley, 2003). Specifically, for Yin (2008) case studies are ideal when the borders between phenomena and context are not entirely clear. It becomes possible to obtain richer data and results to analyze more complex phenomena than when using nomothetic research methodologies (Larsson, 1993). Case studies also provide a tool for using data from a number of sources since accurate and convincing explanations can still be derived (Eisenhardt, 1989). Finally, with this methodology we can "explore the evolution over the time of specific events, essential for the study of transfer of family business" (Lambrecht, 2005: 269). In our research, the cases allowed us to capture the personal and professional experience of predecessors, successors and advisors as well as to uncover and highlight the core issues inherent in the collective succession process.

Selecting cases

Eisenhardt (1989) stated that randomisation is not a necessity when selecting cases for study. On the contrary, cases need to be strategically selected in relation to the relevant theoretical background (Patton & Applebaum, 2003). Multiple cases allow the researcher to replicate elements: each case is considered as an independent research study that confirms — or not — the theoretical background and can also generate new insights (Yin, 2008). Researchers have to select cases in an iterative way to compare the findings until the incremental improvement is minimal (Eisenhardt, 1989). Moreover, since there is no sampling logic, there is no ideal number of cases (Yin, 2008) although Eisenhardt (1989) suggests a range from four to ten cases. We therefore chose six cases.

To construct our cases in the province of Quebec (QC) where there is no family firm databank, we followed the example of Cadieux (2007) and Cadieux, et al. (2002). We proceeded using personal contacts as well as those found via internet searches. We built our study sample based on specific criteria relevant to succession research: family businesses (limited companies) that were located in the same region (Montreal and suburbs, QC, Canada), private enterprises with capital entirely held by the family running the business, which were also small and medium-sized enterprises (SMEs) (see Table 2). In all six firms retained, the leadership and the majority shareholding had been transferred between four and six years prior. We took care to look at several scenarios: four of the sibling team successions were seen as total successes — both from an economic and relational point of view (firms V, H, M, J) — while the other two showed remarkable economic results, although the succession teams were experiencing or had experienced difficulties. In three cases (firms B, V and J), even though the siblings possessed the majority of the voting shares and made all the strategic decisions, the predecessors still held some shares.

Table 2. General characteristics of the firms

	Generation	Revenue growth (annual)*	Number of employees	Sector
Firm B				
Predecessor	Second	$20 million	150	Construction
Successors	Third	$45 million	200	
Firm C				
Predecessor	Second	$22 million	70	Equipment rental and sales
Successors	Third	$32 million	90	
Firm H				
Predecessor	First	$32 million	180	hydrocarbon processing products
Successors	Second	$85 million	450	
Firm J				
Predecessor	Second	$28 million	45	Construction
Successors	Third	$58 million	80	
Firm M				
Predecessor	First	$15 million	70	Machining
Successors	Second	$32 million	110	
Firm V				
Predecessor	First	$13 million	19	Financial services
Successors	Second	$58 million	80	

* Amounts are in Canadian dollars.

Data collection

The snowball sampling method is “particularly applicable when the focus of study is on a sensitive issue, possibly concerning a relatively private matter” (Biernacki & Waldorf, 1981: 141). We used it to identify the advisors in the sibling team succession process and determine their impact on the process. The method consists of asking an interviewee for the contact details of other people who correspond to the same selection criteria so they can be interviewed in turn (Biernacki & Waldorf, 1981). It is possible to apply this approach when interviewees know each other well (as is the case in the family firm). Data were collected through personal, semi-structured interviews (see the interview guide in the Appendix). Two outside readers reviewed the questions for clarity and comprehensiveness. Additional data including financial records, company websites, videos, newspaper articles and company history were gathered to supplement and confirm the information from the interviews. This step was particularly important as in family business research there can be significant differences in the perceptions of different stakeholders. Data obtained from the secondary sources helped us develop an extensive case report for each company.

Even though we collected a large amount of secondary data, the semi-structured interviews formed the essence of our research: “to obtain both retrospective and real-time accounts by those people experiencing the phenomenon of theoretical interest” (Gioia, et al., 2013: p. 19). Interviews were conducted during formal meetings. All the principal succession stakeholders for each case study were interviewed: the predecessors, the successors and almost all the advisors (the exception being the advisor in firm V)[1]. We also interviewed five spouses (three of the predecessors and two of the successors) who were involved in the process (see Table 3). The research was carried out between November 2010 and December 2012. We conducted 37 interviews lasting an average of two hours.

Table 3. The different actors in the succession process

Firm Actor	H	V	B	C	M	J
Predecessor	Pierre*	Albert*	Serge *	Éric*	Karl*	Gabriel*
Successor working in the firm before the succession	Charles*	Jean *	Linda*	François*	Philippe*	Gérard*
Successor(s) who joined the firm for the collective succession	Louis* Marie*	Antoine*	Sébastien*	Georges* Anne*	Jacques* Ève*	Samuel* Lisa*
Permanent, external advisors	Michel (accountant)*	Franck (accountant)**		Martin (accountant)*		Julien (accountant)*
Temporary advisors, supporting the succession	Chloé (family business consultant)*		Marc (coach family business consultant)*	Alex (family business consultant)*	Anne (family business consultant)*	
Independent member of the advisory board		Claude*	Paul*		Sébastien*	
Mothers of the successors/ wives of the predecessors***	Odette*	Chantal*				Émilie*
Spouses of the successors****	Nathalie*	Véronique*				

* Interviewed person
** Advisor involved in the succession process, who died before the beginning of our study
*** In all cases, the mothers of the successors (spouses of the predecessors) were involved in the succession process
**** With the exception of case M, all spouses of the successors were involved in the process

