

LEADERSHIP LEGITIMACY AND DAUGHTER-SUCCESSORS OF FAMILY  
BUSINESSES

BY

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### **DAUGHTER SUCCESSORS OF FAMILY BUSINESSES AND LEADERSHIP LEGITIMACY**

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### **Dedication**

To my husband, Paul, whose love, patience, and encouragement have been my constant source of strength. Your belief in me and your partnership has been my greatest gift.

And to my five incredible children – Margaret, Jack, Tom, Anne and Martha —you inspire me with your ambition, resilience, and boundless potential. Thank you for reminding me that pursuing dreams is a legacy worth passing on.

## Acknowledgements

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To the remarkable daughter-successors who participated in this study, I am humbled by your candour and inspired by your dedication. Your passion for your businesses shone through every conversation. Despite the immense challenges and sacrifices—long hours, time away from family, and personal hardships—you pressed on with resilience and love for what you do. Your commitment to your employees, your families, and your fathers' legacies is nothing short of extraordinary. You not only carried the torch of what your fathers built but also infused it with your own vision and determination to create something even greater.

### Abstract

With the increasing acceptance of women in leadership positions, more daughters are being appointed to take over family businesses from their, typically, father-owners upon retirement. However, daughter-successors face significant challenges, particularly in establishing their legitimacy as family business leaders. Leader legitimacy is critical for any organization's success and is especially vital in family businesses, where smooth leadership transitions are necessary for long-term viability.

Despite its importance, why daughter-successors struggle to gain leadership legitimacy and how they can do so is under-researched. This study addressed two research questions: (1) *Why is it difficult for daughter-successors to achieve legitimacy as family business leaders?* and (2) *How can daughter-successors negotiate their legitimacy as family business leaders?* Semi-structured interviews were conducted with fifteen daughter-successors who inherited their family businesses from their fathers. Using a critical realist methodology and integrating social constructionist feminist theory and patriarchy as a theoretical lens, the study explored the social structures and mechanisms impacting daughters' leadership legitimacy.

Findings revealed that societal gender norms and embedded patriarchal structures prevent daughter-successors from being viewed as legitimate leaders. Gender norms construct leadership as masculine, portraying daughters as lacking the traits needed for the role. Patriarchy within the business world compounds this problem, fostering the perception that daughters are “non-natural” leaders.

The daughter-successors used several key strategies to overcome these obstacles and negotiate their legitimacy. First, they focused on gaining status by highlighting their education and experience while proving their competence and dispelling notions of nepotism. Second, they adopted a masculine, take-charge leadership approach by asserting authority and dismissing detractors while simultaneously implementing a feminine, collaborative management style that aligned with their femininity. This dual approach helped them construct a leader identity, enhancing both their self-perception and external recognition as leaders. Finally, they strategically managed the “father paradox” by using endorsement from their fathers, necessary to gain leadership legitimacy, while simultaneously encouraging them to exit the leadership role.

This research highlights the link between gender and leadership legitimacy in family businesses, offering practical strategies for daughter-successors, their families, and women leaders in general to address legitimacy challenges and promote inclusive leadership.

*Keywords:* family business succession, daughter-successors, leadership legitimacy, gender, critical realism

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**List of Abbreviations**

ABFI – Alberta Business Family Institute

CFA – Certified Financial Analyst

CPA – Certified Public Accountant

EQ – Emotional Quotient

FEC – Family Enterprise Canada

GDP – Gross Domestic Product

IQ – Intelligence Quotient

MBA – Master of Business Administration

PEng – Professional Engineer



## Chapter 1 Introduction

Smokestacks coughing out thick black smoke. Machines whirring as assembly lines snake maze-like through a dark and grimy building. Tired workers streaming out of a grey factory at the end of another workday. Overseeing this industry is the boss – typically an older man in a suit and tie, both feared and revered as the organization's patriarchal leader. Most of these Industrial Revolution-era images have disappeared, replaced by a 21st-century white-collar world with shining office towers and women in the corner office, making deals and leading their global organizations. Or have they?

Today's reality is that women in top leadership positions are still relatively rare, and men in corporate, political, and other sectors of society predominantly hold the role of leader (Eagly & Karau, 2002; Nelson et al., 2009). The few women who reach the pinnacle of their organizations either start their own business (Brush, 2009; Jennings & Brush, 2013), climb the corporate ladder or inherit the leadership of their family business (Chadwick & Dawson, 2018). This research focuses on this last group - women who ascend to leadership roles by inheriting their family businesses.

Traditionally, family firm succession has adhered to the norm of primogeniture<sup>1</sup>, favouring the eldest son as the business leader (Dumas, 1998; Wang, 2010). However, there is a noticeable

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<sup>1</sup> The word comes from the Latin roots *primo*, meaning "first," and *geniture*, meaning "birth" (Kokkonen, A., Møller, J., & Sundell, A. (2022). The Origins and Spread of Primogeniture. In *The Politics of Succession* (pp. 60-87). Oxford University PressOxford. <https://doi.org/10.1093/oso/9780192897510.003.0004> )

global shift in this trend. The growing recognition of women leaders (Akhmedova et al., 2020; Constantinidis & Nelson, 2010; Kubu, 2018; Overbeke et al., 2013) and the diminishing influence of primogeniture (Barnes, 1988; Dumas, 1989, 1998; Wang, 2010) are making the succession of daughters to leadership roles more common.

### **Research Gaps**

Most family business research has overlooked the unique experiences of daughters as family business successors, either focusing on sons' succession experiences or adopting a gender-blind approach. When daughters have been considered, early studies often highlighted the advantages daughters experienced when they joined the family business, seemingly in an attempt to confirm the strides women were making in joining the business world (Cole, 1997; Lyman et al., 1985; Martinez Jimenez, 2009; Salganicoff, 1990). For example, early studies found that daughters joining the family business typically experience improved career opportunities, a better income, and more personal satisfaction than those working in non-family firms. (Cromie & O'Sullivan, 1999). They also experience more flexibility in raising a family, improved job security, and the ability to work in masculine industries often otherwise closed to them (Salganicoff, 1990).

More recently, the appointment of daughters to leadership positions has become more common (Barnes, 1988; Dumas, 1989, 1998; Wang, 2010), leading to increased research focusing on their experiences. The studies have revealed that these daughter-successors often encounter significant challenges as family business leaders, and the advantages highlighted by previous research are often overshadowed by the disadvantages (Dumas, 1989; Vera & Dean, 2005; Wang, 2010). For instance, daughters who assume leadership roles often struggle to

establish a distinct leadership identity, leading to self-doubt about their suitability and competence in the leadership role (Dumas, 1990; McAdam et al., 2021). Other studies have highlighted the challenge of balancing motherhood with leadership (Salganicoff, 1990; Vera & Dean, 2005; Wang, 2010).

Despite the research progress involving daughter-successors, understanding the challenge they face in achieving legitimacy as the family business leader is surprisingly absent. This is a significant omission because leadership legitimacy is critical for the health of organizations (Butler & Geis, 1990; Kanter, 1977; Yoder, 1980; Yoder et al., 1998). Indeed, the perceived legitimacy of an organizational leader can profoundly affect the organization's success and its long-term viability (Chalus-Sauvannet et al., 2016; Li et al., 2023; Zelditch, 2001b). Since the aim of family business succession is to ensure the continuance of the business into the next generation (Handler, 1992, 1994; Sharma et al., 2003a; Wang, 2010), the appointment of a successor who fails to establish leadership legitimacy can potentially mean the end of the business.

When leadership legitimacy of daughter-successors is addressed in family business research, it is seldom specifically studied. For example, McAdam et al. (2021) mentioned lack of leadership legitimacy as a potentially negative outcome if daughter-successors fail to construct a leader identity, and Xian et al. (2021) saw it as an outcome for daughter-successors who fail to manage gender role conflicts as family business leaders. Of the few studies that addressed leadership legitimacy, it seems connected to gender, with women more than men finding it difficult to achieve legitimacy as leaders. For example, Vial et al. (2016) studied how women CEOs often experience a self-reinforcing cycle of illegitimacy, and Byrne et al. (2021) focused

on how fathers needed to help their daughter-successors more than sons to construct a leadership identity and be seen as a legitimate leader. This research builds on these studies to understand why it is difficult for daughter-successors to achieve legitimacy as family business leaders and how they can negotiate their leadership legitimacy.

### **Research Rationale**

I inherited a medium-sized business from my father approximately fifteen years ago. He was the company founder, and it was his focus for over 50 years until he died at age 86. I grew up helping my father with the company bookkeeping in the evenings and answering the phones in the office during summer breaks. Conversations around the dinner table almost always centered on the family business and family vacations typically revolved around some element of the business. While my father often told me, “This will be your company someday,” I was determined to pursue my own career path. Consequently, I completed four university degrees in business and law and worked abroad in an exciting, fast-paced career that fulfilled my passion for international law and finance. I climbed the corporate ladder on my own merit and was rewarded with praise and promotions. However, as my father aged, he began to pull me into the company, asking me for help on legal matters or contract bid submissions. Eventually, I gave up my dream job and returned home to help him, gradually becoming more involved in broader company management. Ultimately, I worked alongside my father as vice president of our family business for over 25 years.

After my father died, and according to his wishes, I became the president and CEO of the company. A few days after the funeral, I walked into the office expecting to be perceived and

respected as the organization's leader. To my surprise, the employees were confused that I was now the leader and seemed skeptical that I knew what I was doing. Consequently, they excluded me from critical discussions and were unwilling to recognize my authority. It was clear that the employees pined for my father, who they still viewed as the family business patriarch, solid in his years of experience and wise in his knowledge.

Recognizing that I could never fill my father's shoes, I pulled away from the company's day-to-day management to the safety of my original legal counsel position. While this departure enabled me to escape my conflict about my role in the company, I felt enormous guilt that I had let my father down. After all, he had entrusted me to look after his company and continue his legacy.

To alleviate my concerns about how I fit the leader role, I sought out peers, joining family business groups to engage with other daughter-successors in similar situations. Unfortunately, conversations with other daughter-successors made me even more confused. Some talked about how much they enjoyed their role and success as leaders. One daughter had doubled the size of the business since taking over from her father and gushed that she "loved her job!" Others were proud to be responsible for the family business and enjoyed its flexibility as a career.

On the other hand, a few daughter-successors expressed frustrations like mine and lamented how difficult it was to lead because they were women. Some felt that their employees refused to accept their authority and that competitors were waiting for them to fail. One had recently quit her role as her family business leader, finding the need to constantly prove her leadership competency too overwhelming.

This dichotomy of experience is what led to this research. I wanted to understand why some daughters thrive as the leaders of their businesses, seemingly respected as legitimate organizational leaders, while others, like me, struggled, effectively invisible to my employees, competitors, advisors, and customers. I also wondered whether my father could have done something that would have helped my legitimacy or if I could have done something to gain legitimacy as the company leader. Finally, I wondered what was going on below the surface that made my legitimacy as the leader so difficult and whether I would ever truly fit my father's shoes.

### **The Pilot Study**

To answer these questions, I conducted a pilot study of why daughter-successors experience gender bias in the leadership role (Hamilton et al., 2021). In family business literature, the term "gender bias" is used to describe the belief that daughters are non-natural successors (Constantinidis & Nelson, 2010) and a preference for sons to be family business leaders (Galiano & Vinturella, 1995; Hollander & Bukowitz, 1990). In doing so, I hoped to confirm that I was not alone and that other daughter-successors had similar experiences. The pilot study took place in November 2019 using semi-structured interviews with three daughter-successors (Abigail, Chelsea, and Georgia). All three inherited the leadership of their family business from their fathers.<sup>2</sup> The interview questions explored how the daughters became family business leaders,

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<sup>2</sup> I used the same interviews for this research project, therefore there is overlap in the narratives. Please see Chapter 5 for a summary of the succession stories of the three daughter-successors.

their relationship with their fathers, employees, and other company stakeholders, and the challenges they experienced in the leader role.

The daughters described events of gender bias, confirming it was a common occurrence for daughter-successors. However, they also described events suggesting that employees, customers, and competitors did not perceive them as legitimate leaders of their organizations. For example, Georgia explained that she was always sure to include her multiple university degrees on her business card so that customers knew she was qualified for the leadership position. Abigail and Chelsea said it was a constant battle to fend off doubts about their leadership competence. The doubts existed despite the daughters having more than adequate (and often exceptional) credentials for the role. The most extreme example of perceptions of a lack of legitimacy was Chelsea, whose competitors advertised in an industry trade magazine shortly after she took over leadership. The advertisement featured the image of a little girl wearing a too-big suit and too-big glasses, drowning under stacks of papers. The caption read: “Would you trust your business to a little girl?” I will delve into these events and their application to this project in later chapters.

After considering the daughters’ stories and my own experience, it was clear that gender bias was too broad and inadequate to explain what the daughters and I experienced. Instead, we were experiencing a perception that we were not the legitimate leaders of our family businesses. I, therefore, concluded that this project needed to focus on legitimacy and understanding *why* achieving leader legitimacy is difficult for daughter-successors and *how* they can negotiate their legitimacy as family business leaders.

## The Research

In this research study, I asked two questions: (1) *Why is it difficult for daughter-successors to achieve legitimacy as family business leaders?* and (2) *How can daughter-successors negotiate their legitimacy as family business leaders?* To answer the questions, I used critical realism as the study's ontology and methodology. Critical realism is a middle ground between positivist and interpretivist research methods, making it ideal for answering social science questions seeking an understanding of causation (Blundel, 2007; Fletcher, 2017; Sayer, 1992). The ontological stance of critical realism is that social reality is stratified into three layers or domains – the empirical, the actual and the real (Bhaskar, 1978; Sayer, 1992). Events are only observable to individuals at the empirical level; some events are unobservable and occur within the actual level of reality; and social structures and mechanisms that cause events lie below the surface within the real level of reality. Critical realist research aims to delve into the layers of reality to identify the mechanisms and social structures that cause the events that individuals experience.

Methodologically, critical realism necessitates using theory to interpret the events reported by study participants, thereby uncovering the social structures and mechanisms responsible for their occurrences. As I noted earlier in this chapter, studies confirm gender's influence on legitimacy perceptions (Hytti et al., 2017; McAdam et al., 2021; Vial et al., 2016; Xian et al., 2021). Therefore, I concluded that a feminist lens was essential to identify the social structures and mechanisms that made it difficult for daughter-successors to achieve legitimacy as family business leaders.



Social constructionist feminist theory acknowledges that gender is shaped and reinforced by societal norms and interactions. This perspective was crucial for revealing how societal gender expectations or gender norms influence perceptions of daughter-successors' leadership capabilities. Applying social constructionist feminist theory to the data highlighted the tension that daughter-successors must navigate between the masculinity of leadership and gender norms that frame daughter-successors as inherently lacking leadership qualities because of gender.

I also used patriarchy as a theoretical framework to provide an additional lens through which to analyze the daughter-successors' experiences. In her seminal work "Theorizing Patriarchy," Sylvia Walby (1990) argues that patriarchy is useful as a stand-alone theory to explain the dominance of men in all aspects of society. Thus, recognizing patriarchy as a theoretical framework allowed for a critical examination of how entrenched gender norms stemming from patriarchal power prescribed men as organizational leaders (Acker, 1992; Eagly & Karau, 2002; Hollander & Yoder, 1980) and dictated the masculinity of the business world (Kanter, 1977; Morgan, 2006). With these elements, patriarchy was a potential social structure that could hinder the pathway to leadership legitimacy for daughter-successors.

The participants for the study were recruited through advertisements for participants on the Alberta Business Family Institute (ABFI) and the Family Enterprise Canada (FEC) websites and through my business connection. As I mentioned earlier, three of the fifteen participants were originally recruited for the pilot study. The two criteria necessary for participation were that the participants were women who inherited their family business from their father and were leaders of their businesses (i.e. CEO). The purpose of the first requirement was threefold. Most family businesses are founded and led by men (Handler, 1994; Harveston et al., 1997), with

approximately two-thirds of family businesses men-owned (Cadieux et al., 2002), I wanted to narrow the focus to father-to-daughter inheritance, eliminating family businesses led by a group, and finally, I wanted to eliminate mother-to-daughter transitions which may have affected findings. The interviews were semi-structured and broadly addressed six themes: (a) participant backgrounds such as age, education and work experience; (b) family business information, including size and industry; (c) the participant's father, including his leadership style; (d) the family structure and attitudes toward women's roles in both domestic and business spheres, (e) succession procedures and any associated preparations, and (f) the daughter's leadership role, including her strategies for negotiating her leadership legitimacy. The participants were encouraged to expand on specific topics or respond to additional queries so that I could delve into events that may reveal underlying structures and mechanisms influencing their leadership legitimacy. After completing the interviews, I coded and analyzed the transcripts to identify themes or demi-regularities<sup>3</sup> that required further analysis to answer the research questions using a critical realist methodology.

## **Thesis Overview**

Chapter 2 presents my literature review of daughter succession and leadership legitimacy. I begin by defining several key concepts I use in this thesis, including family business, family business succession, and leadership legitimacy. Next, I review the literature relevant to this project, including studies that have explored how daughter-successors construct a leader or manage gender role conflict and how failure to do so may affect perceptions of their leadership

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<sup>3</sup> I will explain demi-regularities in detail in Chapter 3.

legitimacy. I then focus on the research that has explored leadership and gender. I close the chapter with a discussion of the gaps in the literature and how this research project will fill them.

In Chapter 3, I explain critical realism, the ontological and methodological framework of the research. In the first part of the chapter, I detail how critical realists view social reality in three layers – the empirical, the actual, and the real- and the notion that social structures and mechanisms cause events. This layered perception of social reality enables a researcher to look below the surface to the deepest levels of reality to identify the mechanisms that cause events experienced by individuals and the social structures that enable them to occur. I then explain the theoretical constructs of social constructionist feminism and patriarchy and why they are appropriate *a priori* theories to identify the social structures and mechanisms that influence the leadership legitimacy of daughter-successors.

Chapter 4 outlines the method I used to collect and analyze the data. I begin the chapter by discussing objectivity and reflexivity as they apply to this research project. I then outline my research method, participant recruitment and criteria, followed by the interview method and guide. Next, I explain how I coded that data and analyzed the narratives to identify demi-regularities or trends in the data consistent with a critical realist methodology. I conclude the chapter by explaining how I used a critical realist research method to reveal the social structures and mechanisms that affected the leadership legitimacy of daughter-successors.

Chapter 5 summarizes the succession stories of the participants. Each participant's story provides a unique perspective and firsthand account of their experience as a daughter-successor, revealing family dynamics, gender roles, and societal expectations that shaped their experience.

My presentation of the stories is not an analysis. Instead, its purpose is to help the reader identify each participant and their experiential background when I refer to a particular statement or narrative in the data analysis. I conclude the chapter with a summary of the key points in the succession stories and a table to help the reader when I refer to the participants' narratives in the following chapters.

In Chapter 6, I present my data analysis to answer the first research question: *Why is it difficult for daughter-successors to achieve legitimacy as family business leaders?* Guided by a critical realist methodology, I applied social constructionist feminist and patriarchal theories to the events described by the participants to discover the mechanisms and social structures that caused them. This involved examining an event at each level of social reality and asking whether either or both theories explain why it occurred.

Chapter 7 outlines my data analysis and findings to answer the second research question: *How can daughter-successors negotiate their legitimacy as family business leaders?* Here, I explain the strategies the daughter-successors used to negotiate their legitimacy and challenge the masculine gender norms that made achieving leadership legitimacy difficult.

Chapter 8 focuses on what I refer to as the father paradox. It is an extension of Chapters 6 and 7 but presented separately as it addresses fathers' critical role in their daughter-successors' quest for leadership legitimacy. In it, I explain how fathers can both negatively and positively influence perceptions of the leadership legitimacy of their daughter-successors, with the endorsement of the daughters by the fathers emerging as a critical and essential strategy to help them negotiate their leadership legitimacy.

The project concludes with Chapter 9, beginning with a summary of the project and my findings. I then discuss the significance and contributions of the research, highlighting its practical application for families who may be considering appointing a daughter-successor to the family business leader roles and daughter-successors who are about to be or are already leaders of their family businesses. I then outline the limitations of the project and propose several directions for future research, suggesting areas where additional studies could provide further insights, extend the findings, and address the gaps left by the current project. I conclude the chapter with a personal reflection on my research journey, evaluating whether and how the project has fulfilled its initial research rationale.

## **Chapter 2 Literature Review**

I begin this literature review by defining several concepts integral to this research: family business, family business succession, and leadership legitimacy. I then review the literature relevant to this research project's two research questions, beginning with the research that has explored how leaders achieve legitimacy. I then focus on the few studies that mentioned daughter-successors and leadership legitimacy. Due to the limited research on daughter-successors and leadership legitimacy, I also present the literature outside of the area of family business to understand how women are perceived as fitting within the leadership role. I close with a discussion of the gaps in the literature and how this research project will fill them.

### **The Family Business**

While some authors describe the family business as "a quaint relic" or "an ideological icon that combines motherhood and apple pie with entrepreneurial drive" (Aronoff & Ward, 1995, p. 121), practically, it is something entirely different. Family businesses are the world's oldest and most widespread organizations and are represented in virtually all business sectors (Huff, 2014), making them the dominant form of organization globally (Bain, 2015; De Massis et al., 2018; Koh, 2017; Stern, 2015). They are also critical to the global economy, generating between 70 and 90 percent of the annual global gross domestic product (GDP) and creating up to 80 percent of jobs in most countries worldwide (De Massis et al., 2018). In Canada, they generate 45% of the GNP, employ 50% of the labour force, and are responsible for 70% and 85% of the new jobs created yearly (Cadieux et al., 2002). As for size, family businesses range in size from the "mom

and pop” corner store (Ghee et al., 2015) to global organizations as large as Volkswagen, Walmart, Cargill, and Merck (Bain, 2015; Stern, 2015).

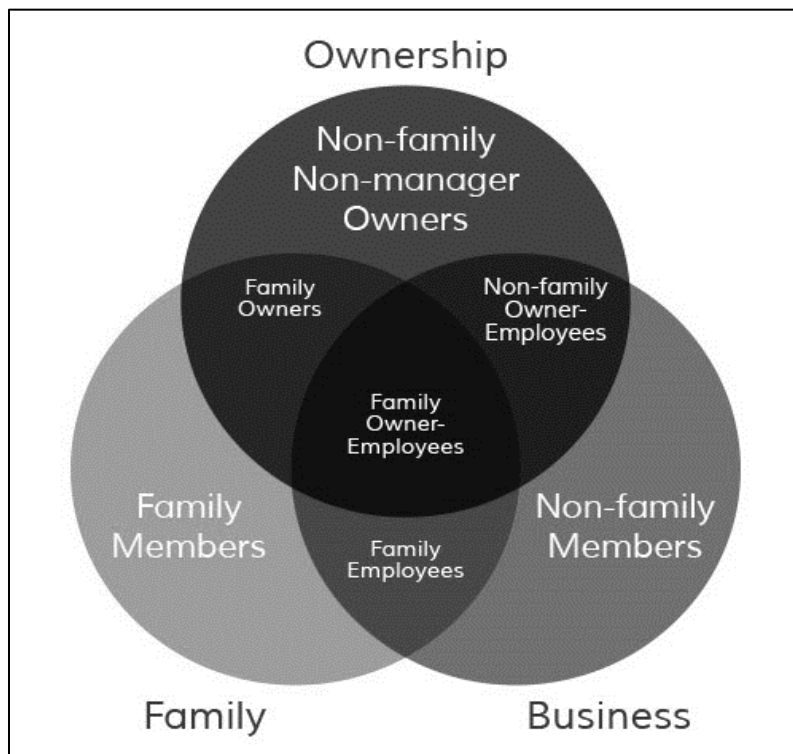
Despite their prevalence, the definition of a family business varies among scholars. Some researchers focus on the level of family control, such as majority ownership by a single family (Villalonga & Amit, 2020), while others emphasize behaviour and the family's role in shaping the vision and control mechanisms of the firm with the intention of intergenerational continuity (Habbershon et al., 2006; Ward, 2011). For instance, Ward (2011) defines a family business as "one that will be passed on for the family's next generation to manage and control" (p. 252). Other scholars argue that both structure and behaviour are crucial in defining a family business (Litz, 1995; Zellweger et al., 2010). Litz (1995) proposes two complementary approaches: a structure-based approach that considers ownership and management and an intention-based approach that focuses on family-related values and preferences (Barrett & Moores, 2013). Some authors argue that components such as ownership, governance, management, and transgenerational succession alone are insufficient to define a family business; one must also consider the behaviours that give rise to the distinct family business entity (Barrett & Moores, 2013).

Tagiuri and Davis (1996) developed their influential three-circle model to describe the family business system. Their model defines a family business as "an organization where two or more extended family members influence the direction of the business through kinship ties, management roles, or ownership rights" (p. 199). The model illustrates the interdependence and overlap of three key groups within the family business system: family, business, and ownership. These groups consist of seven distinct interest groups, each with its own perspectives, goals, and

dynamics. The long-term success of a family business system relies on each group's functioning and mutual support. Due to the overlapping memberships, family members involved in the family firm often have three simultaneous roles: family members, owners, and managers. Family members are primarily concerned with the welfare and unity of the family; owners focus on return on investment and the firm's viability, while managers strive for operational effectiveness (Tagiuri & Davis, 1996). Figure 1 illustrates the three-circle model of the family business system.

**Figure 1**

*The three-circle model of the family business system*



Although the three-circle model is commonly used in family business research, it omits the critical aspect of intergenerational transfer, a feature essential for accurately defining family



businesses. Consequently, I prefer a combination of structural and behavioural definitions that encompass the concept of intergenerational transfer. Thus, I define a family business as a business in which the family holds the majority of the business's shares, the family guides its vision and strategic direction, and there is an intention that the business will survive intergenerationally. This broader definition captures the importance of both ownership and familial commitment to the business's longevity across generations.

### **Family Business Succession**

At some point in the life of a family business, the person who will take over the family firm's ownership and leadership must be considered (Barnes & Hershon, 1989). While some family firms are sold or dissolved, others are passed to a family member to continue the founder's vision and legacy (Sharma et al., 2003a; Wang, 2010). While family business succession is the method by which the family business can survive intergenerationally, most leadership transitions are often unsuccessful (Poza, 2021). Indeed, less than one-third of family businesses survive beyond the second generation, and only 10 to 15 percent make it to the third (Barach et al., 1988; Le Breton-Miller et al., 2004; Miller et al., 2003). Their limited survivability reflects that family business succession is a complex and critical moment in the life of a family firm (Sharma et al., 2003a, 2003b). It is complex because it is often not a singular event but a gradual, dynamic, and often lengthy social process (De Massis et al., 2008; Le Breton-Miller et al., 2004; Sharma et al., 2003a, 2003b), sometimes taking decades (Handler, 1994). It is critical because it can profoundly affect the continuity of the business and the maintenance of family wealth (Barnes & Hershon, 1989; Kubicek & Stamfestova, 2016).

Some authors have attempted to define family business succession. Sharma et al. (2001) saw family business succession as “the actions and events that lead to the transition of leadership from one family member to another in family firms. The two family members may be part of the nuclear or extended family and may not belong to the same generation” (p. 239). Cadieux et al. (2002) observed that family business succession is a dynamic process during which the roles and duties of the predecessor and the successor evolve interdependently and overlap, with the goal being to transfer the management and ownership of the business to the next generation. Hytti et al. (2017) viewed succession as “a process of becoming” (p. 681), which involves a complex identity negotiation process where the successor constructs the identity of the firm leader. Finally, Handler (1990) described the succession process as a mutual role adjustment for both the incumbent and the successor. She explained that one could conceptualize each phase of the succession process as role behaviour associated with the founder and the successor and the transition from one phase to another as a transition from one role to another. Whether identity formation, role adjustment, or both are involved, the definitions arrive at a similar conclusion - family business succession consists of the transfer of the leadership of the business from one generation of the family to the next. I will, therefore, use this understanding of family business succession for this research project.

### **Leader Legitimacy**

Leadership legitimacy is critical for businesses (Butler & Geis, 1990; Johnson & Ford, 1996; Kanter, 1977; Yoder, 1980, 2001; Yoder et al., 1998) as the perceived legitimacy of an organizational leader can profoundly affect the organization’s success (Chalus-Sauvannet et al., 2016; Johnson & Ford, 1996; Vial et al., 2016). Since family business succession depends on a

successful intergenerational transfer, the appointment of a leader who is perceived to lack legitimacy has severe adverse implications for the long-term viability of the family business, with businesses led by individuals who fail to establish their legitimacy less likely to survive.

In family business research, leader legitimacy is used but rarely defined (Hytti et al., 2017; Ochiai, 2016; Xian et al., 2021) even though it has been a topic of inquiry throughout the history of social thought (Zelditch, 2001a). The Greeks were considering the conditions necessary for legitimate power as early as the fifth century BC (Thucydides). The nature, conditions, and consequences of its legitimacy were the questions that Plato sought to answer in *The Republic* and Aristotle in *Politics* (Zeldich, 2001). More recently, Max Weber (1972) is often cited as the basis for understanding leadership legitimacy in the twentieth-century (Beetham, 1991; Matheson, 1987). He focused on defining legitimate authority - the respectability of those who issue commands (Weber, 1972). Of note, one element of legitimate authority is charismatic authority, which stems from others' belief in the exceptional qualities of an outstanding individual (Beetham, 1991; Matheson, 1987; Weber, 1972). French and Raven (1959) also found that perceptions about a leader's characteristics influence perceptions about their leadership legitimacy.

In exploring social hierarchies, Magee and Galinsky (2008) developed a model to explain how legitimacy is connected to power and status. Borrowing from the work of French and Raven (1959), they defined power as the ability of individuals to influence others and the capacity to administer rewards and punishments, which emerges from control over valuable resources. These resources can take tangible forms, such as monetary wealth, or intangible

structures, such as unique information or the authority to make decisions that affect others (French & Raven, 1959).

In contrast, status is the level of respect or admiration that one garners in the eyes of others and exists only to the extent that it is voluntarily conferred upon individuals by their peers, superiors, and subordinates (Magee & Galinsky, 2008). Status elements include perceptions that a leader has expertise, superior ability, special talents, and overall competence. Managing others' respect and admiration of them is crucial in acquiring or maintaining status for leaders (Anderson et al., 2001; Blader & Chen, 2014; Fragale et al., 2011). Magee and Galinsky (2008) refer to these perceptions as "status characteristics," which can arise from various sources, including direct or observed interpersonal interactions (Berger & Zelditch, 1985; Ridgeway, 1989; Ridgeway et al., 1998), societal norms (Cuddy et al., 2007) or an individual's reputation (Anderson & Shirako, 2008; Gould, 2002). Notably, these status characteristics often exist even before any direct interaction occurs between individuals and, therefore, not only shape initial perceptions and evaluations of individuals' status. This conceptualization of legitimacy as being preconceived is critical to this research project. As I will explain in later chapters, daughter-successors must gain status in the eyes of others through their actions despite preconceptions about their fit with leadership to achieve leadership legitimacy.

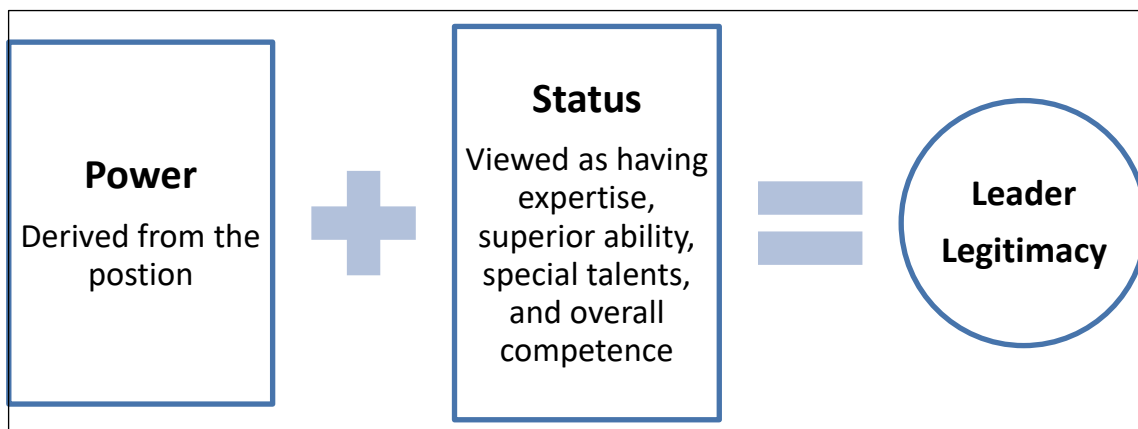
Drawing on Magee & Galinsky's (2008) concepts of power, status, and legitimacy, Vial et al. (2016) developed a model to understand why women leaders often experience a self-reinforcing cycle of illegitimacy. They observed that power grants leaders the authority to manage, reward, or discipline their subordinates. It also includes making decisions on hiring, promoting, demoting, and terminating employees, delegating tasks, and determining the autonomy of team

members. Asking what determines the legitimacy of power-holders, Vial et al. (2016) confirmed the research of Magee and Galinsky (2008) and concluded that it is status. Like Magee and Galinsky (2008), they also defined status as the degree to which a leader is respected and admired by others (Blader & Chen, 2014; Magee & Frasier, 2014; Magee & Galinsky, 2008) and confirmed that it resides in the eyes of subordinates, who either bestow it or withhold it. Leaders who elicit more respect and admiration are more likely to be viewed as deserving of the position. In other words, the degree to which a leader is viewed as legitimate will depend on how much they are respected and admired.

Combining Magee and Galinsky's (2008) and Vial et al.'s (2016) conceptualizations of leadership legitimacy, I will refer to legitimacy as having both power and status. Power is gained when a daughter-successor is appointed to the leader role. Status is achieved when she is viewed as having the skills, expertise, and competence for the leadership role. Figure 2 illustrates the relationship between power, status, and legitimacy.

**Figure 2**

*The elements of legitimacy*



**Leader Legitimacy and Family Business Successors**

Several studies have echoed this conceptualization of power, status, and legitimacy to understand how family business successors gain legitimacy. Barach et al. (1988) found that employees approve of successors who possess the ability and willingness to bring value to the business. Therefore, when successors effectively contribute to positive outcomes for the family business through competence, the successor earns respect and admiration, helping them gain status and be perceived as legitimate leaders. Similarly, Chalus-Sauvannet et al. (2016) discovered that prior management experience enables successors to achieve positive results quickly, bolstering their status and legitimacy as family business leaders. Finally, Plante and Grise (2005) observed that a family business successor is more likely to attain legitimacy when they align with the corporate culture, possess the required skills to deliver expected results and inspire employee confidence while contributing to the firm. In other words, these actions help them to be respected and admired, thus gaining status and hence legitimacy as leaders.

Some research has found that socialization and preparation help successors be viewed as having the skills, expertise and competency for leadership legitimacy, which contributes to perceptions of status and leadership legitimacy. For example, Longenecker and Schoen (1978) conducted a study highlighting the significance of socialization processes within the family for successor legitimacy. They proposed that socialization involves a series of interconnected events that expose the successor to various preparatory positions or roles within the family business. They found that as family business successors move through multiple roles in their companies, they are socialized for leadership and develop and master essential knowledge and skills, ultimately enhancing their status within their organizations.

Finally, in his study on how successors obtain legitimacy in centuries-old Japanese family businesses, Ochiai (2016) distinguished between ascribed and achieved status, arguing that most successors join the family business with an innate status by birthright, referred to as "ascribed status." However, ascribed status alone is insufficient to gain legitimacy. Instead, a successor must demonstrate "achieved status," which can only be accomplished by showcasing competence in the business, typically through assuming increasing responsibilities in the firm.

### **Daughter Successors and Leader Legitimacy**

As I noted in the introduction to this project, early research on daughters in family business focused on identifying the advantages of them joining the family firm. However, as more daughters became family business leaders, scholars began to recognize the importance of understanding their experiences. Their studies revealed that leadership is often difficult for daughter-successors because of their failure to construct a leader identity, role conflict, or a combination of both. When these occur, daughter-successors may be viewed as lacking legitimacy as family business leaders. I will explain this research next.

### ***Identity Construction and Gender***

In their study on family businesses in China, Xian et al. (2021) examined how daughter-successors who take over their family firms often struggle to construct a leader identity. They found that daughter-successors could construct the identity of a leader by simultaneously negotiating their leadership identity with their identity as a daughter. This required daughter-successors to navigate gendered expectations associated with two identity norms - those shaped by traditional societal and family values and the social values associated with business

leadership. However, navigating these values was difficult because business leadership is linked to masculinity, while a daughter's identity is linked to femininity. Consequently, daughter-successors needed to construct a leader identity to bridge their traditional gender role and their role as family business leaders to be viewed as legitimate leaders.

Byrne et al. (2021) also explored leader identity construction. Studying family businesses in France, they discovered that son and daughter successors enacted various masculine and feminine identities at certain times to gain legitimacy as family business leaders. They referred to this strategy as "gender gymnastics." While both son and daughter successors enacted certain masculinities (entrepreneurial, authoritarian, and paternalistic), the daughter successors often enacted masculinities plus what they labelled as individualized and maternal femininities to construct a legitimate leader identity as needed. Byrne et al. (2021) also found that successors often mirrored the masculine identities of their fathers. For example, daughter-successors enacted entrepreneurial masculinity if their incumbent father was viewed as highly entrepreneurial to emphasize their likeness to him and their suitability to succeed him.

In contrast, Hytti et al. (2017) found that daughter-successors tried constructing a leader identity through "identity switching." Applying a "doing gender" approach conceptualized by West and Zimmerman (1987), they found that gender is an ongoing construction emerging from interactions among various actors within the family business, including daughters, fathers, mothers, brothers, and external stakeholders. Furthermore, since gender identity is not inherent to individuals but emerges from the interplay between daughter-successors and the gendered expectations embedded within family business practices, daughter-successors need to engage in the process of constructing and negotiating their gender and leadership identities. They managed



these expectations by adopting, challenging, or expanding the gendered roles prescribed by their business environment. This involved strategic identity switching, where they oscillated between revealing a feminine leadership identity and adopting a more masculinized façade to assert their authority and legitimacy as leaders. Such maneuvering allowed them to navigate the complex landscape of gendered assumptions and expectations, aligning themselves with the prevailing gender norms or actively contesting them to be viewed as a legitimate leader.

On the other hand, Hytti et al. (2017) also found that daughter-successors could only construct the identity of family business leaders by doing so in their own eyes, then in the eyes of their family, and finally, in the eyes of their employees and other stakeholders (Hytti et al., 2017). This finding is important as it highlights that daughter-successors must take responsibility for identity work and that it is not automatic. Recall that succession is a process where, over time, daughter-successors begin to see themselves as leaders (Cadieux et al., 2002; Handler, 1990; Longenecker & Schoen, 1978; Stavrou, 1998) and succession is “a process of becoming” (Hytti et al., 2017, p. 681). However, there is an external element at play here. As Nelson et al. (2009) observe, identity construction requires the management of shadow negotiations where “the unspoken attitudes, hidden assumptions, stereotypes, power relations, and expectations play out” (p. 63), suggesting that gender norms are a critical element of the identity construction process.

Finally, Cha et al. (2023) found that self-doubt among women leaders often leads to lower performance, which in turn causes questions about their leadership suitability. This cycle of doubt and self-questioning prevents daughter-successors from developing a solid leadership

identity and achieving legitimacy. In Chapter 6, I will explain the importance of self-doubt and self-questioning and its relevance to daughter-successors in this study.

Several studies have focused on the role of fathers in influencing their successors' identity construction. Fathers initiate their daughter-successors' leader identity construction when they influence their selection, development, and eventual transition as leaders (Cater et al., 2016; Cater & Young, 2019; Daspit et al., 2016; Miller et al., 2003). This identity construction process is aided by a positive relationship between the incumbent and his successor, typically characterized by trust, mutual understanding, and effective communication (Handler, 1994; McAdam et al., 2021; Venter & Boshoff, 2006). Conversely, challenges such as mistrust, a lack of shared vision, and excessive involvement of the incumbent after succession—the so-called "generational shadow"<sup>44</sup> (Davis & Harveston, 1999) can significantly impede the process (McAdam et al., 2021).