A comprehensive view — covering the involvement of advisors in depth[2] — was obtained from the interviewees. Researchers carried out the interviews, then recorded and transcribed them. The researchers examined their notes before subsequent meetings. Field observations throughout the study allowed the researchers to remain on good terms with the different actors while keeping the distance required for analysis. Indeed, creating relationships of trust proved to be a useful gauge of the quality of the information gathered. The questions in the first version of the interview guide covered: general information about the company and its performance both before and after succession; profiles of the predecessor and successors; the succession process from the point of view of the predecessor; the process from the point of view of all the successors; the

1. He died before our research began.
2. The interviews brought to light the important role of mothers in team succession. However, since the subject matter was sensitive, the interviews did not deal with their role directly and we were not able to meet them.

advisors' influence during the succession process; and the advisors' point of view with regards to their involvement in the succession process. As the study advanced, we added elements based on insights from the interviews already conducted. We included as many spouses as possible in our interviews once the importance of their role became apparent. Specific questions were therefore added to the guide to understand the succession process from the point of view of these spouses. The interview guide included questions that could be compared across the three main types of interviewees (predecessors, successors and advisors).

Data coding

Within qualitative studies, discussing the processing of the data implies asking how exactly the data content is analyzed since it essentially consists of studying verbal transcriptions. Processing happened in two steps: analyzing the individual unit of production and extracting meaning from the data. The first operation was linked to the analysis of each interview. A number of problems were encountered and overcome regarding encoding practices (specifically the definition of the units for analysis), creating categories and identifying themes. The second operation was linked to understanding the dialogue, first for each interview and then for all the cases together (the researchers produced an overview of the main points of each case). An advantage of using case studies resides in the fact that, while some topics of interest are determined beforehand, others can be redefined and fine-tuned as the researcher learns from conversations with the interviewees. We therefore proceeded by cycling through multiple readings of the data to develop a data structure and added topics as they came to light. We did an iterative coding[3] of recurring first-order categories and identified both emerging second-order categories and aggregate dimensions (Gioia, et al., 2013) that brought to light the role of different advisors in the sibling team succession process (see Figure 1). Guided by the theoretical framework, we were able to gain conceptual insights from the case studies (Corbin & Strauss, 1990).

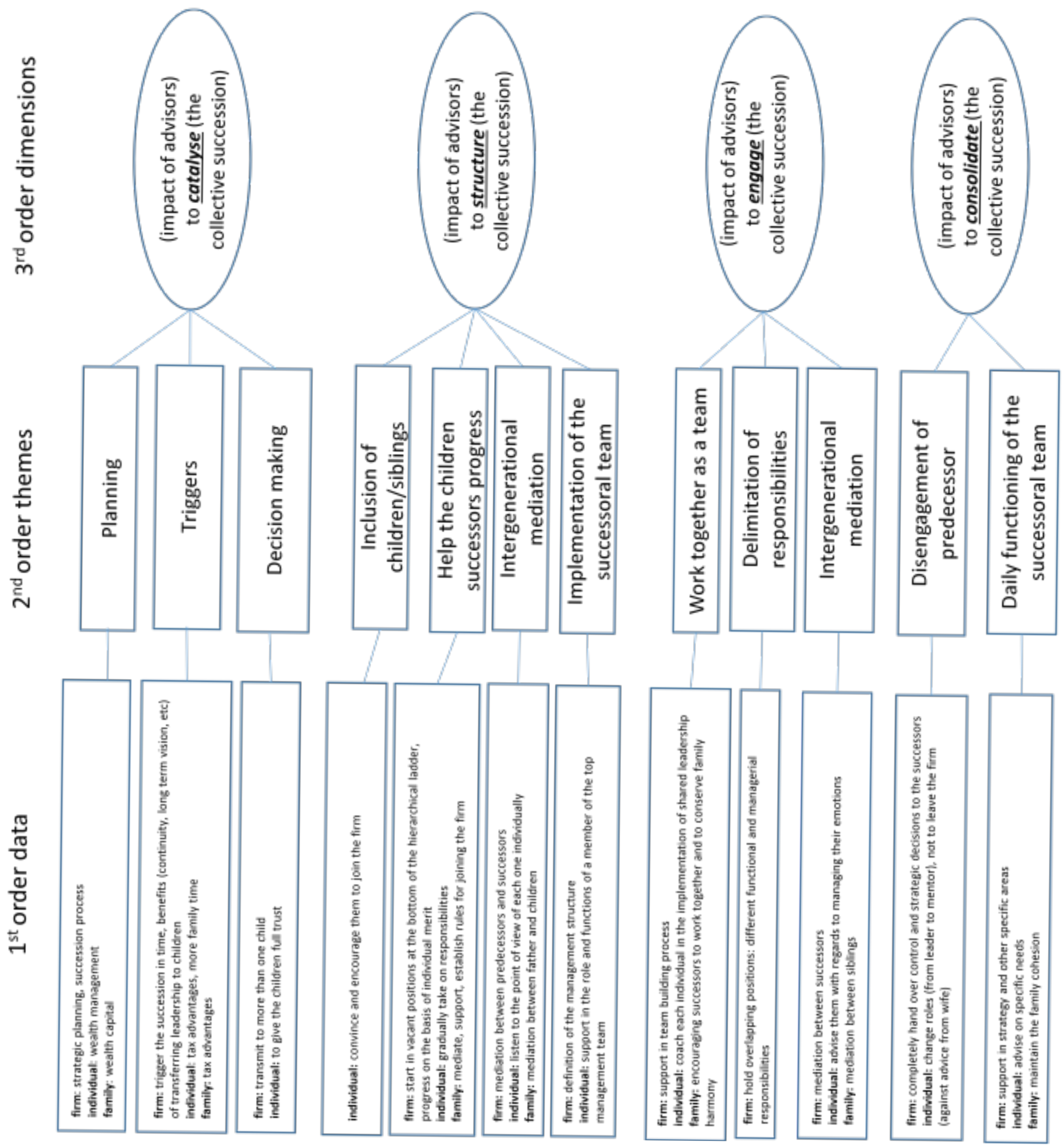
Figure 1 presents the structure of the data: from the first-order data supplied by the interviewees to more general second-order themes deduced by the researchers, and finally to the aggregated third-order dimensions (Gioia, et al., 2013). Within the first-order data, we identified the recipient of the advice provided by the various advisors and then categorized it by area or level: firm, individual or family. The figure above is not a causal model, but rather a representation of the key elements and their relationships to each other. The objective of this figure is to serve as the basis for the emergent theoretical framework and grounded theory model.