Dumas (1989) also explored how fathers influence their daughter's leadership identity. She found that fathers and their daughters-successors typically engage in one of four relationships, with all but three preventing daughter-successors from constructing a leader identity. In the first relationship, which Dumas (1989) referred to as "daddy's little girl," fathers prevent their daughters from constructing a leadership identity because they do not view them as having the characteristics needed for the leadership role. Instead of seeing their daughters as leaders, they consider them "little girls." Coupled with this perception, fathers often have conflicting emotions

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<sup>44</sup>Davis and Harveston (1999) defined "generational shadow" as the prior generation's excessive and inappropriate involvement in the organization causing disruptions within the company (p. 311).

over placing their daughters in a leadership role because they see them as defenceless dependents who require protection from business stresses (Hollander & Bukowitz, 1990). Dumas (1989) explained the problem as follows:

The roles assigned to the daughters by their fathers and by the daughters themselves [included] the role of daddy's little girl, which stressed her fragile and defenceless position within the family and the necessity of "pleasing Daddy" [...] While these daughters were capable of and did assume other roles in the business, their primary role with their fathers, which was learned at an early age, was that of a defenceless dependent. (p. 37)

Dumas (1989) concluded that unless a daughter-successor undergoes a conversion whereby the father incumbent begins to see his vulnerable daughter as a capable manager, she will never be able to form a leader identity.

The second relationship Dumas (1990) found was what she called "caretaker of the father" (p. 174). In this father-daughter relationship, fathers view their daughters as their caretakers, and the daughter-successors exist in their father's shadow, patiently listening to them, complimenting them, bolstering their morale, and supporting them. This dynamic causes daughter-successors to be afraid to speak up or trust themselves to act in their best interests or those of the firm. In other words, because of their weak leadership identity, daughters in this father-daughter relationship only see their role as caring for their father rather than being leaders of the family business.

The third relationship Dumas (1990) discovered was that of "taker of the gold" (p. 176). Here, the daughter-successor struggles with the leader's identity and only acts in her best

interests. These daughter-successors ignore the resources available, such as mentoring by their father or using their father's experience or networks to help them themselves as leaders. This behaviour can potentially negatively affect the business's economic viability (Dumas, 1990).

Finally, some daughter-successors have a relationship with their father, which Dumas (1990) called "caretaker of the king's gold" (p. 176). In this relationship, daughter-successors construct the identity of family business leaders by taking care of their father while also managing the business. Taking care of the father meant being a source of support for him and meeting his needs as a father and employer while at the same time finding a balance between dependent and independent behaviour. Daughters who formed this identity could take charge of the business by exercising power conferred on them by their fathers, who appointed them as his successor. Dumas considered this relationship healthy because it enabled the daughter-successors to form the identity of the family business leader.

McAdam et al. (2021) came close to directly addressing leadership legitimacy in their study of the relationship between fathers and their daughter-successors. They found that daughters need help from their fathers to construct a legitimate leadership identity, which involves three critical actions. First, fathers needed to endorse their daughters as successors either explicitly or implicitly. For example, while explicit endorsement might involve a company-wide announcement, implicit endorsement takes the form of the father allocating his office to his daughter and communicating that she is now the company leader. Second, fathers needed to relinquish control over the business, removing the adverse effect of their generational shadow (Davis & Harveston, 1999). Finally, there needed to be a strong relationship between the fathers and the daughters. This last factor was critical as it allowed daughters to use their father's status

as a visible leader to create “osmotic credibility” (Marlow & McAdam, 2015, p. 804). In other words, daughter-successors in family businesses derive legitimacy and authority indirectly through their association with their fathers, who are viewed as well-established, respected leaders. Thus, these daughters absorb the credibility and legitimacy naturally attributed to their fathers due to their visible leadership roles. This borrowed credibility and legitimacy helps the daughters construct a leader identity and gain acceptance within the company.

McAdam et al. (2021) also found that while adequate preparation and socialization for leadership is essential for all family business successors, the preparation process is particularly critical for daughter-successors. They discovered that daughter-successors who lacked adequate preparation or socialization struggled with their fathers in co-constructing a legitimate successor identity. For example, study participants who lacked knowledge or experience in the business triggered their personal insecurities and negative appraisals from non-family staff and customers, resulting in their failure to establish a legitimate successor identity.

### ***Role Conflict***

Other research involving daughter-successors has focused on role conflict. For example, Byrne et al. (2019) found that women leaders of family businesses are often penalized due to their perceived lack of fit with the ideal masculine leader role. The result is resistance by stakeholders to a daughter’s leadership (Park & Westphal, 2013). Xian et al. (2021) also discovered that when daughters tried to conform to the leader role expectations by enacting masculine behaviour (i.e., competitive, individualistic, and aggressive), they experienced role conflict. This role conflict, in turn, damaged the daughter’s legitimacy as the leader because the

masculine characteristics associated with the role of the leader were incompatible with the feminine expectations related to daughters. As one daughter explained:

I work like a man. I have to prove to the senior managers that I am their leader [...].

When negotiating a business deal, I don't want people to see me as a woman. If they see me as a woman, they might think, 'I cannot put too much pressure on her. She may cry.'

(p. 170)

Xian et al. (2021) concluded that daughter successors needed to manage the conflict between the feminine familial (i.e., daughter) role and the masculine business role (i.e., leader). This required them to resist traditional gendered expectations their family and society prescribed and act independently. Daughter-successors also needed to find their own strategies to overcome personal insecurities and negative appraisals from organizational members. Only by using these strategies could daughter-successors gain legitimacy as family business leaders.

Other studies looked at another kind of role conflict - balancing the role of mother with that of leader (Salganicoff, 1990; Vera & Dean, 2005). While involvement in the family business enables daughter-successors the flexibility to raise a family, they often receive conflicting messages such as “dedicate yourself fully to the business but give the family children” and “be independent and autonomous but take care of the family and behave like a mother” (Salganicoff, 1990, p. 133). Cole (1997) confirmed this double messaging, noting that parents sometimes push their daughters into producing grandchildren yet complain if their daughter-successor neglects the business while focusing on childcare.

### **Gender and Leadership**

Several studies outside the area of family business provide insights that help an understanding of the relationship between gender and leader legitimacy. Morgan (2006) emphasized that organizations are a system of roles, and individuals carry out each role and act consistent with the duties, expectations, norms, and behaviours associated with the role. Roles evolve due to patterned and characteristic social behaviours, and identities are assumed by social participants and understood by all (Biddle, 1979). Roles within organizations are typically based on gender and, as Kanter (1977) observed, “carry characteristic images of the kinds of people that should occupy them” (p. 250). In other words, there is an expectation about who will carry out a particular role in a company based on the gender of that person.

One gendered role is leadership, with the role of a leader typically associated with men (Eagly & Koenig, 2008; Koenig et al., 2011). Acker (1990) referred to the “masculine ethic” of rationality and reason, often identified with the image of the organizational leader. Calás and Smircich (2006) observed that images of the ideal organization leader tend to be those of “forceful masculinity” (p. 26). Therefore, leaders within organizations are often depicted as embodying masculine traits, including aggressiveness, goal-oriented, and competitiveness (Acker, 1992). As Morgan (2006) explained, the role of organizational leader “typically builds upon characteristics associated with Western male values and, historically, has been dominated by males” (p. 218). Other writers agree that leadership has historically been masculine (Hollander, 1985; Yoder, 1980) and even today, there is still a consensual belief that women and men tend to hold distinctively specific occupational and family roles, with men filling the role of leader (Diekmann & Schneider, 2010; Yoder, 1980).

Other studies confirm a connection between leadership and masculinity. Schein (2001) argued that masculine corporate cultures prioritize masculine attributes such as competitiveness, assertiveness, and individualism. Therefore, corporate cultures often marginalize women's leadership styles (i.e.) collaborative, nurturing, and empathetic. The result is a challenging environment for women leaders who do not fit the expectations associated with the image of the masculine leader. Heilman (2001) observed that women leaders must navigate conflicting expectations where they are viewed as competent but lacking likability or likeable but lacking competence. This double bind arises from the incongruity between masculine leadership expectations and societal gender norms, contributing to doubts about women's legitimacy in leadership roles.

Eagly et al. (1992) analyzed 61 studies to understand whether women are evaluated less favourably than men when performing leadership and managerial behaviours. They found that women are less accepted than men as leaders, and the differential was exceptionally high in traditionally masculine fields (Eagly et al., 1992). To understand these results, they applied gender role theory (Eagly & Wood, 2012), which suggests that individuals develop expectations for their own and other's behaviour based on their beliefs about the behaviour appropriate for their gender. In an organizational setting, individuals also set expectations about the behaviour appropriate for a leader.

The research of Vial et al. (2016) is valuable in understanding the relationship between gender and legitimacy and leadership. They discovered that women leaders often experience a self-reinforcing cycle of illegitimacy when women occupy positions of power within an organization. They found that women leaders frequently have difficulty eliciting respect and



admiration from subordinates, leading to low legitimacy perceptions. This rejection by subordinates triggers a negative response by woman leaders toward their subordinates (i.e., backlash), which confirms negative expectations about them. The result is a self-reinforcing cycle of illegitimacy.

To explain this self-reinforcing cycle of illegitimacy, they developed a model to explain why women are often less accepted as leaders than men, building on previous studies by scholars such as Brescoll (2011), Eagly et al. (1992), and Heilman & Okimoto (2007). Their analysis, which included a meta-analysis of 61 studies, revealed that women leaders generally receive lower levels of liking and acceptance than their men counterparts, with this disparity being especially pronounced in traditionally masculine fields like finance and technology (Eagly et al., 1992).

Vial et al. (2016) provide two main explanations for the resistance to women leaders and subsequent perceptions of their lack of legitimacy. First, there is a perceived lack of fit (Heilman, 2001; Ridgeway, 2001) or incongruity (Eagly & Karau, 2002) between the qualities and behaviours associated with successful leadership. They argue that masculine characteristics that include assertiveness, control, and confidence are generally expected in leaders. In contrast, women's characteristics, such as being affectionate, helpful, and concerned with the welfare of other people, are not viewed as aligning with the traits of successful leaders, making it harder for women to be seen as competent leaders (Koenig et al., 2011). This mismatch leads to expectations that women will be less effective leaders than equally qualified men, forcing women to work harder or achieve significantly more to be perceived as equally competent (Lyness & Heilman, 2006). Ultimately, these perceived feminine characteristics lead to the assumption that women are less suited for leadership compared to men, contributing to the

perception that women leaders are less competent and, therefore, less deserving of respect and admiration. Even when formal power and perceptions of power remain constant, the lower status assigned to female leaders results in a corresponding decrease in their perceived legitimacy compared to men leaders.

Vial et al. (2016) also argue that another significant factor contributing to the resistance against women leaders stems from the research on prescriptive and proscriptive gender norms (Rudman, 1998; Rudman & Glick, 2001). Individuals who deviate from established gender norms—whether men or women—are penalized for their nonconformity. For women in leadership roles, this typically results in penalties for not conforming to the expectation that women should be communal, leading to what is known as a communality deficit (Heilman & Okimoto, 2007). Additionally, they face consequences for violating norms discouraging women from being dominant, resulting in a dominance penalty. Vial et al. (2016) reference a meta-analysis of 63 studies covering 39 years, which confirmed that women are more likely than men to be penalized for openly displaying dominance. From this research, they concluded that the same level of formal authority may be perceived as excessive when enacted by a woman rather than a man, with powerful women often viewed as threatening. Since power is not typically associated with women (Eagly & Koenig, 2008; Koenig et al., 2011), a woman in a position of authority may be seen as violating societal expectations. Consequently, the level of respect and admiration that legitimizes a man's authority may fall short of establishing the legitimacy of a woman leader.

Gutek and Morasch (1982) confirm that these gender-based expectations about behaviour often spill over into the workplace. However, this gender-role spillover has different

consequences for women than men because expectations about the behaviours appropriate for leaders more closely match expectations about men than women (Heilman & Eagly, 2008). Eagly and Karau (2002) referred to this mismatch between behaviour and the expectations associated with a role as role incongruity (Eagly & Karau, 2002). The result is that women leaders are perceived less favourably than men as leaders. As Eagly and Karau (2002) observed,

A potential for prejudice exists when social perceivers hold a stereotype about a social group that is incongruent with the attributes that are thought to be required for success in certain social roles. When a stereotyped group member and an incongruent social role become joined in the perceiver's mind, this inconsistency lowers the evaluation of the group member as an actual or potential occupant of the role. In general, prejudice toward female leaders follows from the incongruity that many people perceive between the characteristics of women and the requirements of leadership roles. (p. 574)

In other words, for women, a mismatch occurs due to the incongruity many perceive between the characteristics of women and the characteristics required for leadership roles.

While there is an expectation that men rather than women will be organizational leaders, some research suggests that there is also a societal *preference* for men as leaders (Brown et al., 2011; Eagly & Karau, 2002; Kubu, 2018), which has implications for perceptions about the legitimacy of women leaders. For example, Eagly and Johannesen-Schmidt (2001) found that the preference for men as leaders stems from constructions of gender and perceptions about the characteristics of men and women. They argued that men are generally associated with agentic

characteristics (i.e., assertive, controlling, and confident). In contrast, people generally associate women with communal traits (i.e., concern for others' welfare, empathy, interpersonal sensitivity, and nurturing). Agentic characteristics are considered more desirable for leadership because individuals who display them can influence others, initiate actions to complete tasks and focus on problem-solving and innovation - all actions aligned with perceptions of effective leadership (Eagly & Johannesen-Schmidt, 2001).

It should be noted, however, that this research contrasts with the work of Bass (1985), who found that transformational leadership, typically associated with women, is more effective than transactional leadership, typically associated with men. Transactional leadership emphasizes emotional connection, individualized consideration, and the ability to foster a sense of shared purpose, which builds trust, enhances team performance, and fosters innovation, making it particularly well-suited to navigating the complexities of modern organizational environments. I will return to this point in discussing strategies to achieve leadership legitimacy in Chapter 7.

Several other authors have found that the incongruity between the traits and behaviours associated with leadership and the traits associated with women creates an expectation that women will be less competent leaders than men with identical credentials (Eagly & Karau, 2002). For example, Lyness and Heilman (2006) examined gender and performance evaluations of 448 upper-level managers. They found that because of a greater perceived lack of fit between stereotypical attributes of women and requirements of managerial positions, women in upper-management positions received lower performance ratings (i.e., lower perceptions of competence) than women in lower-level positions or men in upper-management or lower-level positions.

The masculinity of corporate culture may contribute to the perception that women leaders lack legitimacy. This culture is rooted in historical gender norms and biases that shape leadership expectations and evaluation criteria, often disadvantaging women (Eagly & Johannesen-Schmidt, 2001). As I noted above, Eagly and Karau (2002) demonstrated how masculine cultural norms within organizations lead to a perception that women are incongruent with leadership roles, thus casting doubt on their suitability and legitimacy as leaders. This incongruity arises from aligning leadership traits with stereotypical masculine characteristics, reinforcing the idea that women's leadership styles are less credible.

Similarly, in her important work, *Men and Women of the Corporation*, Kanter (1977) critically examined the prevailing masculinity within the corporate world. She discovered that traditional masculine norms and values shape organizational structures, leadership dynamics, and employee behaviours. Thus, masculine characteristics such as competition, hierarchy, and assertiveness, typically associated with the masculine corporate culture, create barriers to women's advancement.

In summary, the research reveals how the incongruity between gender norms that prescribe leadership traits and societal perceptions of femininity significantly undermines women's leadership legitimacy. The studies illustrate how entrenched gender norms perpetuate the perception that women are less or even unsuited for leadership roles compared to men and reinforce a corporate culture that values masculine traits, potentially positioning women as lacking legitimacy as organizational leaders.

## Research Gaps

As I explained above, most family business research has focused on sons' experience as family business successors or has taken a genderless approach, failing to consider the succession experience of daughters. Most early studies specifically considering daughters focused on identifying the advantages of daughters joining their family firms (Cole, 1997; Martinez Jimenez, 2009; Salganicoff, 1990). Later studies, on the other hand, began to recognize the disadvantages, particularly when daughters take over the leader role (Glover, 2014; Vera & Dean, 2005; Wang, 2010).

Of the disadvantages, the research has mostly aimed at understanding identity construction and role conflict with the challenge of establishing legitimacy as the family business leader either omitted or mentioned in passing. This lack of attention to daughter-successors and leadership legitimacy is a significant gap due to the importance of leadership legitimacy for organizations (Chalus-Sauvannet et al., 2016; Kanter, 1977; Vial et al., 2016; Zelditch, 2001) and the trend of daughter-successors taking over the helm of their family businesses (Cornet & Constantidinis, 2008; Overbeke et al., 2013; Vera & Dean, 2005; Wang, 2010). Indeed, there is a pressing need for dedicated research that *directly* addresses daughter-successors and leadership legitimacy – both in terms of why they struggle to achieve leadership legitimacy and how they can negotiate their leadership legitimacy.

To fill this gap, this research will specifically focus on daughter-successors and leadership legitimacy by asking two critical research questions: (1) *Why is it difficult for daughter-successors to achieve legitimacy as family business leaders?* and (2) *How can daughter-*

*successors negotiate their legitimacy as family business leaders?* To answer these questions, I will begin by identifying the cause of the challenge and the social structures that hinder daughter-successors from achieving leadership legitimacy. As I mentioned above, gender seems to be a factor (Byrne et al., 2019; Byrne et al., 2021; McAdam et al., 2021; Xian et al., 2021) and notably, research outside the area of family business provides clues about the influence of gender on leadership (Eagly & Johannesen-Schmidt, 2001; Eagly et al., 1992; Kanter, 1977). Therefore, the research must explore how gender affects daughter-successors' leadership journeys. In understanding the influence of gender, it may be possible to identify strategies for daughter-successors to navigate and negotiate their leadership legitimacy. Such research will not only contribute to the academic literature on family business and gender but also offer practical implications for daughter-successors striving to establish themselves as legitimate leaders in their family businesses.

## **Chapter Conclusion**

In this chapter I reviewed the literature relevant to daughter-successors leading their family businesses and leadership legitimacy. I began by using the literature to define family business, family business succession, and leader legitimacy. This led to a discussion of the research exploring daughter-successors and their struggle to construct a leader identity and manage gender roles, which affected perceptions of leadership legitimacy. Research outside the area of family business research, which aimed to understand role incongruity and the preference for men as leaders, offered some understanding of why achieving leadership legitimacy is difficult. I concluded the chapter by outlining a significant gap in research that directly addresses the leadership legitimacy of daughter-successors and the strategies they can use to negotiate their

legitimacy as family business leaders. In the next chapter, I will explain how I will use a critical realist methodology to answer the research questions and address this gap, revealing the social structures and mechanisms that influence a daughter-successor's legitimacy as a family business leader.



### **Chapter 3 Methodology**

This chapter outlines the methodology of this research project, critical realism. I begin with an explanation of critical realism, followed by an outline of key critical realist concepts, including events, social structures, mechanisms, stratified reality, abstraction and retrodution. I also explain why critical realism is ideal for this study and how it enabled me to identify the social structures and mechanisms that affect the leadership legitimacy of daughter-successors. I also discuss the theoretical framework I used to identify the social structures and mechanisms, enabling me to answer the project's research questions.

#### **Ontological and Methodological Framework**

Roy Bhaskar (1978) developed critical realism as an ontology and methodology to address the limitations he saw in existing philosophical approaches to social science. He introduced critical realism to provide a framework for understanding the relationship between the natural and social worlds, positing that reality has both observable phenomena and underlying mechanisms and social structures that are not always visible. Andrew Sayer (1992) expanded on Bhaskar's ideas by emphasizing the importance of acknowledging the role of social structure and human agency in research, which helps understand how societal structures influence individual actions and experiences. This interpretation aids researchers in understanding not just what happens but why it happens, linking causal mechanisms to observable events.

One significant advantage of critical realism for social science research is its methodology, which enables the identification and understanding of the social structures and mechanisms that underlie social events (Ackroyd & Fleetwood, 2000). As Sayer (1992)

observed, “the world exists independently of our knowledge of it and objects, whether natural or social – necessarily have particular causal powers or ways of acting” (p. 5). By revealing these structures and mechanisms, critical realism provides insights into why social events occur, going beyond the experience-level interpretations offered by other approaches. Thus, critical realism provides a framework for investigating and comprehending the complexities of social phenomena in social science research.

Besides its unique approach to understanding social reality, critical realism has its own terms related to the research process. In the next section, I will explain events, social structures and mechanisms, all essential elements of critical realist research. I then explain stratified reality and the critical realist research process referred to as retrodution, which draws in theory, to analyze data at each level of stratified reality.

### ***Events***

Events are what is investigated by researchers using critical realism. They are the observable behaviours of people, systems, and things as they occur or have occurred (Easton, 2010). While events are observable, human experience filters them, providing an interpretation that may not always reflect what is actually occurring or occurred (Fletcher, 2017). Therefore, to understand an event, a researcher must look below the surface to deeper levels of social reality to ask why it occurred and identify the social structures and mechanisms that caused it.

*Social Structures*

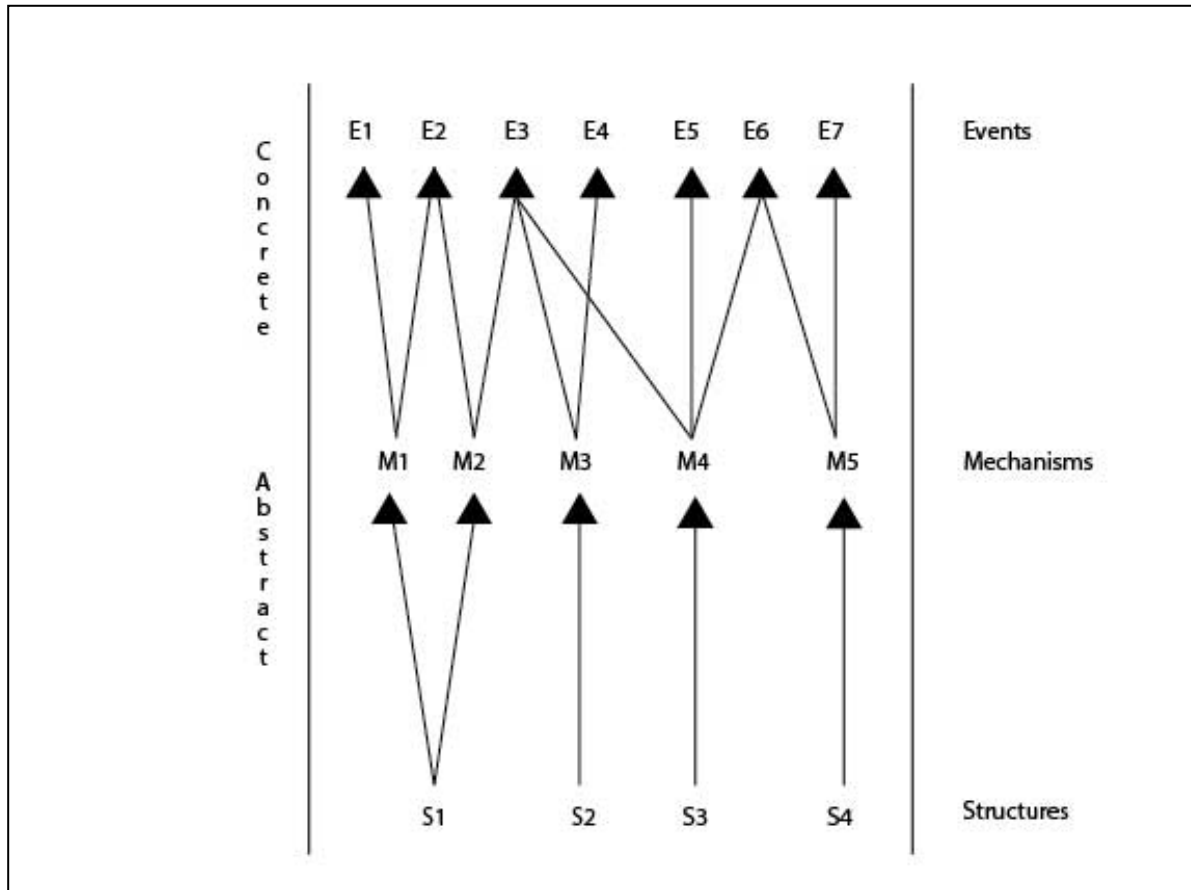
Social structures govern how individuals relate (Sayer, 1992). They are “internally related objects or practices” (Sayer, 1992, p. 92) and exist because of interactions between individuals. All individuals exist within social structures. For example, a family is a social structure because of the interrelationship of family members. Similarly, employees work within organizations where they follow certain routines and adhere to certain hierarchies (New, 2005), comply with established relationships and roles and participate in an internal culture that governs their behaviour (Willmont, 1997). Consequently, every action of an individual is constrained and shaped by social structures.

While social structures are both pre-existing and permanent, in some situations, agency enables individuals to change some of them (Sayer, 2012). As Sayer (1992) observed, “Social structures do not endure automatically. They only do so where people reproduce them; but, in turn, people do not reproduce them automatically and rarely intentionally” (p. 96). Bhaskar (1978) referred to the transformation of social structures as the Transformational Model of Social Activity (TMSA). Under the model, individuals are distinct from social structures, and, in some cases, individuals can recognize and transform some social structures. When this transformation occurs, new structures form, which human actions then reproduce (Anderson, 2019). In Chapter 7, I will explain how I found that daughter-successors may have altered the social structure of their family businesses by enacting a new management style.

### *Mechanisms*

Mechanisms are what cause an event to occur. Mechanisms exist within social structures, and they can either enable or prevent individuals within those structures from acting in specific ways. Sayer (1992) observed that to ask what caused something to happen is to ask what “produces, generates, creates or determines it, or, more weakly, what enables or leads to it” (p. 104). Examples of mechanisms include norms and roles (Danermark et al., 2019), personality and attitude (Sayer, 1992), and culture (Manicas, 2006).

Identification of a particular mechanism is not always straightforward. Social reality is an open system; therefore, conditions in the open social world can prevent or enable mechanisms from being observable (Archer et al., 2004b; Fletcher, 2017; Sayer, 1992; Wynn & Williams, 2012). For example, time may separate a causal mechanism from an event’s occurrence, making it difficult to establish a causal link between them (Anderson, 2019; Tsoukas, 1993). Additionally, depending on the circumstances, the same mechanism may produce different events; conversely, the same event may have other causes (Sayer, 1992). Mechanisms may also act transfactually (Ackroyd & Fleetwood, 2000; Gambetta, 2010; Wynn & Williams, 2012) so that other mechanisms hide their effect or interact with other mechanisms to alter them (Easton, 2010). Furthermore, the relationship between cause and effect is not predictable and automatic (Sayer, 1992). In sum, mechanisms exist whether or not they are exercised and whether or not they are observed. Furthermore, for mechanisms to operate, they must be externally triggered, and appropriate external conditions must exist. Figure 3 illustrates the relationship between events, structures, and mechanisms.

**Figure 3***Events, structures and mechanisms*

*Note:* This illustration depicts relationships between structures, mechanisms, and events. S1 to S4 are a variety of structures that may enable a variety of mechanisms (M1 to M5), which in turn produce events (E1 to E7). When activated, mechanisms produce effects which may be unique. According to conditions, the exact mechanism may sometimes produce different events; conversely, the same type of event may have other causes. Adapted from Sayer, A. (1992), *Method in Social Science*, 2nd edition, p. 117. Copyright 1992 Routledge.

*Stratified Reality*

Fundamental to critical realism is the notion of stratified reality. Critical realists see the social world as differentiated and stratified. As Bhaskar (1978) explains:

Events must occur independently of the experiences in which they are apprehended. Structures and mechanisms are real and distinct from the patterns of events they generate, just as events are real and distinct from the experiences in which they are apprehended. Mechanisms, events, and experiences thus constitute three overlapping domains of reality, viz., the domains of the real, the actual, and the empirical. (p. 56)

Thus, critical realists see reality as existing within three domains (Archer et al., 2004b; Bhaskar, 1978; Harré, 1972). The empirical domain is the world of human experiences, observations, and perceptions. It is what we can directly see, hear, or observe (Hu, 2018). In research, the empirical level is the data collected through observations, surveys, interviews, and other methods of inquiry and is the most accessible level of reality to us. Within this domain, events, observations, perceptions, and sensations of reality are observable to individuals and the researcher who investigates it. However, human experience and interpretation filter events perceived by actors at this level of reality. Therefore, what is perceived or not perceived does not always reveal what is actually occurring (Fletcher, 2017).

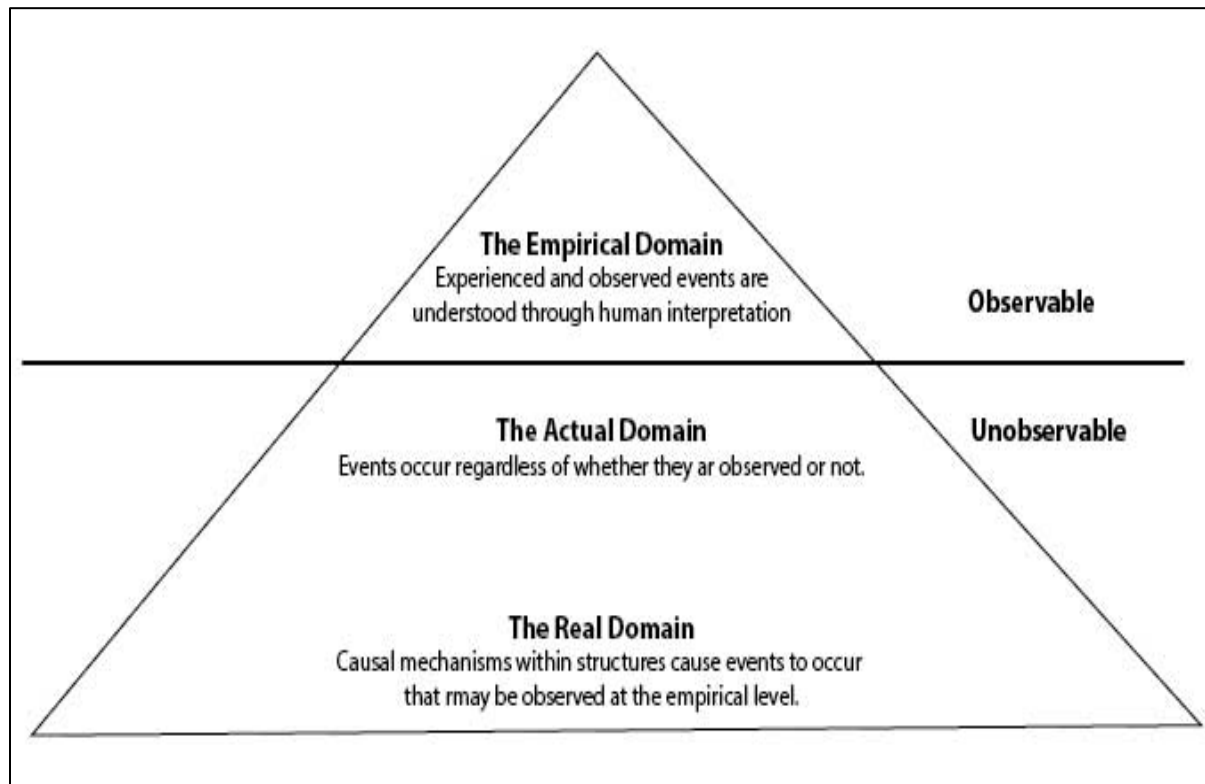
The second or middle domain is the domain of the actual. Here, events occur whether or not they are experienced or interpreted by humans. Human perception does not filter events at this level of reality (Bhaskar, 1978; Fletcher, 2017). Consequently, they may differ significantly from

those observed within the empirical domain (Ackroyd & Fleetwood, 2000; Danermark et al., 2019; Fletcher, 2017). Some events at the actual level may never be experienced by anyone or directly observed, but they still occur and can have effects. On the other hand, events within this domain are only transferred into the empirical domain when they are identified by individuals and transformed into experience (Bhaskar, 1978). Furthermore, since what individuals experience within the empirical domain is ontologically separate and different from the actual domain in which events occur, several individuals may have competing ideas about why a particular event occurred. Nevertheless, the event remains the same (Blundel, 2007).

Finally, the real level is the deepest level of reality, consisting of the underlying mechanisms, social structures, powers, and tendencies that cause the events and experiences observed at the empirical and actual levels (Bhaskar, 1978; Sayer, 1992). Like the other domains, the real domain is ontologically separate; therefore, structures and mechanisms are not observable to individuals (Bhaskar, 1978). In other words, mechanisms and social structures are not directly observable but are inferred from the patterns and regularities (or lack thereof) evident in the empirical data. Figure 4 illustrates critical realism's stratified reality.

**Figure 4**

*Critical realism's stratified reality*



*Note:* Three strata of social reality exist: the real, actual, and empirical domains. Social structures at the deepest level of reality - the real domain contains generative mechanisms, which may then create events in the actual domain. If events are perceived, they move from the actual domain to the empirical domain, where individuals observe and interpret them. The horizontal line delineates between social reality that is either perceived or hidden. Adapted from Fletcher, A. J. (2017). *Applying critical realism in qualitative research: Methodology meets method*. *International Journal of Social Research Methodology*, 20(2), p. 6.



***Abstraction***

Abstraction is the process of narrowing down the focus of the data analysis. Areas of research interest are “abstracted” from a larger context and are used to focus on the most relevant issues and events associated with a particular phenomenon. As Fletcher (2017) explains,

Abstraction is an important tool not only for limiting the study's parameters but also for giving us insight into the structures to which these abstractions are linked. This initial step will facilitate the determination of generative mechanisms, which exist within these deep structures at a later point in the research process. (p. 99)

In other words, abstraction involves choosing certain phenomena relevant to the research to focus on (Fletcher, 2017).

***Retroduction***

Finally, to fully understand social phenomena, critical realist researchers must describe what is observed or what happens and uncover the underlying causes or mechanisms that explain why an event occurred. This involves using the critical realist method of research called retroduction (Sayer, 1992). Retroduction is the process of applying theory to the events described by research participants at the three levels of reality. Lawson (1997) explained retroduction as follows:

Whereas induction and deduction are concerned with movements at the level of events from the particular to the general and vice versa, retroduction involves moving from a conception of some phenomenon of interest to a conception of a

different kind of thing (power, mechanism) that could have generated the given phenomenon. (p.236)

Retroduction is the research process of moving backwards to ask what must be true to make an event possible. It begins at the empirical or experience level of reality, where empirical data and people's perceptions of events provide initial insight into critical patterns and trends in the data (Fletcher, 2013).

Next, the analysis moves to the actual level. At this level, human experience or interpretation does not filter events. Thus, a researcher must consider what might occur that the participants do not observe and how events differ from people's interpretations (Fletcher, 2013). Understanding the difference requires a researcher to think beyond the empirical level of reality and consider several explanations for the occurrence of an event to arrive at the best one. Fletcher (2013) notes that theory and prior literature are helpful but should not limit or determine the analytical process. Therefore, critical realists must think both with and against existing theories (Fletcher, 2013).

Finally, critical realist researchers move to the real level of social reality and apply theory to events to explain why they occurred. By doing so, it may be possible to identify the social structures and mechanisms that caused the event. However, critical realism does not simply apply a theory to confirm or deny a hypothesis. Instead, it begins with a theory on trial until proven (Fletcher, 2017). Thus, a particular theory is only a starting point enabling a researcher to test why events occur and guide them in understanding how certain mechanisms and social structures may trigger events (Fletcher, 2017). If the theory does not reveal structures and

mechanisms, a researcher must apply other theories until the structures and mechanisms are identified (Fletcher, 2017).

### **Why Critical Realism?**

Critical realism's advantage is the ability to answer "why" questions and go beyond simply confirming the existence of a particular phenomenon to looking below the surface to understand the social structures and mechanisms that may have caused it (Fletcher, 2017). Therefore, using critical realism, I could analyze the events described by the daughter-successors to go below the surface of reality to identify why it is difficult for daughter-successors to achieve legitimacy as family business leaders. This involved identifying mechanisms and social structures that may prevent daughter-successors from achieving legitimacy. Furthermore, by understanding the underlying mechanisms and social structures that caused an event, I could identify the negotiation strategies that might help daughter-successors achieve leadership legitimacy and answer the second research question - *How can daughter-successors negotiate their legitimacy as family business leaders?* and understand whether a particular strategy may or may not be successful.

### **Theoretical Framework**

Critical realism recommends that researchers begin with an *a priori* or starting point theory to discover the mechanisms and social structures that cause events (Fletcher, 2017). The theory is used in the retrodution process by asking whether it adequately explains why an event occurred. If, after applying a particular theory to the empirical data, it fails to explain the event, it may

need to be modified or even rejected for a theory or theories that better explain the event (Fletcher, 2017).

In the literature review, I mentioned that the research on daughter-successors who become family business leaders has found that their experience is influenced by gender (Byrne et al., 2021; Vial et al., 2016; Xian et al., 2021). Therefore, I concluded that this research project needed a feminist theoretical framework to answer the research questions. While feminist theory is rare in combination with a critical realist methodology<sup>5</sup>, combining feminist theory with a critical realist methodology will enable the identification of the gendered social structures and causative mechanisms that influence a daughter-successor's leadership legitimacy.

Most research on daughter-successors and leadership has used a liberal feminist perspective (Barrett & Moores, 2013). Liberal feminism emphasizes the importance of equal opportunities and rights. It is grounded in the philosophical belief that women are as good as men (Calás & Smircich, 2006) and that women and men are essentially similar (Ahl, 2006). Consequently, women and men should be treated equally because their shared humanity supersedes any reproductive differentiation (Ahl, 2006; Lorber, 2010). Furthermore, to achieve equality between men and women, one or both genders must change their behaviour (Barrett & Moores, 2009). Indeed, one of the primary contributions of liberal feminism is to create an awareness of the degree to which modern society discriminates against women (Lorber, 2010). For example, liberal feminism often informs research exploring discriminatory practices that have denied

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<sup>5</sup> Exceptions include, for example, Fletcher (2013, 2017), Gillman (2016), New (1998), and Norrie (2004; 2010).

women access to higher positions in organizational hierarchies (i.e., the "glass ceiling") (Federal Glass Ceiling, 1995). Thus, the liberal feminist perspective's underlying premise is that women are as capable as men and that if they encounter limits in their pursuits, those limits must be identified and overcome.

However, liberal feminism does not question organizational structure, such as men in leadership, but instead advises women to adapt to society's existing order (Calas et al., 1999). For example, liberal feminism underlies popular literature that urges women to "*Lean In*" (Sandberg & Scovell, 2013) or "*Act Like a Leader, Think Like a Leader*" (Ibarra, 2015) to be successful in the business world. In doing so, liberal feminism fails to address social structures, avoiding the question of *why* daughter-successors may struggle to achieve leadership legitimacy and argues that women must somehow adapt their behaviour to fit within a patriarchal world.

### **Social Constructionist Feminist Theory**

In contrast, social constructionist feminist theory can answer the "why" question of this research project. It posits that gender is not a natural or biological trait but a construct that emerges through social processes and interactions. It emphasizes that our understanding of gender is shaped by cultural, historical, and social contexts rather than being an innate quality. Consequently, social constructionist feminist theory argues that gender is socially constructed. Therefore, in contrast to liberal feminist theory, it is not behaviour that must change but societal perceptions of gender.

Indeed, the central premise of social constructionist feminism is that gender is not essentialist (i.e., based on biology) but is socially constructed (Calas et al., 1999). In other words,

masculinity or femininity is independent of a person's biological or chromosomal sex, and gender is something that is "done" rather than something that "is" (West & Zimmerman, 1987).

As Ahl (2006) explained:

One is not free to perform gender in any way one chooses. Each culture's norms restrain proper gender behaviour, and these norms have social effects. Social constructionist feminist work investigates and challenges such norms or notions about gender, which are taken for granted. (p. 2)

Social constructionist feminists also argue that all knowledge is historically and culturally specific. Therefore, all meanings are negotiated socially from this perspective, and individuals simultaneously enact multiple gender identities (Mavin & Grandy, 2012; Nentwich & Kelan, 2014). For instance, West and Zimmerman's seminal 1987 article, "Doing Gender," challenges the traditional view of gender as a static attribute. They argue that gender is an active, ongoing accomplishment that individuals perform in their daily interactions. They write, "Gender is a 'routine accomplishment [. . .] constituted through everyday interactions'" (p. 129) and accepted norms of masculinity and femininity evaluate the actions of individuals. In other words, gender is a "routine accomplishment [. . .] constituted through everyday interactions" (West & Zimmerman, 1987, p. 129), and accepted norms of masculinity and femininity evaluate the actions of individuals (West & Zimmerman, 1987). In other words, gender distinctions are not inherently tied to biology but are produced and perpetuated through social activities.

Social construction feminist theory also recognizes that gender is situated conduct. Gender performance is context-dependent, influenced by the social expectations present in different settings. As West and Zimmerman (1987) observe, "The 'doing' of gender is undertaken by

women and men whose competence as members of society is hostage to its production” (p. 126). This statement highlights the role of social context in shaping how gender is enacted and perceived, aligning with the social constructionist view that reality, including gender, is constructed through social processes.

Accountability is another crucial concept in social constructionist feminist theory. West and Zimmerman (1987) explain, “To ‘do’ gender is not always to live up to normative conceptions of femininity or masculinity; it is to engage in the behaviour at the risk of gender assessment” (p. 136). This idea suggests that individuals are constantly being evaluated based on their conformity to gender norms, and this evaluative process reinforces the social construction of gender. People’s actions are scrutinized for their adherence to expected gender behaviours, thus perpetuating the established norms and expectations of gendered conduct. Thus, societal understandings of what constitutes "masculine" or "feminine" are not natural or inherent but are constructed through social interactions and institutional practices such that gender is continuously constructed and reconstructed through everyday actions and interactions.

Furthermore, gender performances are not just individual acts but are embedded in a larger social and cultural context that dictates what behaviours are deemed appropriate for each gender. Indeed, gender constructs our behaviour, identities, work, and family lives (West & Zimmerman, 1987). As Lorber (2018) explains, “Throughout our lives, we dance a gendered dance, and through the dance, we are gendered” (p. 4). In other words, through social processes, society’s institutions become gendered.

***Why Social Constructionist Feminism as an A Priori Theory?***

There are several reasons why social constructionist feminism is an appropriate *a priori* to answer the research questions. First, social constructionist feminist theory recognizes that gender is a socially constructed structure. This idea is compatible with critical realist notions of how individuals build and maintain social structures. In other words, social constructionist feminism speaks directly to critical realist notions of gender constructions within social reality.

Second, social constructionist feminist theory may provide insight into why daughter-successors are often not perceived as having the characteristics for leadership. In the literature review, I mentioned that several studies have found that daughter-successors are viewed as not fitting the leader role because they lack the typically masculine characteristics associated with leadership (Byrne et al., 2019; Byrne et al., 2021; Eagly & Karau, 2002; Eagly & Koenig, 2008). For example, Byrne et al. (2019) examined how gender norms and masculine-typed leadership schemas shape normative expectations about women's ability to be family business leaders. They found that women who become leaders are often penalized due to their perceived lack of fit with the ideal (masculine) leader. The result is uncertainty and, in some cases, resistance to a woman's leadership by external and internal stakeholders (Park & Westphal, 2013). However, when successor leaders engage in gender gymnastics (Byrne et al., 2021) to enact varying masculinities (entrepreneurial, authoritarian, and paternalistic) and femininities (relational, individualized, and maternal) throughout the succession process, these expectations may be altered (Byrne et al., 2020). Similarly, Xian et al. (2021) found that by taking steps to manage the role conflict between the feminine familial (i.e., daughter) role and the masculine business role (i.e., leader), daughters-successors could gain legitimacy as the family business leader. In sum,



social constructionist feminist theory may reveal how socially constructed notions of gender influence a daughter-successor's legitimacy as the family business leader.

Third, social constructionist feminist theory allows a deeper look into examining gender as a socially constructed phenomenon continuously negotiated and performed through social interactions. This perspective is beneficial for understanding the legitimacy struggles of daughter-successors because it highlights how gender norms are not just external expectations imposed on individuals but are actively constructed and reinforced within the family business context. It acknowledges the fluidity and performative nature of gender, allowing for a more dynamic exploration of how daughter-successors navigate and challenge the patriarchal and gendered expectations that question their suitability for leadership roles.

Finally, social constructionist feminist theory critically examines how societal constructions of gender affect perceptions of leadership. By recognizing that leadership is a gendered construct, this theory helps reveal the mechanisms that cause daughter-successors to be viewed as lacking leadership legitimacy. It also provides a framework for understanding how patriarchal structures and gender norms within both the family and the broader business community contribute to the perception that women are less fit for leadership roles, not because of a lack of competence or merit but because of ingrained biases about what a leader looks like and embodies.

## **Patriarchy**

The word "patriarchy" is derived from ancient Greek and means "rule of the father" (Walby, 1990). It was adopted by feminist<sup>6</sup> writers during the 1970s and 1980s to describe the domination of men over women in the familial, organizational, and social spheres. For instance, Walby (1990) defined patriarchy as "a system of social structures and practices in which men dominate, oppress, and exploit women" (p. 214), and Johnson (1996) perceived it as a societal system that involves the domination of men and women's subordination.

Lerner (1986) argued that patriarchy is the most pervasive ideology in society. It is so embedded in society that it is invisible and natural. She stated, "You might even say that patriarchy's particular power is its capacity to make itself as invisible as possible; it tries very hard not to draw attention to the means of its endurance" (para. 9). In her interview with Higgins (2018), Lerner explained:

For much of human history, the persistence of male domination was so much part of the oxygen of life that patriarchy was not even identified as a concept...it is upheld by powerful cultural norms and supported by tradition, education, and religion. It reproduces itself endlessly through these norms and structures, which are themselves patriarchal. (Para. 12)

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<sup>6</sup> Primarily Marxist and radical feminists. See discussion to follow.

Indeed, patriarchy is evident in various cultures and societies' social, legal, political, religious, and economic organizations (Meagher, 2011).

Other scholars understand patriarchy as a societal structure where the experiences, interests, values, and viewpoints of men shape the organization of social life (Wood, 2008). Wood (2008) explained that feminist scholars have observed that many societies, including Western cultures, were initially structured by men who used their experiences as the foundation for organizing social institutions. This historical system led to a social order that did not fully account for or represent women's experiences, needs, and perspectives. This is not to suggest that men intentionally designed society to oppress women (Wood, 2008). Instead, it highlights that during the creation of these cultures, men held leadership roles and positions of power, excluding women's experiences from consideration. For example, women's roles in child raising, household maintenance, and the preparation of meals were not mirrored in the masculine social structure (Galvin, 2006). Conversely, society tended to reflect masculine activities, such as working outside the home, participating in competitive pursuits, and viewing the home as a sanctuary maintained for their comfort and sustenance (Galvin, 2006; Wood, 2008). This discrepancy underlines how patriarchal systems inherently prioritize men's experiences and overlook the realities of women's lives.

### ***Patriarchy and Marxist Feminist Theory***

While patriarchy's roots can be traced back to prehistory (Walby, 1990), the concept of patriarchy is often entwined with Marxist feminist theory. In *The Origin of the Family, Private Property, and the State*, published in 1884, Marx's collaborator, Frederick Engels, argued that

capitalism replaced communal, matrilineal societies with capitalist societies based on individual wealth and private property (Engels & Karl Marx, 2010). Furthermore, the Industrial Revolution resulted in a division of labour within the family where men worked in factories and women remained home, primarily responsible for the home and child-raising. Because men received wages for their labour, they dominated the family unit. In contrast, women's labour was unpaid (largely unrecognized), giving them a subordinate role (Walby, 1990). In other words, capitalism led to the evolution of the patriarchal family, whereby the man took command in the home, and women were reduced to servitude. Engels describes this as the world-historic defeat of the female sex (Engels, 2010). From a position of leadership and respect, women became powerless domestic slaves (Walby, 1990). In observing Marx's connection between the family and patriarchy, the feminist writer Shulamith Firestone (1971) states:

Marx was on to something more profound than he knew when he observed that the family contained within itself in embryo all the antagonisms that later developed on a wide scale within the society and the state. For unless revolution uproots the basic social organization, the biological family – the vinculum through which the psychology of power can always be smuggled – the tapeworm of exploitation will never be annihilated. (p. 95-96)

Thus, from the writings of Marx and Engels, Marxist feminism evolved to explain how capitalism and patriarchy intersect to oppress women. Marxist feminists argued that the capitalist system exploits women's labour both in the workplace and in the home. They emphasized the role of economic structures in shaping gender relations and focused on the class struggle as a crucial factor in women's oppression. Key points of Marxist feminism include economic

exploitation, where women are doubly exploited under capitalism, both as workers and as unpaid domestic labourers; class and gender, where the oppression of women is intrinsically linked to class oppression; therefore, the liberation of women requires the overthrow of capitalist structures; and reproductive labour where unpaid reproductive labour (childcare, housework) supports the capitalist economy.

### ***Patriarchy and Radical Feminist Theory***

On the other hand, radical feminists saw significant limitations in the Marxist feminist link between patriarchy and economic systems (Walby, 1990). In response, they argued that the root cause of women's oppression lies in patriarchal social structures and cultural norms, which are more fundamental than economic systems alone. Thus, radical feminists focus on patriarchy as the primary system of oppression, arguing that men's dominance and control over women's bodies and lives are the most fundamental forms of social inequality. As Beauvoir (2010) observed, because of patriarchy, women are viewed as the "other" to the masculine norm, causing them to be systematically marginalized and oppressed. Within this inequality are issues such as sexual violence, reproductive rights, and the control of women's sexuality are central concerns. Consequently, radical feminists call for a transformation of society to dismantle patriarchal norms and create a more egalitarian social order. This includes challenging deeply ingrained cultural practices and beliefs about gender (Calás & Smircich, 2006).

### ***Patriarchy as a Stand-Alone Theory***

Echoing concerns of radical feminists, Walby (1990) contends that patriarchy is broader than Marxist feminist theory, which ties it to economic and class conditions. Instead, it is a social

system in which men hold primary power and predominate in political leadership, moral authority, social privilege, and property control. It is characterized by the systemic and institutionalized dominance of men over women and children in both public and private spheres.

It is also broader than a radical feminist perspective as it does not center on sexual violence, reproductive rights, and the control of women's sexuality, nor does it have a specific agenda calling for changes to social order. Instead, patriarchy exists well as a stand-alone theory as it examines how societal institutions, such as the family, education systems, and the workplace, reinforce men's dominance. These social structures perpetuate gender inequalities by privileging men's experiences and perspectives.

Thus, within the business context, men's experiences created business environments that reflected the masculine social order, with leadership roles and corporate cultures embodying the values deemed important to men (Galvin, 2006; Wood, 2008). This historical setup of the business world by men, for men, has had lasting implications. It established a normative framework that implicitly suggests leadership and business success are inherently linked to men. Over time, these values became associated with success in business and led to a rigid workplace structure grounded in masculinity. Consequently, as women began to enter the workforce and aspire to leadership positions, they encountered a business landscape not designed with their experiences, needs, or perspectives in mind.

Certainly, the corporate structures and leadership models did not account for the realities of women's lives, such as the dual responsibilities of career and caregiving or the different approaches women might take to leadership and competition. Thus, the masculinization of the

business world and its leadership models are a byproduct of a society organized around men's experiences and values. While the design of business practices and leadership roles may not have been a deliberate effort to exclude women, it reflected a societal social structure that privileged men. This legacy continues to influence perceptions of leadership legitimacy and the challenges women face in achieving recognition and success in leadership roles within the business world.

### ***Why Patriarchy as an A Priori Theory??***

While most critical realist research uses only one *a priori* theory, using patriarchy as an additional theoretical perspective will help understand how perceptions of patriarchy as a social structure affect perceptions about the leadership legitimacy of daughter-successors. Simply by being perceived as a woman in a role traditionally reserved for men, daughter-successors may be assessed as lacking legitimacy regardless of their skills, experience and competency. Patriarchy as a theory also enables exploration of how cultural norms and values, including notions of masculinity and femininity, are constructed and perpetuated in ways that uphold men's dominance, making it ideal in combination with social constructionist feminist theory.

Earlier, I noted that Walby (1990) defined patriarchy as a system of social structures and practices in which men dominate, oppress, and exploit women. This definition distinguishes patriarchy from the social constructionist understanding of gender norms. Thus, patriarchy as a theory is needed for this project to go beyond constructions of gender to understand how patriarchy works as a social structure at the micro level to influence perceptions of women's legitimacy as family business leaders.

**Chapter Conclusion**

In this chapter, I explained the methodology of this project, critical realism and discussed critical realist concepts in detail, including events, social structures, mechanisms, stratified reality and retrodution. I concluded the section by explaining why critical realism is appropriate for this research project and how it enabled me to answer the two research questions. I then explained the theoretical frameworks I used for this research project. Social constructionist feminist theory provides insight into the social structures and mechanisms that cause daughter-successors to be perceived as lacking the characteristics for leadership. In contrast, patriarchy as a theory provides an understanding of the social structures and mechanisms that establish men in power, making it difficult for daughter-successors to achieve legitimacy as leaders of their family business.



### **Chapter 4 Method**

This chapter focuses on the method I used to collect the data. It begins with discussing objectivity and reflexivity and how they concern this research project. I then move to the method, including the importance of the research questions, choosing between extensive vs. intensive research, sample size, participant recruitment, the interview method and guide and finally, the coding process. I also explain the importance of the participant narratives for revealing the mechanisms and social structures and how I use the narratives in later chapters to illustrate the findings. I conclude by explaining the critical realist processes of abstraction and retrodution.

#### **Objectivity**

Some philosophers and theorists have debated whether objectivity is possible in feminist research. Fletcher (2013) explains:

For several decades, feminists have debated the very possibility of objective reality and objective knowing. Some reject the concepts altogether, arguing that science has privileged the viewpoint of a white masculine knower and has passed off this particular perspective as the “objective reality” when, in fact, there are multiple realities and multiple ways of knowing. (p. 101)

The study of “objective reality” is a long-standing debate in feminist research. Haraway (1988) explored the question with her exploration of “situated knowledges” (p. 581), arguing that knowledge can never be objective. It is impossible to view the world from a neutral, external

standpoint. There is no one truth; all knowledge is partial and linked to the contexts in which it is created.

Furthermore, positionality and power influence the knowledge production process. Haraway (1988) called this fiction of objectivity “the god trick,” which is enabled by “a perverse capacity [...] to distance the knowing subject from everybody and everything in the interests of unfettered power” (p. 581). In contrast, situated knowledges produce “[...] a more adequate, richer, better account of a world, to live in it well and in critical, reflexive relation to our own as well as others' practices of domination and the unequal parts of privilege and oppression that make up all positions” (Haraway, 1988, p. 579). They require the observer to carefully observe the power relations underlying knowledge production processes. This might be done by asking the following questions: “How to see? Where to see from? What limits to vision? What to see for? Whom to see with? Who gets to have more than one point of view? Who gets blinded? Who wears blinders? Who interprets the visual field? What other sensory powers do we wish to cultivate besides vision?” (p. 587). Therefore, situated knowledges are dynamic and enable the deconstruction of what is considered objective knowledge, creating space for questions to emerge.

In this research project, I acknowledge that my experiences as a woman and a daughter-successor shaped my perspective. These experiences inevitably influenced my interpretation of the events described by the participants and how they align with my own understanding of what it entails to be a daughter-successor leading a family business. Additionally, I am mindful of the societal constructs surrounding gender, including gender norms and prescribed gender roles, as well as the prevailing notion of an idealized (often masculine) leader. In other words, I am not a

neutral observer in this research. The insights derived from my background can benefit and limit the study. Therefore, I recognized that I needed to navigate and manage these influences effectively throughout the research process. By acknowledging and critically reflecting on my situated knowledges and biases, I strived to approach the research with openness and rigour, ensuring a balanced and nuanced analysis of the data and findings.

Objectivity is also an issue for this research project because of its ontology – critical realism. Critical realists accept that people provide the data for their research and that an individual's explanation of events is fundamentally interpretivist. As Sayer (1992) observed, “The greatest degree of pessimism about the possibility of evaluating competing accounts in social science concerns interpretive understanding” (p. 220). Critical researchers must also interpret a participant's description of an event (Woodside et al., 2005), adding a layer of interpretation to the research. In other words, not only are the accounts of events described by participants interpretivist, but a researcher's understanding of the event and how it may reveal an underlying cause is also interpretivist. Furthermore, meanings and interpretations of events and their causation, whether by a researcher or participant, will vary across space and time (Easton, 2010) and are historically, culturally, and socially grounded.

Critical realists must also rationally judge competing theories using their intrinsic merits as possible explanations of reality (López & Potter, 2005). Critical realists refer to this as judgment rationality (Fletcher, 2013; Sayer, 2000). Many qualitative researchers claim that an objective world exists outside of language, texts, and other human constructs (Archer et al., 2004a). However, unlike quantitative researchers, qualitative scholars reject the idea that external data is ‘given’ but instead claim that ‘qualified objectivity’ is possible (Archer et al., 2004a). Manicas

(2006) recognizes that this type of objectivity is contextual. However, making judgements about the research process is possible if they are made through ‘responsible forms of rationality’ (p. 35). Therefore, being reflexive about an object of investigation is crucial. It involves asking probing questions during the research process, such as whether one's interpretation makes sense and captures the unique social relations surrounding an event (Manicas, 2006). Reflexivity then leads to questions about causal relationships attached to these social relations. In other words, critical realist researchers do not have direct or immediate access to the reality they study, so they must be more aware of the relationship between their research and reality and consider how they might choose one theory over another (Isaksen, 2016). As Fletcher (2013) observed,

Analysis is not just a mechanistic application of methods that produce “truth;” instead, research requires analysis and rational judgment by the researcher.

Researchers using critical realism aim to find the best explanation or account of reality to gain knowledge of truth, but not necessarily an exact image. (p. 92)

Critical realists emphasize that judgmental rationality is an ideal that presents challenges when evaluating and discerning different and conflicting interpretations of reality. They recognize that facts are not objective entities, but the knowledge production process intertwines with them. Critical realists also argue against the notion that knowledge can solely rely on experiential or empirical data, as they highlight that theories influence facts and facts influence theories. Consequently, there is no neutral standpoint from which one can impartially observe the world and objectively assess theories (Critical Realism, 2016).

Furthermore, it is essential to acknowledge that there is no mechanistic or deterministic connection between our knowledge and the world we seek to understand. Instead, there exists a double hermeneutic process of interpretation where the thoughts and the events under examination continuously interact (Critical Realism Network, 2016). As a critical realist researcher, I must, therefore, exercise judgmental rationality in interpreting the events the research participants recount and offer the best possible explanation for their emergence based on my understanding of the world.

### **Reflexivity**

Self-reflection is crucial to achieving a more objective understanding of reality (Fletcher, 2017; Hesse-Biber et al., 2012). Self-reflection allows researchers to acknowledge how their social background, experiences, personal positionality, and assumptions can shape their research process (Fletcher, 2013). It requires a critical examination of one's own biases and an awareness of how these biases can influence the interpretation of participants' responses and the application of theory to the data.

As a daughter-successor struggling as the leader of my own family business, it is essential to recognize how this personal experience may shape my perspective. Having encountered similar events described by the participants, I bring my own interpretations and motivations, which may differ from those of the daughter-successors interviewed. I must, therefore, be mindful of these divergences and approach the research with greater awareness and understanding.

In conducting this research project, I have also come to recognize and embrace my identity as a feminist and a daughter-successor grappling with leadership challenges. Thus, I am aware that

my perspective may create biases in my interpretation of the data and that I must manage them throughout the data analysis process. On the other hand, being a daughter-successor and a feminist also brings certain advantages that contribute to the objectivity of the research. Sharing similar experiences with the participants allowed me to understand their perspectives more fully. It also created a sense of trust and openness, as the participants may have felt more comfortable discussing their struggles as leaders with someone who could relate to the challenges.

Indeed, many of the daughter participants welcomed the opportunity to share their stories with me. The interviews often extended beyond the scheduled time, delving into broad topics such as navigating a masculine working environment and adhering to societal expectations. This rich exchange of information resulted in valuable data that revealed previously unvoiced feelings and perceptions. Furthermore, my position as an older, prominent businesswoman within the business community granted me access to a wide range of daughter leaders who may not have been accessible to other researchers. This access enabled the inclusion of participants from various ages and industries, contributing to the breadth and objectivity of the research.

Lastly, my engagement as a feminist scholar and my familiarity with relevant academic research offers valuable insights into how gender shapes the participants' experiences. When a participant describes an event that may relate to their legitimacy as a family business leader, I can delve deeper and draw upon my research knowledge to better understand what might be causing the event to occur.

## **Method**

While the principles of critical realism are well established, the method to reveal structures and mechanisms is less certain (Danermark et al., 2019; Fletcher, 2017; Sayer, 1992). As Fletcher (2017) observes, "While critical realism is a useful philosophical framework for social science, little guidance is available on which precise methods, including methods of data collection, coding, and analysis, are best suited to applied critical realist research" (p. 1). Fortunately, several authors have provided some practical guidance (Danermark et al., 2019; Easton, 2010; Fletcher, 2017; Parr, 2015; Sayer, 1992), which I used for this research project and will explain next.

### ***The Research Question(s)***

The first step in critical realist research is to develop the research question (Fletcher, 2017; Sayer, 1992), which must be a "why" question (i.e. why did this event occur?). By asking why, the critical realist researcher can examine events described by research participants and apply theory to them to identify the underlying structures and mechanisms that cause them (Easton, 2010). This research meets this requirement by asking: *Why is it difficult for daughter-successors to achieve legitimacy as family business leaders?* Once I identified these social structures and mechanisms, I could answer the second research question: *How can daughter-successors negotiate their legitimacy as family business leaders?*

***Extensive vs. Intensive Research***

Critical realist researchers must choose between extensive and intensive research methods (Easton, 2010; Fletcher, 2017; Sayer, 1992). Extensive research is typically associated with quantitative methods and is concerned with discovering common properties and general patterns within a population where the concern is breadth rather than depth (Parr, 2015). In contrast, intensive research typically uses qualitative methods such as small sample interviews or case-based studies. Intensive research is better for analysis sensitive to contextual and causal circumstances, such as that associated with critical realism (Parr, 2015). Intensive research is preferred in critical realist research because it enables a researcher to focus on what causes an event to occur in a specific or limited number of cases. This allows a researcher to clarify complex relationships and processes that predetermined response categories or standardized quantitative measures cannot capture (Parr, 2015; Sayer, 1992).

Interviews are the recommended data collection method in intensive critical realist research (Easton, 2010; Elder-Vass, 2010; Fletcher, 2017; Sayer, 1992; Smith & Elger, 2012). The social world has an external reality that affects how individuals act, although often, they are not fully aware of it (Elder-Vass, 2010). As Pawson (1996) explained:

People are always knowledgeable about the reasons for their conduct but in a way which can never carry total awareness of the entire set of structural conditions which prompt an action, nor the full set of consequences of that action. (p. 302)

This lack of complete knowledge about the cause of actions or events means a critical realist researcher cannot simply rely on empirical data from research participants. Interviews enable a



researcher to use the participants' narratives and investigate the events described within each at the deeper levels of reality – the actual and the real - to discover the underlying mechanisms and social structures that cause the events.

Archer et al. (2004a) explained that qualitative interview techniques are valuable for critical realist research because they enable researchers to discover how people feel and think about the research topic under investigation. They describe qualitative interviews as a conversation with a purpose. Interviews allow a researcher to probe more deeply around everyday issues and are more attuned to the “messiness” and “openness” of real social life (p. 5). As I wanted to delve into the participants' stories to understand what was really going on below the surface, I used interviews to identify the social structures and mechanisms deep within the layers of social reality that could affect a daughter-successor’s legitimacy as the family business leader.

The interviews used for this project were semi-structured and theory-driven. Since critical realist research involves testing a theory or theories to identify the structures and mechanisms that cause events, the interview's subject matter is the researcher’s theory rather than the interviewee's (Smith & Elger, 2012). Indeed, as Pawson (1996) explains, “While the interviewer remains the expert on the subject matter, the interviewee is there to confirm or falsify and, above all, refine that theory” (p. 299). Semi-structured interviews are an ideal way to achieve this. Their flexibility allows for a fluid, interactive process that explores the participants’ interpretation of events connected to structures and mechanisms (Fletcher, 2017; McAvoy & Butler, 2018). At the same time, it enables the researcher to test the *a priori* theories that attempt

to explain why events occur. Indeed, several times during the interviews for this project, I asked additional questions that enabled me to probe deeper to understand the participants' statements.

### *Sample Size*

Research using a critical realist method does not specify the optimal sample size. However, Easton (2010) noted that a small sample for in-depth research is well-suited to a critical realist approach because critical realism aims to understand why things are as they are. While a small sample size can raise concerns about the generalizability of results, he explains that the aim of in-depth analysis using a small sample is generalizability to theoretical propositions, not to populations or universes. He explains further,

From a critical realist perspective, expansion and generalization come from identifying the deep processes at work under contingent conditions via particular mechanisms. A causal explanation in a single case must be based upon a theory structured in terms of what comprises a critical realist causal explanation. The best explanation, that is, the one most consistent with the data, is what is being sought.

(Easton, 2010, p. 126)

In other words, critical realism aims to discover the best explanation of why an event occurs rather than the generalization of a particular finding. Therefore, a small size is appropriate for achieving this aim.

Like Easton (2010), McAvoy and Butler (2018) did not recommend a particular sample size but did stress the importance of interviewing multiple participants. They argued that, in doing so,

a researcher can develop a framework to explain the empirical domain of each participant. Comparing the interviews helps to identify the demi-regularities in the data, revealed by coding the events described in each participant's interview (Fletcher, 2017). Multiple interviews also enable confirmation or elimination of an *a priori* theory since differences between data may create better or new explanations of mechanisms and structures that cause events.

This project used interviews with fifteen participants. Of the fifteen, I conducted three interviews for the pilot study that preceded this project (Abigail, Chelsea, and Georgia). While I considered not including the pilot study participants since the pilot study focused on gender bias rather than legitimacy, when I reviewed the pilot project transcripts, it became apparent that the interview questions elicited responses similar to those in this study. Furthermore, during their interviews, the participants revealed their strategies to negotiate their legitimacy. Therefore, I concluded that the data applied to this study and included the initial pilot study interviews in the analysis.

### ***Participant Recruitment***

I located the participants using three types of sampling - purposive, theoretical and snowball. Purposive sampling involves selecting participants best suited to answer the questions (Maxwell, 2012) As Morse et al. (2002) described, "the sample must be appropriate, consisting of participants who best represent or have knowledge of the research topic" (p. 18). Knowledge of the research topic is essential in critical realist research because the analysis relies on the participants' descriptions of events to reveal their underlying causes. Therefore, I only included daughters who inherited the leadership of their family business.

I also used theoretical sampling for my study. Theoretical sampling is the continual selection of “new participants who are likely to refine your theory” (Auerbach & Silverstein, 2003). Theoretical sampling is consistent with what Morse et al. (2002) described as sample appropriateness and is a critical strategy for producing reliable research (Fletcher, 2013). Previous research (Garcia-Retamero & López-Zafra, 2006) and the pilot study (Hamilton et al., 2021) revealed that daughter-successors often experience significant gender bias when leading businesses in masculine industries. To ensure a broad perspective on this issue, I attempted to recruit participants who led companies in industries that employed an equal number of men and women (e.g., publishing and service industries) or were operating within industries primarily employing women whose perspectives on legitimacy would help refine my understanding of this issue<sup>7</sup>.

Furthermore, most family businesses are founded and managed by men (Handler, 1994; Harveston et al., 1997), with approximately two-thirds of family businesses being men-owned (Cadieux et al., 2002). Therefore, succession within the family typically involves the business transfer from a father to their child and, due to primogeniture, the transfer is typically from father to son. However, this research focuses on the transfer of the family business from father to

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<sup>7</sup> As discussed in the section on limitations in Chapter 10, I was unable to recruit participants leading businesses in feminine industries (e.g., clothing, beauty, children, and home products). I attributed this to my assumption that businesses operating in feminine industries would be more likely to be led by women. Therefore, it was difficult to locate participants who would have inherited leadership of their business from fathers.

daughter. Therefore, I only recruited women participants who inherited their businesses from their fathers. This approach enabled me to focus on how the social structure and mechanisms within family businesses, typically developed and perpetuated by a father patriarch, influenced perceptions of a daughter-successor's legitimacy as their leader.

Finally, I used snowball sampling. Snowball sampling uses networking and referral to identify participants (Yin, 2003, 2017). It begins with one participant who meets the research eligibility criteria and asks them to recommend other participants who fit the research criteria and may also be willing to be interviewed. Snowball sampling generated several participants in an MBA program at the University of Alberta.

I considered interviewing the participants' fathers, mothers, and employees. The employees could have confirmed whether the daughter-successors were viewed as having legitimacy as the leader and may have offered insight into why not. For example, they may have revealed that the participant was considered too young for leadership and, hence, lacked the respect and admiration associated with legitimacy. Others may have mentioned that the daughter-successor did not understand the business enough to achieve status in the leader role.

Interviewing fathers may have added valuable insight into their motivation for appointing their daughter as the successor, and mothers' narratives may have added insight into gender roles within the family and how they may have influenced the leadership legitimacy of the daughters. I explain the research value using interviews with employees and the fathers and mothers of the participants in Chapter 9 in the section on future research. However, I decided that since the research aimed to discover why daughter-successors struggle to achieve legitimacy and how they

negotiate it, interviews with the daughter-successors that asked the appropriate questions and enabled open dialogue would reveal the structures and mechanisms that affected the leader legitimacy of daughter-successors.

### **Locating Participants**

I used a variety of methods to locate participants. I found several participants through my business contacts, while I identified others through referrals of participants. In one case, I contacted the participant because she was well-known in the business community for inheriting her family's business after her father died. Two other sources yielded additional participants: a call for participants by the Alberta Business Family Institute (ABFI) at the University of Alberta and Family Enterprise Canada (FEC). Since FEC is in Ontario, the participants recruited from FEC were primarily from the Toronto area, which provided geographic diversity from the Alberta-based contacts, which came from the ABFI and my business contacts. Several of the FEC participants were also leaders of large (more than 1000 employees) family businesses, providing a diversity of size. The variety of sources helped ensure the participant group's diversity. Table 1 on the next page is a summary of the participant recruitment sources.

**Table 1***Participant recruitment methods*

<b>Participant Recruitment Methods</b>	<b># Of Participants</b>
Recruited from FEC advertisement (participant-initiated contact)	3
Recruited from ABFI advertisement (participant-initiated contact)	4
Referrals from participants (snowball sampling)	2
Referrals through business contacts (researcher-initiated contact)	5
Researcher initiated contact	1
<b>Total</b>	<b>15</b>

**Participant Criteria**

The daughter-successors needed to meet several criteria to participate in the research. First, the participants needed to be either the CEO or president of their family businesses. This requirement aligns with the research project's purpose - understanding daughter-successors and leadership legitimacy. Initially, I restricted the leadership to participants who were the sole leaders of their companies. However, two participants were appointed co-leaders by their fathers. After speaking with them, I determined that their experiences met the research aim and that their employees, customers, and outside advisors perceived them as equally sharing leadership responsibilities. I also encountered two situations where extended family was involved in business management but not in the company's leadership. By restricting the interview questions to only the daughter's relationship with her immediate family, I decided these participants could

be included in the research project. Similarly, three participants explained that an advisory board or management team oversaw the family business. I concluded that such a board or team did not diminish their role as the family business leader and thus included them as participants.

The participants also needed to have inherited the role from their father incumbent. This requirement stemmed from the literature, which suggests that fathers play a critical role in the succession process (Dumas, 1989, 1990; Vera & Dean, 2005). However, as I noted earlier, I wanted to understand whether the fathers' creation of a patriarchal, masculine business structure was a factor in the difficulty daughter-successors faced in achieving leadership legitimacy. I also wondered how taking over the role of the family business leader from their fathers may have influenced perceptions of the leadership legitimacy of the daughter-successors. Therefore, requiring that the daughter-successors inherit their fathers' leadership role would enable me to answer these questions.

I allowed some latitude in the stage of the succession process; 13 of the 15 participants had fathers who were either deceased or retired from their leadership roles, thus leaving them in complete control of the family business. However, two daughter-successors were at an earlier stage in the succession process and had fathers who had handed over company leadership to their daughter (i.e., appointed them president or CEO) but were still alive and had a part-time oversight role. After reviewing the cases, I considered that operationally, these daughters were the leaders of their family firms and thus met the criteria for inclusion in the project. I also thought that, as new leaders, their perspective on leadership legitimacy would be valuable for inclusion in the research. Finally, the participants needed to have replaced their father as the



leader of the family firm. This requirement aimed to understand whether the masculinity of the incumbent leader affected a daughter-successor's leadership legitimacy.

Two of the daughter-successors' businesses were not started by the fathers, which caused me to consider excluding them as participants. In the literature review, I explained how founding fathers are intimately connected to their businesses. Thus, they have a considerable vested interest in ensuring it continues into the next generation (Hnátek, 2015). Helen's father inherited his business from his father, while Lucy's father bought his business from the previous owner while he was a young employee. In both cases, I concluded that the businesses were identified as the father's businesses, and they imprinted their identity on the businesses, enabling the data from the interviews with their daughters to be included in the project.

I also considered excluding the data from Helen's interview because her leadership stemmed not from the original business led by her father but from a sub-business she led. Her business was effectively sold when it was publicly listed, and her role was the leadership of the new holding company rather than the day-to-day operations of her father's original company. I concluded that since her responsibility was leadership of the core finances of the original family business, I would include her interview data.

I did, however, exclude several types of individuals from the project. I excluded son successors because the research focuses on daughters. I explain the value of research comparing the experiences of daughters and sons in Chapter 9 under the discussion of future research. However, a comparison did not meet the aim of this research. I also excluded daughters who inherited their family business from their mothers. The experiences of daughters inheriting the

family business from their mothers are quite different from those inherited from their fathers (Vera & Dean, 2005). Therefore, examining mother-daughter succession is outside this project's scope but may be valuable for future research. Finally, I excluded daughters who expected to be the leader but had not yet been appointed the leader of their family firm. The research aimed to understand daughter-successors and leadership legitimacy; therefore, potential leaders would not have provided data appropriate for the study.

### ***The Interview Method and Guide***

Once I confirmed that the participants met the criteria for inclusion in the study, I sent them the Invitation to Participate and a Letter of Information/Informed Consent (see Appendix B and C). After reading and signing the Informed Consent, they returned the form to me, and the documents were stored per Athabasca University's ethics guidelines. The participants were encouraged to contact me by telephone or email if they had any questions before signing. As noted above, three contacted me with questions about their eligibility for the research.

Earlier, I mentioned that I included the data from the interviews for the pilot study in this research project. Those interviews included three participants in November 2019 (Abigail, Chelsea, and Georgia). In March and April 2022, I interviewed an additional 11 participants. I used the Microsoft Teams video meeting platform to conduct the second set of interviews and the iPhone app Otter<sup>8</sup> to record and transcribe the participants' responses verbatim. Once again, I stored the data per the university's ethics guidelines.

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<sup>8</sup> Details can be found at [www.otter.ai](http://www.otter.ai).

Before beginning each interview, I restated that data from the interviews are confidential. Furthermore, if I used a participant's data in the written portion of this research, I would disguise their identity and business. I also introduced myself as a daughter-successor, briefly explaining that I was the leader of my family aviation business after inheriting the business from my father. This introduction was an icebreaker encouraging participants to speak freely about their succession and leadership experiences. Indeed, several daughters referenced my experience as a business owner during their interviews, which helped to abbreviate their explanations about their business operations.

Each interview followed a guide which covered six main themes: (a) background information about the participant (e.g., age, education, marital status, and childcare arrangements, if applicable), (b) information about the family business (e.g. size, type of industry), (c) the father of the participants including, how he started the company and his leadership style, (d) the family, including values about women in the home and business, (e) the succession process, including any preparations for succession, and (f) the daughter's leadership, including strategies she used to negotiate her legitimacy as the leader. Within the broad lead questions in the interview guide, the participants were offered wide latitude to add information based on prompts to explain a particular theme in more detail. I often asked participants to elaborate on points or respond to additional questions that would help me reveal the structures and mechanisms that affected their legitimacy as leaders. Appendix A contains the interview guide.

I scheduled each interview for one hour and asked all the questions within one hour. However, many participants wanted to continue the discussion for as long as an additional 30

minutes. I encouraged the participants to continue speaking as they often revealed experiences or opinions not mentioned earlier in the interview. Several participants added valuable information about their strategies to negotiate their legitimacy when they were encouraged to speak freely at the end of the interview.

After each interview, I added each daughter's demographic data to an Excel spreadsheet. This data clarified some of the demi-regularities. Additionally, I made field notes throughout the interviewing process. The field notes served to (a) record the context of the interviews, (b) record my perceptions for reflexivity purposes, and (c) highlight significant points to be explored in detail later.

### *Coding*

After completing the interviews, I coded the transcripts from each interview using NVIVO<sup>9</sup> software. Coding aims to identify data demi-regularities or trends that may explain why an event occurs (Fletcher, 2013). However, like the method to reveal structures and mechanisms, there is little instruction in the literature on using coding in critical analysis research. As Fletcher (2013) observed:

Even in the empirical literature on [critical realism], there is a tendency to sidestep a detailed discussion of data processing methods such as coding. References to qualitative data processing are vague at best. (p. 120)

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<sup>9</sup> More information about NVIVO is available at <https://www.qsrinternational.com/nvivo-qualitative-data-analysis-software/home>.

However, coding is critical in critical realist research because it is vital for identifying demi-regularities, the first step in the retroduction process (Fletcher, 2013). Fletcher (2013) explained that critical realist analysis aims to locate the causes of demi-regularities and evaluate, elaborate, or refute the theories that currently attempt to describe these demi-regularities. Therefore, rather than disregarding pre-existing theories for an entirely inductive and open coding approach, it is sensible to use them to process and analyze data (Fletcher, 2013).

Fletcher (2013) also recommends using a flexible coding process featuring negative case analysis. Thus, codes are not static and may be changed, eliminated, or supplemented with new codes (Gilgun, 2011). Negative case analysis involves looking for exceptions to the analysis rather than seeking only information that supports or reinforces it. As Gilgun (2011) argues, “It is easy to find material that supports the prior codes, but it is just as important in many cases to find material that does not fit into your codes” (p. 2). Thus, negative case analysis prevents the predetermined codes from acting as “blindness” (Fletcher, 2013) during the coding process.

Following Fletcher’s advice, I used two coding cycles for the analysis. The first cycle used provisional codes based on the succession stories of the participants. For example, how they became leaders and their father’s involvement in the company. I then organized the provisional codes according to whether they were organizational or theoretical (Maxwell, 2012). Fletcher (2013) describes organizational codes as topic-based bins for sorting information. Some organizational codes included “attended university,” “received endorsement by the father,” and “worked in the family firm to gain experience.”

In contrast, theoretical codes are those that may support or refute the *a priori* theories. Some theoretical codes included “self-doubt,” “traditional gender roles in the family,” or “perceptions of daughter’s competence.” In either case, Fletcher (2013) warns against a rigid approach to provisional coding. Saldaña (2013) confirms this, stating, “Your preconceptions of what to expect...may distort your objective and even interpretive observations of what is ‘really’ happening there” (p. 122). I treated the provisional codes as such, with several being added, revised, renamed, or deleted as the coding process progressed. Within this coding cycle, I also used NVIVO’s sentiment coding feature. Sentiment coding was valuable for highlighting themes based on emotions or conflicts (Saldaña, 2013). For example, some sentiment codes included “anger,” “overwhelmed,” “proud,” and “confused.”