Data analysis

The themes that structured the interview guides provided us with the keys for the subsequent thematic analysis, allowing us to explore the different underlying logics. Once the interviews were transcribed, the research team discussed their impressions and compared their observations and notes. The researchers then summarized the information from each interview into a grid according to the 12 second-order categories presented above. Six distinct and extensive case studies were formulated from the data gathered both from primary and secondary sources. The case descriptions were written independently of each other to respect the required rigor and to be coherent with the logic of replication (Yin, 2008).

3. This research was part of a larger study about stakeholders and multiple sibling successions. In this paper, we only present the categories relevant to the advisor role.

Figure 1. Data structure



To improve internal validity, we presented our analysis to the respondents for discussion and then we triangulated the data (through interviews and workshops). Our multiple analyses of content were thus supported by deconstructing the dialogue with the aim of identifying and categorizing meaning on the one hand, and reconstructing the dialogue using a structure to explain the whole on the other. The unique coherence of each interview was then left behind to find a thematic coherence among interviews (Blanchet & Gotman, 1992).

PRESENTATION OF CASES

The six firms chosen can be qualified as success stories in terms of growth (increased revenues — business income in general — and number of employees). Three of the firms are now second generation and the other three are third (see Table 2). Except for firm C, all successors are frequently invited to share their experiences in workshops as they are considered examples to follow. Four of them (firms D, J, M and V) have won prizes for the quality of their succession. However, in firm B, the successors have problems interacting with each other. For the same reason, the sibling team succession in firm C can be considered a failure. Indeed, at the end of the succession process, even though the business was thriving economically, two of three siblings left the firm.

In Table 4, we describe the roles of the predecessors and successors whom we interviewed and we present the way shares and leadership were distributed. The three different situations observed are illustrated: 1) equal distribution of shares, with co-CEOs (cases V, B, H and C); 2) equal distribution of shares but one sibling (the first to have joined the firm and proven his competency) is CEO and his equity partners (siblings) are his subordinates (case J); and 3) unequal distribution of shares with the majority shareholder as the leader (case M). The results were obtained from firms that were comparable (in size, geographical location, culture, etc.). The research was carried out by one foreign researcher based in Montreal for several years before the study and a second researcher based in France. The second researcher adopted an “outsider perspective whose role is to critique interpretations that might look a little too gullible” (Gioia, et al., 2013: 5). Both researchers participated in the data gathering and analysis so any risk of “going native” — adopting the informant’s view (Gioia, et al., 2013) — was neutralized, as were any characteristics of Quebec’s culture that could lead to distortion.

RESULTS

We have based this section on the structure used to present data in Figure 1 to maintain continuity.

IMPACT OF ADVISORS IN CATALYZING THE SIBLING TEAM SUCCESSION

Succession planning

In all cases, the leaders planned their succession with the support of tax advisors, independent members of the advisory board (firms B, V and M) and external accountants (firms H, C and J). The tax advisors primarily provided guidance on the transfer of ownership (property). The independent members of the advisory board and external accountants participated in planning at the level of the companies’ strategies. “My role in this step was two-fold: to facilitate thinking about the best way to gradually transfer leadership of the company to the next generation, and to help any opportunities that should be taken during the succession process emerge” (Julien, external accountant, firm J).

Table 4. Roles and equity distribution

	Predecessor	Successors	Leadership	Share distribution	Other siblings with no shares
B	Serge: Member of the advisory board Has controlling shares	Linda: Co-CEO Sébastien: Co-CEO No specific functions or specific responsibilities	Co-leadership Successors share the strategic decision making	Equal distribution 50% each sibling	
C	Éric: Member of the advisory board No longer has shares	François: Co-CEO Georges: Co-CEO Anne: Co-CEO No specific functions or specific responsibilities	Co-leadership Successors share the strategic decision making	Equal distribution 33.33% each sibling	
H	Pierre: President (honorary) of the advisory board No longer has shares	Charles: Sales and business development director Louis: Operations and production director Marie: Communications and HR director	Co-leadership Successors share the strategic decision making	Equal distribution 30% each sibling 10% employee	One brother
J	Gabriel: Member of the advisory board Has controlling shares	Gérard: President and CEO Lisa: Finance director Samuel: Project manager	The elder brother is the CEO and the other children are part of the management team The three siblings participate in the strategic decision-making process but the elder brother has the last word	Equal distribution 33.33% each sibling	
M	Karl: President (honorary) No longer has shares	Philippe: CEO Jacques: Technical associate director Ève: Director of human resources	The elder brother is the CEO and the other children are part of the management team The three siblings participate in the strategic decision-making process but the elder brother has the last word The siblings are members of the board of directors, which has to approve the strategic decisions	Unequal distribution 50% the eldest and 25% the other two siblings	One brother
V	Albert: President (honorary) Has controlling shares, 5% of voting shares	Jean: Sales director, CEO Antoine: Finance director	Co-leadership Successors share the strategic decision making	Equal distribution 47.5% each sibling 5% (father)	One sister

Triggers for succession

Three main factors triggered the implementation of the succession process: 1) the tax advantages for predecessors and their families (highlighted by tax advisors) and the benefits (legitimacy, continuity, long-term vision, etc.) to the firm of being transferred to the successors whose abilities had been underlined by external accountants (firms H, V, C and J); 2) the recommendations by independent members of the advisory board that the leader of the firm prepare his succession well in advance to ensure it had a positive outcome (firms B and M); and 3) the advice of the predecessors' spouses, who suggested to the predecessors that they should leave their firms (firms M, H, V, C and J). "I had to be very convincing, but I [finally] persuaded my husband to take more leisure time, to spend more time with the family, especially with our grandchildren, […] and to travel more together" (Émilie, spouse of the predecessor, firm J).