The second coding cycle involved sorting the participants' responses into structure and agency. The responses were sorted to identify the social structures that may affect a daughter-successor's leadership legitimacy while identifying the mechanisms that may exist or be counter-acted because of agency. For example, I considered the gender roles in the family and perceptions of the father as the family business patriarch as structure. Similarly, I considered the perception that the business world is masculine as a social structure. In contrast, I considered the father’s encouragement of their daughters to abandon gender roles and daughters gaining professional designations as agency. In addition to this secondary coding, I used Fletcher’s recommendation for NVIVO coding queries and tree charts to identify the most common codes to reveal demi-regularities and any connections between them. Table 2 is an example of some codes sorted into structure and agency during the coding process.

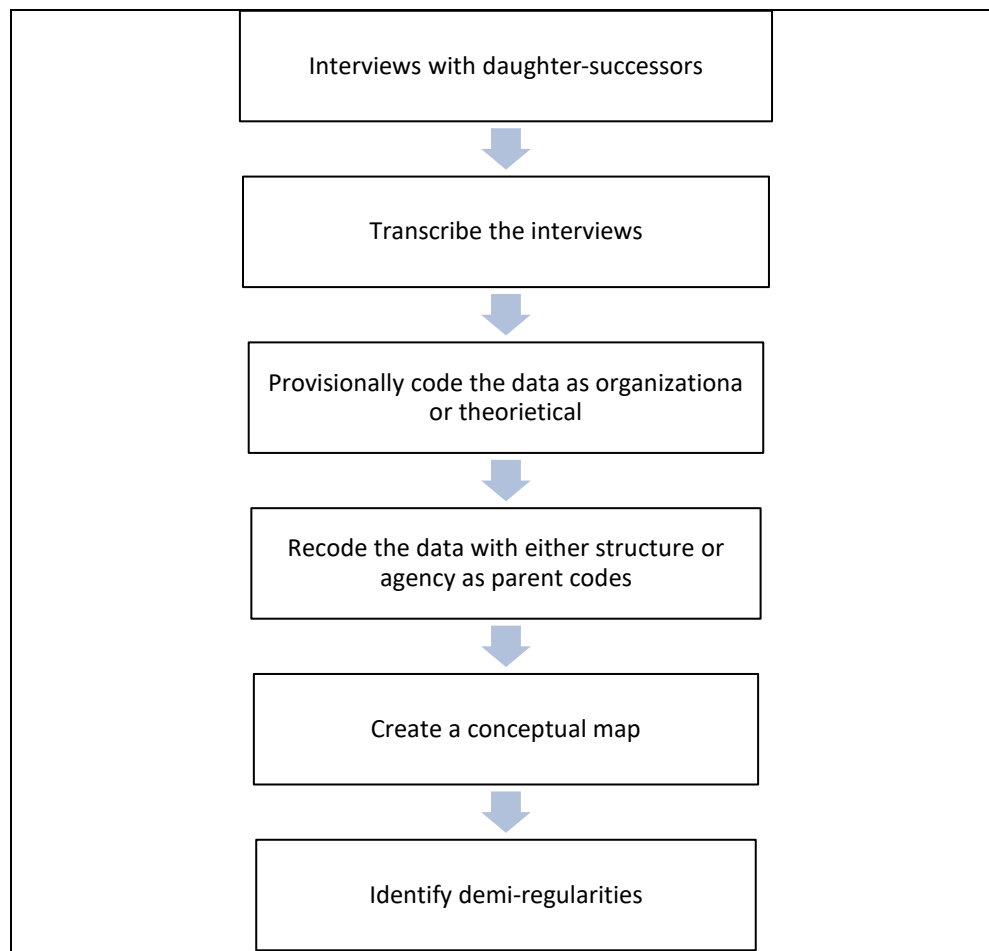
**Table 2***Coding examples*

<b>Structure (Coding Pass 1)</b>	<b>Response – Agency (Coding Pass 2)</b>	<b>Example</b>
Resistance and skepticism	Need to have and prove credentials/status.	Degrees on business cards, working harder than others, proving experience
Father as patriarch	<p>Father encourages and endorses his daughter (formally or informally).</p> <p>The father prepares his daughter for leadership (e.g. education and work experience).</p> <p>Encouragement of the daughter to abandon gender roles and avoid reliance on men.</p>	<p>Father announces his daughter will be the new leader.</p> <p>The father requires the daughter to gain a university education and experience before becoming the leader.</p> <p>Messages that the daughter can “do anything.”</p> <p>Fathers take their daughters to the office or encourage them to work at the office as a summer job.</p>
The family business	Because the father started the business, he is invested in how/whether it will continue into the next generation.	<p>Father “started with nothing” and grew the business.</p> <p>People view the father as a legend.</p>
Traditional family roles	Followed by the family but ignored when they require the daughter-successor to be the leader of the family business	<p>The father is responsible for big decisions, and the mother is responsible for the home.</p> <p>Father is the breadwinner.</p> <p>Mother quit her career to look after the children.</p>
Gender	<p>View that daughter-successors do not have the characteristics associated with leadership.</p> <p>There is an expectation that a man occupies the leadership role (preferably the father)</p>	<p>Competitors see the daughter-successor as a little girl.</p> <p>Rumours that the business will not last with the daughter-successor as the leader.</p> <p>Daughter is excluded from men only networking events.</p>

Maxwell (2012) warns that coding data into themes removes it from its original context, resulting in a loss of meaning and misinterpretation of the data. To avoid this problem, I followed Fletcher's (2017) recommendation and used Microsoft Excel to create columns linking each question in the interview guide with the responses from each participant. This approach enabled me to organize the demographic data and maintain a connection between each participant and their answers. Figure 5 outlines the coding process I used in this research project.

**Figure 5**

*The coding process*





*The Narratives*

While coding the transcripts was critical for revealing demi-regularities, I also wanted to adhere to the principles of narrative analysis to reveal the nuances of events described by the participants (Hytti et al., 2017; Mussolino et al., 2019). This process involved multiple readings of the interview transcripts in unearthing personal narratives. Chase (2017) describes personal narratives as

A distinct form of communication: It is meaning-making through the shaping of experience; a way of understanding one's own or others' actions; of organizing events, objects, feelings, or thoughts about each other; of connecting and seeing the consequences of actions, events, feelings, or thoughts over time (in the past, present, and future). (p. 951)

Analyzing each interview transcript, I focused on how the narratives helped me understand gender roles, succession, and leadership within family businesses. I also examined how the participants narrated their succession experiences, including their reflections on their past and present roles within the family business.

The process involved iterative readings of the interview transcriptions, which provided a broader understanding of the relationship between gender and legitimacy and better revealed the strategies the daughter-successors used to negotiate their leadership legitimacy. The iterative readings also enabled me to identify personal narratives critical for revealing the participants' understanding of and views regarding gender roles and expectations, family business succession, and family business leadership.

Using narratives with coding also enabled a better understanding of the events (Fletcher, 2013). Narratives of the demi-regularities and their relationship to the phenomenon of interest revealed the relationship between social structures and generative mechanisms that coding alone may not have revealed (Smith & Elger, 2012). Byrne et al. (2021) observed that prior research has shown that narratives can result in powerful insights into family business leadership (Dalpiaz et al., 2014; Hytti et al., 2017).

García and Welter (2013) recommend using narratives for research exploring the influence of gender. They observed that narratives are critical for exposing personal perceptions, interpretations, and experiences relative to gender. Narratives also provide insight into and understanding of gender and identity within a system of gender relations (García & Welter, 2013). Gherardi & Poggio (2007) view narratives as processes of “practising gender” (p. 25) and, therefore, are appropriate for the feminist perspective of this research. Hytti et al. (2017) concurs, stressing the value of narratives for understanding how gender is embedded within the family business.

Finally, narratives are often used in family business research because narratives enable researchers to understand the intricate connections between the family and the business (Hamilton, 2006). By using the participants' narratives, I could understand the complex relationship between the social structures of the family and the family business and how the relationship affected the leadership legitimacy of the daughter-successors. For these reasons, while coding was essential for the data analysis, the narratives of the daughter-successors provided critical context for the demi-regularities revealed through coding and a deeper understanding of the events and sentiments described during the interviews.

As will be evident in later chapters, I also consider the narratives an essential part of my presentation of the data. I wanted to use the daughter-successors' voices to reveal events and sentiments that would be lost with coding alone. Furthermore, the daughter-successors could describe their feelings about an event better than I could ever. For example, Chelsea<sup>10</sup> described her experience when she first became a leader. She said,

I felt so lost in the beginning. I had no support from anyone, and it seemed like they just hoped I would quit and go away. They excluded me, and I felt powerless. It wasn't what I expected when I agreed to be the leader.

As I will explain in Chapter 6, none of the daughter-successors explicitly said people did not perceive them to be legitimate leaders. However, their words to describe events as leaders revealed a palpable struggle often marked by anger and frustration. In contrast, when I asked the daughter-successors to describe their leadership role, their genuine passion for their businesses and employees was revealed in their words. I was surprised when Chelsea contrasted her early experience with how she felt now. She said,

I absolutely love what we've created. I wouldn't change anything. I'm so proud of our team and us. I love our story. I love what we get to do every day. I genuinely love who I work with. We get to create, and we have this really cool vessel to make a big impact for people. So, I love it.

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<sup>10</sup> The succession stories of each of the participants is summarized in Chapter 6.

This passion might not have been evident if I had presented the data as coding alone.

Finally, Dumas (1989) mentioned how daughter-successors often feel “voiceless” when they become the family business leaders. She explained how several daughter-successors in her research expressed a sense of alienation and lack of purpose in the family business. Thus, she introduced the concept of silent voice to explain how daughter-successors often have no voice of their own where they either passively accept their position of inferiority in the business or deny and silence the voice that they have. Daughter-successors with a silent voice do not allow themselves to speak up in their own voice by taking charge of the family business. With this in mind, I wanted to give the daughters space for their voices to come through so their thoughts and feelings about their role as the family business leader could be shared and heard.

### ***Abstraction***

In Chapter 3, I mentioned the critical realist concept of abstraction. Abstraction is the process of narrowing down the focus of the data analysis. Areas of research interest are abstracted from a larger context to focus on the most relevant events associated with a particular phenomenon. Pre-existing theory and empirical data typically guide the choice of abstractions (Fletcher, 2013). Previous research revealed that gender influences perceptions of women as leaders (Eagly & Johannesen-Schmidt, 2001; Eagly & Karau, 2002) and that daughter-successors often struggle with legitimacy as leaders because of gender (Byrne et al., 2019, 2021; Hytti et al., 2017a). Therefore, the inquiry focused on gender and its relationship to the leadership legitimacy of daughter-successors.

I also abstracted three social structures that could affect the leadership legitimacy of the daughter-successors - the family, the family business and society. As explained earlier, families often imprint their culture, values, and beliefs onto the family firm (Chrisman et al., 2012; Distelberg & Sorenson, 2009; Litz, 1995; Zellweger & Nason, 2008). Furthermore, families socialize daughters consistent with gender roles practiced by the family (Constantinidis & Nelson, 2010; Cornet & Constantinidis, 2008). As I explain in the next chapter, participants confirmed these findings when they described growing up according to what they described as a “traditional” family structure. Therefore, I identified the family as a critical social structure that required investigation.

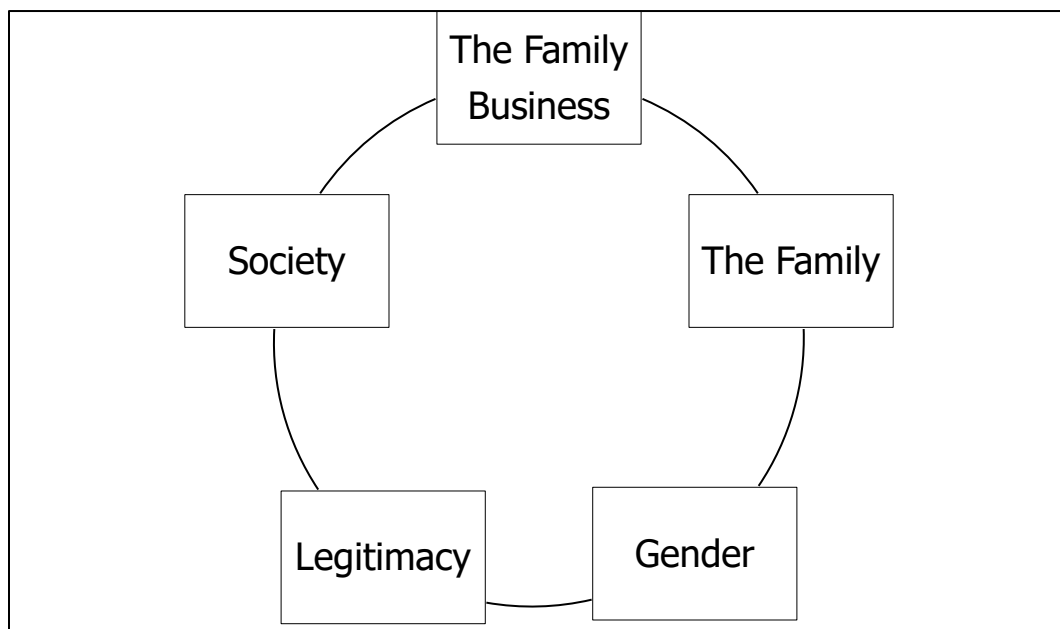
The family business was also a social structure that required close examination. The daughter-successors were leaders of their family business, meaning understanding how the family business affects legitimacy is critical. Furthermore, research has found that organizations are gendered, with some roles associated with men and others related to women (Acker, 1990; Ely & Meyerson, 2000; Kanter, 1977). Notably, there is an expectation that a man occupies the role of leader of the organization (Eagly & Karau, 2002; Garcia-Retamero & López-Zafra, 2006; Koenig et al., 2011). Understanding gender and its effect on the family business structure was another abstraction.

Finally, as I mentioned in the literature review, societal perceptions about women and leadership often preclude women from leadership (Eagly & Karau, 2002). For example, as I mentioned earlier, Yoder (1980) observed that leadership has historically been a masculine concept and that entrenched stereotypes that a man should fill the role of the leader persist. Consequently, I concluded that society is another social structure with the potential to influence

the leadership legitimacy of daughter-successors, and thus, I included it as an abstraction. Figure 6 on the next page illustrates the abstractions I used in the data analysis.

**Figure 6**

*Abstractions*



***Retroduction***

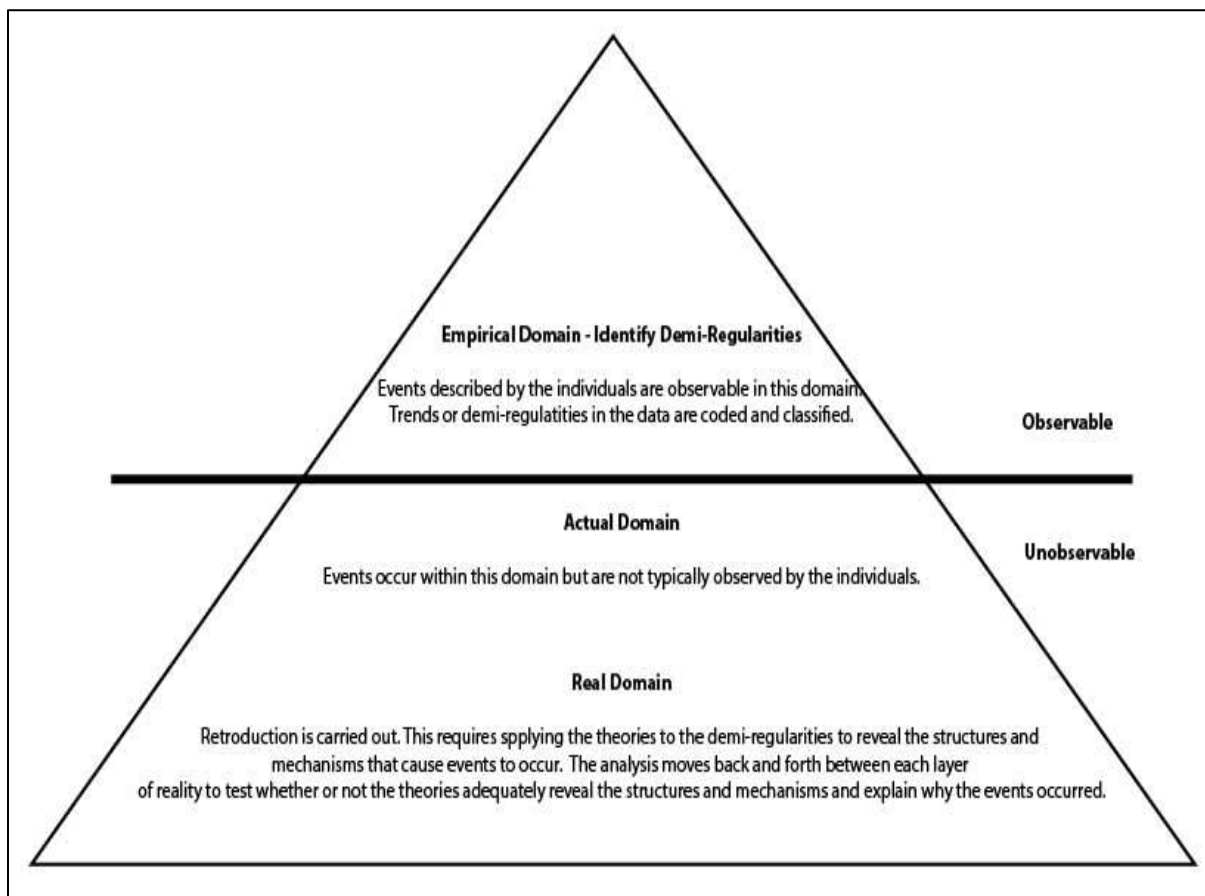
To critically analyze the data, the critical realist research process moves to the final step, which critical realists refer to as retroduction. As I explained in Chapter 3, retroduction involves applying theory to events and moving backwards to ask what must be true to make an event possible. In other words, it requires moving from knowledge of existing phenomena at one level of reality to understanding mechanisms at a deeper level of reality. However, it also requires moving forward to test another event against the theory to confirm whether the theory provides

an adequate explanation for the phenomenon. This moving back and forth between each level of reality can reveal the causal mechanisms and social structures that explain events (Easton, 2010).

Figure 7 illustrates the retrodution process.

**Figure 7**

*Retrodution*



**Chapter Conclusion**

I began the chapter by discussing objectivity and reflexivity and how they influence this project. I then outlined the project's research design and highlighted the importance of the research question and the benefit of using interviews to collect data in critical realist analysis. Next, I discussed sample size, participant recruitment and criteria. I also explained the interview method and guide, how I coded the data, and how I used the participants' narratives to reveal demi-regularities or trends in the data for further analysis. I concluded the discussion by describing how I used abstraction and retroduction to analyze data. In the following chapters, I summarize the succession stories of the participants, followed by my findings.



## **Chapter 5 The Succession Stories**

This chapter summarizes the succession stories shared by the participants. Recall that critical realists view social reality as existing at three levels – the empirical, the actual and the real. The stories presented here exist at the empirical or surface level of reality and, when coupled with other events described by the participants in the following chapters, formed the basis of my analysis to discover the mechanisms and social structures affecting the leadership legitimacy of daughter-successors. The chapter does not involve interpretation of the data as its purpose is to summarize and contextualize the participants' experiences, helping the reader understand my analysis in the following chapters.

Given the importance of participant confidentiality, I gave the participants fictional names, which I arranged alphabetically. I also only revealed details about the participants and their businesses relevant to my analysis. Thus, the details I present include the age of the participants when I interviewed them, the age at which they became leaders, and how long they had been leaders. I also noted their education and whether they had young children. Moving to the fathers, I outlined their education, involvement in the transfer of leadership to their daughters, and role in the company once succession was complete. Finally, I present information about the family businesses, including their age, size, and industry. I conclude the chapter with a summary of the key points in the succession stories and a table to help the reader when I refer to the participants' narratives in the following chapters.

I defined company size based on a Canadian Revenue Agency definition, with a small business being an organization with 1 to 99 employees, a medium-sized business with 100 to 499

employees, and a large business with 500 or more employees. However, my labelling of the company's gender orientation was more subjective. I considered industries to be associated with masculinity when almost all their workforce other than support roles were men, customers they dealt with were men, and other companies in their industry employed almost entirely men in roles other than support staff. Thus, for example, I considered companies in the industrial manufacturing sector, transportation and mining as examples of masculine industries. In contrast, I labelled companies as gender-neutral when they were not associated with a particular gender. For example, publishing, law or service industries. None of the participants led companies in industries centered on women. The family businesses' size and gender orientation will be referred to in the succession stories of the participants to which I now turn.

### **The Succession Stories**

#### ***Abigail***

Fifty-nine-year-old Abigail was one of the pilot study participants interviewed in November 2019. At the time, she had been the leader of her family's industrial manufacturing business for five years, taking over the role when she was 54. Abigail's father started the family business 52 years ago, having achieved a grade-eight level of education. He began with one employee, gradually growing it into a medium-sized company with multiple locations throughout Canada. Abigail's company employs mostly men as does the industry within which the firm operates.

Abigail's mother met her father at work, where her mother worked in a specialized technical role. When Abigail's mother and father married, her father gave her mother half the

shares in the company. Despite Abigail's mother's 50% ownership of the company, employees and other company stakeholders viewed Abigail's father as the family business leader.

Approximately 25 years ago, Abigail's father entrusted the company's day-to-day management to a male cousin so he and Abigail's mother could retire. Concurrent with the transition, Abigail's parents gave Abigail her brother a 50-50 stake in the company's shares. While her brother worked in a non-management position on the shop floor, Abigail continued her teaching career and remained distanced from the business. With this arrangement in place, Abigail's parents retired from the company and pursued other interests.

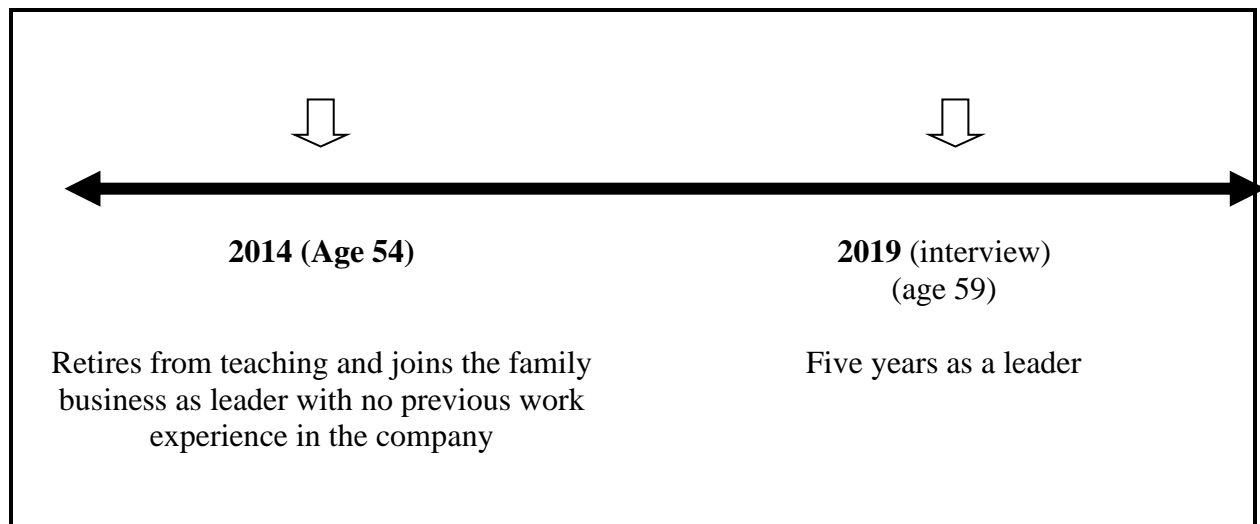
After a few years, the cousin died, and Abigail's parents appointed her brother as company leader. However, after taking over the role, he devised a secret plan to sell the company to a competitor. The plan was of no benefit to anyone other than Abigail's brother, and when Abigail's parents found out about it, they were devastated. Consequently, they approached Abigail when she was to step in and take over the leader role to stop the sale. Abigail was hesitant to accept the offer as she had recently retired from a career as a teacher and was enjoying retirement. She also had never been involved in the business other than as a shareholder and knew very little about it or the industry within which it operated.

Abigail ultimately accepted the position to help her parents and keep the company in the family. After successfully stopping the sale of the company, her brother returned to his previous role on the shop floor, and Abigail remained in the role of company leader. Despite initially hesitating to become the leader, she now considers her position permanent. While the company has experienced ups and downs over the years due to the economy, she has grown the firm in

size and geography since taking over leadership, and the company has profitable contracts with various large customers. Abigail completed a bachelor-level education degree and is married with two grown children. Figure 8 is a timeline of her succession to leadership.

**Figure 8**

*Timeline of Abigail's succession to leadership*

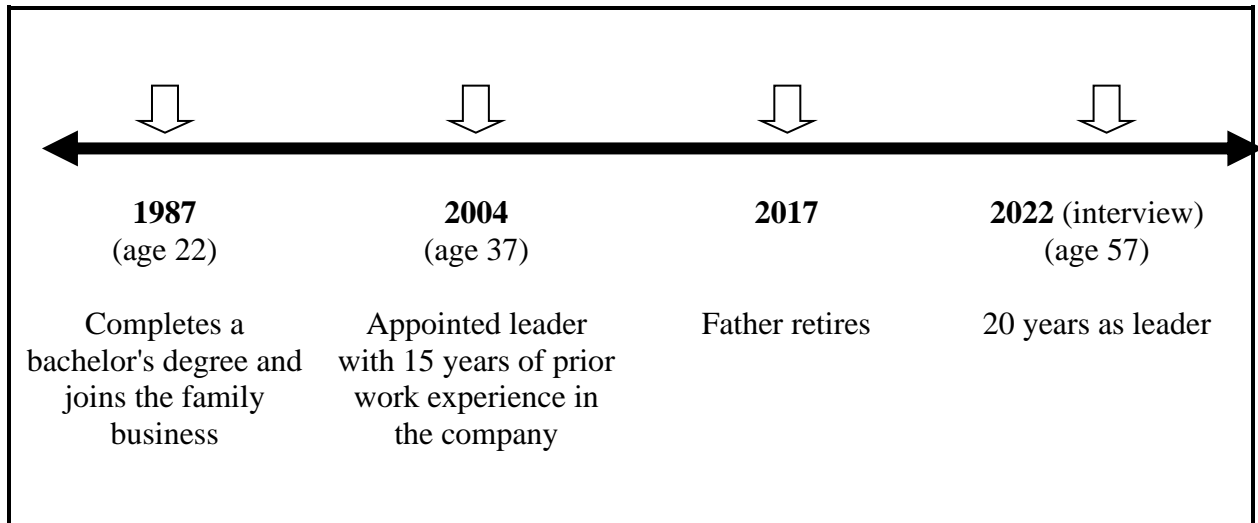


***Barbara***

Fifty-seven-year-old Barbara became the leader of her family's food production business approximately twenty years ago when she was 37 years old. After completing an eighth-grade education, Barbara's father started the family business 77 years ago. Her father expanded the company throughout Canada, eventually employing thousands of employees. While Barbara's company and industry employ women at the line level, men dominate at the production and management level and therefore, I labelled Barbara's business as masculine

Barbara attended university and completed a degree relevant to her company's core operations. After graduating, she joined the family business and, working alongside her father, gained more and more responsibility. A few years later, she returned to university and completed an MBA at her father's urging, who believed it was necessary for her involvement in the family business. During this time, Barbara married and had two children.

About 20 years ago, when Barbara's father was 80, his health began to decline, and Barbara and her siblings (two brothers and two sisters) decided they needed to plan for the company's succession. Barbara's father was tough to deal with as he had strong opinions about how the business should operate and high expectations of his employees. Since Barbara was the only one who could work with her father, and therefore, none of the siblings wanted anything to do with the business, Barbara and her siblings decided that she would be president and CEO. At the time, her father agreed to the plan. At this time, Barbara had 15 years of experience working in the company. Five years ago, Barbara's father fully retired, giving her the autonomy to decide the company's direction. Under her guidance, the company has grown exponentially, becoming the largest company in its industry. Barbara is now divorced, and both her children are grown and are not involved with the family business. Figure 9 on the next page is a timeline of Barbara's succession to leadership.

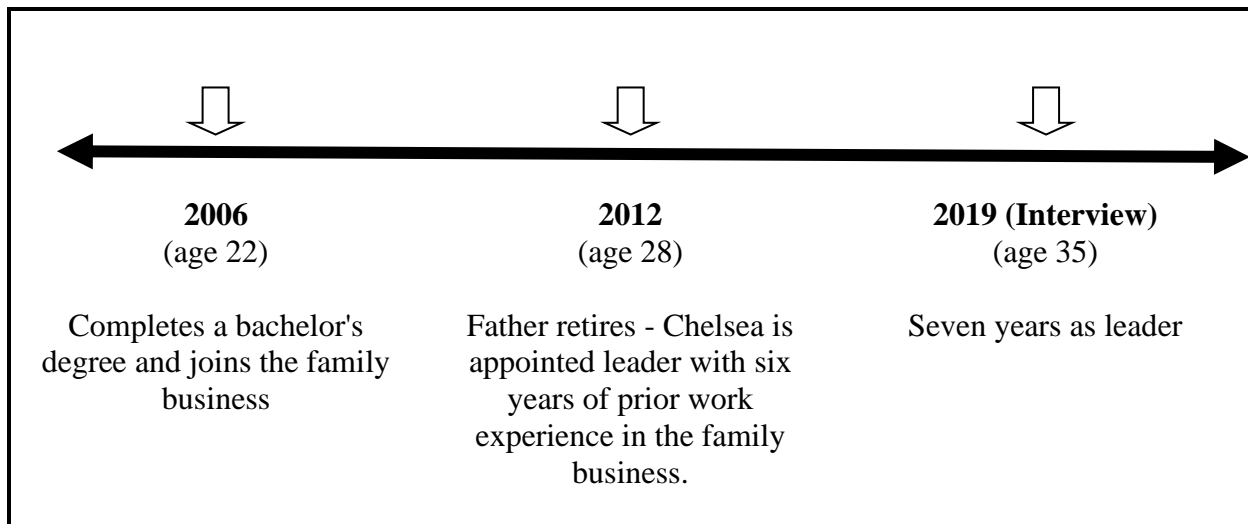
**Figure 9***Timeline of Barbara's succession to leadership****Chelsea***

I interviewed Chelsea in 2019 as part of the pilot study. About 36 years before the interview, her father started the family's service business after he completed high school. The small company operates in an industry primarily employing men at senior management levels. Seven years ago, when Chelsea was 28, her father was diagnosed with a severe and chronic health concern that rendered him permanently incapable of acting as the leader within six months after diagnosis of the illness. With the diagnosis, her parents, sister, and she discussed selling the business. However, her father said he wanted to keep the business in the family. Since Chelsea had a bachelor's level university education, had industry-relevant training, and had worked for the company for five years, Chelsea's father decided that she would take on the leadership role. Unfortunately, almost immediately after her appointment, half of Chelsea's employees quit, and

she lost most of her customers, causing the company to struggle financially. She has since replaced many of the staff who quit with women, rebranding the company as woman-owned and managed. Chelsea and her husband had a young child at the time of the interview. Figure 10 is a timeline of Chelsea's succession experience.

**Figure 10**

*Timeline of Chelsea's succession to leadership*



### *Delores*

Sixty-year-old Delores inherited her family's 70-year-old small service-related business from her father after he passed away suddenly. Delores' father started the company after completing a grade-eight education. Delores completed a bachelor-level university degree even though her parents expected her to get married and have children instead of a career.

Twenty-four years ago, Delores suffered two significant tragedies leading to her leadership role. Her brother, who was expected to be the family business successor, suddenly

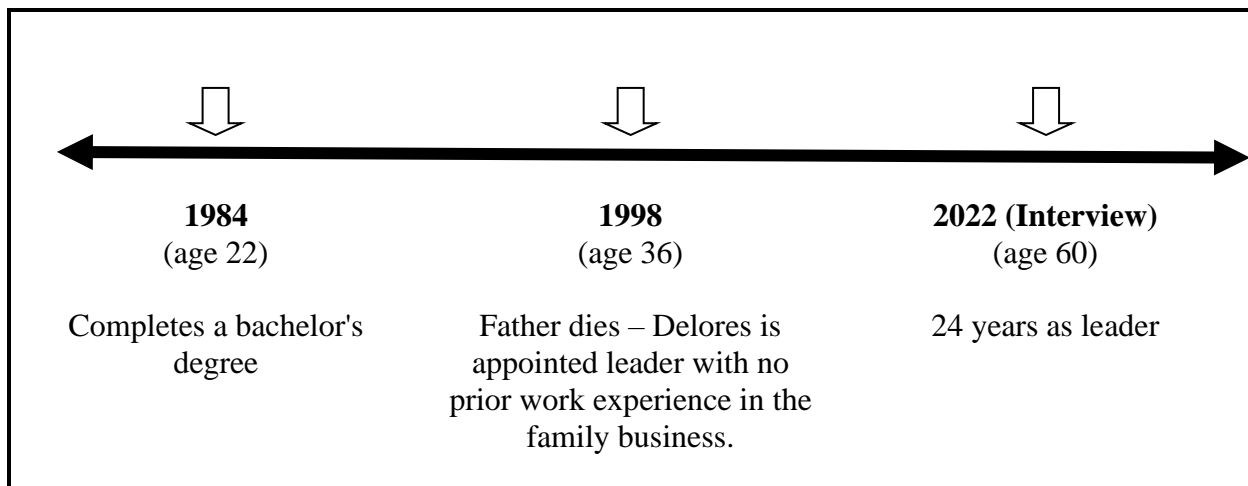
passed away. This event was followed by the sudden death of her father a few months later.

While her mother had been involved when she was younger, she was not interested in returning to work, leaving only Delores as a family member available for the leadership role.

Despite having no experience in the business, Delores has grown it by adding several outlets and increasing the company's employees to approximately 150. The company employs an equal number of men and women, reflecting the gender balance of her industry. Delores recently adopted a young son her husband looks after during the day, enabling her to focus on the business. Figure 11 is a timeline of her succession to leadership.

**Figure 11**

*Timeline of Delores' succession to leadership*

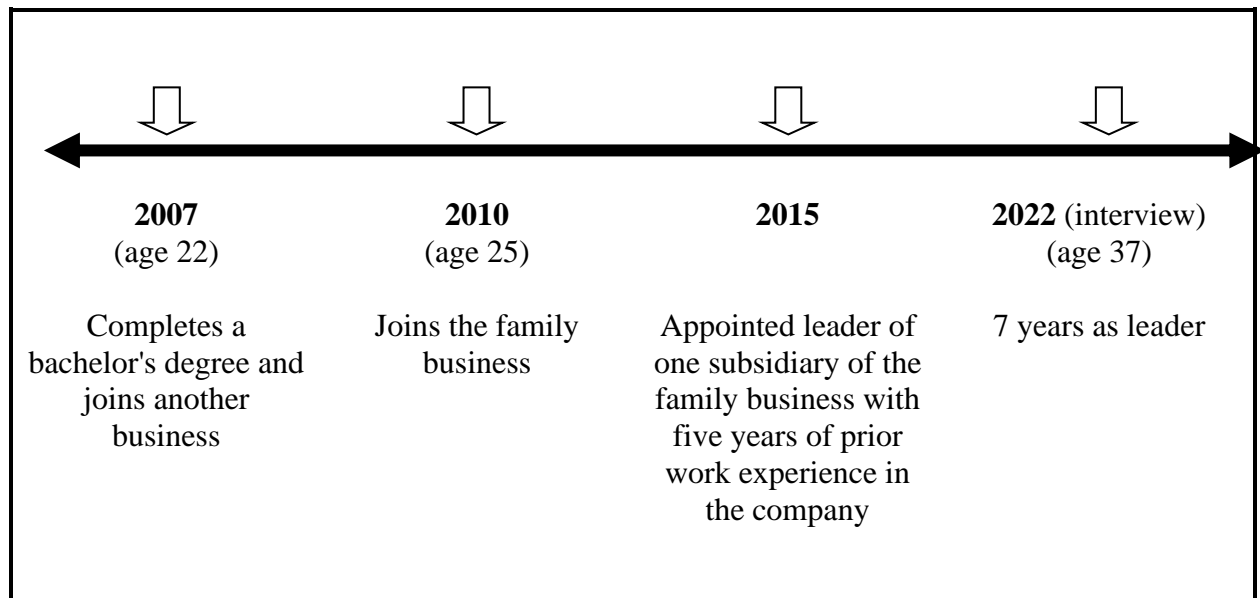




*Ella*

Thirty-seven-year-old Ella's father started the family's medium-sized transportation-related business 67 years ago after he completed high school. The company has subsidiaries in Canada and abroad, each operating independently in industries that employ almost exclusively men. After obtaining a bachelor's degree in business, Ella worked for another company in a related industry for three years. When an opportunity arose to join one of the subsidiaries of the family business at age 25, Ella saw it as a chance to learn the industry and eventually become the leader. After taking on increasing responsibilities over five years, her father appointed her leader of one of the larger subsidiaries seven years ago at age 30. Ella has a brother who is also involved in the business in a non-leader role in a separate division.

While her father is chairman of the global conglomerate, Ella is responsible for the Canadian operations. Under her leadership, the company has remained stable in size and location. However, at the time of the interview, Ella was uncertain of her future as the leader as she was a single parent struggling to care for two preschool-aged children while running the company. As her father is still involved in the overall operation of the larger enterprise, he would step in and manage the subsidiary if she decided to quit. Figure 12 is a timeline of her succession to leadership.

**Figure 12***Timeline of Ella's succession to leadership****Florence***

Florence, aged 55, is the leader of her family's medium-sized industrial manufacturing company. Florence's business and industry employ primarily men in a masculine industry. Her father established the company 60 years ago after completing high school. Growing up, Florence was actively involved in the family business, which initially operated from their home. Even as a young girl, she took on various responsibilities, such as answering phones and assisting with bookkeeping. As an only child, Florence's father increasingly relied on her to help him with the business.

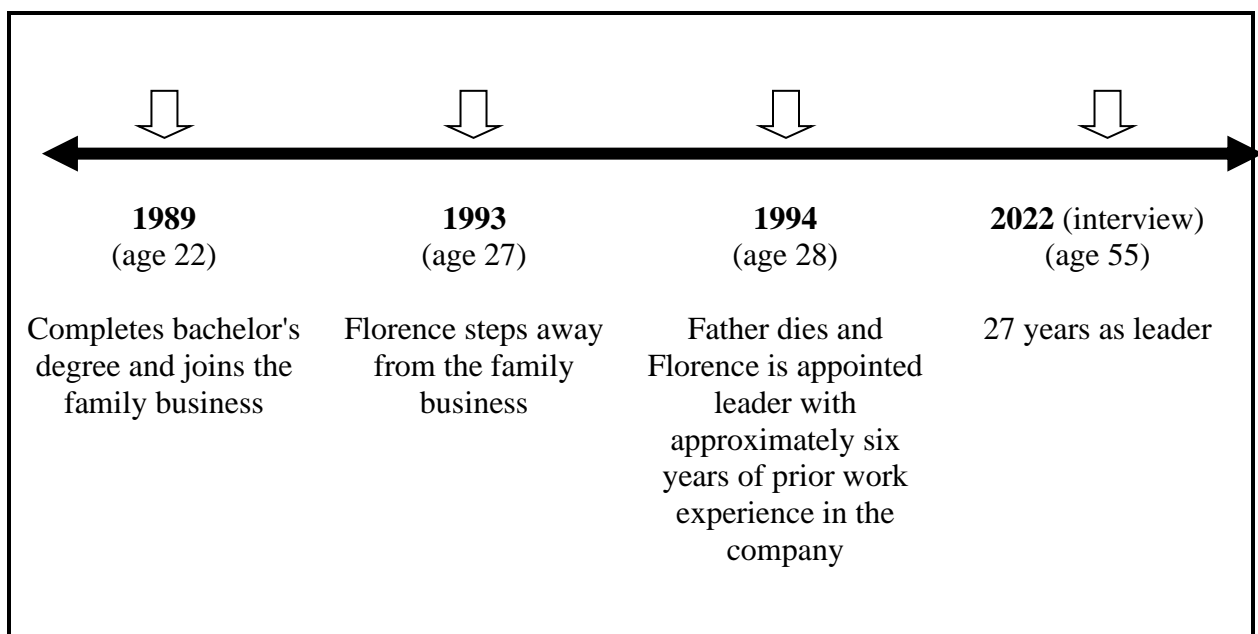
After completing her university education, getting married, and having two children, Florence temporarily stepped away from her full-time involvement in the family business to

focus on raising her family. Unfortunately, when her youngest child was an infant, her father fell ill and passed away shortly after. In his final months, he appointed Florence as the company's CEO, necessitating her return to the office while still on maternity leave. She was 28 at the time. Excluding her years of part-time work growing up and while attending university, she entered the role with approximately six years of full-time involvement with the company.

Over her 27 years as leader, Florence has successfully grown the company from its small beginnings to a medium-sized enterprise, taking on projects of greater magnitude than her father ever did. Florence now has a grown son and a daughter. While her son has chosen his own career path, her daughter recently joined the company after completing a business degree with the plan that she will continue the family legacy, which Florence has encouraged. Figure 13 on the next page is a timeline of Florence's succession experience.

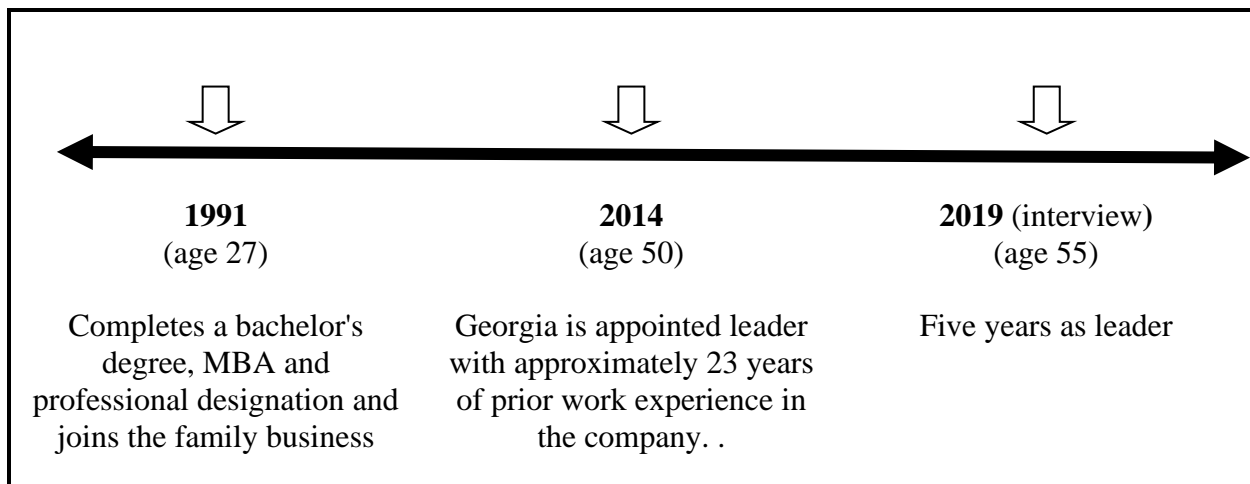
**Figure 13**

*Timeline of Florence's succession to leadership*



*Georgia*

Fifty-five-year-old Georgia's father started her family's business in the mid-1970s after completing a university degree. The company operates in the construction industry, where some middle managers and most support staff are women. After completing two university degrees, including an MBA and a professional designation, Georgia entered her family business at age 27, starting in the office answering phones. Georgia's responsibilities increased such that she eventually became what she described as her father's 'right hand.' When Georgia's father semi-retired from the company five years ago, he appointed her CEO even though her younger brother and sister also work in the company. Georgia explained that her father groomed her for leadership by encouraging her education and mentoring her to become a leader since she was a young girl. Georgia has three school-age children. Georgia's father is semi-retired and has limited involvement in the company's day-to-day operations. Figure 14 is a timeline of Georgia's succession to leadership.

**Figure 14***Timeline of Georgia's succession to leadership*

*Helen*

Fifty-eight-year-old Helen had a different succession experience than the other participants. Helen's grandfather started her family's manufacturing company 73 years ago. When he retired, he passed the company to her father, who took over the business after graduating high school. Helen's father transformed the family's business from a small operation into a large company operating internationally.

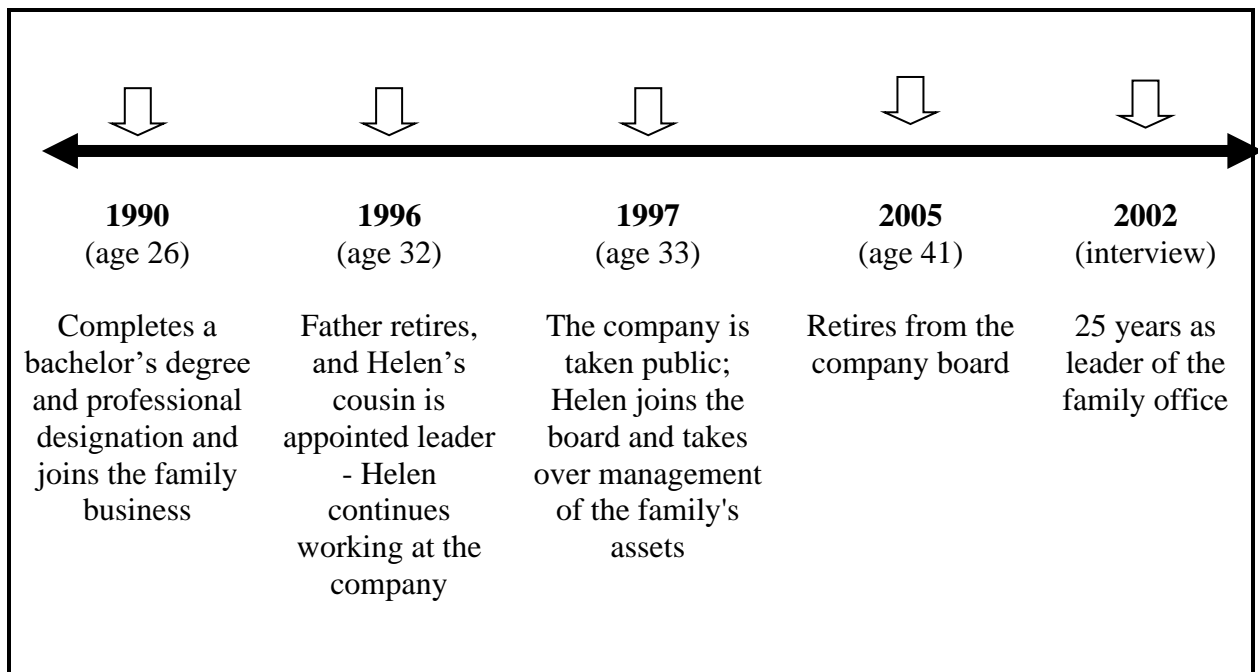
After graduating from university and achieving a professional designation, Helen worked alongside her father for eight years, gaining increasing responsibility and using her professional designation to guide the company. However, when her father retired, he chose to pass the business leadership to her cousin, appointing him as the CEO. Helen's father had only daughters, and this appointment was consistent with her father's traditional background, where sons rather than daughters are expected to take over the family business. Eventually, Helen's cousin took the company public. With this restructuring, Helen's father appointed her to the board of directors, giving her some leadership responsibility.

Due to company bylaws, Helen needed to resign from the board of directors as she had served the maximum number of terms allowed. Still wanting to be involved in the family business, Helen focused on the significant finances the company's public offering generated for the family. Since Helen had experience and education, her father entrusted her with managing the proceeds from the reorganization, which involved investing in various business ventures (i.e., managing the family's assets in a "family office" structure). Helen has been the leader of the new company structure for 25 years. She employs approximately twenty men and women and

encounters an equal balance of men and women in her leadership role. Helen has three grown children. A timeline of Helen's succession experience is outlined in Figure 15.

**Figure 15**

*Timeline of Helen's succession to leadership*



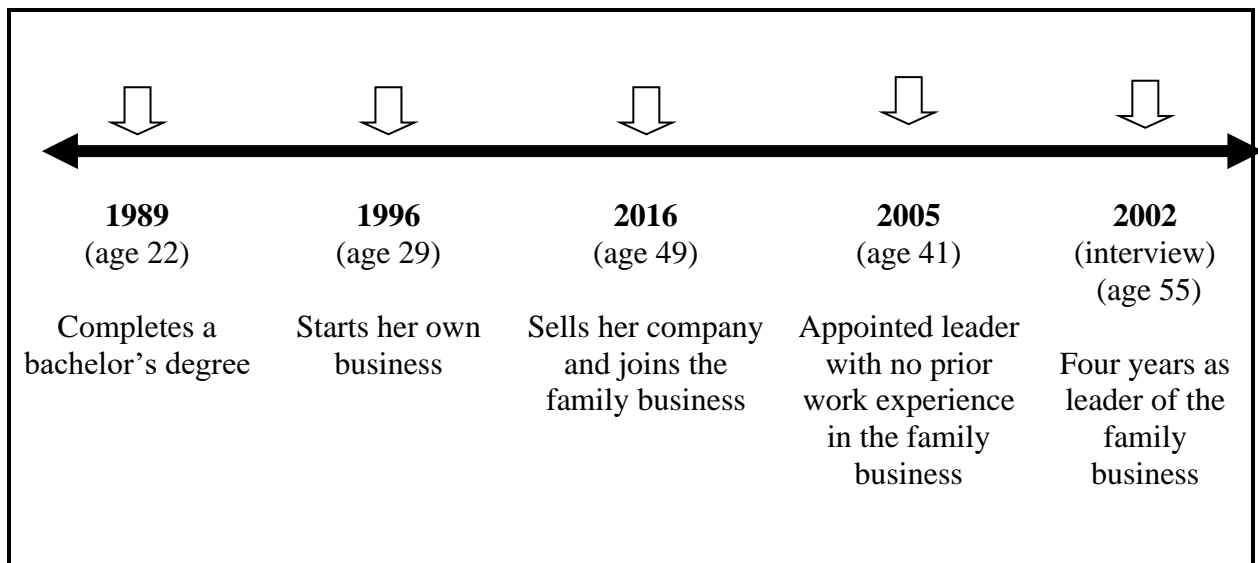
### *Irene*

Seventy years ago, after completing high school, Irene's father established the family's medium-sized technology-related business, which operates in an industry employing a balance of men and women. Irene is an only child and grew up closely involved with the company, frequently accompanying her father to work on Saturdays. After completing her bachelor's degree, Irene started her own company in a different industry. Over 20 years, Irene grew the business to employ about 85 individuals.

Irene's father contemplated retirement a few years ago and asked her to join the company. Consequently, Irene sold her own business to return home and assume responsibility for the family business. However, instead of immediately stepping into the leadership role, she worked in positions across Canada that allowed her to gain insights into the company's inner workings, build relationships, and understand the challenges and opportunities within the organization. Two years later, at age 51, she took over the leadership role. At the time of the interview, Irene was 55, married and did not have children. Her father is semi-retired in another city and has some oversight of the operation of the national company. Irene did not have a brother available for the leadership role. Figure 16 is a timeline of her succession to leadership.

**Figure 16**

*Timeline of Irene's succession to leadership*

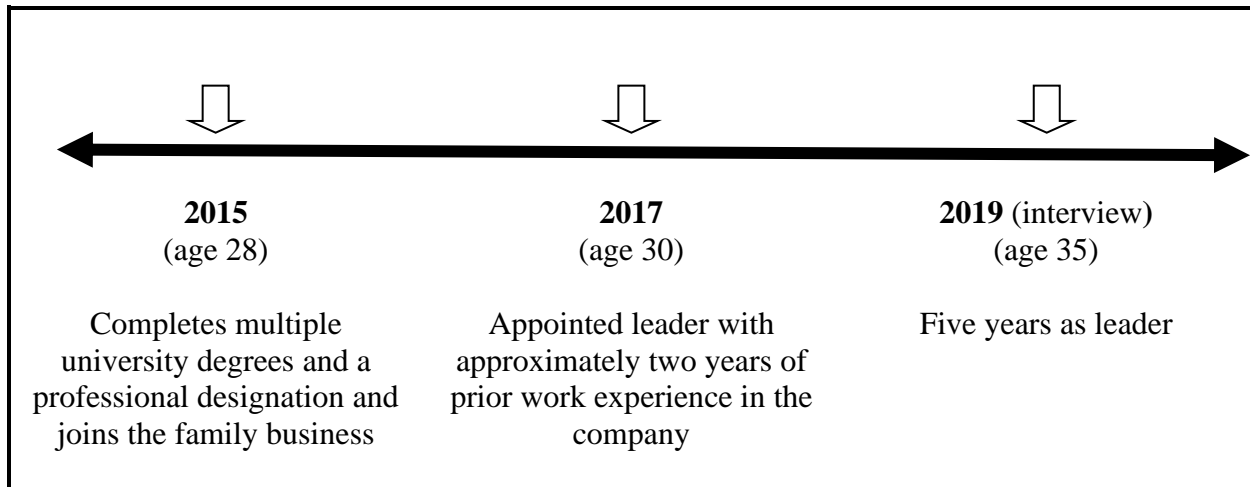


*Jasmine*

Approximately 40 years ago, Jasmine's father decided to leave the advisory company where he was an employee and establish his own business. Before this venture, he had obtained a university degree relevant to his initial job role. The family business employs approximately ten men in professional roles and a similar number of women in support staff roles. Jasmine, aged 35, assumed leadership of the family firm five years ago when her father retired.

Jasmine stated that she had been involved with the family business throughout her life, starting with summer jobs where she would answer phones and greet customers. She pursued undergraduate and graduate business degrees and recently added a law degree to her collection of university degrees and professional designations. This focus on education meant that Jasmine only had two years of full-time management experience in the family business before becoming a leader. Jasmine is married and has three young children. Jasmine has a younger brother who joined the family business one year ago in a non-management role. Figure 17 is a timeline of Jasmine's succession to leadership.



**Figure 17***Timeline of Jasmine's succession to leadership****Kyra***

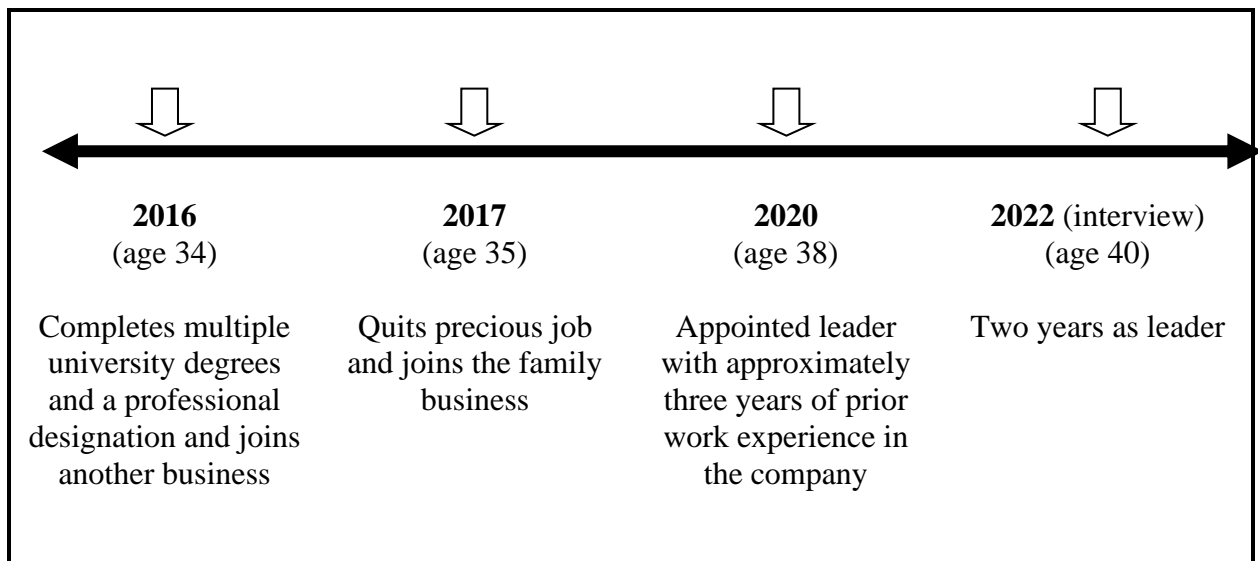
Twenty-five years ago, Kyra's father established a small business in the service industry employing an equal number of men and women. Her father completed grade eight education and pursued various entrepreneurial endeavours before finding success with the current business. Kyra worked at the family business during high school and university during the summer, learning about the company from the ground up. After completing a bachelor's degree and an MBA, she joined an accounting firm to pursue a career as an accountant. However, she decided she did not enjoy the work and, after a year, quit to join the family business.

As an only child, Kyra's father always planned for her to become the company's leader. He believed her transition to leader would be smoother if she understood the business from various roles and locations. Consequently, Kyra worked at several remote business locations

instead of being based solely at the head office for approximately two years. Two years ago, at age 38, her father officially appointed her as the company leader, although he occasionally comes into the office to check operations and answer questions. Kyra has two school-age children. Figure 18 is a timeline of her succession to leadership.

**Figure 18**

*Timeline of Kyra's succession to leadership*



### ***Lucy***

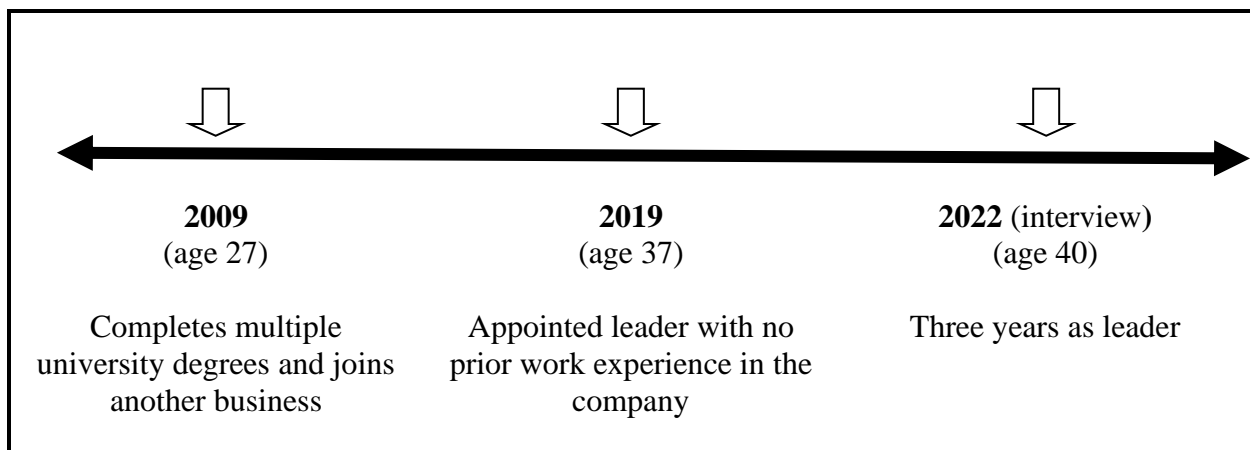
Lucy's father began his career as an employee of the family industrial manufacturing business after completing high school. Thirty years ago, he purchased the company from its previous owner and expanded its operations, establishing multiple divisions across Canada. The company has since grown to employ around 2,000 individuals. The business operates in an almost exclusively masculine industry.

After university, Lucy worked in a senior management position in an unrelated company for approximately ten years. During that time, she also completed an MBA. Three years ago, at age 37, Lucy and her father decided she should assume leadership of the family business despite her lack of prior experience within the company. Lucy's father chose her for the role instead of her siblings, who also worked in the company, with her sister responsible for marketing and her brother overseeing areas beyond the primary business.

During the interview, Lucy was acting as an apprentice leader. Because of the breadth of the operation, her father wanted her to work in various locations across Canada to gain knowledge of the business before relocating to the company's head office. Lucy's father was semi-retired, serving as the company's advisory board chairman. Lucy is married and does not have children. Figure 19 is a timeline of her succession to leadership.

**Figure 19**

*Timeline of Lucy's succession to leadership*



*Mavis and Nancy*

Mavis and Nancy, aged 62 and 60, respectively, serve as co-leaders of their father's medium-sized industrial manufacturing company. They make joint decisions regarding its overall direction and contribute their expertise within their respective areas of responsibility. Their father, who completed high school, established the business approximately 55 years ago. Currently, the company employs around 450 individuals in a predominantly masculine industry.

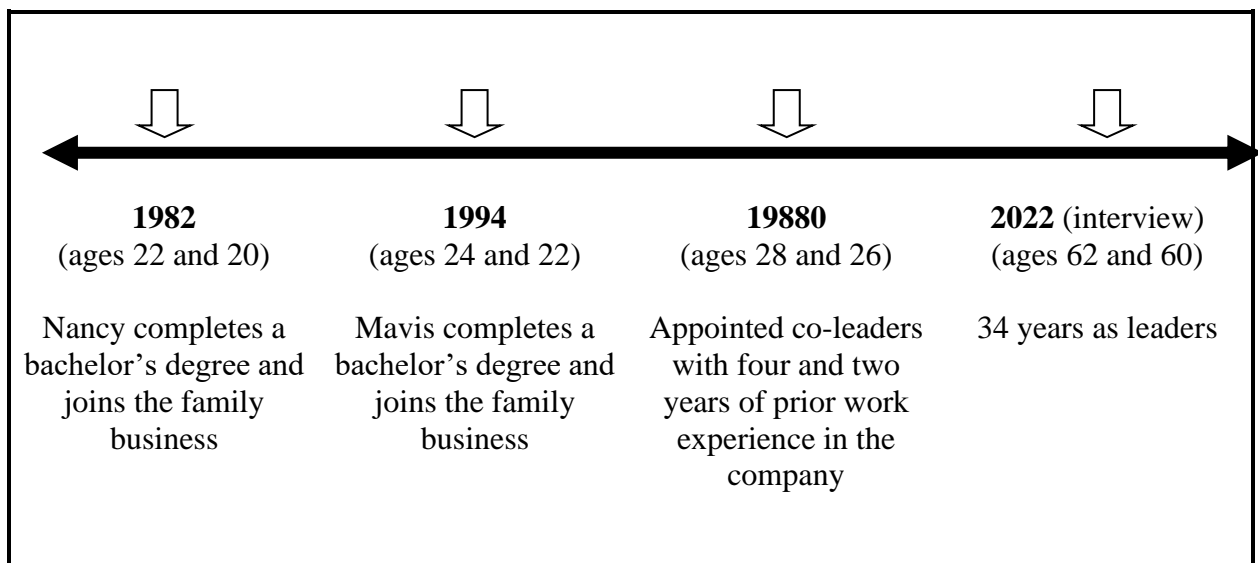
Thirty-four years ago, their father decided to retire from the business and pursue another entrepreneurial opportunity. Initially, the succession plan involved Mavis as the sole leader, as she had always wanted to take over the company, and Nancy intended to pursue a career outside the family business. However, during the succession discussions, Nancy changed her mind and decided to become a co-leader, responsible for the financial aspects of the company, while Mavis focused on the human resources side of the business. At the time, Mavis was 28 years old, and Nancy was 26. Both had completed university degrees and held senior positions within the company, having worked there for four and two years. Nancy and Mavis do not have any other siblings.

After the appointment of the two daughters as co-leaders, their father gradually transitioned out of the business, visiting the office sporadically. Although he attended the company's weekly management meetings during the transition, he rarely spoke. Mavis described his role as a tiebreaker if the two daughters could not agree on a particular decision. Mavis and Nancy mentioned that their father had only recently retired from his other business at 94. Both

daughters are married and have grown children. Figure 20 is a timeline of Mavis' and Nancy's succession experience.

**Figure 20**

*Timeline of Mavis and Nancy's succession to leadership*



### *Olivia*

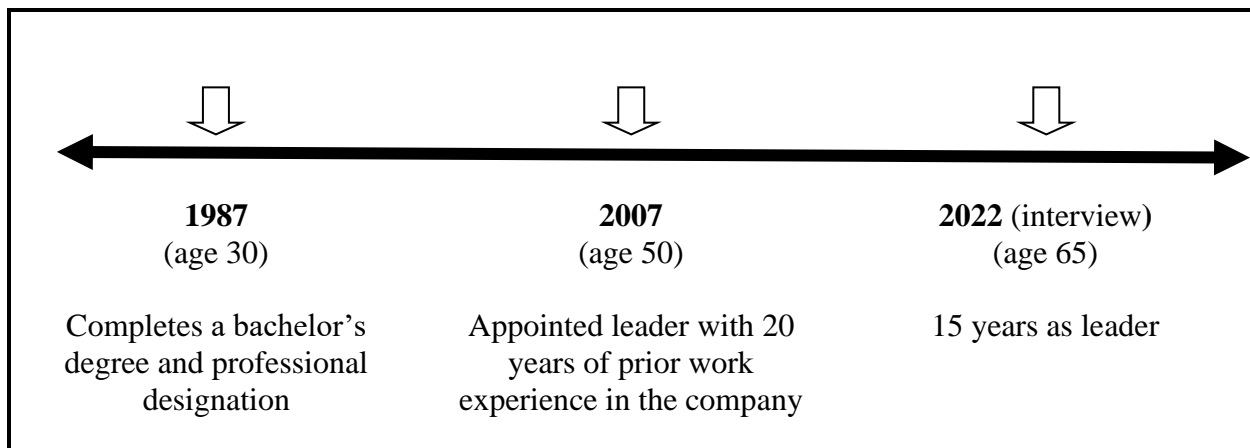
Olivia, age 65, was the oldest of the interview participants. After completing high school, her father pursued several entrepreneurial ventures, eventually founding the family business in 1975 and growing it to employ around 160 individuals in a predominantly masculine industrial industry. Olivia mentioned that she grew up immersed in the business and worked at the company during her summer breaks. Olivia was an only child.

After completing university and obtaining a professional accounting designation, Olivia joined the business at her father's request when she was 30, intending to help for just three years. Ultimately, Olivia worked alongside her father for 20 years until he began transitioning out of the company approximately 15 years ago. Despite functionally operating as the company leader before her father's passing, Olivia was officially appointed president only after his death when she was 50. Throughout their working relationship, Olivia's father focused on the technical aspects of the business while she handled what she described as "the business part of the business."

At the time of the interview, Olivia had been married for 30 years and had two grown children. While she enjoyed her role as a leader, Olivia was now looking forward to retirement, as her children had no interest in continuing the business. Consequently, Olivia recently completed the sale of the company and was in the final stages of handing over the family business to the buyer. A timeline of Olivia's succession experience is set out in Figure 21.

**Figure 21**

*Timeline of Olivia's succession to leadership*



### **Interview Data Summary**

In this section, I summarize the interview data to help the reader understand the participants as a group. In the summary below, I highlight the data relevant to the daughter-successors, followed by their fathers, and finally, their family businesses. The summary concludes with Table 3, consolidating the information gathered from the succession stories.

#### ***The Daughters***

The average age of the participants was 51.6 years. The youngest participants were Chelsea and Jasmine, both 35 years old, while Olivia was the most senior at 65. On average, the daughter-successors assumed leadership of their family businesses at 37.1 years of age. Nancy was the youngest to take on the role at 26, although Chelsea, Florence, and Mavis also took over leadership in their twenties at age 28. The oldest participant to be appointed leader was Abigail, who was 54. This average age is younger than the average age of CEOs in Canada, which is 58 (Korn-Ferry, 2017). The participants had been in the leader role for an average of 14.5 years, ranging from just two years to 37 years.

All daughter-successors had completed university-level education, with several holding multiple degrees. Three participants had obtained professional designations, including a Peng, CFA, and CPA. In cases where the daughter-successors pursued additional degrees, it was typically an MBA or another master's level degree relevant to their role as the family business leader. Some daughters also took business coaching courses to develop their skills further.

Most participants had dedicated their careers to the family business, often starting in junior roles after completing university and gradually progressing to leadership positions. Exceptions included Lucy, who had briefly worked for another company but joined the family business before taking on the leadership role, Irene who had her own business for several years before becoming leader, Abigail, who came from an unrelated profession and had no prior experience in the family business when she became the leader and Delores who stepped in after both her brother and father suddenly passed away.

Six of the fifteen daughter-successors were only children or had a sibling who passed away (Delores), making them the default option if the father wanted one of his children to lead the family business. Mavis and Nancy did not have siblings, leaving them to share the role. Abigail became the leader after her brother failed, and Barbara became the leader because no one else in the family wanted the job. The remaining five participants became leaders instead of available siblings or cousins.

### ***The Fathers***

Out of the fifteen participants, three of their fathers were deceased when the participants took over leadership (Delores, Florence, and Olivia), and one was incapacitated (Chelsea) and, therefore, unable to engage in the transition process. One father was chair of the company (Ella), assuming an oversight role while allowing her to lead the business. The remaining eleven fathers were either semi-retired, mentoring their daughters until the transition was complete, or immediately retired from the company after their daughters' leadership appointment. Among the



participants' fathers, only two had completed a university degree after high school, ten completed high school, and three did not progress beyond grade eight.

### *The Family Businesses*

Most of the participants were leaders of medium-sized businesses, with two participants leading large firms and three leading small companies. The youngest family businesses had been operating for 24 and 25 years, while the average age of the family businesses was 56.1 years, indicating the daughter-successors were assuming leadership roles in well-established and successful companies with a significant presence in their industries. Of the fifteen family businesses, twelve operated in industries that employed predominantly employed men in management and operational positions. These industries included industrial manufacturing, construction, agriculture, finance, and transportation. The remaining family businesses operated in service industries that had an equal representation of men and women employees in all organizational ranks. None of the companies conducted business in industries with a woman-dominated workforce.

Table 3 summarizes the information provided by the participants during their interviews relevant to my analysis. The left-hand column summarizes information about the daughter-successors to help the reader distinguish between the participants and outline information I will refer to later in my analysis. It includes the age of the participants at the time of the interview when they became the family business leader, the number of years of experience working in the family business before becoming a leader and how many years they had been a leader when I interviewed them. I also included information about their education level, including any

professional designation such as CPA, CFA, or other, and their family situation at the time of the interview. The middle column summarizes information about the participants' fathers, including their education level, their involvement with the business at the time of the interview and whether they was involved in the transition process, which I considered as the overlap between when the participants were appointed leaders and the time when the fathers left the organization, handing over full responsibility for the business to their daughters. Finally, the right-hand column summarizes information about the family businesses of each participant, including the companies' age, size, and gender orientation.

**Table 3***Succession stories summary*

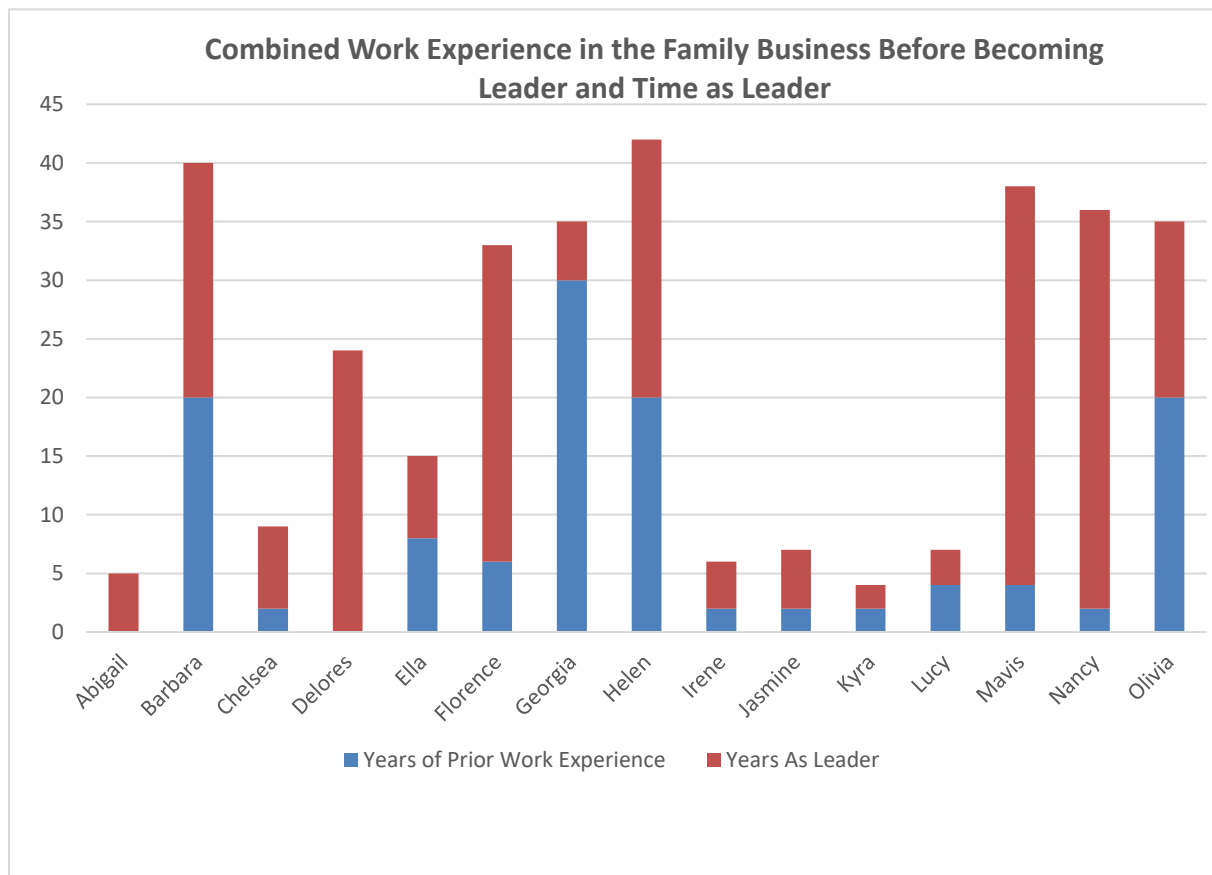
Daughter-Successors							Fathers			Family Businesses		
	Age	Age when appointed leader	Years of experience before becoming leader	Years as leader	Education	Family	Education	Current role	Transition time with daughter	Age	Size	Industry gender
Abigail	59	54	0	5	Bachelor's	Married with grown children	Grade 8	Retired	No	52	Medium	Masculine
Barbara	57	37	15	20	Master's	Divorced with grown children	Grade 8	Retired	Yes	77	Large	Masculine
Chelsea	35	28	5	7	Bachelor's	Married with one child < 5	High school	Retired	No	36	Small	Masculine
Delores	60	36	0	24	Bachelor's	Married with one child < 5	Grade 8	Deceased	No	63	Medium	Gender Neutral
Ella	37	30	5	7	Master's	Separated with two children < 7	High school	Semi-retired	Yes	67	Medium	Masculine
Florence	55	28	6	27	Bachelor's	Married with grown children	High school	Deceased	Yes	62	Medium	Masculine
Georgia	55	50	23	5	Master's + Prof Designation	Married with three children < 18	Bachelor's	Semi-retired	Yes	47	Medium	Masculine
Helen	58	36	7	22	Bachelor's + Prof Designation	Married - grown children	High school	Retired	Yes	24	Small	Moderately Masculine

Daughter-Successors							Fathers			Family Businesses		
	Age	Age when appointed leader	Years of experience before becoming leader	Years as leader	Education	Family	Education	Current role	Transition time with daughter	Age	Size	Industry gender
Irene	55	51	2	4	Bachelor's	Married – no children	High school	Semi-retired	Yes	70	Medium	Gender Neutral
Jasmine	35	30	2	5	Master's + Prof Designation	Married with children < 18	Bachelor	Retired	Yes	40	Small	Masculine
Kyra	38	36	2	2	Bachelor's + Prof Designation	Married with children < 12	High school	Semi-retired	Yes	25	Medium	Gender Neutral
Lucy	40	37	4	3	Master's	Married – no children	High school	Semi-retired	Yes	102	Large	Masculine
Mavis	62	28	4	34	Bachelor's	Married with grown children	High school	Retired	Yes	65	Medium	Masculine
Nancy	60	26	2	34	Bachelor's	Married with grown children	High school	Retired	Yes	65	Medium	Masculine
Olivia	65	50	20	15	Bachelor's + Prof Designation	Married with grown children	High school	Deceased	Yes	47	Medium	Masculine
<b>Average</b>	<b>51.6</b>	<b>37.1</b>		<b>14.5</b>						<b>56.1</b>		

Figure 22 below illustrates the years of work experience in the family business each daughter-successor had before becoming the family business leader and their time as the leader. The graph is intended to provide the reader with a snapshot of each participant's work and leadership experience for reference in the data analysis to follow in the next chapters. This chart is interesting as it shows how different participants had different work experiences in the company before becoming leaders and the time in the leader role at the time of the interview. Later in this study, I will explain the importance of these factors in my findings.

**Figure 22**

*Participants' combined work experience and time as leaders*



**Chapter Conclusion**

In this chapter, I presented brief summaries of the succession stories shared by the participants during the interviews. At the end of the stories, I included a consolidated summary chart to help the reader refer to and recall the details of the participants' succession experiences when I mention them in my analysis in the following chapters. Finally, to further aid the reader, I provided a chart illustrating each participant's prior work experience in the company and their years as leaders.

### **Chapter 6 Data Analysis – Understanding Why**

*There was a lot of chatter. You know, how long is it going to last? Almost waiting for the failure to happen. – Ella*

In this chapter, I present my data analysis and findings to answer the first research question: *Why is it difficult for daughter-successors to achieve legitimacy as family business leaders?* I begin by presenting the results of the first step of critical realist analysis, referred to as retrodution, which involves analyzing the interview transcripts to identify demi-regularities in the data. Having identified the demi-regularities, I then present my data analysis using the two *a priori* theories – social constructionist feminist theory and patriarchy theory to identify the mechanisms and social structures that caused the events comprising the demi-regularities.

#### **Empirical Data - Skepticism, Resistance and Exclusion**

I began the interviews by asking the participants about themselves, their businesses, and how they became family business leaders. This data provided much of the information I outlined in Chapter 5. I also asked them to describe their experience as the leader of their family business. Initially, the responses were positive, with most participants explaining that they enjoyed being the leader of their family business and that they found it immensely rewarding. However, as their stories progressed, they all revealed that leadership was not always easy, and they explained how they often experienced events I coded as skepticism, resistance, and exclusion in the role. These events existed at the empirical level of reality and were external to the daughter-successors as they were enacted by others.

Skepticism typically reflected events where others doubted the daughter-successor's abilities as family business leaders and perceived that they did not fit the leadership role. While skepticism primarily occurred when the daughters-successors first took over leadership, some participants experienced skepticism after they had been leaders for several years. Resistance was a response to the appointment of daughter-successors to the leader role and tended to be performed by employees and customers who did not want to work for or do business with the daughter-successors. Finally, exclusion was manifested as exclusion from networking or business opportunities and was primarily exhibited by outside business contacts.

For example, skepticism was revealed by former teacher Abigail, who recounted her employees' reactions to her appointment as a leader as a mix of confusion and disrespect, with many expressing explicit doubts about her capabilities as the leader. She recounted, "I think it was, for all of them, a WTF. It was like, what is going on here? While a few were respectful, many were rude. It was tough". Later in the interview, she added, "Several people wondered, 'What is she doing here?' They were really confused. They had no idea why I was the leader". Despite having worked for her family's industrial manufacturing business for over 15 years before becoming leader, Oliva described a similar response when she stepped into the leader role. She said, "Some people really raised their eyebrows about me becoming the leader. One fellow even laughed about it." Several other participant statements revealed considerable skepticism, reflecting a perception that the daughter-successors did not belong in the leader role of their family business.