Decision to transfer leadership to several children

The first reflex of the predecessors in our study was to transmit the firm the first child to become involved in the family business. "I always thought that the firm could only have one boss. My eldest son always showed interest for carrying on [the business]. The others did not show any signs. I thought that handing over the leadership of the firm to my three children could cause conflict" (Pierre, predecessor, firm H). The spouses of the predecessors were determinant in persuading them to transmit the firms to all their children and also to trust them fully (firms M, H, V, C and J). They were convinced a team of siblings could work. "Luckily for me, my mother convinced my father to give me the opportunity when my brother had already been selected" (Linda, successor, firm B). Several actors (all non-salaried) also directly or indirectly influenced the predecessors' decision to transmit the firm to more than one child. In cases H, V, C and J, it was the external accountant. "Our accountant said to us several times that he knew of firms led by two or three children. So, François and I decided to invite the other children to join the firm" (Eric, predecessor, firm C). In cases B and M, it was the family business management consultant. In firms V and B, the independent members of the advisory board brought to light the complementary nature of siblings' personalities, competences and profiles that could lead to a virtuous relationship in co-leadership. "The members of my advisory board persuaded me to envisage a co-leadership for my succession" (Albert, predecessor firm V).

Impact of advisors in structuring the sibling team succession

Bringing children to the company

In all the cases, at least one child already worked at the firm before the succession process began. The other siblings joined the firm to prepare for the succession. Four actors played an important role in convincing these children to join the family firm: the predecessors (firms V, J, C and H), the children already working in the firm (firms B, M, H and J), the spouses of the predecessors (firms V, J, B and M) and the spouses of the successors (firms M, V, J, C and H). The latter strongly influenced the potential successors to express their desire to take over the leadership of the firm (firms H, J, V and C). "In the beginning, my husband was reluctant to join his father and his brother. He was worried that it would end badly between them. I think that my advice and encouragement really influenced his inclusion into the company" (Véronique, successor's wife, firm V). For that step, advisors are close family.

Moving successors into open positions and allowing them to move up from the bottom of the hierarchy

Firm C was the only one within which positions were created specifically for the children of the firm's manager without specific company needs being predefined. In the other companies, the successors started in vacant positions, in line with the needs of the firm, on the recommendation of external advisors (management experts, coaches, family business experts). The children all had professional experience from outside the family firm and "were doing well" (Jean, successor firm V) according to their brothers and sisters. "We needed someone in the firm with his profile and experience" (Gérard, successor, firm J).

The children gradually took on responsibilities within the family firms, which grew as they mastered different functions. On the recommendation of the external accountants (firms J and H) and independent members of the advisory board (firms M, V and B), the new members of the firm started at the bottom of the hierarchical ladder. In firms M, B and H, they were supported and advised by internal coaches. "A member of the management team coached my son. I took this decision to make the process of integration more formal and to allow him to grow without being stuck to his father" (Pierre, predecessor, firm H). Firm C was again the exception, since the children joined at board level — without the required expertise and with a lack of legitimacy as far as the employees were concerned. At the suggestion of the external accountant, the predecessor of firm C subsequently sent his children to the bottom of the hierarchical ladder, which they did not appreciate: "Even today, I still do not understand why my father did that to us. Parachuting us directly into management team positions was not a good decision, but demoting us was not a better one… We felt humiliated in the eyes of our brother who was working in the company before the succession" (Georges, successor, firm C). At this point in the succession, there were family councils[4] for all the firms except firm C. This played an important role in including the children in the family business: they were offered a place to express feelings about irritating elements that could spark conflict, as well as a place for mutual support. "In these meetings, we give advice and comfort to each other" (Samuel, successor, firm J). For firms M, J, and H, the final decision to make children joining the firm work up from the bottom of the companies' hierarchies was taken within the family council; the same rule was applied for any other family members who wanted to join the firm. The family councils are composed of the predecessor, successors and the predecessor's wife, who acts also as a wife and as a mother to protect and calm conflicts.

Mediation between predecessors and successors

The mediation between fathers and children was led by the predecessors' "trustworthy advisors"; for firms M, B and V this was an independent member of the advisory board and for firms J and H, it was the external accountant. The mediator role was essential to the separation of the family and business logics. "We need an external person so that our meetings are more formal and less emotional" (Serge, predecessor, firm B). The successors of firms B and V did not feel comfortable with assigning this role to the external accountant because they considered him too close to their father. But the predecessors in these firms did not feel comfortable leaving this role to any of the other external advisors (consultant, coach, family business consultant) as they needed to be "completely confident in the mediator" (Pierre, predecessor, firm H). Through the family councils, the predecessors' spouses played a determinant role in intergenerational mediation. In the council meetings, the hierarchical organization of the firm faded away, allowing the successors to confront predecessors "without feeling [they were] in a weak position" (Linda, successor, firm J). Predecessors' spouses seem to have a key role in the success of the structure step because they represent the roots of the family and the business. Their actions influence either the individuals (husbands and children), or the family stability.