Other participants reported events of resistance. Resistance occurred when employees refused to take direction from the daughter-successors, undermined their authority, or quit the



family business when the participants took over the leadership role. For example, Olivia described the resistance she encountered: “We had one employee who said, ‘I will never work for you.’” Other employees, whom she described as “bad actors,” refused to cooperate with her as a leader and undermined her authority at every chance. Chelsea reported losing half of her staff when she became a family business leader, as many employees who had worked for her father refused to work for her.

Finally, some participants reported experiencing exclusion. Exclusion involved being excluded from networking events, trade associations, and business opportunities by individuals outside the family business. For example, despite their golf abilities and interest in sports, Nancy explained that men never invited her and her sister to participate in activities such as golf games or attending sports events, which she viewed as necessary for networking and growing her business. Similarly, Barbara’s experience revealed exclusion when she explained how, in her trade association, she was never invited to participate on the board of directors despite being the leader of the largest and oldest company in her industry. I concluded that skepticism, resistance, and exclusion in detail were demi-regularities existing at the empirical level of social reality requiring further analysis at the deeper levels of social reality to understand why they occurred.

### **Empirical Data - Self-Doubt and Imposter Syndrome**

I also discovered that the participants experienced considerable internal events of self-doubt about their fit with the leadership role and felt they were imposters as family business leaders. These events also existed at the empirical level of reality. Clance and Imes (1978) defined imposter syndrome as a feeling of lack of qualifications or intellectual phoniness. They

found that imposter phenomenon is particularly prevalent and intense among high-achieving women who, despite outstanding academic and professional accomplishments, believe they are not intelligent or skilled at their jobs and have fooled anyone who thinks otherwise. Numerous achievements, which one might expect to provide ample evidence of superior intellectual or professional functioning, do not counter the impostor belief (Clance & Imes, 1978).

With this research in mind, I asked the participants, *“Do you feel like the leader of your business?”* Although they initially unanimously responded in the affirmative. I also asked, *“Have you ever felt you were not perceived as the leader, and if so, give me an example?”* The response to this prompt was interesting as it revealed that the participants often did not feel like leaders and had significant doubts about their fit with the role. For example, despite initially replying that she felt like the leader of her business, Abigail stated, “It’s tough as the leader because, you know, you start to wonder, and you start to question yourself. You know, all those kinds of things, right?” Kyra said, “There have definitely been times when I haven’t felt like the leader.” Lucy added that she had moments of self-doubt about her suitability for leadership that seemed to come and go throughout her career. She explained, “There have been times where I haven’t felt like the leader, often because I didn’t have the confidence around maybe what I was doing or where we were going.” Chelsea mentioned,

So, for a couple of years, I was doing my best to tread water and fight off all these rumors and prove that I could do it and we would be around. I wondered what I had gotten myself into, and others wondered if I was the right leader.

Similarly, Olivia initially said she felt like a leader. However, she also expressed uncertainty about whether she had what it takes to be the leader, relating her feelings of imposter syndrome. She explained:

I definitely have had my fair share of imposter syndrome and all that. I asked myself, “Do I have what it takes”? I think I'm reflective in that sense. I feel like there's still always, you know, room to learn and grow. I think I can certainly do better than I am doing. There have been days when I'm like, am I the right leader

While I expected self-doubt and uncertainty when the participants first took over the leadership role, I was surprised that many questioned whether they fit the leadership role years after taking over the helm of their businesses. In other words, this ongoing self-doubt and feeling that they are imposters in the leader role was not simply being new at the job but a reflection of something deeper.

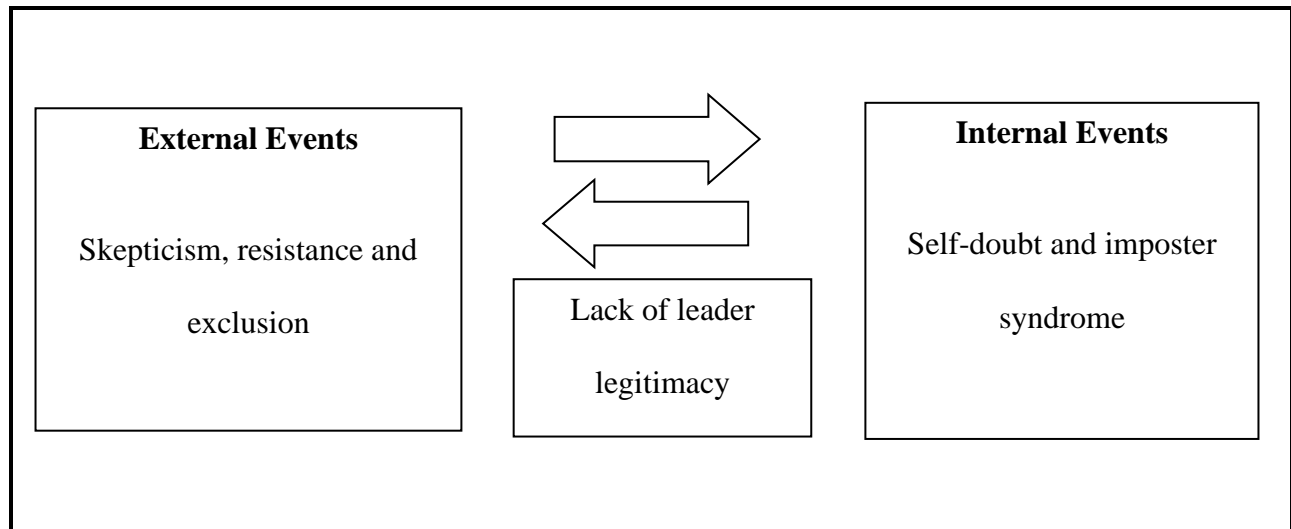
### **Analysis at the Actual Level of Reality**

Drawing together my analysis of the narratives and the literature, I concluded that the events of skepticism, resistance and exclusion manifested a perception that the daughter-successors lacked legitimacy as family business leaders. The perception existed at the actual level of reality as it was not directly observable by the participants. I also concluded that the internal events of self-doubt and imposter syndrome reflected the participants' inability to construct a leader identity. This failure to construct a leader identity also occurred below the surface at the actual level of reality as it was not directly observable. Furthermore, my analysis revealed that the events were interconnected. In Chapter 2, I explained that studies have found

that when daughter-successors fail to construct a leader identity, others doubt their legitimacy as leaders (Hytti et al., 2017). As Hytti et al. (2017) noted, identity construction requires daughter-successors to first construct the identity of family business leaders in their own eyes, then in the eyes of their family, and finally, in the eyes of their employees and other stakeholders. Figure 23 illustrates the relationship between the events and the cycle of lack of legitimacy.

**Figure 23**

*Relationship between the external and internal events and perceptions of leadership legitimacy*



### **Gender Norms and Leadership Legitimacy**

The next step in the data analysis was to identify the mechanisms and social structures at the real level of reality that may have caused the events reported by the participants. As I explained in Chapter 3, mechanisms cause an event to occur. In Chapter 2, I mentioned that research suggests that gender is related to perceptions of a daughter-successors leadership legitimacy (McAdam et al., 2021; Vial et al., 2016; Xian et al., 2021). Therefore, I asked the participants, *“Does being a woman make it more difficult for you to be perceived as a leader?”* This question

elicited a unanimous response in the affirmative, with many participants elaborating in considerable detail on their struggles as women in the leadership role.

For example, Chelsea credited most of the resistance she experienced to gender. She said, "A lot of the guys in the company opted out when my dad started to shift out of being the leader because I was a woman." Jasmine also reported a negative response to her leadership appointment, which she attributed to gender. She said, "I would say the majority of the employees were very concerned because I was a woman. They wondered what I was doing here." Similarly, Abigail detailed her challenges as a women leader, noting, "There was fear about a woman taking over. There were definitely thoughts that I couldn't do it."

The influence of gender on perceptions of the participant's leadership legitimacy often extended to events outside the family firm. Several participants reported events where customers told them that they did not want to do business with the daughters because they were women. Chelsea explained that one of her customers told her, "You're not going to be around next year, so why would I send work your way? You're a woman. You're not going to cut it. You're not going to make it." She also mentioned that one of her customers moved their business to another company, telling her, "I don't want a chick attached to my work." Mavis also explained that some customers did not want to do business with her firm when she and Nancy took over the leadership role because they were women. For instance, she described an event where potential customers doubted her and her sister's leadership legitimacy even though they knew nothing about the daughters other than that they were women. She related the following event:

Nancy and I had wanted to expand the company. So, one time, we were given a meeting with a very, very large potential customer. And we could tell that they were there as a favour. So, I think there were like seven men in a very dark room at a board table, and they had their arms folded, and clearly, you could see it written all over them, "Yeah, what we're doing is a favour. Let's get this painful time over with these two women trying to talk to us".

While Chelsea experienced skepticism and resistance from employees and customers because of her gender, she also battled competitors in her industry who seemed determined to cast her as lacking leadership legitimacy because she was a woman. She explained,

Our competitors were putting out ads of a little girl sitting behind a desk with a too-big suit, big glasses and stacks of paper that said, "Would you trust your business to the professionals or a little girl? They went into full-blown attack mode to take our work. They didn't think I could do it. I was doing my best to tread water and fight off all these rumours and prove that I could do it.

Other events of skepticism, resistance and exclusion were expressed by individuals far removed from the family business' inner workings. Continuing her discussion on exclusion from networking events, Nancy elaborated,

So, there are times when Mavis and I are excluded because we are women. And you know, there might be a men's golf trip. Well, a lot of business gets done through those kinds of things. And if we're excluded, we miss out. But even golf games, So very, very, very large company. I would ask the buyer, you know, out to a golf

game during the day because lord knows I couldn't invite him out for dinner, and he'd say, Nancy, I'm just being honest, but I get X number of golf days allowed in my position with vendors. And quite frankly, I would rather be golfing with men.

Later in the interview, she described how even her father recognized that gender influenced her role as leader. She related:

I certainly could never invite a male customer out for dinner. A male could invite another male customer out for dinner, but that's not okay. And even Dad said that's not okay. You can't.

Olivia also experienced exclusion from networking events, recognizing that it could negatively affect her company. She explained,

It was difficult because you're never one of the boys like my father was. I was not going out for a beer after work, you know, all the places where the sort of the real connections happen in a male-dominated industry. You know, the customers loved and respected me, but I was also seen as a 'girl.'

As I noted above, Barbara also reported exclusion within her industry, which she attributed to her gender. She explained,

I would go to industry meetings, and even though I owned the largest company in the industry, I was never nominated to the industry board. The men would appoint each other, even though I was the one that should have been involved in the

decision-making in the industry. I would sit in the room being completely ignored because I was a woman.

The daughter-successor's self-doubt also seemed to have a gender element. Chelsea's narrative revealed uncertainty about how to behave as the leader and how she believed she needed to enact a tough exterior to hide her worry that she lacked the masculine characteristics for the role. She explained,

I felt like I had to have this tough shell on. I didn't want to be portrayed as weak. I didn't want to say, "Oh my god, I don't know what I'm doing and need help," because I didn't want anyone to know that. They wouldn't believe in me as a leader if they thought I was weak.

As I mentioned above, Barbara also struggled, recognizing that deferring to others was not a trait associated with leadership, causing her to wonder whether she was suitable for the job. These narratives reflect self-doubt about their fit with leadership and the confusion and uncertainty of navigating gender and expectations associated with the leader role.

#### Gender Norms as a Mechanism

Using the *a priori* theories to ask why the events reported by the participants occurred, I concluded that gender norms were a powerful mechanism that caused the external events of skepticism, resistance and exclusion and the internal events of self-doubt and imposter syndrome. Recall that mechanisms are the underlying processes or causal powers that generate observable phenomena. These mechanisms exist independently of whether they



are observed and interact with other mechanisms to produce actual events or outcomes.

Identifying and understanding these mechanisms is key to explaining how and why things happen.

Gender norms are the societal rules and expectations that guide and inform behaviour considered appropriate, acceptable, or desirable for people based on their perceived or assigned gender (West & Zimmerman, 1987). Gender norms influence various activities and behaviours embedded in cultural, social, and institutional structures, such as business organizations. They influence many aspects of life, including the division of labour within households (Walby, 1990), occupational segregation (Kanter, 1977), and roles within familial and social frameworks.

Social constructionist feminist theory emphasizes that gender norms are shaped and reinforced through everyday interactions and institutional practices. Gender performance is continually assessed against societal norms of masculinity and femininity, with leadership qualities typically associated with masculine traits such as assertiveness, decisiveness, and authority (Morgan, 2006; Yoder, 2001). Since these traits are linked to men, women who exhibit them may be seen as or see themselves as breaking gender norms, while those who do not may be viewed as or view themselves as lacking essential leadership qualities.

For the daughter-successors, these gendered expectations played a significant role. Society typically views daughters through the lens of traditional femininity, which conflicts with leadership characteristics. Consequently, when a daughter takes on a leadership role, her actions are scrutinized based on how well they align with or diverge from the masculine gender norms

associated with leadership. In this study, when the daughter-successors took on leadership roles contrary to these expectations, they experienced skepticism, resistance and exclusion regardless of their leadership performance, simply because they were women. In other words, they were categorized based on a societal perception of biological sex, which places them in the sex category of “female” with a narrow set of feminine norms to which they are assumed to adhere. This evaluation based on gender made it difficult and potentially impossible for the daughter-successors to achieve legitimacy as leaders.

For example, Chelsea's account of being depicted as a "little girl" in competitors' advertisements implied she was viewed as inherently inexperienced and lacking the skills, expertise, and competency for the leadership role because she was a woman. Similarly, Georgia, who worked in her family business for 23 years before becoming the leader, described how men tried to “pull one over” on her, assuming that since she was a woman, she lacked the business acumen necessary for leadership and could be taken advantage of. In other words, social constructions of gender led to expectations about the characteristics needed for leadership and expectations about the characteristics of women. Since the family firm's leadership characteristics were constructed as masculine, the daughter-successors were seen as not matching the leader role due to their gender. This led to a perception that they lacked legitimacy as leaders, expressed as skepticism, resistance, and exclusion.

Gender norms also affected perceptions of their leadership legitimacy in dealings with individuals outside the family business structure, confirming that gender norms extended beyond the family business. For example, Chelsea's customer's comment, “I don't want a chick attached to my work,” or being told, “You're a woman. You're not going to cut it. You're not going to

make it,” and Nancy’s statement, “It’s a man’s world, and it’s hard to fit it. There is still the old boys club. It’s unfair, but it is what it is”, revealed the influence of broader gender norms existing outside the family business.

Gender norms also affected the ability of the daughter-successors to construct a leader identity, which in turn contributed to perceptions of their lack of legitimacy. Yoder (2001) explained, "The way women perform their leadership roles is deeply affected by their gender identity, including the stereotypes and expectations that accompany it" (p. 815). Cha et al. (2023) also found that disparities in perceptions of leadership legitimacy, whereby women often view their leadership roles as less legitimate than men, contribute to a diminished sense of worth and self-perception as leaders, making it challenging to construct a leader identity. As mentioned above, when women leaders fail to construct a leadership identity, they are often perceived as lacking legitimacy, creating a cycle of internal self-doubt and external skepticism, resistance and exclusion.

For example, when daughter-successors step into a leadership role, they often experience an internal conflict between socially constructed expectations of femininity and the behaviours typically associated with effective leadership. This dissonance can make it difficult for daughter-successors to fully embrace a leadership identity because they constantly negotiate the conflicting expectations of being a woman and a competent leader. This struggle is not merely about personal identity but is rooted in the broader social constructs that define and limit what women are "supposed" to be. As a result, the daughter-successors find it challenging to assert themselves in a leadership role in a socially accepted way, thus hindering their ability to achieve leadership legitimacy. Indeed, when daughter-successors perform gender in a way that is

perceived as non-normative (i.e. a trait associated with masculinity), it is perceived in a negative as there is a lack of perceived alignment between the daughter-successors' sex category and how they do gender (West & Zimmerman, 1987).

Patriarchy, as a theoretical perspective, also explains the existence of gender norms. In a patriarchal system, individuals are judged based on their conformity to gender norms, which reinforce men's dominance. For daughter-successors, this meant their leadership was often evaluated against their father predecessors and judged through the lens of patriarchal expectations that deem leadership inappropriate for women. This double standard intensified the struggle for the daughter-successors to be seen as legitimate leaders within the family business and the wider business world.

Patriarchal theory also highlights how the social context within which leadership is enacted is a further obstacle to the leadership legitimacy of daughter-successors. In businesses, the organizational environment is heavily influenced by patriarchal norms that promote men as leaders. This social structure creates a significant barrier for daughter-successors, who must navigate not only the expectations of effective leadership but also rigid patriarchal norms that undervalue their contributions because they are women. The expectation that leadership is a man's domain means that women who aspire to a leader role are often viewed with skepticism or outright resistance.

Patriarchy also reinforces the notion that women, including daughter-successors, are inherently less capable or suited for leadership. This perception can manifest in lower expectations, reduced support, and greater scrutiny for women in leadership positions and cause

internal doubt about whether they are capable of the leader role. Indeed, even when daughter-successors displayed skills and competence, the patriarchal structure within the business world often undermined their authority and legitimacy simply because they were women. For example, Nancy observed, “It's a man's world, and it's hard to fit it,” reflecting her recognition that she did not fit within the patriarchal social structure of the business world.

Patriarchy also prescribes gender roles, which caused significant internal doubt about the participants' fit with leadership. Earlier, I defined gender norms as the societal rules and expectations that guide and inform behaviour considered appropriate, acceptable, or desirable for people based on their perceived or assigned gender (West & Zimmerman, 1987). Gender norms also prescribe gender roles, which guide various aspects of life, such as the division of labour within households (Walby, 1990), occupational segregation (Kanter, 1977), and roles within familial and social structures. Gender roles stem from a consensual belief that women and men tend to hold distinctively specific occupational and family roles (Diekmann & Schneider, 2010; Yoder, 1980), with men expected to fill leadership roles (Eagly & Johannesen-Schmidt, 2001; Heilman & Eagly, 2008; Schein, 2001), while women are expected to fulfill roles aligned with childcare and household management. When women step outside their ascribed gender roles and become business leaders, they act against expectations associated with gender roles, causing the challenges they experience.

For example, participants with children often described confusion about the dichotomy of normative femininity, which includes motherhood and expectations associated with leadership, further amplifying their struggle to construct a leadership identity within a patriarchal social structure. I discovered this when I asked the interview participants with children how they

managed childcare when their children were young, and they were at work. All participants with children described events where they struggled to balance being both a leader and a mother. Six participants described an immense inner conflict to meet perceived expectations associated with leadership and motherhood. For instance, Chelsea, who had one child and was planning another, mentioned that being away from her child during the day was stressful, and she was concerned about how she would balance leadership and motherhood since her husband had made it clear he would not be able to help with the child raising. Similarly, Florence expressed the significant pressure she experienced trying to simultaneously fulfil the family business leader and caregiver role. She explained,

I think it's harder for women. When I got married and had kids, I would get home by six. I'm the one with seven divisions, but I was the one who was expected to organize soccer and do all the grocery shopping. I did all of that stuff. I visited seven locations during the day, and all my husband did was go to work. That's part of why I'm not married anymore. I had all this pressure from my dad to work in the business, and I had all this pressure from my husband to carry the lion's share of the work at home. It really didn't work that well together.

Georgia, Jasmine, Delores, and Kyra also struggled to fit both roles, balancing the care of their children with the pressure from their fathers to devote one hundred percent to the family business. Salganicoff (1990) described this conflict in her research, finding that daughter-successors typically receive conflicting messages from their families to fully dedicate themselves to the company while simultaneously providing the family with grandchildren. Ella's narrative illustrates this dilemma. Although Ella's father appointed her as the family business leader, her

account revealed that while he was pleased that she took on the leader role, he expected Ella to devote herself to her children. She explained, "I think my dad is still a bit old school. He thinks that women should be at home looking after the kids. Or if you don't have kids or you're older, the family should be the focus and the priority." On the other hand, he perceived her as "slacking off" when she prioritized being present for her children during the COVID-19 pandemic, raising doubts about her commitment to the leadership role. She explained,

I think my dad thinks I'm slacking off. I think he thinks that they saw a lot of passion and excitement at the beginning, and I think now he thinks I'm just letting things slide because I'm not in the office every day. So, I feel like I will really have to prove something all over again once the kids are at school.

When I asked her what she meant by "prove," she explained:

Prove my dedication, interest, and determination to do the job because I had to do that when I wanted to take on the role. And I did. And then, I hate to blame things on children, but it is what I do. Everyone says you can do both. I don't. I don't think it's true. You can half-assed both, but you can't excel at both. So, I feel like I'm excelling at being a mother right now, but I need to shift my focus again and prove that I can excel at leadership again.

Ella's narrative pinpointed the daughter-successors' confusion about how they fulfill the leadership role while trying to fulfill the expectation of raising a family. This confusion about conforming to gender roles and carrying out their expected roles in the family and the business caused them to struggle to construct a leader identity.

Gender roles stemming from patriarchy within the family structure also caused the participants to question their fit with leadership. All 15 participants described their family structure as “traditional,” leading me to wonder whether they were coming to the leader role with preconceived ideas about traditional gender roles that did not fit their role as family business leaders. For instance, when I asked Chelsea what she meant by traditional, she explained, “My mom has a very traditional role. She didn't work. She stays at home”. In other words, a family structure is based on relatively rigid gender roles, where the father acts as the family's leader, and the mother acts in a supporting role, looking after the home and raising the children. Barbara confirmed this response, explaining,

Growing up, we ate around the supper table, and my dad sat there while [the women] all cleaned up the dishes. We were expected to help with the dinner while my dad took out the garbage and mowed the lawn. So, we were definitely traditional.

Helen mentioned a traditional upbringing where she and her sisters were raised by their parents to “serve men.” She summed up her upbringing as follows:

The role of women in the family was very much traditional. Women did the cooking and the cleaning and looked after the men. For my mom, it was very important that I knew how to cook and look after the house and all that kind of thing. So yeah, I grew up very much with traditional norms and values when it came to women's roles in the house, for sure.



With these narratives in mind, I concluded that constructions of gender roles stemming from gender norms hindered the daughter-successors from constructing a leader identity. Growing up in a family environment described as traditional by the participants meant they were influenced by conventional gender norms, which often delineate clear, distinct roles for men and women. This upbringing instilled certain preconceived notions about what leadership looks like and who is “naturally” suited for it. As a result, when they stepped into leadership roles within their family businesses, they encountered a conflict between these ingrained gender role expectations and the demands of being a business leader. This conflict caused confusion and self-doubt, as their internalized beliefs about gender roles did not align with the expectations associated with leadership.

### ***The Masculinity of the Family Business?***

While I identified gender norms as a mechanism that caused the events, I wondered whether some of the events of skepticism, resistance and exclusion might have been related to the masculinity of the industries in which the family businesses operated. Some research has found that women leaders of business that operate in industries centered around men (i.e. masculine businesses) experience more resistance to their leadership than those in gender-balanced industries or industries dominated by women (Eagly et al., 1992; Garcia-Retamero & López-Zafra, 2006). For example, Garcia-Retamero and López-Zafra (2006) tested how people’s expectations affect perceptions of women leaders in different work environments. Participants evaluated a man or a woman candidate for a leadership position in an industry that was congruent or incongruent with the candidate’s gender. The results

revealed a prejudice against the women candidates, especially when they worked in masculine industries.

In this study, twelve participants led family businesses operating in normatively masculine industries, such as construction, transportation and industrial manufacturing. Of the twelve, all described how they experienced considerable skepticism and resistance, which they attributed to being a woman leading a business in masculine industries. For example, Olivia described the resistance she experienced as follows,

The employees believed they couldn't come in and swear and stomp and do all of that like they could with my father. They had to mind their P's and Q's, so to speak. And that was very difficult for some of these guys. It was also difficult for me. So, in an industry like ours, that's what guys want. But I was always viewed as the daughter.

To find out whether the masculinity of the family business affected perceptions of the leadership legitimacy of daughter-successors, I looked more closely at the responses of Delores, Irene, and Kyra, who led family businesses in what were more gender-balanced industries such as publishing and service industries. I hypothesized that the potentially diminished presence of masculine norms in their family firms would help them to be recognized as legitimate leaders, and a more gender-balanced industry would reduce events where their legitimacy was challenged, or they doubted their own leadership legitimacy.

However, the narratives revealed the same events of skepticism, resistance, exclusion, and self-doubt as the daughter-successors leading companies in masculine

industries. This finding illustrated the pervasive perception that the daughter-successors did not fit the traditional leader archetype or possess the requisite leadership traits as defined by patriarchal and gendered expectations. This finding contradicts previous research and suggests that the legitimacy of women's leadership is consistently contested, not merely in masculine sectors but across the spectrum. In other words, the narratives of Delores, Irene, and Kyra suggest that entrenched gender norms favouring men as leaders are not restricted to masculine industries but extend to all organizations, regardless of the gender focus of their industry. Figure 24 on the next page summarizes my data analysis to answer the first research question: *Why is it difficult for daughter-successors to achieve legitimacy as family business leaders?*

### **Social Structures**

Recall that in Chapter 3, I explained that mechanisms exist within social structures and social structures govern how individuals relate (Sayer, 1992). Social structures are enduring patterns of relationships, rules, roles, and practices that shape human behaviour and social interactions. They are relatively stable but can change over time through human agency. Social structures both enable and constrain actions, and they exist independently of individuals while being reproduced or transformed through social activity. One social structure is patriarchy. In the business context, men's experiences created a business environment that reflected a masculine social order, with leadership roles and corporate cultures embodying the values deemed important to men (Galvin, 2006; Wood, 2008). In other words, patriarchy is a normative framework that associates leadership and business with men.

In this research, it became clear that the daughter-successors found themselves within a patriarchal social structure when they became leaders of their family businesses. Over the years, their fathers constructed a social structure where they dominated as the masculine family business leader. This structure perpetuated gender norms, which caused the events the daughter-successors experienced. For example, the mass exodus of employees that Chelsea experienced reflected resistance, whereby they refused to work for a woman leader, causing Chelsea to be viewed as lacking leadership legitimacy. Similarly, when the daughter-successors became leaders of this patriarchal structure, they questioned their fit, causing self-doubt and imposter syndrome, which intensified perceptions they lacked leadership legitimacy.

Unfortunately, patriarchy did not just exist within the family business. It was inherent to the broader business world, where the daughter-successors encountered customer resistance and exclusion from business opportunities and networking events. Patriarchy enabled and perpetuated gender norms outside the family business, casting the daughter-successors as not fitting within the patriarchal business social structure because of their gender. Furthermore, like patriarchy within the family business structure, societal patriarchy perpetuated gender norms that caused the daughter-successors internal struggles regarding how they fit a leadership role typically reserved for men.

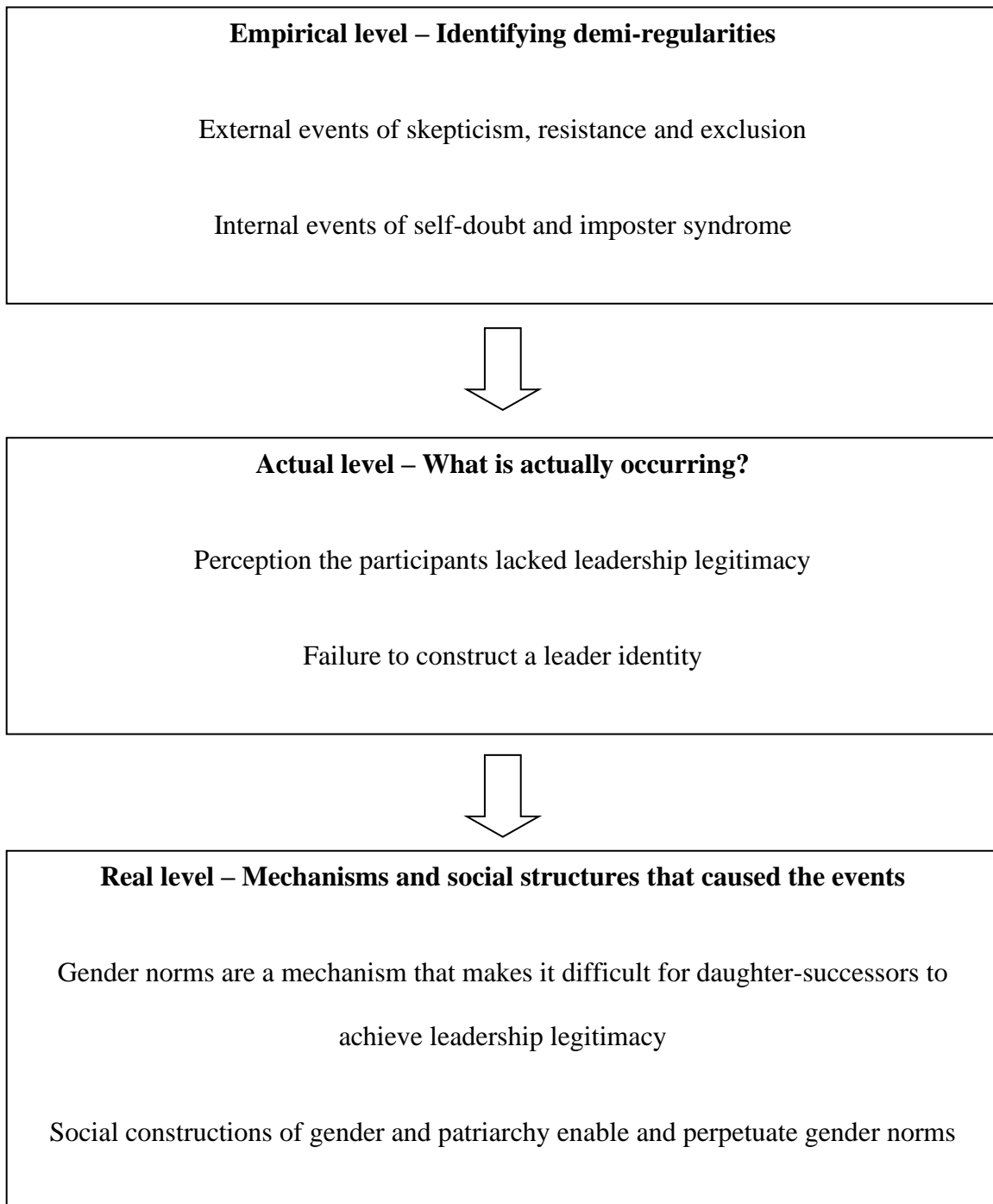
This analysis reflects the views of Lorber (2018), who explained that gender norms both emerge from and create institutionalized patterns of social interactions. She observed that society's institutions become gendered through social processes. Thus, through this gendering process, institutions such as businesses have become the domain of men. The analysis also reflects the critical realist views on the development and permanence of social structures. Social

structures govern how individuals relate and are created and perpetuated by social interaction – such as gender norms. Therefore, when daughter-successors become leaders of their patriarchal family businesses, a structure that was both created and perpetuated by their fathers, they are met with skepticism and resistance and struggle to construct a leader identity.

Similarly, as the daughter-successors interacted in the broader business world, they battled gender norms created and perpetuated by and for men, which caused them to be viewed as lacking legitimacy as family business leaders. Again, they struggled against skepticism, resistance and exclusion and doubted their fit within this gendered business world causing them to be viewed as lacking leadership legitimacy. Figure 24 on the next page summarizes my data analysis to answer the first research question.

**Figure 24**

*Summary of the data analysis to answer the first research question*



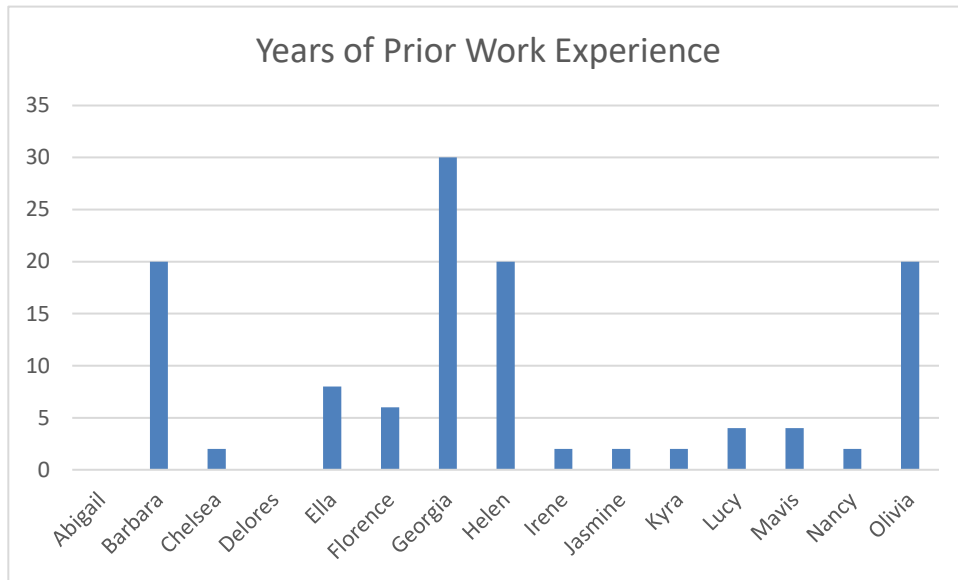
**Possible Other Causes**

Critical realism requires a researcher to ask whether there might be another explanation for an event before concluding what caused it. The data revealed that several participants had little or no experience working in the company before becoming leaders, suggesting that lack of experience may have contributed to the difficulties they experienced in achieving leadership legitimacy. For example, Abigail and Delores became leaders without any practical business experience. Abigail was a teacher for most of her career and was only appointed leader after her brother was removed from the role. She did not have any management skills and knew little about the business. Similarly, Delores was never expected to be the leader and inherited the leadership role after her father died. She had no experience with the company and preparation for the leadership role and struggled to be viewed as the family business leader. Her only contact with the business was running around the shop floor as a young girl and playing with the office equipment.

Chelsea, Irene, Jasmine, Kyra, and Nancy also had relatively little experience before becoming leaders, all entering the leadership role with only two years of prior work experience in the family business. For example, Jasmine and Kyra had pursued several university degrees, and Irene had spent several years working outside the family firm. Similarly, Lucy and Mavis became leaders with only four years of prior work experience in the business – Lucy having worked outside the firm. Together, these nine participants became leaders of their family businesses with less than five years of work experience in their firms. Figure 25 on the next page illustrates the years of experience working in the family firm each participant completed before becoming its leader.

**Figure 25**

*Years of work experience in the family business before becoming the leader*



Several participants also became family business leaders at a young age, possibly contributing to the skepticism, resistance and exclusion they experienced. For example, Nancy, Chelsea, Florence, and Mavis all became family business leaders in their 20s and early 30s, which is considerably younger than the average age of CEOs in Canada of 58 (Korn, 2017). For example, Chelsea mentioned that some of her staff members viewed her as too young for the leader role. Ella also mentioned that she was seen as a “cute, blond 20-something-year-old” by the men she interacted with rather than a legitimate leader.

However, looking more closely, I concluded that gender norms still contributed to skepticism, resistance and exclusion experienced by the participants. In the context of social constructions of gender, where constructions of gender mean women are viewed as lacking the traits associated with leadership, combined youth and lack of experience may have validated



these gendered norms. In other words, the participants' young age and minimal involvement in their family businesses before assuming leadership may have amplified societal beliefs that women are inherently less qualified for leadership due to a supposed lack of experience and confirmed perceptions that they lacked skills, expertise and competency for the role.

Consequently, when the daughter-successors assumed leadership roles as young women with limited experience, they inadvertently perpetuated perceptions of women's unsuitability for leadership, further challenging their efforts to establish legitimacy.

This lack of experience may also have contributed to what several participants mentioned as a perception of their role as leaders was a hand-out from their fathers rather than on merit. Helen's observation encapsulated this sentiment: "There is a real problem for daughters of founders because there is an unfortunate assumption that it's just a golden spoon and you only got what you're doing because of who you are. Not your competence." This sentiment of unearned privilege was echoed by Nancy, who faced significant challenges in dispelling notions of entitlement: "It was extremely difficult to overcome perceptions of entitlement. People just thought I got the job because of my dad, not because I was actually qualified." This perceived nepotism was particularly pronounced in the cases of Abigail and Delores, who assumed leadership roles with little to no prior experience, validating suspicions of their roles being handed to them. Kyra's concerns about being judged unfavourably due to her familial relationship further illustrate the prevalence of this belief: "I was really worried about stepping in and being judged or being perceived a certain way because I was the owner's daughter."

However, like age and lack of experience, it appeared gender norms were still at play. Perceiving the leader role as a father's handout may also have amplified societal beliefs that

women are inherently less qualified for leadership. It communicated that the daughter-successors could only be leaders because of their fathers and, as women, would never be leaders based on merit. In other words, the combination of gendered expectations and the assumption that women are less experienced or less capable leaders created a double bind for daughter-successors. They needed to prove their competence in a traditionally associated with men and overcome additional scrutiny due to the belief that their leadership role was not earned. This skepticism was further compounded when the daughter-successors had little to no prior experience within the company or were young and relatively inexperienced in life in general, as it aligned with and reinforced societal biases that question women's suitability for leadership roles.

I also examined whether personality conflicts and rivalry with others may have caused the skepticism, resistance, and exclusion the daughter-successors reported. For instance, earlier, I mentioned that Chelsea experienced personality conflicts with some of her employees. She explained, "I would come around the corner at the office, and people would be talking about me. They really didn't like me". Barki and Hartwick (2001) refer to interpersonal conflict in organizations as "a phenomenon that occurs between interdependent parties as they experience negative emotional reactions to perceived disagreements and interference with the attainment of their goals" (p. 199). Generally, the conflicts are rooted in the personal attributes and perspectives of the individuals involved rather than organizational roles or tasks. Personality conflicts are often displayed as tension, disagreements, and even open hostility, which can negatively influence the organization's effectiveness (Jehn & Mannix, 2001). Therefore, I wondered whether it was not gender norms that were creating a perception that daughter-successors such as Chelsea lacked legitimacy but rather that they were simply not liked by

employees and industry peers.

Similarly, Olivia, Abigail, and Irene experienced personality conflicts with senior men managers that seemed to be rooted in rivalry for the leader position. In her research on family businesses, (Dumas, 1989) found that in about half of the enterprises she studied, non-family men managers formed a complex triangular relationship with the father and daughter, giving rise to a competitive dynamic between the daughter-successor and the senior manager. This research was echoed by the narrative of Olivia, who battled two senior men who had expected to be the family business leaders instead of her. She explained,

Well, in my case, I had a couple of these bad actors. I had to develop a little bit of expertise in dysfunctional personalities. I literally was getting advice from advisory services on what's what, and they explained to me how these guys can behave like this. Since they believed they were going to be in charge, they made my life miserable until I could send them packing.

Abigail similarly described her relationship with one senior manager who worked at the company for over 40 years. She said, “Everything that came out of my mouth. He would go up against it. So, all I did was battle him”. Irene also dealt with her father's senior man manager, who second-guessed her every decision.

However, delving deeper into the narratives, I concluded that gender norms were at play. The senior managers perceived that because the daughter-successors were women, they lacked leadership legitimacy and, therefore, the leader position should have been theirs. In Chapter 2, I explained that not all family businesses are passed on to children. Instead, families will appoint

an external CEO (Bennedsen et al., 2007) or select a masculine insider as the family business leader (Wang, 2010). For example, the senior manager whom Abigail battled refused to accept her as the leader and instead viewed her as a teacher, lacking the skills for leadership. In contrast, he viewed himself as the rightful leader, having both the experience and the masculine characteristics for the leader role. Similarly, Olivia mentioned how the senior men she battled felt they needed to mind their behaviour around her, revealing a perception that she did not fit the masculinity associated with leadership. Consequently, they saw themselves as better suited for the masculine leadership role and were surprised and resentful when Oliva's father did not appoint them as the leader. As for Chelsea, she related other events of resistance from her employees that were clearly gender-based and unrelated to personality conflicts, confirming that gender was the issue. For example, she described being told by some employees that they would not work for a woman. In sum, I concluded that gender norms, rather than personality conflicts or rivalry, caused the resistance participants such as Chelsea, Abigail, Olivia, and Irene experienced when they became family business leaders.

## **Chapter Conclusion**

I started this chapter by presenting the findings from the first stage of critical realist analysis - focusing on examining the interview transcripts to uncover patterns or demi-regularities within the data. Recurring themes included skepticism from others regarding their leadership capabilities, resistance to their authority, and experiences of exclusion, which confirmed that daughter-successors were perceived as lacking leadership legitimacy. Additionally, many participants expressed self-doubt about their suitability for leadership, often referencing feelings of imposter syndrome. Following my analysis using the *a priori* theories, I

explained that I discovered gender norms to be a mechanism that made achieving leadership legitimacy difficult for daughter-successors. Constructions of gender meant that ascribed characteristics of women were seen as not fitting those associated with leadership and patriarchy, whereby leadership is associated with men, leading to a perception that daughter-successors lack legitimacy as family business leaders. Gender norms existed within the social structure of patriarchy, which positioned men in power, causing the daughter-successors to be viewed as incompatible with leadership and question their own legitimacy as leaders. I ended the chapter by considering other possible mechanisms that may have contributed to the events described by the participants. While young age, lack of experience, personality conflicts, and rivalry may have contributed to the events, I concluded that gender norms were the predominant mechanism.

### Chapter 7 Data Analysis – Understanding How

*I think it is an important thing for females to make sure that you show that you have the credentials because, unfortunately, otherwise, I'm just a daughter, a no one.* - Georgia

In this chapter, I focus on the data to answer the second research question: *How can daughter-successors negotiate their legitimacy as family business leaders?* Here, I identify the strategies the daughter-successors enacted to negotiate their legitimacy and challenge the masculine gender norms that prevented them from achieving leadership legitimacy. I will explain how the participants used education, work experience and earning the role to negotiate their leadership legitimacy. I will also explain the benefit of enacting a new management style that was normatively masculine but, in outcome, enabled a better fit with their feminine leadership approach.

#### Gaining Status

To understand how the participants managed gender norms that caused them to be viewed as lacking legitimacy as family business leaders, I asked them, “*How do you handle situations when you are not perceived as the leader?*”. All participants reported that they either emphasized their education and prior work experience or attempted to prove they earned the role to negotiate their legitimacy as family business leaders. These strategies aligned with the need to gain status to be viewed as legitimate leaders. I explain these strategies in detail to follow.

*Education*

Five participants mentioned that they highlighted their education to be viewed as a legitimate leader, particularly when interacting with people outside their family business. For example, Georgia explained that she always listed all her university degrees on her business card to prove she had the credentials to be a leader. She said, "I needed a university degree to stand in front of the bankers and accountants to show this company is being succeeded by somebody who is really educated." Six participants mentioned that having a university education was more critical for leadership because they were women. Georgia stated that without her education credentials, she would be viewed as "just a daughter, a no one." Similarly, Barbara, who had a bachelor's and master's degree, stated that women needed to prove they had the credentials for leadership more than men. She said, "I think a woman needs to bring it up a notch more than men. Show yes, I'm smart, or yes, I had the education". Echoing Georgia and Barbara's stance on education, Jasmine mentioned how she often stressed her professional designation to demonstrate her superior credentials to the men in her firm.

The value of a university degree in establishing leadership legitimacy is supported by research suggesting that educational credentials can significantly affect perceptions of competence and authority, especially for women in leadership roles (Singh et al., 2015). Similarly, Chrisman et al. (1998b) linked education with competency, finding that education communicates that a successor has the knowledge, skills, and problem-solving abilities necessary for the leadership role. In other words, they have the status characteristics (Magee & Galinsky, 2008) to be viewed as a legitimate leader.

From a theoretical standpoint, highlighting educational achievements seemed to be a response by the participants to a perception by others that they lacked leadership legitimacy. Social constructionist feminist theory revealed that the strategy of promoting their education was an attempt to counter perceptions that they lacked the characteristics associated with the leadership role because they were women. Thus, proving their skills and intelligence for leadership was designed to counter gender norms that positioned them as unsuitable for the role. Similarly, patriarchy theory revealed the daughter-successors attempted to prove they had what it takes to fit the patriarchal structure of the business world and alleviate their own self-doubt about how they fit within the role. Notably, Georgia's concern that without her university credentials, she would be viewed as "just a daughter, a no one" was evidence of a deep worry that as a woman, she both lacked the characteristics associated with leadership and did not fit men's patriarchal domain of leadership.

On the other hand, the data analysis revealed that despite having university-level education and some completing master's level qualifications such as MBAs, all the participants reported experiencing considerable skepticism and resistance to their leadership and self-doubt about their credentials for the leader role. For example, Georgia completed the most education of the participants, listing a bachelor's degree, an MBA and a professional designation on her business card. Nevertheless, she reported that men often tried to "pull one over" on her because they assumed she lacked the skills, expertise and competency for leadership.

While this response may be due to others discounting women's educational achievements, it may also be related to a general shift in perceptions around the value of university education in business. Traditionally, academic credentials were seen as a hallmark of competence and



capability (Conger & Ready, 2004). However, in today's technology-based and innovation-driven market, practical experience, entrepreneurial skills, and the ability to adapt and innovate are increasingly valued over traditional academic achievements (Conger & Ready, 2004).

On the other hand, it may reveal the formidable barrier women must overcome in the business world to be viewed as having the status characteristics for leadership legitimacy. In other words, no amount of education can counter gender norms that position them as lacking the characteristics for leadership or fitting the masculine leader role. I, therefore, concluded that highlighting their university education alone was not a pathway to legitimacy for the daughter-successors, and they needed to supplement it with other strategies to negotiate their legitimacy as family business leaders.

### ***Prior Work Experience in the Family Business***

Prior work experience in the family business before assuming leadership roles seemed to smooth the daughter-successor's transition to the leader role and helped them negotiate a legitimate leader identity. While some research found that prior work experience, whether inside or outside the firm, was valuable (Chalus-Sauvannet et al. (2016), the data in this study suggests that prior work experience must be *in* the family business to prove competence and negotiate leadership legitimacy.

For instance, eleven of the participants worked in their family businesses before becoming leaders<sup>11</sup>. Barbara explained the importance of work experience in her company as critical for earning the respect and admiration of her employees and proving her leadership competency. She said,

Every daughter-successor needs to enter the company at a level that makes sense for what they are doing at the time. Stick her head down. Bust her ass. Earn her credit and work her butt off to earn the respect of the employees. But she's gonna have to work her way and earn the respect of the people in the business and learn the business because you can pull some pretty high-level strings and not really understand the downstream impacts if you don't understand what you're doing. You can't just sit there and fly by the seat of your pants and think you're gonna keep your business under control. You need to have experience. You've got to have a seat at the table and seriously understand what's going on.

Olivia also implied that proving she had experience in the firm before taking over leadership helped her legitimacy as the leader. She explained,

Since I worked in the business before becoming leader, I had a lot of people around me that I had good relationships with. That I'd already built my social credit with. Like I'd already kind of freely driven a lot of the innovation that had grown the top line and bottom line of the business, and it was understood that I had, you know,

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<sup>11</sup> Abigail and Delores did not have prior business experience and Irene and Lucy worked in businesses outside the family business before becoming leaders of their family firms.

really been the person leading a lot of that right. So, I think if you're coming into the leader role, having worked in, and helped grow the business and worked alongside the people and gained their respect, it's a lot easier to move into a position of authority. People really honour the hard work and grit.

These narratives imply that previous work experience enables daughter-successors to interact with their employees and establish themselves as competent leaders.

In contrast, Abigail, Delores, Lucy, and Irene did not work in their family enterprises before becoming leaders and reported significant challenges in negotiating their leadership legitimacy. Indeed, while Chrisman et al. (1998b) found that experience outside the family business helped perceptions of a successor's competency as the family business leader, the findings of this study contradict their research. Irene and Lucy worked outside their family businesses before assuming leadership roles. Irene started her own company, eventually growing it to 85 employees over twenty years, while Lucy worked in senior management for a large firm. However, when they joined their family businesses, others perceived the move as a failure in their previous careers rather than a strategic decision. Lucy articulated her concern: "When I first became leader, people thought I failed [in my other career], so I joined my family business. It was really hard." Similarly, Irene recounted how employees questioned her sudden leadership role, suggesting she joined the family business because she couldn't "make it" elsewhere.

Assessing work experience in the family firm as a negotiation strategy, the data showed this strategy to be helpful. From a social constructionist feminist theory standpoint, work experience enabled the daughter-successors to demonstrate their competence and align

themselves with the socially constructed leadership expectations within the firm. By gaining hands-on experience and proving their capabilities in the business, the daughter-successors could challenge the traditional gender norms that caused them to be viewed as unsuitable for leadership roles. From a patriarchal theoretical perspective, the participant's previous work experience enabled them to demonstrate their value and competence within the established patriarchal framework, slowly building a case for their leadership. In contrast, the daughter-successors who joined the family business with experience outside the family firm needed to battle assumptions that, as women, they lack the masculine characteristics and skills, expertise and competence to succeed in a patriarchal business world.

### *Earn It*

Finally, proving they earned the leader role emerged as a critical negotiation strategy. All the participants stressed the importance of proving to others that they earned the leadership role and that they had the skills, expertise and competency for the job. Florence explained this strategy: "I think when you go in there, and you work your tail off, and people see you working, then you start to gain your own social credit." In other words, she proved she had the status characteristics to be viewed as a legitimate leader. Lucy also highlighted the importance of proving she earned the leadership role:

I am mindful of being a daughter-successor, and I always try to earn my spot but also not be flagrant about it. I'm not boastful. I deserve to be here. No, I would hope that my dad would fire me if I didn't deserve to be here. And I expect that he would.

I tell everybody that all the time, 'My job is on the line just like yours.' I need to earn my ability to be here every single day, and I hope that I do.

Nancy provided valuable insight on the importance of proving oneself as the leader:

I was never catapulted into the job. It's not an ivory tower. My dad always said that I needed to work my way up and prove myself. I also just learned early on that you have got to come to the table prepared. And so, for me, it was always more about proving why you're there and that you are there because you're the right person to be there. As my father said, 'You represent our brand. So don't screw it up. You have to work hard because everybody's watching you'. So, you need to show you deserve the role. How do you do that? Oh, just by being very, very good at what you do".

Georgia also explained, "I need to prove myself as having an education and then through years and years of work", highlighting how she needed to prove she had the skills, expertise and competence, which education alone did not offer.

Barbara's case was interesting as by proving her worth as a leader, she could earn the respect of her chief skeptic - her father. Barbara became the leader of her family firm because none of her siblings wanted the role. As her father became older and unable to manage the business due to health reasons, she and her siblings decided to intervene and appointed Barbara as leader. She got the role not only because she had a university degree applicable to the business and considerable experience in the company but also because she was the only one who could manage her father's tyrannical approach to leadership. She stated,

So, I just kept going. And I never really gave up. Then, there were a few instances where I fixed a few things, and the bottom line really started to look better, and you could tell my dad knew that it was because of the processes that I put in place. And so, he started to accept it, and he kind of stopped [the negative attitude] even though he would still dress me down in meetings. He gradually shifted from trying to stop me because he didn't agree with me to recognizing that the processes I implemented were actually good.

Eventually, Barbara earned her father's respect, proving that she earned the role. As his skepticism and resistance to her leadership reduced, he began to accept her as the leader.

Many of the narratives linked the need to prove they earned the leader role with gender. For example, Nancy and Olivia, who both had considerable experience as leaders at the time of the interviews, observed that women, more so than men, needed to prove they earned the role to negotiate their leadership legitimacy. Nancy opined, "I think women have more challenges for sure. You have to be willing to work hard. You have to be willing to put in the time. You have to demonstrate it to them". Olivia echoed this sentiment: "I think a woman needs to show she's credible to be respected and understood. Unfortunately, there's a lot of men who can wing it without the credibility or legitimacy, but I think women need to prove it a little more ". In other words, the daughter-successors recognized that as women, the bar was higher to prove they had the skills, expertise and competency for leadership.

The narratives also suggested that proving they earned the role took a considerable amount of time. Certainly, most of the skepticism and resistance reported by the daughters-

successors occurred when they first took over the leader role, suggesting they had yet to prove their legitimacy. For example, participants who were relatively new to the leadership role, such as Chelsea, Ella, Jasmine, and Kyra, reported considerable skepticism and resistance as leaders. On the other hand, Delores reported that while she initially experienced skepticism and resistance, after 24 years in the leader role she finally began to earn the respect of her staff. Similarly, while Mavis and Nancy joined their firm with little previous work experience, after 34 years as leaders, they reported less skepticism and resistance to their leadership from within their company. As Nancy explained, “It can take years to show others you deserved the role.” Mavis added,

The fact that I have been here so long, I think, helps with my street cred to some extent, and the employees have seen me in a lot of different roles. They know that I've paid my dues and that I understand lots of other roles throughout the company. You have to know your business. You have to be passionate about it. You have to be able to speak about it. You have to be exceptional at it. So, you really have to know what you're doing.

Similarly, even though Abigail came to the leadership role with no prior business experience, she reported how time in the role helped her gain admiration and respect as the leader. She explained, “You need to learn the business, and until you are perceived as knowing what you're talking about, you won't gain the respect of the employees, the customers, or the advisors.” The experiences of these participants demonstrate that as daughter-successors prove their competence as leaders over time, gendered norms may fade, enabling their skills and credentials to take

precedence. Eventually, employees and stakeholders perceive them not as “just” daughters but as capable leaders with proven abilities and accomplishments.

From a theoretical standpoint, proving they earned their role as family business leader helped the daughter-successors overcome gender norms that prescribed that, as women, they lacked the characteristics for leadership. As the daughters-successors proved their abilities, preconceived notions about the characteristics of women and their lack of fit with leadership began to fade, and their skills and credentials took precedence. Employees and stakeholders began to perceive them not as just daughters, lacking the skills for leadership but as capable leaders based on their proven abilities, experience, and accomplishments.

This strategy also seemed to counter perceptions that the daughter-successors received the job as a hand-out from their fathers. As I mentioned in the last chapter, daughter-successors must battle perceptions that they did not earn the role but received the leadership role as a handout. The data suggests that this perception that the role was a handout was amplified because the daughter-successors were women and were viewed as lacking leadership skills, expertise and competency. For example, Georgia mentioned that without proving to others she had the educational credentials for leadership, she faced a perception that she was “just a daughter,” implying she received the role because of her relationship with the father leader rather than on merit. Barbara emphasized the importance of merit and progression within the business to overcome the perception she was handed the role. She explained,

There is a real problem for daughters of founders because there is an emphasis on the importance of merit and progression within the business to overcome this



assumption that it's just a golden spoon and you only got what you're doing because of who you are. Not your competence. The most important thing that [daughters] need to understand is that this is not just a handout and a backup plan for their failures. There's a hierarchy. You can't just enter the business and be like, 'Oh, I'm the president.' You have to work your way up the ladder just like you would in any business.

In sum, by proving their leadership abilities, the daughter-successors could counter constructions of gender that positioned them as lacking the characteristics essential for leadership and negotiate their legitimacy as family business leaders.

On the other hand, patriarchy remained a daunting social structure that counteracted the skills, expertise and competency of the daughter-successors. Despite hard work and proving competency, the overarching patriarchal system still posed a significant barrier that made achieving leadership legitimacy difficult. For example, Mavis and Nancy had successfully led their company for over thirty years. Still, they experienced exclusion from networking events, revealing how the wider business world existed within a rigid patriarchal structure that excluded women from power and positioned the daughter-successors as lacking leadership legitimacy regardless of their leadership experience. Indeed, this negotiation strategy, while helpful within the family business, did not translate to the broader business world, as preconceived ideas about women and leadership could not be disproved through direct experience with the daughters. Hence, exclusion from events outside the family business structure occurred despite the participant's exemplary qualifications and years of exceptional experience, confirming the persistence of gender norms within the wider masculine business world.

### **A Normative Masculine Approach**

While highlighting education and prior work experience and proving they earned the leader role were deliberate strategies enacted by the daughter-successors to negotiate their leadership legitimacy, the narratives also revealed that they seemed to unconsciously enact a normative masculine approach to their leader role. In the literature review, I noted that some researchers found that daughter-successors often enact behaviours associated with masculinity to fit the leader role. For example, Hytti et al. (2017) found that daughter-successors used identity switching to move between concealing their feminine leader identity and producing a masculine one to fit within the leadership role. Similarly, Xian et al. (2021) found that daughter-successors could conform to the leader role expectations by adopting a masculine leader identity even though it contrasted with traditional societal norms. Finally, Byrne et al. (2021) found that daughter-successors used gender gymnastics switching between behaviours associated with masculinity and femininity to fit the leader role and to mirror the masculine identities of their fathers to help them be perceived as legitimate successors.

On the other hand, other studies found that adopting masculine behaviours to fit the leader role was unsuccessful in negotiating legitimacy. For example, Heilman (2001) discovered that women leaders are typically penalized for violating feminine norms. In other words, if they enact masculine characteristics and behaviours, they are disliked and considered unfeminine, negatively affecting their leadership legitimacy. Similarly, Vial et al. (2016) explained that women leaders are often penalized for displaying behaviour that does not conform to gender norms resulting in a self-reinforcing cycle of illegitimacy.

This research supports the findings of Heilman (2001) and Vial et al. (2016). Nancy revealed how she was penalized if she behaved in a way that was perceived as too aggressive as a woman leader. She said,

Mavis and I sometimes have to muscle or weigh in, and that can be perceived as we're too aggressive. And then get a reputation for being too aggressive or too opinionated. A man can be opinionated, and that's Bob.

Indeed, probing further, both Mavis and Nancy shared that the more they enacted normative masculine behaviours, the more others questioned their fit as leaders, and they became unsure of their identity as leaders. Their narrative is an example of how, when women perform femininity in a way that is not normative, they are labelled “aggressive”.

On the other hand, while enacting masculine behaviour had its perils, adopting a leadership approach that echoed normative masculinity seemed to help the daughter-successors in this study negotiate their leadership legitimacy. To be clear, they did not enact masculine *behaviour* to fit the masculine leader role. Instead, they enacted a leadership style that, in its implementation, was normatively masculine but, in the outcome, enabled the daughter-successors to create a new, more feminine organizational culture that better suited their leadership characteristics. I explain how this was achieved next.

### ***Take Charge***

All of the participants mentioned how, after experiencing skepticism, resistance and exclusion, they needed to do something to take charge of their businesses or quit their leadership

For instance, Abigail and Barbara explained how they took a decisive “own the sandbox” attitude where they actively asserted their authority as both owners and leaders of their family businesses. Abigail explained, “People can give you grief, but what are they gonna do? I own the sandbox. So, if I make a decision, they gotta live with it”. Similarly, Barbara explained how once her father left the leadership role, she told everyone she was the “new sheriff in town” and that they would have to live with her as the leader or leave the organization.

Other participants took a take-charge approach by removing skeptics and rivals that undermined their authority. In the last chapter, I explained how some participants experienced personality conflicts with senior men managers that seemed to be rooted in rivalry for the leader position. This rivalry formed a complex triangular relationship between senior managers, the father and daughter-successor, giving rise to a competitive dynamic between the daughter-successor and the senior manager.

In part due to the rivalry, the data suggests that the senior managers were often the chief instigators of the skepticism and resistance the daughter-successors experienced, creating a toxic workplace environment and causing others to also question the daughter-successors’ leadership legitimacy. However, once these senior managers, skeptics and resisters left the organization, the daughter-successors could assert their authority, construct a leader identity and begin to negotiate their legitimacy as leaders. This approach supports the research of Xian et al. (2021) who found that daughter-successors must find effective strategies to overcome personal insecurities and negative appraisals.

From a social constructionist feminist perspective, this take-charge approach was effective because it countered gender norms and bypassed questions about whether or not the daughter-successors met the characteristics associated with leadership, it also mitigated questions about whether or not the daughter-successors fit as leaders within the patriarchal structure of their businesses. In essence, their power as both business owners and leaders trumped any doubts about their status, enabling them to negotiate their legitimacy as family business leaders.

### **Enact a New, Normative Feminine Management Style**

By enacting a normative masculine approach of taking charge of their family businesses, the participants discovered they could enact a new management style that not only contrasted with that of their fathers, but better suited their feminine leadership identity. In doing so, they discovered that they could construct a leader identity and negotiate their leadership legitimacy. For instance, when I asked the participants if their management style differed from their fathers and, if so, how. Abigail explained:

I have a very different approach to management than my father. He led by the iron fist by yelling and screaming and putting people down. So, I kind of have more of a feminine touch. A more empathetic side. So very, very different.

Others also described a management style that was feminine in its approach. For example, Olivia explained how she was viewed as a mother by her employees. Delores explained how her employees see her as always welcoming and happy to listen to her problems. These responses are consistent with research that describes a feminine leadership style as

collaborative, nurturing, and empathetic (Schein, 2001) or affectionate, helpful, and concerned with the welfare of other people (Koenig et al., 2011),

Probing further, I asked the participants why their management style differs from that of their fathers. Interestingly, they all explained how they recognized that they needed to emerge from under their father's shadow and become independent leaders, essentially constructing a leader identity. For example, Chelsea explained,

For the first couple of years, I just tried to be like my dad and do everything the way he did. I was scared to make any changes that were different, and then I was super unhappy. I had this fake toughness, but on the inside, I was totally unhappy. I thought, "I don't want to do this. I can't live this way anymore. I think I need to quit". Instead, I decided, "I'm going to stop living in his shadow. I couldn't be like him".

Delores also reported how she eventually understood that she could not manage like her father. She said,

I'd walk into this really good, busy business, but I wouldn't be happy. I would be really angry. Screaming and yelling at people and always having to prove that I had the right to be there. People loved my dad, but I'm not my dad.

These narratives reveal that Chelsea and Delores recognized that their fathers' management style was a shadow to which they would be compared unless they could change it and establish their own authority over their businesses.

This recognition that they needed to abandon their fathers' management approach and needed to enact a new management style that better fit them proved to be a critical negotiation strategy. Chelsea explained, "I did a lot of work on [the company's] core values and where I wanted it to go. In the end, I discovered I needed to create a leader role that fit me". Similarly, Helen explained,

I decided, "Okay, you know what, scrap that mold, that's his mold. Now I will make my own mold." Because if you don't, nobody will know who you are and what your strengths are. Your strengths will not be your father's strengths, and the business in the future might not be your father's vision of the business.

These narratives reveal that the daughter-successors understood that their fathers' masculine management style was incompatible with their identity as leaders and that they needed to take charge and change it to fit them. Furthermore, they reveal that the participants recognized the incongruity of trying to fit a masculine leadership role as women. Once they accepted that they did not fit and altered the organizational structure to be more feminine, they found they better fit the role, could construct a leader identity, and could negotiate their leadership legitimacy.

### **TMSA?**

In Chapter 3, I explained that critical realists consider social structures as pre-existing and semi-permanent. However, sometimes, agency enables individuals to change some of them (Collier, 1997; Sayer, 2020). Bhaskar (1978) referred to the ability of individuals to alter social structures as TMSA. When this transformation occurs, new structures form, which human

actions reproduce (Anderson, 2019). By enacting a new management style that diverged from that of their fathers and was more feminine in its outcome, the daughter-successors seemed to reshape the social structure of their family business. When they became family business leaders, they confronted a social structure characterized by patriarchal norms and gendered leadership expectations. However, when the daughter-successors enacted a new management style that fit them, they could challenge and alter the existing gender norms. By fostering an organizational culture of inclusion and collaboration they could gradually dismantle the patriarchy within their businesses and form a new social structure that valued leadership based on competence rather than gender.

This transformation, therefore, achieved three outcomes that helped the daughter-successors negotiate their leader identity. First, others began to view the daughter-successors as having the competence, skills, and expertise for the leader role. Instead of seeing their femininity as clashing with the masculine characteristics associated with leadership, stakeholders began to embrace the transformed organizational culture that promoted teamwork and empathy. For example, Chelsea described how she introduced yoga sessions within her organization. Initially, she experienced considerable resistance, and the yoga sessions only reinforced the perception that she lacked legitimacy as the leader. However, as she began to transform her organization to her own vision, staff members began to look forward to the sessions, and they became an integral part of her company's corporate culture.

Second, within this transformed social structure, the daughter-successors discovered they no longer doubted their fit with the leader role and could construct their own



legitimate leader identity. In other words, instead of experiencing self-doubt and uncertainty about how their femininity fit with leadership, they began to gain confidence as leaders, enabling them to showcase their skills, expertise and competence. Over time, they earned the respect and admiration of business stakeholders, who began to view them as legitimate leaders.

Finally, the new management style eroded the patriarchy that characterized their fathers' leadership tenure. The new, more feminine approach created a new social structure that was less shaped by patriarchy and more shaped by a corporate culture based on feminine characteristics. Within this new structure, the daughter-successors were viewed as better fitting the leader role, enabling them to negotiate their leadership legitimacy. However, it is important to note that these strategies were primarily effective within the family business as it is unlikely others outside the company would experience the outcome of the transformed social structure. Thus, outside the family business, the social structure of patriarchy and expectations about the masculinity of leadership remained, and, as the narratives of, for example, Mavis and Nancy revealed, the daughter-successors still experienced skepticism, resistance and exclusion in their interactions with customers, competitors, suppliers, advisors and others external to the family firm.

## **Chapter Conclusion**

The daughter-successors enacted various strategies to negotiate their leadership legitimacy. All highlighted either their education and prior work experience in the family firm or attempted to prove to others that they earned the leadership role. While stressing their university education was not alone successful, highlighting their work experience in the company and

proving they earned their leadership helped the daughter-successors negotiate their leadership legitimacy. As they demonstrated their skills, expertise, and competence, others began to view them as capable leaders, and gender-based expectations about their fit with the leader role began to disappear. The participants also enacted a normative masculine approach to leadership to negotiate their legitimacy. This approach involved taking charge of their businesses, eliminating rivals and skeptics who undermined their legitimacy and enacting a new management style that not only contrasted with the patriarchal approach of their fathers but enabled them to implement a more feminine management style that better fit them. This new leadership style was feminine in its delivery, altering the patriarchal social structure promoted by the fathers. It also enabled the daughter-successors to bypass the rigid gender norms usually associated with the masculine leadership role, enabling them to negotiate their leadership legitimacy.

## **Chapter 8 The Father Paradox**

*Dad, I can't do this on my own. I need you to help me! - Irene*

This chapter focuses on fathers and the critical role they play in the leadership legitimacy of their daughter-successors. It is presented as a separate chapter as it is so critical that it deserves a separate discussion. I begin by explaining the importance of fathers in the succession process. I then discuss the data that revealed how fathers could either undermine or positively influence the ability of their daughter-successors to negotiate their leadership legitimacy. I conclude the chapter by using the *a priori* theories to explain this paradox and discuss why fathers are essential in helping their daughter-successors achieve legitimacy as family business leaders.

### **Fathers and the Succession Process**

Most family businesses are founded and managed by men (Handler, 1994; Harveston et al., 1997), with approximately two-thirds of family businesses being men-owned (Cadieux et al., 2002). These entrepreneurial men are inextricably linked to their businesses because the founder drives the company's culture, vision, and values. As Hnátek (2015) observed,

The foundation stories of family firms are typical entrepreneur stories. Actions like seeking the market gap, deciding on the business branch, taking risks, and following innovations are roles all entrepreneurs undertake actively in the start-up step. This step is also the step in which family values start to form [...] Family businesses are driven by entrepreneurs who found them, set up the corporate culture, and transform

visions into values [...] The founders and their visions are essential for the future success of family businesses because each business needs a driving force, just as a ship needs a captain. (p. 343)

Because of this intimate connection, a founding father serves not only as the family business leader but also as the guardian of the family's legacy. His dedication to the continuity of the business drives his interest in aligning the succession process with the established family values and vision. Thus, fathers must carefully balance maintaining the business's core principles while permitting the next generation to establish their own leadership styles and visions. This role includes overseeing the leadership transition and safeguarding the family values, ensuring the business thrives for future generations (Hnátek, 2015).

Often, these family business founders are viewed as the gold standard of leadership, embodying the ideal of masculine leadership that commands respect and admiration within the family and the business (Gersick, 1997). The narratives in this study support this research. When I asked the participants, "*Tell me about your father as the leader of the business,*" all described their fathers as respected and admired by their employees, customers, and other business stakeholders. For example, Mavis recalled: "My dad had a lot of loyalty in the company, and people really loved him. They wanted to work with him and cared about him." Chelsea explained,

I started going to events with my dad and seeing him, and how people talked with him, how he talked to people, and how much people respected him. I was just

blown away. I always thought my dad was great but then seeing all these other people who also thought my dad was great was really cool.

Florence described her father: “He was everybody's best friend. He got along with everybody. He figured out how to talk to people and how to best be received by them. The vast majority of the people loved him.” In some cases, the founding fathers were elevated to legendary status. For instance, Ella explained, “My father is a legend. Everybody knows who he is, and everybody loves him, even if they have never seen him face to face.” Olivia also used the word legend to describe how people viewed her father.

On the other hand, some fathers were not loved but certainly respected as leaders of the family business. For example, Helen, Barbara, and Abigail reported that their fathers were viewed as respected and admired leaders despite their dictatorial, authoritarian approach to leadership. Barbara described her father as a tyrant, and Helen and Abigail described their fathers as leading with an “iron fist.” However, the narratives of these participants suggested that their fathers’ sometimes tyrannical leadership was ignored by employees, customers, and industry peers and the fathers were viewed as legendary, admired leaders regardless of their oppressive behaviour.

### **The Negative Influence of Fathers**

Unfortunately, this perception of the fathers as legendary leaders had significant negative consequences on the leadership legitimacy of their daughter-successors. Whether the fathers were loved or feared, the daughter-successors related events where they were negatively compared to fathers because they were viewed as lacking the leadership characteristics of their

legendary fathers. For instance, Barbara explained, “People said, ‘Oh, your father would have done it this way, and your father would have done it that way, and your father would have said this.’ It was hard to compete with that”. Kyra explained the problem as follows: “It’s hard to follow someone like my dad because he’s such a personality, and he has the social credit of having built the place,” recognizing the elevated status her father had as the family business founder.

Certainly, founding and growing the business over many years deservedly elevated the status of the fathers, making it difficult for daughter-successors to measure up. However, many of the negative comparisons were based on gender. Florence explained the comparisons as follows: “It was really hard because people thought I would be like my dad. But I wasn’t. I never could be because I’m a woman. I’m different”. Similarly, Olivia related how her employees felt uncomfortable dealing with her because they couldn’t “swear and stomp” like they could with her father. Consequently, they struggled to accept her in the leader role.

Often, the fathers perpetuated these negative comparisons based on gender norms. In the literature review, I explained that Dumas (1989) discovered that instead of forming the leader identity, daughter-successors often adopt the identity of "daddy's little girl" to "please Daddy" (Dumas, 1989, p. 37), which arises from the father’s perceptions of their daughters as "little girls." This paternal viewpoint, stemming from familial and societal gender norms, frames daughters as figures needing protection rather than as potential leaders capable of steering the company. Fathers, influenced by masculine norms about fatherhood, unconsciously assign an identity to their daughters that emphasizes their vulnerability and dependency rather than their strength and autonomy. This dynamic prevents their daughters from constructing a leader

identity because their identity is tied to being a little girl rather than a leader. For example, Barbara's narrative demonstrated how her father viewed her as a little girl, often scolding her for her "bad behaviour". She described one of these events as follows:

He would be sitting there in meetings, just dressing me down like I was four years old in front of all the leadership team. And they would all just sit there and look down because he was so rude to me. He would sit there and be abusive to me in those meetings. It's hard to feel like the leader when your father's treating you like you're four. But I forged on. I was very thick-skinned.

Events such as these caused others to doubt Barbara's legitimacy as the family business leader and perpetuate her struggle to construct a leader identity.

Other participants described how their fathers expected them not just to help in the business but to act as their caretakers. Dumas (1990) found that when daughter-successors adopt this identity, they exist in their father's shadow instead of creating a leader identity for themselves. She noted that this "caretaker of the father" role (p. 174) can negatively affect a daughter-successor's ability to construct a leadership identity. She added, "Within this dynamic, daughters find themselves unable to assert their opinions or act independently, constrained by their role as their father's support system—there to listen, praise, boost morale, and provide emotional support" (Dumas, 1990, p. 174). This positioning under the father's shadow prevents daughters from constructing a leadership identity because they view their primary role as that of their father's caretaker rather than as the leader of the family business. Georgia exemplified this sentiment, explaining how she sees her role as caring for her father. She said,

I always felt like my main role was to take care of my father, to support him and make him proud. I became more of a caretaker than a leader in my own right. So, I don't know whether that was ever planned, but it's how I've kind of defined my role and defined myself. I just kind of put myself into that role—the right arm for my dad. I don't know. It's come through my whole personal life, as well as my corporate life.

Indeed, nine participants described events where the fathers saw their role as caretakers of their family business to continue the father's legacy. For instance, Delores mentioned becoming the leader after her father died because she felt obligated to continue his legacy. Abigail said, "When I agreed to take over the business, it was to fulfil my father's wishes and continue his legacy. It was a sense of duty and obligation." Chelsea also felt pressure to help her father. She said, "I wanted to take the burden off my dad. I wanted to keep the company going."

When the daughter-successors took over the caretaker role of their father's family business, they typically sacrificed their ambitions, further complicating their identity as the family business leader. Abigail took over her company at her father's request despite looking forward to her retirement and spending time with her grandchildren. Irene gave up her own successful business to return home and help her father. Helen also reflected on her conflict between doing what she wanted and pleasing her father, saying, "I did some soul-searching about why I was here. You know, why am I doing this for my dad? What did I want?" Finally, Olivia wanted to stay home to look after her children but agreed to help her father briefly, eventually helping for 33 years. She could not leave the leadership role because of her sense of responsibility to her father. She explained, "I wanted to please my father and honour his legacy,



but deep down, I had my own dreams and aspirations that I had to put aside." In these instances, the daughter-successors' commitment to their fathers' wishes often meant setting aside their aspirations and ambitions, leading to a conflict about who they were and wanted to be.

### **Theoretical Perspectives**

Examining the narratives through the lens of social constructionist feminist theory, I concluded that gender norms, which characterize men as embodying leadership traits, positioned the fathers as the most appropriate figures of authority in the family business. When their daughters stepped into leadership roles, they were inevitably compared to their fathers, who had personified the masculine ideal of leadership. For some of the participants, this challenge was compounded by the fact that their fathers were seen as legendary leaders, making it even more difficult to gain legitimacy in a role traditionally viewed as masculine.

Similarly, from a patriarchy theory standpoint, the fathers' status as leader set an ultimate standard for leadership within the family business. As successors, the daughters were measured against this benchmark, further diminishing their perceived legitimacy. Patriarchy not only reinforced the belief that leadership was a man's domain but also amplified the challenges for daughters who were stepping into roles once held by powerful and revered fathers. This comparison, particularly against legendary men figures, made it exceptionally difficult for the daughter-successors to be seen as legitimate leaders, as they were judged not just as women in leadership but as women replacing iconic men leaders.

Finally, gender norms influenced how the fathers viewed their daughters. The fathers perceived their daughters as little girls or caretakers, consistent with constructions of the

characteristics of women. In turn, the daughter-successors struggled to navigate their father's views, negatively affecting their ability to construct a leader identity. As I noted earlier, constructing a leader identity is critical for daughter-successors as it influences perceptions of their leadership legitimacy.

### **Encourage Fathers to Exit the Leader Role**

To overcome the negative influence of the fathers, the daughter-successors recognized the value of encouraging their fathers to retire and exit the leader role. The negative consequences of fathers' continued involvement in the family business after the passing of the leadership baton have been extensively discussed in the literature (Davis & Harveston, 1999; Handler, 1990, 1992; Vera & Dean, 2005). The failure of fathers to let go of leadership control is referred to as "generational shadow" (Davis & Harveston, 1998) and often leads to uncertainty among stakeholders regarding who is truly in charge, potentially creating a challenge for successors to construct a leader identity and assert their legitimacy as leaders.

Barbara's narrative illustrates the problem of fathers and generational shadow. She explained how her father did not want to give up leadership to her so he could stay involved and "pull strings." She also explained how he continued to meddle in the business long after she became a leader, frequently countermanding her decisions. She stated, "Very early on, it was a power struggle between my dad and me. I had to arm wrestle [power] away. He didn't want to give it up". Thus, because of her father's shadow over the business, people continued to perceive her father as the leader, even after she had the title of president and CEO for some time. Only when

her father was no longer coming into the office could she form a leader identity and negotiate her legitimacy in the leader role.

Kyra also explained how she did not feel like a leader when her father was involved in the company. She said,

There were junior management all the way up to senior management that I basically inherited from my father. And even though I took on this new role, they felt that they had a relationship with him so that if they came to me, it wouldn't get solved or done. But if they went to him, it would get resolved. So, I never really felt like I was the leader.

Dumas' (1989) work is confirmed in these narratives. She found that daughters often struggle to assert power and take charge as long as their fathers remain involved in the business. For example, daughters often see themselves as having no voice because they either passively accept their position of inferiority in the business or deny and silence their voice. She found that daughters often do not allow themselves to speak up and take charge of the family business, passively accepting that their father is still perceived as the leader. Consequently, they defer to their father's authority rather than assert themselves as leaders. Unfortunately, fathers often resist stepping down due to their deep attachment to the business, financial dependence, and limited interests outside the business sphere (Vera & Dean, 2005). This resistance is not just a personal issue but is rooted in patriarchal notions of legacy, control, and authority. Therefore, encouraging the father to exit the business is a delicate but necessary task for daughters-successors.

From a social construction of gender perspective, the presence of the father reinforces traditional gender roles and expectations, where the daughter is seen as a caretaker of the father's legacy rather than an independent leader with her own leader identity. She is also constantly compared to her father, whose masculine behaviour affirms the masculinity of the leader role, while her perceived femininity is viewed as not fitting the leader role. From a patriarchy theory perspective, the problem with fathers remaining in the company for daughter-successors is the father figure embodies the ultimate authority and control in the patriarchal family business structure. His continued presence in the business perpetuates a patriarchal structure where his authority remains unchallenged, overshadowing his daughter's role as the new leader. This dynamic hinders the daughter's ability to assert her leadership and establish her own authority.

As long as the comparisons to their father persisted, it was difficult, if not impossible, for the daughter-successors to negotiate their leadership legitimacy. Thus, the departure of the father from the business was a critical step in dismantling the patriarchy and gendered perceptions within the firm, creating a space for daughters to step out from their father's leadership reign and challenge the traditional gender norms with the family business. Once this shift occurred, the daughter-successors could begin to construct a leader identity, assert their own authority and leadership style, and be recognized as legitimate leaders.

### **The Positive Influence of Fathers**

On the other hand, fathers can positively influence the perceived leadership legitimacy of their daughter-successors. In the literature review, I mentioned that McAdam et al. (2021) explored how daughter successors must engage in identity work with their father during the

succession process to construct a legitimate leader identity. They found that when daughters had a positive relationship with their fathers and used them for preparation, endorsement, and osmotic credibility, they could develop a leadership identity independent of their fathers and establish leadership legitimacy.

Drawing on this research, I asked the daughter-successors if their fathers did anything to help them as family business leaders. Except for the daughter-successors who were not expected to be leaders (Abigail and Delores) or whose fathers were unavailable or deceased (Chelsea, Delores, and Florence), the remaining participants described two critical strategies – preparation and endorsement, which I explain next.