Structure of the management team

In all firms, with the exception of firm C, the independent advisory board members, the external accountants and the internal coaches made active

4. According to Neubauer and Lank (1998), the family council is a working governing body that is elected by the business family members to deliberate on family business issues. The council is usually established once the business family reaches a critical size. The family council is established as a representative governance body for coordinating the interests of the family members in their business.

contributions to creating a top management team of successors and defining a new collective management structure. “Working within the top management team of the company with my father, my brother and other managers from outside of the family was a real challenge. Fortunately my [internal] coach advised me well with regards to the role and the functions of a member of the management team” (Albert, successor, firm V).

IMPACT OF ADVISORS IN ENGAGING THE SIBLING TEAM SUCCESSION

Team work

A strong team is built by assigning responsibilities within a climate of peaceful relationships. In the cases we studied, team work among the successors did not occur naturally: four succession teams (M, V, B and H) were accompanied in the team-building process and implementing shared leadership by a family business or another external coach. “After several disagreements and conflicts, we called on a family business consultant to help [each of] us find our marks, improve communication and create synergies from our complementary profiles” (Charles, successor, firm H). Firms J and C did not call in experts specifically to reinforce the cohesion of the team. In the case of C, a family business consultant intervened when two of the successors threatened to leave. However, according to Alex (advisor, firm C): “The bonds of trust between siblings were already broken. My work was then to facilitate a gentle exit, avoiding major confrontations, in order to preserve family relationships”. In all cases, with the exception of firm C, family advising by the external consultant was “a catalyst to reinforce bonds between children” (Ève, successor, firm M). However, we must once again highlight the significant role played here by the spouses of the predecessors working from within the family council (firms J, M, B, V and H). “During the family council meetings my mother knew how to remind us of the family values and maintain family harmony” (Louis, successor, firm H).

Delimiting the responsibilities of successors

In three of the firms (V, H and C) the successors held functional responsibilities (sales director, finance director, human resources director, etc.) in addition to their management (co-director) functions. This matrix structure was recommended by the independent members of the advisory board (firm V) and by the external accountants (firms H and C) with the aim of facilitating the process of strategic decision making, as each person was then more responsible and legitimate in their area of expertise. “Each director heads one or two functional responsibilities. For strategic decisions, we discuss [them] and make decisions as a team” (Marie, successor, firm H). In firms J and M, the elder brothers were the leaders of the firm, while the other siblings were members of the management team. In cases J, V and H, the external accountants helped the children clearly differentiate their functions within the firm and share responsibilities, thus “avoiding overlaps and freeing up time” (Louis, successor, firm H). In firms B and C, where the co-successors did not have well-defined functions, there was friction and misunderstandings — stressful situations arose. “Today, I think that one of the main causes of the failure of the co-leadership was the overlapping of functions. We all wanted to have all the information and take decisions on everything” (François, successor, firm C).

Mediation between successors

In each case, the predecessors accompanied the successors to train and advise them on strategic decisions. The predecessors appeared to be “natural” mediators in this context. The family council was still a place for successors to “diffuse arguments between ourselves” (Gérard, successor, firm J). The family council, particularly the intervention of predecessors’ spouses, played a useful role in managing family relationships and reducing conflicts between successors. They listen, understand and advise. They remain mothers with a particular link to their children. They knew how to "intervene in order to facilitate communication between one child and another" (Jacques, successor, firm M). In addition, firms M, H and B were supported by family business consultants while firm V had a general management consultant. "To try to concentrate on the managerial aspects while at the same time taking into account the views of each [family member] is the challenge of my mandate in strategic 'meetings'" (Marc, advisor, firm B). The family business consultants appeared indispensable to adopting the behavioral codes and rules needed for the ongoing resolution of disagreements (cases M, V and H). These rules were explicit and formalized in shareholders' agreements. "When the firm's leaders called on me, they wanted to put in place the mechanisms to take decisions while avoiding conflict. We formulated a code of conduct and a rule book for team work" (Chloé, family business consultant, firm H). In firms M, H, and B, the successors called on their external coaches to support them individually and help them develop their "collective emotional intelligence" (Jacques successor, firm M).

IMPACT OF ADVISORS IN CONSOLIDATING THE SIBLING TEAM SUCCESSION

Disengagement of the predecessor

At the time of our research, the predecessors in firms B, J and V had not completely left the company. They were physically present, even maintaining their initial offices. While they no longer participated directly in decision making, they still wanted to be kept abreast of the situation. They still went to the company every day to play an administrative role or take care of correspondence. More importantly, their children still consulted them on strategic decisions. Their role expanded when there were significant sources of conflict, for example when the predecessor was the only person to whom employees spoke (firm V). "During this period, my father's presence created stability in our dealings with clients, suppliers and bankers" (Linda, successor, firm B). In firms C, H and M, the predecessors completely disengaged. The independent advisory board member (firm M) and external accountant (firms C and H) contributed substantially to the timing for disengagement being respected. "Although the predecessor had set a date for leaving, he pushed it back every time he could. As the advisor, I needed to help him decide what his priorities were, but also to help him realise that his children had more than doubled the firm's operations and the turnover" (Michel, external accountant, Firm H). However, it was now the spouses of the predecessors who began to feel they would lose their status to some extent once their husband had left the firm. They also worried about their new lives: "Paradoxically, the mother, that lady who had wholeheartedly encouraged her husband to hand over the firm, now realised that she was going to lose a lot of things: her status as wife of the CEO, her office, her social function representing the firm… And on top of that, she and her husband would now be spending a lot more time together. She hadn't prepared herself for that. Consciously or unconsciously, she tried to put obstacles in the way of the hand over" (Julien, external accountant, firm J).

Daily challenges of the successor teams

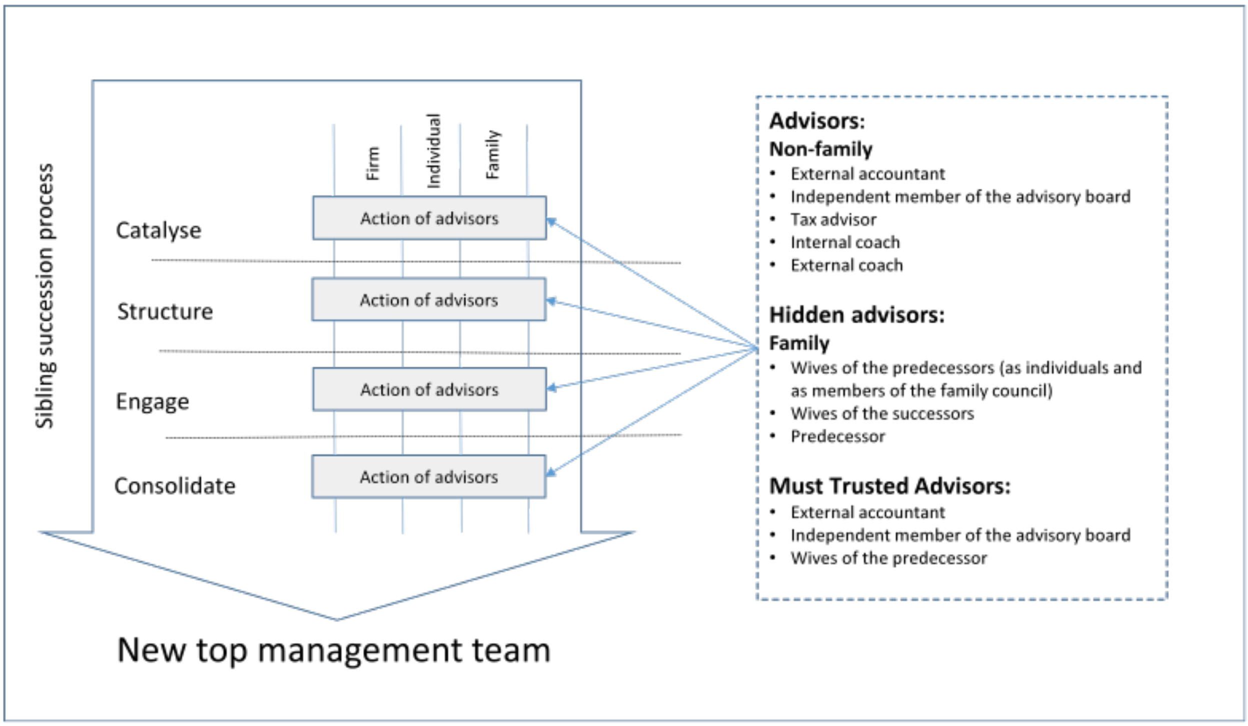
In all six firms, the successors made decisions democratically. In firms J, H, M and C, where the management team was made up of three children, decisions were made with a majority of two out of three votes. In firms V and B, when the firms' leaders were in disagreement, the father (predecessor) made the final decision. In cases B, C, and D, the external advisors who participated in the succession process and had been chosen by the successors, remained to

support them in their strategic decision-making meetings. Firms H, V and M called on new specialised consultants. None of the firms retained consultants who had been close to the predecessors. The family council continued to provide "a place for improving communication, reconciliation… and maybe even increasing complicity" (Louis, successor, firm H).
Table 5 gives an overview of our outcomes.

DISCUSSION

Our aim in this paper was to increase the body of knowledge on advising within family succession by identifying the advisors involved in a sibling team succession and, specifically, to determine their roles in the succession process. Our discussion is structured by the grounded theory model (see Figure 2).

Figure 2. Sequence of advisor actions in a sibling succession



A redefined four-stage succession process according to advisors' actions

Figure 2, like the results of our study, has four parts corresponding to the four stages in the collective succession process. We describe these four stages as follows:

- catalyse: this groups the different steps in the decision process for a succession to more than one child;
- structure: looks at the preparation to include siblings into the family firm;
- engage: covers the organization of the firm and the roles of each actor in achieving a harmonious sibling succession; this stage extends beyond the period of joint management by predecessor and successors as the advisors are implicated in issues that go outside of the scope of its implicit duality;
- consolidate: shows the extent to which the successors have established themselves as co-leaders and looks at the creation of the top management team.

Table 5. Synthesis of the results

Level		Firm		Individual		Family	
Stage	Activity / Advisor	Non-family advisor	Family advisor	Non-family advisor	Family advisor	Non-family advisor	Family advisor
Catalyse	Planning	External accountant (firms H, C & J) Advisory board member (firms B, V & M)		Tax advisor (firms B, V & M)		Tax advisor (firms B, V & M)	
	Trigger	Advisory board member (firms B & M) External accountant (firms H, V, C & J)		Tax advisor (all firms)	Predecessors' spouses (firms M, H, V, C & J)	Tax advisor (all firms)	
	Making a decision	External accountant (firms H, V, C & J) Advisory board member (firms B & V)		External accountant* Consultant FB (firms M & B)	Predecessors' spouses (firms M, H, V, C & J)		
Structure	Inclusion of the children (who did not work in the family firm)				Predecessor (firms M, V & C) predecessors' spouses (firms B, J, M & V) Successors' spouses (firms H, V, C & J) Child already working in the firm (firms B, H & J)		
	Help the development of the successors	External accountant (firms C** H & J) Advisory board member (firms M, V & B)		Internal coach (firms M &H)			Predecessors' spouses through the family council (firms H, B & J)
	Intergenerational mediation	External accountant (firms H & J) Advisory board member (firms M, V & B)		Advisory board member * (firms H & J) External accountant * (firms H & J)	Predecessors' spouses (firms M & H)		Predecessors' spouses through the family council (firms M, H, V, B & J)
	Implementation of the successor team	External accountant (firms H & J) Advisory board member (firms M, B & V)		Internal coach (firms H & M)			

* He is leaving his role.
** In the case of firm C, the children joined the firm directly at the level of the top management team but later, on the advice of the external accountant, they were sent to the bottom of the hierarchical ladder.

Table 5 (continued). Synthesis of the results

Level		Firm		Individual		Family	
Stage	Activity / Advisor	Non-family advisor	Family advisor	Non-family advisor	Family advisor	Non-family advisor	Family advisor
Engage	Working together (as a team)	Consultants FB (firms M, B, H & V)		External coach (firms M & H)	Predecessor's wife (firms M, B, H & V)		Predecessors' spouses through the family council (firms M, J, B, H & V)
	Delimitation of responsibilities	External accountant (firms J, V & H) Advisory board member (firm V)					
	Intragenerational mediation	Consultant FB (firms M, B & H) Management advisor (firm V)		External coach (firms M & H)	Predecessor Successors' spouses (firms M, B, H & J)		Predecessors' spouses through the family council (firms M, B, H & J)
Consolidate	Predecessor's disengagement from the firm			External accountant * (firms H & C) Advisory board member * (firm M)	Predecessor's wife (firms M, V, H & J)		
	Daily functioning of the successor team	New advisors to the successors (firms M, B, J & H)	Predecessor (firms B & V)		Predecessor		Successors' spouses through the family council

* He is leaving his role.
** In the case of firm C, the children joined the firm directly at the level of the top management team but later, on the advice of the external accountant, they were sent to the bottom of the hierarchical ladder.

It is not simply the degree to which the successor has disengaged since, in several cases, after having transferred the ownership of the firm the predecessor remains in the new role of advisor and family mediator.

The stages do not correspond to the traditional breakdown in the literature (Handler, 1994) as they emerged from the advisors' actions in the sibling team succession process. The stages of our model thus provide a fresh point of view from which to analyze the process and call attention to the singularity of the collective succession. Indeed, the succession of a leader to several successors makes the process more complex. The new co-owners have individual fears but share blood ties and common family experiences. They therefore need advice, not only on structuring the succession from an organizational point of view (Montgomery & Sinclair, 2000), but also at the levels of the individual and the family. The necessity for this is illustrated by case C, where the firm's leaders were neither advised at the individual nor at the family level, resulting in the succession failing on the level of the family.

Advisors at the level of the firm, the family and/or the individual

The advisors were involved at three levels that were not exclusive and could sometimes be complementary: 1) at the level of the firm: they had a contract or formal mandate to intervene in the organization; 2) at the level of the individual (predecessor or successor(s)): they advised with respect to the personal and professional interests of the individual; and 3) at the level of the family: they had the objective of establishing or reinforcing family harmony. This contribution of our study to the literature on advisors in family successions goes beyond the usual separation of family, business, and ownership (Hilburt-Davis & Dyer, 2003; Lansberg, 1988; Strike, 2012) and further than the other categories that we mentioned in the theoretical part of this paper.

Our research shows that neither the predecessor nor the successors are aware of the need for advice at more than one level. They are accompanied in their individual areas of concern by their personal advisors; their issues are linked either to the family, to themselves or to the organization. Table 5 shows that some advisors — the external accountant for example — act on more than one level.

Non-family MTAs

Our results confirm prior studies showing the presence of MTAs among non-family advisors, namely external accountants (Nicholson, Shepherd, & Woods, 2010) and independent members of the advisory board (Lester & Cannella, 2006). Working as closely as possible with the predecessors, they went beyond their official roles (the roles for which they were hired) giving advice and helping the predecessors through more personal difficult decisions, such as making the choice to transfer leadership to more than one child. This finding is important and surprising as the advisors in question did not have either the qualifications or the competence to provide this type of advice. It was their experience and relationship of trust that developed with the family member over a long time, allowing the advisor to become an MTA. They acted as a facilitator of the succession as they were capable of untangling the firm-individual-family relationships. This was possible thanks to their significant influence over the leaders of the family firm (Strike, 2012, 2013). While the relationship with an MTA sometimes extends to another generation (Grubman & Jaffe, 2010), the successors we studied did not retain their fathers' MTAs in stage 4, "Consolidate". Our results do not allow us to conclude whether the successors already had their own MTAs among the new advisors who supported them.

The hidden role of the predecessors' spouses

The actions of predecessors' spouses were critical to the succession process. Their role intervened at an individual level with their husband at the beginning of the process; then towards husbands and children in the steps of structuring an engagement. Their participation inside the family council cut their role in two: they are beside their husbands and are mothers to their children. They are the heart of the family. We consider them MTAs since they had a truly trusted advising capacity. Like Lansberg (1988), we observed that they were often supportive of succession process and, in many cases, served as a powerful influence in mobilizing the predecessor to tackle the problems they faced during the transition. Thus far, the role of MTAs in family firms has not been studied to a great extent, despite the influence that they can have on family firm members (Strike, 2013). In particular, the role of spouses as MTAs has been overlooked in the literature. In our study, the predecessors' spouses were present and fulfilled the natural role of confidant and advisor (giving moral and emotional support).

While the role of spouses as advisors in the family firm has been researched (Strike, 2012), the role of these individuals as mothers to successors has not. Our results show that as mothers they contributed to reinforcing the family values and harmony (Le Breton-Miller, et al., 2004). They played a supportive role for their children (the successors), helped improve family communication and also mediated between members of the family when family bonds were strained. They were very present in the family councils that they usually initiated and led. This role of predecessors' spouses is a new element for succession research.

The role of successors' spouses should be quite similar to that of the predecessors' spouses: it is at two steps of the process. Their role would tend to evolve as they become CEOs' spouses. Will they act in family council after the predecessor's disengagement? What about the predecessor's spouse's disengagement? How will a family council with multiple CEOs and multiple spouses be run? These are some interesting strands of research.

CONCLUSIONS, LIMITS AND FUTURE AVENUES FOR RESEARCH

Taking into account the high quality of the information we obtained from our fieldwork, we think our contribution to understanding the role of advisors within sibling team succession is significant. We shed new light on the succession process by formulating the specific stages of the collective succession. We develop the understanding of the advisors' roles through a typology based on whether they belong to the family. We add to Strike's work (2013) by showing the clear role played by predecessors' spouses as MTAs in preserving family harmony, the mediation between generations and the relationships between successors. Our contribution lies not only in defining the advisors' role in the succession process, but also in highlighting the specific way they influence it. The results of our research contribute to a better understanding of the relationships between advisors, predecessors and several successors within the family context. This can be useful for all the owner-managers of small family businesses, whether potential predecessor or successor. Lastly, our results are also of use for the advisors themselves; they help them to position themselves at each stage of the collective succession process and legitimate their roles with respect to other stakeholders. In addition, they potentially help advisors provide additional advice and, above all, to meet the requirements of family members in a collective succession, where needs evolve during the process and for each of the actors.

Nonetheless, our research remains bound by limitations. The advantage of our chosen methodology lies in allowing underlying logics to emerge and illustrate both the role as well as the impact of advisors within the context of a collective succession. However, the protocol presents limits: 1) our analysis is based on the dialogue of actors and is subject to interpretation even when recorded;

2) although from a qualitative methodology point of view, six cases represent a significant sample, the generalization of our results would need to be supported by a quantitative study to verify the role of advisors; and 3) the geographical region, Quebec province, is a common denominator for all the cases, ensuring comparability; however, the study should be extended to other cultural contexts.

Since the need for advice changes during the succession process, there is a requirement for an overview that encompasses the stages in the process as well as the levels on which the advisors act. No advisors were appointed to accompany the whole process and all its actors. These results encouraged us to go beyond earlier studies where categories of advisors were static, to consider the relationships and the synergies that can form between actors. Finally, a future avenue of research would be to compare the role of advisors in successions to other family members, such as cousins or even sons- or daughters-in-law. We could also give attention to hybrid collective successions (composed of both family members and employees of the family firm).

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APPENDIX A. Interview guide

General information about the firm

- Sector
- Number of employees
    - Before the start of the succession process
    - Five years after the succession occurred
- Primary market
- Turnover[1]
    - Before the start of the succession process
    - Five years after the succession occurred
- Members of the top management team
    - Before the start of the succession process
    - Five years after the succession occurred
- Distribution of the firm's capital (ownership of the firm)

Questions for the leaders of the firm (predecessor and successor(s))

- **Leader's profile**
    - Academic background
    - Professional experience
- **Succession process**

  It is important to note that after each of the main questions
  we asked related questions:
    - Did anyone advise or support you? Excluding advisors, did other key actors give you advice? Who? How? What was their [level of] involvement? How long did they advise you? Who requested (or proposed) the advising process? Was the advisor's role formally or informally defined? How did you remunerate them?
    - **Questions for the predecessor**
        - Did you plan the success process? If so, could you describe how it was planned and who participated in the planning process?
        - What were your motivations for transferring the business?
        - Why did you transfer [leadership of] the firm to several children?
        - Why do you think your children joined the family firm?
        - How did your children join the firm?
        - How was the top management team structured?

1 Translator's note: here we mean revenues or the general income of the firm

- How was work carried out within the top management team?
- How did you resolve delicate situations or conflicts...
  - ...within the top management?
  - ...of purely familial nature but linked to the succession process?
- How were tasks and responsibilities transferred?
- When did you decide to end your leadership of the firm?
- What (if any) are your current roles and responsibilities?
- How did you decide to leave the company? How did the [decision process] occur?

- **Questions for the successor(s)**
  - Was the succession planned? If yes, did you participate in the process? How?
  - What were your motivations for joining the firm and taking over [its leadership]?
  - Why did you agree to taking over the firm with your siblings?
  - At what level in the firm's hierarchy did you join? What was your first position (responsibilities and tasks)?
  - How did you develop within the firm?
  - How was the top management team structured?
  - How was work carried out within the top management team?
  - How did you resolve delicate situations or conflicts...
    - ...within the top management?
    - ...of purely familial nature but linked to the succession process?
  - How were tasks and responsibilities transferred to you?
  - Could you describe the daily functioning of the (successor) top management team?

Questions for non-family advisors

- Profile
  - Academic background
  - Professional experience
  - When did you start advising this firm?
  - ☐ Internal advisor
    - What is your position in the firm?
  - ☐ External advisor
    - For what company do you work?

- Involvement in the [succession] process
    - How did you participate in the firm's succession process?
    - Who requested (or proposed) the advising process?
    - When and how did it start?
    - What was your involvement? Who did you advise (predecessor, successor, family, firm)?
    - Was the advising process triggered by a specific problem or goal?
    - Was your advising role informal or formally defined?
    - [Please describe] how you participated in the process.
    - Did you advise different people in the company? What form did the advising take?
    - Before the advising process, did you already know the company or the family? If yes, since when?
    - Were you remunerated? How was remuneration determined?
    - How are you related to the firm's leaders (friendship, family, professional)?
    - How would you describe your interaction with the members of family? Are you close to members of the family?
    - Did you give advice on topics that fell outside of your area of expertise? In which situations? Were you asked [for your advice] or did you propose it without being asked?
    - Before advising this firm, had you already participated in succession process of another company? Was the succession a collective one?

Questions for the spouses

- Were you involved in any way in the family firm?
- Were you consulted before or during the succession process? Were you involved [in the succession process]?
- Did you advise (or influence) members of the family who participated in the succession process? If yes, on what topic did you advise (or influence) them? Were you asked [for your advice] or did you propose it without being asked?
- Did you play any role during the succession process (mediation, support, etc.)?

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