### ***Preparation***

In Chapter 7, I explained that the participants highlighted their education and work experience in the company while proving to others that they earned the leadership role. This negotiation strategy helped them to be viewed as having status for leadership, which was critical for negotiating their leadership legitimacy. While the participants enacted these strategies, a deeper analysis of the interview data revealed that the fathers often orchestrated them. For instance, four participants reported that their fathers made it mandatory for them to complete university before joining the family business. Nancy explained the influence her father had on her educational achievements. She said, “It was a non-argument that I was going off to university and getting an education. It was non-negotiable.” Georgia explained,

Education was really, really important to my father. So, it was really important that I went to university. The fact that I had to go to university was really embedded in me at an early age. I didn't even know that I had an option. I just knew I had to go.

Jasmine and Kyra related that their fathers told them they needed to complete an MBA before they would consider them as family business leaders. Jasmine explained, "He really encouraged me to do the best that I could in my education." Kyra also related,

So, if I'd had my way, I probably would never have gone to business school. I would have done a liberal arts degree. But, you know, it was about my father's expectations, and business school was an expectation. And so that's what I did.

Jasmine's father, albeit unsuccessfully, also attempted to influence her education choices. She explained how her father was against her attending university to achieve a law degree as he did not see how it would fit with her role as the family business leader. She said, "I don't think that he appreciated me going back and getting my law degree. He was very mad about that. It was very bad. We don't talk about it." Jasmine's narrative illustrated how her father had a clear idea of the role he wanted for her and saw a legal career incompatible with her role as the family business leader.

Five fathers helped their daughters prepare for leadership by providing opportunities to gain work experience in the family business, sometimes even directing that they work in a particular area or role within the company. For instance, Irene, who led a national family business with offices across Canada, explained that her father created a specific role for her to gain experience at the executive level. She observed, "My dad didn't think it would be fair for me to take on the

leader role without [experience] behind me.” Kyra related her desire to work in a senior position at the head office near her home. However, her father disagreed, saying, “I need you to be in the field. You need to understand this company.” In complying with their fathers’ wishes, the daughter-successors gained skills and competencies that could help them challenge gender norms and be perceived as competent leaders.

Other than the participants who were not expected to be leaders, all related how their fathers socialized them for leadership from a young age. In the literature review, I mentioned that socialization is an effort to integrate a potential successor into the family business, and it follows a specific process - initiation, integration, joint management, and retirement (Cadieux et al., 2002; Handler, 1990; Longenecker & Schoen, 1978; Stavrou, 1998). Handler (1994) observed that conversations around the dinner table, visits to the company, and part-time work in the firm during school years are critical socialization that affect a child’s interest in the family business and prepare them for eventual involvement in the family firm.

The experiences of the participants in this research project echoed this research. When I asked the participants to explain how they became the family business leader, some attributed their interest in the business to these business conversations around the dinner table. Others mentioned going to the family business office with their fathers as young girls and being employed part-time at the family firm while growing up. For example, Irene explained how she remembered helping her father do the company’s books in the evenings when she was young. Florence described how she often answered the phone for her father as a young girl. Chelsea added,

Even when I was little, at the family dinner table, my dad would bring up work stuff and pick my brain and listen to what I thought. He would also take me to work on my days off from school, and I would go there and work in reception or clean the file room. He always wanted me to be included in the business.

Finally, Georgia explained how she worked for her father at the office first as a janitor, cleaning floors and bathrooms, and later as a receptionist, answering phones and greeting customers. She considered this early socialization to help her understand the business, leading her to consider her involvement in the company a career opportunity.

On the other hand, three participants described a different type of socialization for leadership. In response to my interview question, "*What values did your father instill in you about women in business?*" the participants described how their fathers had what they referred to as "progressive values" about women, which were instrumental in encouraging them to take over the leadership of the family business. For example, Chelsea explained, "I think it's very clear I had a very open-minded father about women. That there was no limit to what I could do or where I could go and he made certain that I had the support to do my role." Georgia said, "My dad always gave me the opportunity to do whatever it is that I wanted to do and said, whatever you do, I'll support it." Later in the interview, she related an event that she described as pivotal in her career. She said,

I stayed at home after my first child was born. When he was 14 months old, my dad said, "You know, you need to come back to work." So, my dad encouraged me to come back to work. And I think it was a great turning point because if he hadn't



said anything, I could have decided at that time to just stay home and be a stay-at-home mom.

Georgia concluded that her father's encouragement was critical for her leadership, and without his support, she would not have become the family business leader. Finally, Chelsea explained the encouragement she received from her father, even though he could not take an active role in the succession process due to his illness. She said,

An interviewer asked Dad, "What did you say to those people who said she couldn't do it?" And my dad's quote was something along the lines of he believed in me from day one. He always believed in me. And so now it's kind of cool like, "Oh my gosh, thank you, Dad. You are right."

Interestingly, some participants explained that their father's attitude was not just progressive values about women in business but was a push to achieve independence from men. Jasmine said, "My dad believed my sister and I should not have to rely on men for our well-being and that we should be able to take care of ourselves." Delores said, "My dad told me to get an education and not rely on men. So, I was like, oh, okay, so I can be independent." Georgia stated,

So, I guess my father instilled in [my sister and me] the desire to get an education. My father always said, "Get an education. No one can take it away from you, especially as a woman. Don't ever put yourself in a position where you have to rely on a husband to pay your bills".

Finally, Lucy explained, “When I was younger, I didn’t even think I was going to need a husband to help me and take care of things. I just didn’t think that was a thing”. Consequently, the daughter-successors began recognizing that preparation for family business leadership was an avenue to independence.

I was surprised by these narratives as all the participants described growing up in a traditional family structure where fathers took on the role of family patriarch, and mothers took on a subservient role, responsible for childcare and home management. Even girls in the families were expected to fulfill the traditional gender role of household management. In Chapter 6, I explained how Barbara saw her and her sisters’ role as cleaning up the dishes while Helen was brought up to “serve men.” Furthermore, Helen was the only one in her family who was encouraged to become the leader of her family business. Her sisters were encouraged to marry and have children, consistent with the traditional gender roles that dominated their family’s social structure.

This traditional patriarchal social structure contrasts with the father’s preparation of their daughters for leadership, suggesting something else may have been happening below the surface. In his book *Trapped in the Family Business*, Klien (2012) found that many fathers use their children to satisfy their desire to continue their family business legacy. He explains this motive as follows:

The individual becomes nothing more than a servant to the family name, the family business, and the legacy of every previous family member who poured their heart and soul into the business. Parents who may want to simply sustain the family

legacy can unintentionally over-emphasize the importance of the continuity of the family business - especially when this is exactly what their own parents communicated to them. The business family name becomes far more important than anything a single individual may want or need and to consider or act outside of this expectation can seem unthinkable (Klein, 2012, p. 17-18).

In this study, six of the fifteen daughter-successors were only children or had a sibling who passed away (Delores), making them the default option if the father wanted one of his children to lead the family business. Mavis and Nancy did not have siblings, leaving them to share the role. Abigail became the leader after her brother was removed from the role, and Barbara became the leader because no one else in the family wanted the job. The remaining five participants became leaders instead of available siblings or cousins.

The narratives reinforced that the daughter-successors, who were the default option, experienced considerable pressure from their fathers to take over the leadership role. For example, Chelsea mentioned, "He always wanted me to take over. He always did. He wanted me to be the one that was out, sharing our story and meeting with clients". Kyra said, "My father said to me at a very young age that he wanted me to take over. He said, 'You will succeed this company one day'". Indeed, the father's influence on the daughter-successor's destiny was often strong.

When the daughter-successors complied with their father's wishes to become the leader, they were often rewarded with praise by their fathers, reinforcing their belief that they had made the right choice. For example, Ella explained, "he was so proud and pleased to see that I showed

interest in and drive to be involved in the business and continue it on.” Chelsea related an event where a magazine profiled her family business. When I asked her what her father thought of the magazine article, she said,

I think he is so proud. I'm so pumped. My dad is my biggest advocate. He is so proud. We've been lucky to receive some really cool accolades and awards and recognition. And he's just over the moon.

Nancy and Mavis also spoke about how proud their father was that they were running the family business. Mavis said, ‘I would hear from other people saying, “Oh, my goodness, your dad is so proud of you girls,” or I would hear him talking about how proud he was of this accomplishment or that accomplishment.’ In other words, they could please their father by complying with their father’s wishes to lead the family business.

Klein (2012) also found that successors who become family business leaders by default often feel an overwhelming sense of personal responsibility to the family and the business and agree to become their family’s business leaders, even if they prefer to pursue their career interests. In this study, several participants mentioned that they became family business leaders due to a sense of responsibility to their father and to support his desire to continue his legacy and maintain the business within the family. For example, Chelsea explained, “I wanted to take the burden off my dad. I wanted it to keep going”. Delores mentioned becoming the leader after her father died because she felt obligated to him, and he wanted her to continue his legacy.

Others described how they sacrificed their ambitions to please their fathers. Abigail took over her company at her father's request despite looking forward to her retirement and spending time

with her grandchildren. Olivia wanted to stay home to look after her children but agreed to help her father briefly. Eventually, she helped for nearly 15 years, unable to leave the leadership role because of her sense of responsibility to her father. Interestingly, this feeling of obligation to their fathers was essentially performance of normative femininity and acceptance by the daughter-successors that their role is caretakers for their fathers, and they must fulfil the wants and desires of their patriarchal fathers. Later I will explain how this contrasts with events whereby the daughter-successors are empowered by their fathers.

In examining the succession stories, I also noted that all but two of the fathers founded their businesses, starting from nothing and growing the company over their lifetime into the success it became. The daughter-successors described their fathers as proud of their achievements and mentioned how they placed enormous emotional value on their businesses. When I asked the participants whether their fathers considered options such as selling the business or bringing in outside management instead of appointing them as the leader, the thirteen participants whose fathers founded the family business answered “never”. Chelsea mentioned that her family discussed selling the company when her father became ill. However, since her father wanted the business to continue, it was decided that she would become the president and leader. Similarly, after her father died, Delores explained that she and her mother decided her father would have wanted the business and his legacy to continue. Therefore, Delores took over the leadership role.

I concluded that due to the fathers’ passion for and emotional investment in their businesses, they would not have wanted to hand the businesses over to outsiders to manage or sell the businesses, supporting Klein’s (2012) research. I also concluded that since the fathers recognized that their daughters were the only option to continue their legacy, they recognized that they

needed to prepare their daughters for eventual leadership. Helen explained, “My parents raised me as a girl to serve, but later on, they switched and said, get your education, be independent, self-sufficient.” In other words, they encouraged their daughters to abandon the traditional gender roles that governed the family structure so they could take over and be prepared for leadership.

On the other hand, five fathers had sons but appointed their daughters as successors, suggesting that leadership based on merit was more critical than following the norm of primogeniture which often characterizes family business succession. For instance, Abigail, Ella, Georgia, Barbara, and Jasmine had brothers who could have taken over the leader role. Thus, the preparation of the daughters as leaders seemed to be a significant shift from traditional patriarchal norms and a conscious decision to preserve their legacies in a manner that transcended gender-based notions of succession. Indeed, reviewing the narratives of the five participants closely, I concluded that the father’s encouragement of their daughters was not just a narcissistic desire to continue their legacy but also reflected a deeper understanding of leadership qualities and a commitment to progressive values within the family business. For example, when I asked Georgia why her father chose her over her brother, she replied, “He doesn’t think my brother has what it takes.” In other words, the decision to support their daughters revealed a recognition that leadership is not necessarily tied to gender but to the individual’s aptitude and vision for the business.

In analyzing these narratives, I concluded that, despite their role as the family and family business patriarch, which maintained and supported their power, the fathers actively encouraged their daughters to counter the gender roles that characterized the traditional family structure and

pursue independence. By following their fathers' encouragement to complete university education, gain work experience and embrace the progressive values instilled by their fathers, the daughter-successors developed a belief that women should not be restricted by gender, serving as a foundational ethos that supported their leadership role. This powerful message of empowerment equipped their daughters to enact the strategies they did to challenge prevailing gender norms that eroded their leadership legitimacy.

### ***Endorsement***

While helping their daughter-successors prepare for leadership enabled them to negotiate their leadership legitimacy, the fathers' endorsement of their daughters as family business leaders emerged as more critical and, possibly, the most critical negotiation strategy. Marlow and McAdam (2015) referred to endorsement as “osmotic credibility” or “credibility by association,” which grants daughter-successors both power and status for legitimacy. However, in this study, endorsement conferred two essential elements. First, simply by appointing the daughter to the leadership role, the father granted power, one-half of the legitimacy requirement. Second, either by virtue of the appointment (informal endorsement) or by actively communicating that he believes his daughter has the skills, expertise, and competence for the role (formal endorsement), fathers confer status. This anointment or “seal of approval” effectively passes the leadership baton to their daughters and helps them negotiate their legitimacy as leaders.

The endorsement of the daughters by the fathers in this study was either explicit, such as when the fathers formally announced their daughters would be taking over their leadership, or implicit, as the daughters gradually took over their role of leader over time. Jasmine and Lucy

described events where their fathers officially announced them as the new leader, which helped perceptions of their legitimacy. Jasmine told how her father used a video announcement to her staff to introduce her as the new leader. She explained, “The video is just the two of us sitting on a couch talking about his history and who I am, and what I bring, and that was very important because I wanted him to.” Lucy also described how she and her father formally announced to her staff. She explained, “We made a big deal out of it. We took people to a club. We did a big presentation. We gave them all gifts, so it made it like there’s a new future.” These formal announcements clarified that the daughter was the new leader, helping others accept her legitimacy as the family business leader.

On the other hand, most endorsement of the daughter-successors was less explicit and less formal, sometimes occurring over several years, reflecting the nature of the transitional phase (Cadieux et al., 2002). Five of the participants mentioned how their fathers took them to meetings, conferences, and events and introduced them to advisors, suppliers, and customers as their eventual successors. For example, Helen described how her father took her to lunch with the family accountants and let her do all the talking, indicating that she was in charge. Jasmine explained how her father directed his phone line to her so that his clients would get to know her when she answered the phone for her father. Over time, the customers felt comfortable dealing with her and accepted her as the leader when her father retired. She added, “I knew I was ready to step into the leader role when my father’s clients started asking to speak to me instead of him. Because of this, he spent less time at the office and eventually stopped coming in altogether.” Kyra explained, “My father started to really include me with our lawyer and accountant and his executive team. Eventually, he started to say to them, ‘Look, you know, I’m starting to kind of



take a sidestep, and she's gonna start looking at the areas that I was looking at.' Florence related an event where her father endorsed her during the transition phase to leadership. She explained,

My dad and I worked on a construction site, and we were closing it up for the weekend. We had these motors that had panels that went on the side of them. I was working with this guy who was like six foot four. So, he easily put the panel up on one side, and I started with the panel up on the other side, which meant that because I was short, I had to climb up on the loader tire, get myself up, and then try to get this panel on. And it was a challenge. I was looking for help but not asking for help. And this guy comes around the side, and he's like, 'Oh my God, I'll get that for you.' And my dad was not very far away, and he just turned to that guy and said, 'She is perfectly capable of putting that up. Don't you dare put it up. She's gonna pick that up,' and he just lost it. My dad always said to people, 'She can do that. Let her do it. She can do that.'

These narratives reflect communication by the fathers that their daughters have the skills and competence for leadership, effectively handing over the leader role to their daughters. This type of endorsement confers power and status - a critical starting point for the daughter-successors to negotiate their leadership legitimacy.

Jasmine and Irene seemed to recognize the value of their fathers' endorsement for positioning them to negotiate their leadership legitimacy. For example, Jasmine astutely understood how her father could help her gain legitimacy through endorsement. She explained, "I told my dad, 'You need to endorse me. Then the staff will listen because they follow your

lead, which will open the door for me””. Irene’s reflection on her father’s endorsement also highlights how she recognized his transformative power. She said, “I think people respected my dad so much. Knowing I was his daughter and seeing my last name. People had a bit more respect or a frame of reference of what I could be like.” Irene’s experience demonstrates how her father’s endorsement, as a patriarchal figure within the family business, helped her leadership legitimacy.

The importance of endorsement by fathers is illustrated by the participants who were not endorsed by their fathers. Delores’ father died suddenly, so he could not endorse her. While Chelsea’s father was active in appointing her as his successor, he could not demonstrate his endorsement of her to others due to his sudden illness. Barbara’s situation was unique in that her father appointed her as leader but acted as though he disapproved of her, which often manifested in his emotional abuse of her. As I highlighted earlier, Barbara suffered verbal and emotional abuse from her father, who communicated to the staff that he thought she did not have the credentials for the leadership role, affecting her legitimacy.

All three participants described how they experienced significant skepticism, resistance and exclusion and often experienced self-doubt and imposter syndrome as leaders, confirming the importance of endorsement. For example, as I mentioned earlier, Barbara felt that she was excluded by her business peers as they never viewed her as a legitimate leader, Delores struggled with self-doubt and imposter syndrome, often wondering if she had what it takes to be a leader and Chelsea encountered over 50 percent turnover of her staff, while employees, customers, and competitors openly told her it was only a matter of time before her business would fail with her in charge. Her narrative poignantly reveals her struggle:

It felt like a battle. I felt like I was on a battlefield. It was battle after battle. Fending off the rumours. Fending off competitors trying to poach and hire all our team members. Rumours from employees that I couldn't make good decisions and that I didn't know what to do. Rumours about whether our company would be around.

Chelsea also harboured considerable anger against her father for his inability to endorse her. She explained,

Literally, when my dad was out, he was out, which I struggled with for a couple of years - having anger and resentment and feeling like I had been abandoned. Like he made this big company, he worked so hard to build and create, and he literally just left me to deal with this [swear word] that I had no idea how to figure out. But I was just, like, abandoned.

Thus, when their patriarchal fathers do not endorse daughter-successors, the daughters experience significant obstacles in negotiating their legitimacy as family business leaders.

It's crucial to understand that while the fathers' endorsement was a key factor, the daughter-successors also had an important role to play. The transfer of leadership was a powerful act, and the fathers' endorsement was a clear signal that they believed in their daughter-successors' skills, expertise, and competence for leadership. However, the daughters still had to negotiate their legitimacy and prove themselves as capable of the leader role. This mutual dependence was a testament to the fact that both fathers and daughters needed each other for the daughters to achieve leadership legitimacy and ensure a successful transition of the family business to the next generation.

Applying patriarchy to this strategy helps to understand why endorsement by fathers is critical for daughter-successors to achieve leadership legitimacy. Essentially, endorsement is the flip side of the same coin, illustrating the functioning of patriarchy. When daughter-successors enlisted their fathers to endorse them, they harnessed their father's patriarchal power and used the patriarchal norms and structures that govern the business to achieve leadership legitimacy. In other words, by endorsing their daughters as leaders, the fathers helped their daughters challenge the patriarchal structure of the family business as a "man's world". In doing so, they counteracted perceptions that, as women, their daughters lacked the skills and character for leadership.

In other words, when the fathers used their power within the patriarchal structure to challenge and disrupt conventional gender norms and expectations, it opened the door for their daughters to negotiate their legitimacy. As the data revealed, the absence of endorsement perpetuates the patriarchal norms and structures that govern the business, reinforcing the notion that women are not suitable or capable leaders. Previous research supports this finding, illustrating that daughters cannot achieve legitimacy alone and need their father's support, who derives power from patriarchy to negotiate their legitimacy (Hamilton et al., 2021).

## **Chapter Conclusion**

This chapter focused on the data that revealed the critical role of fathers in helping their daughter-successors achieve leadership legitimacy. Fathers can have a profound negative influence on perceptions of the leadership legitimacy of their daughters. Comparisons to the often-legendary patriarchal father, the father's visualization of their daughters as little girls or

their caretakers, and generational shadow all undermine daughter-successors' efforts to negotiate their leadership legitimacy. On the other hand, fathers could positively affect the ability of their daughter-successors to negotiate their legitimacy as family business leaders. The daughters who embraced their father's preparation efforts found they were better placed to confront the gender norms within the social structures that challenged their legitimacy. More importantly, the daughters-successors needed their fathers to endorse them as family business leaders. Drawing on their fathers' patriarchal power for power and status, they were in a better position to negotiate their leadership legitimacy.

## **Chapter 9 – Conclusion**

This chapter concludes the research project. I begin by summarizing the project and reviewing the findings. I then outline the significance of the research and highlight its practical application. The practical applications of this research are wide-ranging, from guiding family businesses in their succession planning to empowering women leaders to navigate the challenges of leadership. I then present my recommendations for future research and end the chapter by reflecting on the outcome of this endeavour.

### **Project Summary**

This research was born of my confusion and frustration about why I lacked legitimacy as the leader of my family business. I held multiple university degrees in fields directly applicable to the leader role, I grew up in the family business and had over twenty years of management experience in the company when I took over leadership. In short, I should have thrived as the family business leader. Discussions with other daughter-successors of family businesses made me more confused. Several of these daughter-successors described flourishing as leaders, while others seemed to be in a perpetual struggle.

Reviewing the literature, I discovered that while there are advantages to daughters-successors joining the family business, they often face significant challenges as leaders, with achieving legitimacy as leaders potentially the most critical. The perceived leadership legitimacy of daughter-successors is crucial, as leaders who lack legitimacy can profoundly affect the organization's success (Chalus-Sauvannet et al., 2016; Kanter, 1977; Vial et al., 2016; Zelditch, 2001). Since family business succession depends on a successful intergenerational transfer, the

appointment of a leader perceived to lack legitimacy has severe implications for the long-term viability of the family business. Therefore, with the greater acceptance of women in leadership roles commensurate with an increase in daughters appointed as family business leaders, understanding how daughter-successors achieve legitimacy as leaders is a critical concern.

Therefore, this study asked two research questions: (1) *Why is it difficult for daughter-successors to achieve legitimacy as family business leaders?* and (2) *How can daughter-successors negotiate their legitimacy as family business leaders?* The study used semi-structured interviews with fifteen daughter-successors who inherited their family businesses from their fathers to answer these questions. The interview data was analyzed using a critical realist ontology and methodology, integrating social constructionist feminist and patriarchal theories as the *a priori* or starting point theories to identify the mechanisms and social structures influencing the leadership legitimacy of daughter-successors.

### **Analysis and Findings**

The data analysis revealed several demi-regularities which existed at the empirical level of social reality. Skepticism, resistance and exclusion were common events exhibited by individuals both within and outside the family business. At the actual level of social reality, I discovered that these events reflected a perception that the participants lacked legitimacy as family business leaders. The participants also mentioned often feeling self-doubt and imposter syndrome, suggesting they battled their own doubts about their leadership legitimacy. Analyzing these events at the actual level of social reality, I concluded that these doubts caused them to struggle to construct a leadership identity critical for leadership legitimacy.

Examining the events at the real level of social reality, the *a priori* theories explained how gender norms acted as a powerful mechanism to cause the daughter-successors to be viewed as lacking leadership legitimacy and question their fit with the leader role. For example, social constructionist feminist theory revealed that gender norms caused the daughter-successors to be viewed as lacking the masculine characteristics necessary for leadership, negatively affecting their leadership legitimacy. Examining the data from the standpoint of patriarchy, gender norms caused the participants to be viewed as not matching the masculine domain of leadership, which perpetuated the notion of men in power. The gender norms were made possible by social structures within both the family business and the broader business world that shaped leadership as masculine. Indeed, phrases like "old boys club" and "it's a man's world" highlighted the existence of a structural framework that perpetuated gender norms that excluded women from the masculine sphere of business leadership.

The daughter-successors attempted to negotiate their legitimacy and counter the gender norms that they faced as family business leaders. They highlighted their education and prior work experience in the family business to not only bolster their status as leaders, but challenge perceptions that they lacked the characteristics for leadership because of gender. Additionally, they attempted to prove they earned the leader role to counter perceptions that they lacked the skills, experience and competence for leadership and that they received the role as a hand-out from their fathers. The participants also attempted to negotiate their leadership legitimacy by taking what amounted to a normative masculine approach to leadership. This involved taking charge and asserting their authority as leaders and removing rivals and skeptics who undermined



their legitimacy as leaders. For instance, one participant declared herself the "new sheriff in town," establishing her authority.

Implementing a take-charge approach to leadership enabled the daughter-successors to enact a new management style that was normatively feminine. To be clear, this strategy did not involve gender gymnastics (Byrne et al., 2021) where the daughter-successors enacted masculine behaviour to be seen as legitimate leaders. Rather, they enacted a new management approach that was effectively feminine in its outcome - collaborative, empathetic and team-oriented, allowing them a better fit with the leader role. Indeed, enacting a feminine management approach countered the gender norms associated with their fathers' leadership role and challenged his established patriarchal social structure. With this new feminine management style, the daughter-successors effectively altered the social structure of their businesses, enabling them to better fit the characteristics associated with the leader role and negotiate their leadership legitimacy within their family firms.

Finally, my data analysis also uncovered how fathers can both prevent and enable their daughter-successors to negotiate their leadership legitimacy. As authors such as Dumas (1980) found, fathers can negatively influence how their daughters are perceived as leaders and how they perceive themselves as leaders. For example, negative comparisons of the daughter-successors to their fathers by others, the father's visualization of their daughters as little girls or their caretakers, and generational shadow all undermined the daughter-successors' efforts to negotiate their leadership legitimacy. On the other hand, fathers played a critical role in helping their daughter-successors negotiate their legitimacy as family business leaders. The daughters who embraced their father's preparation and socialization efforts found they were better placed

to confront the gender norms within the patriarchal social structure that challenged their legitimacy. More importantly, the data revealed that it was critical the fathers endorsed their daughter-successors as family business leaders, either explicitly or implicitly. Drawing on their fathers' patriarchal power for power and status, the daughter-successors could negotiate their leadership legitimacy.

### **Significance and Contributions of the Research**

This research is significant for several reasons. First, it confirms the relationship between gender and leadership legitimacy. To date, most research has failed to clearly identify this relationship and understand how gender negatively affects the ability of daughter-successors to achieve leadership legitimacy. With this understanding, researchers may be encouraged to explore additional strategies that enable daughter-successors to negotiate their legitimacy when they become family firm leaders.

Second, I applied feminist theory to the data. Critical realist and family business research rarely uses a feminist approach despite the value of a gendered lens to identify the social structures and mechanisms that affect the leadership legitimacy of daughter-successors. Feminist theory emerged as a critical tool in revealing the gendered challenges faced by daughter-successors in their pursuit of legitimacy within family businesses. By using patriarchy as a theoretical perspective and social constructionist feminist theory together, I could delve into the pervasive gender dynamics often ignored by family business scholarship to critically examine how patriarchal norms and constructs of gender contributed to the challenges faced by daughter-successors. As the literature review uncovered, the relationship between gender, daughter-

successors and leadership legitimacy is often ignored. This research unveils the intricacies of gendered expectations and societal constructs that influence the leadership legitimacy of daughter-successors of family businesses and how they can be negotiated.

Third, I used critical realism as the ontological and methodological framework. Family business research seldom uses a critical realist approach despite its ability to enable a researcher to delve deep within the layers of social reality to understand the mechanisms and social structures that cause events. Using critical realism, I discovered how gender norms acted as a powerful mechanism to make it difficult for daughter-successors to achieve leadership legitimacy. Furthermore, patriarchy was a rigid social structure that enabled and perpetuated the gender norms. With these findings, other family business researchers may recognize the value of critical realism as a research methodology to further analyze the mechanisms and social structures that influence family businesses.

Finally, the research reveals several practical strategies that daughter-successors can use to negotiate their legitimacy as business leaders. However, the findings have broader application. Some of the strategies such as education, socialization, prior experience in the family firm and the father's endorsement, may be useful for sons inheriting the family business and daughters inheriting their family business from their mothers. The research is also relevant for understanding why women leaders in non-family businesses experience difficulty achieving legitimacy and strategies they can use to negotiate their legitimacy. Indeed, this research has potentially broad relevance, fostering an understanding of all leaders' challenges and offering potential solutions to help them in their leadership journey.

**Research Limitations**

Examining gender's effect on the leadership legitimacy of daughter-successors provides valuable insights, yet the analysis could benefit from additional considerations. First, relying on qualitative data and subjective experiences introduces the potential for individual biases and interpretations to influence the results. Critical realism requires the researcher to use their background knowledge to interpret events described by participants and, by applying theory, conclude what caused the event. Thus, critical realist research is never positivistic and leaves room for alternative interpretations of social reality. This limitation highlights the need for further research to expand the knowledge base and explore different contexts and perspectives.

Second, most of the family businesses were medium-sized – only three participants led small companies, while two led large firms. Business size may affect perceptions of a daughter-successor's leadership legitimacy. For example, employees of smaller companies might have a closer relationship with the daughter-successor, which may affect perceptions of her leadership legitimacy. In contrast, the leadership role may differ for daughter-successors leading a company with thousands of employees who have little contact with the leader and cannot accurately assess her leadership legitimacy. More selective recruiting procedures would help alleviate this problem, although separate research addressing this issue would be informative.

Third, the research did not consider the families' cultural background and how it might affect the leadership legitimacy of the daughter's successors. While I did not ask the participants about their culture, a few participants attributed the gender roles in the family to their cultural heritage. As I mentioned earlier, the family influences the family business (Tagiuri & Davis, 1996).

Therefore, examining how cultural norms and expectations within the families influence perceptions of a daughter-successors leadership legitimacy within the business would be valuable. For example, the narratives of Delores, Georgia, Helen, and Kyra touched upon their cultural backgrounds during their interviews, hinting at the gender roles embedded within their respective cultures and suggesting that these traditional norms might further complicate their paths to leadership legitimacy.

Fourth, all the families of the daughter-successors were comprised of a mother, a father and two or three children. Furthermore, the family businesses were led by this nuclear family, with limited involvement from extended family members. However, family businesses are often led by a large extended family with brothers of the father patriarch and cousins of the daughter-successor involved in the firm. This research project focused on the relationship within this nuclear family structure; therefore, the findings may be limited to this type of family business. Further research would be valuable to understand the dynamics of a large extended family and how it may affect a daughter-successor's legitimacy.

I also wondered whether my data analysis might be biased according to the years a participant had been the leader. New leaders, having recently transitioned into their roles, will likely have a more vivid recall of events they encountered. This heightened recollection is grounded in the psychological principle that recent events are more easily remembered and can be more emotionally charged than those that occurred further in the past. For newer leaders, the challenges of establishing their legitimacy, asserting their leadership identity, and navigating initial skepticism and resistance were relatively recent experiences. These recent encounters may have shaped their perceptions of their leadership experience, making the events seem more

pronounced and impactful. This immediacy of the experiences may have resulted in a more detailed and emotionally charged account of their difficulties, offering insight into the initial barriers to leadership legitimacy but not necessarily challenges faced later in their tenure as leaders.

Moreover, the recency effect, a cognitive bias favouring the recall of the latest information (Baddeley & Hitch, 2022), suggests that newer leaders might place disproportionate emphasis on recent events. This cognitive bias could result in an overrepresentation of, for example, skepticism and resistance or struggles to form a leader identity in their narratives, as these experiences were top-of-mind during the interviews and readily accessible during recall. The recency of their appointment as leaders may also have meant that some of the participants were still actively processing and responding to the events, further amplifying their perceived impact. In contrast, leaders who had been in their roles for longer may not have recalled their initial experiences with the same clarity or emotional intensity, as time may have diluted the impact of these early challenges. This discrepancy highlights the importance of considering the temporal context of leadership experiences when analyzing the data.

This study was also limited because it did not explicitly focus on daughter-successors' age. In Chapter 6, I queried whether the skepticism, resistance, and exclusion some of the younger participants reported may have been related to their young age. For instance, I wondered whether the skepticism experienced by participants like Chelsea may have stemmed from assumptions that they lacked the necessary business knowledge and experience because they were young. Combined with the influence of gender norms, their comparative youth made achieving their leadership legitimacy difficult.

In contrast, I observed that daughter-successors who were older when they first became leaders seemed to report fewer events where their leadership legitimacy was questioned. For instance, participants like Olivia, who became a leader at an older age, appeared to benefit from a presumption of experience and maturity that positively influenced perceptions of her legitimacy. Because experience and a proven track record are highly valued in business leadership, older successors may have been viewed as having had more opportunities to accumulate business acumen and life experience, leading to a perception that they were legitimate leaders.

Finally, there were a variety of strands of feminist theories that could have been used in this research project, each with its merits. For example, intersectionality could have been used to understand how the entwined identities of the participants may have affected perceptions of their leadership legitimacy. As I mentioned earlier, the participants were of varied cultural backgrounds, which may have influenced gender norms within the family business. Furthermore, some participants were visible minorities which may have affected perceptions of their leadership legitimacy. However, I decided not to use intersectionality as an *a priori* theory as it would have significantly broadened the research scope, requiring an analysis of not just gender but also race, class, sexuality, and other axes of identity (Crenshaw, 1989). Second, this complexity would require a larger sample size to adequately represent the various intersections of identity. Again, while other feminist theories may have been of value, I concluded that social constructionist feminist and patriarchal theories were the best theoretical frameworks for answering the research questions.

**Future Research**

While carrying out this research project, I uncovered several significant areas that warrant further investigation. These avenues for future research not only promise to deepen our understanding of the interplay between gender norms and the leadership of family businesses but may also offer further strategies to support daughter-successors in overcoming systemic barriers caused by gender norms within the typically patriarchal social structure of the family firm. The following sections will detail these prospective research paths, highlighting their relevance and the valuable insights they could provide into the complex dynamics of family business succession.

***Comparison to Sons***

This study did not address whether a daughter-successors' experiences might differ from those of sons. Understanding how sons are perceived and their challenges in the same context could expand our knowledge of gendered expectations and biases, revealing how gender norms and patriarchal structures specifically disadvantage daughter-successors. For example, by examining the experiences of son successors alongside those of daughter-successors, it may be possible to identify specific gendered expectations placed on each group. Sons may be presumed to naturally possess leadership qualities and business acumen simply because of their gender, reflecting gendered expectations about leadership. In contrast, daughters might be subjected to higher scrutiny regarding their skills, expertise and competence, with their leadership potential often overshadowed by their gender. This comparison could reveal the subtle and overt ways gender norms shape expectations for successors, thereby affecting their perceived legitimacy as leaders.



A comparative analysis could also uncover biases in how sons and daughters are evaluated as leaders within their family businesses. Sons might be afforded more leniency in their mistakes or learning processes, perceived as part of their growth into influential leaders. On the other hand, daughters' errors might be judged harshly as evidence of their unsuitability for leadership. By highlighting these disparities, the study would contribute to a better understanding of how patriarchal structures and expectations about gender and gender roles create uneven playing fields for successors based on gender.

Finally, comparing sons and daughters' challenges in assuming leadership roles might identify gender-specific strategies each group could use to overcome them. While sons might focus on differentiating themselves from their fathers or predecessors to establish their leadership identity, daughters may have to additionally combat gender norms and prove their worth beyond their familial ties. Understanding these distinct challenges and strategies could help the daughter-successor better negotiate their legitimacy.

### ***Succession from Mother Leaders***

Research on daughter-successors leading businesses started by their mothers, in contrast to those initiated by their fathers, offers a compelling avenue for exploring the nuances of gender dynamics within family business leadership transitions. Daughter-successors taking over businesses from their mothers are inheriting leadership models that may significantly differ from those established by men founders. Mothers who have navigated the dual challenges of entrepreneurship and societal gender norms might foster business cultures that better fit their daughter's approach to leadership, enabling them to quickly establish themselves as having

status as leaders. Researching these transitions may provide insights into how maternal leadership models affect the development of daughter-successors' leadership identities, potentially offering alternative narratives to the traditional, patriarchal leadership paradigms prevalent in businesses started by fathers.

The gender of the founding parent might also influence external and internal perceptions of a daughter-successor's leadership legitimacy. Successors of maternal founders might face different expectations and gender norms as stakeholders adjust their perceptions based on the precedent of a woman leader. Comparing these experiences with those of daughters succeeding fathers may highlight how constructions of gender and leadership expectations affect the succession process and the strategies used by daughter-successors to negotiate their legitimacy.

On the other hand, daughter-successors of maternal founders might encounter a distinct set of challenges and need to use different strategies to navigate their leadership legitimacy. For instance, they may leverage the legacy of women-led entrepreneurship within their family as a source of inspiration and legitimacy, or they may face specific biases questioning their ability to continue or expand upon their mothers' successes. Research in this area may reveal the barriers and enablers of success for daughter-successors following in their mother's footsteps, offering valuable lessons on overcoming gendered obstacles in leadership.

*Longitudinal Study*

Conducting a longitudinal study to track changes in perceptions of legitimacy and the effectiveness of different negotiation strategies would also be valuable. For example, a longitudinal study would enable an analysis of how perceptions of daughter-successors' legitimacy as leaders change over time within their family businesses and the larger industry. By comparing initial perceptions of legitimacy with those held in later stages of leadership, it may be possible to identify factors contributing to changes in legitimacy perceptions, whether positive or negative.

A longitudinal approach would also enable an in-depth evaluation of the negotiation strategies used by daughter-successors to assert their legitimacy. Over time, the effectiveness of these strategies in different contexts—such as during critical business decisions or significant organizational changes—could be assessed. This analysis could help in understanding which strategies are most resilient and effective in overcoming gender norms and patriarchal structures, providing a blueprint for future daughter-successors in similar contexts.

A longitudinal study could also serve as a barometer for changes in gender norms within family businesses. By observing how daughter-successors navigate their roles over time, it may be possible to understand the evolving nature of gender norms and their effect on family business leadership. This could include shifts in the acceptance of daughters as leaders, changes in family and societal attitudes towards gender and leadership, and how these shifts affect daughter-successors' strategies to assert their legitimacy. Such an understanding could be relevant as more daughter-successors take over leadership positions in the future.

### ***The Role of Mothers***

This research project did not consider the influence of mothers on the leadership legitimacy of the daughter successors as it was beyond the project's scope. While my focus was on fathers, the mothers may also have been an influence. Several participants mentioned that their mothers encouraged them to break out of the gender roles their mothers occupied. For example, Ella said her stay-at-home mother told her, "Don't do what I do. Go have a life. Make sure you have a career. Go to school". Chelsea explained,

My mom was pretty clear that a level of independence was healthier than what she always had. She was quite frustrated by a lack of it. So, she really felt that both my sister and I should be independent women in our own rights.

These statements suggest that the mothers recognized the constraints traditional gender norms imposed on them and wanted something different for their daughters. Like the fathers of the daughter-successors, the mothers encouraged their daughters to complete university and gain work experience. However, they also encouraged their daughters to have a life free from the constraints of traditional gender roles. Together, this encouragement may have helped the daughters prepare for leadership and see the leadership of the family business as an achievable goal.

### ***Cultural Background***

As I mentioned in the limitations section above, I did not pursue an understanding of how cultural background may affect the ability of daughters-successors to achieve leadership

legitimacy. However, exploring daughter-successors' experiences in diverse cultural and economic contexts could highlight variations in challenges faced and strategies used, offering a more comprehensive understanding of why daughter-successors experience difficulty achieving leadership legitimacy and how they can negotiate it. For example, in some cultures, stringent gender norms may severely limit daughter-successors' participation in business and leadership roles, making the leadership transition particularly challenging. Exploring these contexts can provide insights into how cultural attitudes towards gender and family hierarchy affect daughter-successors' ability to assert their legitimacy and navigate their leadership roles. Conversely, in cultures with a more egalitarian view of gender roles, daughter-successors might face different challenges and need to use other strategies to negotiate their leadership.

### **Gender Orientation of the Family Business**

In Chapter 6, I discussed the relationship between the masculinity of the family business and perceptions of the legitimacy of the leadership of daughter-successors. This analysis stemmed from my observation that most family businesses operated in masculine and not feminine industries. I concluded that the masculinity of the industry did not matter, and the daughter-successors who lead businesses in gender-neutral industries also struggled to achieve leadership legitimacy.

However, this study's sample size was limited and skewed toward masculine industries. This limitation restricted a full exploration of the nuances of how industry gender orientation—whether perceived as masculine, feminine, or neutral—affects the leadership legitimacy of daughter-successors. For example, patriarchal norms may manifest differently across industries,

affecting daughter-successors' leadership legitimacy in unique ways. In industries where leadership has been historically masculine, patriarchal norms may be more rigid, directly affecting daughter-successors' acceptance as leaders. Conversely, in sectors where women have had a more significant presence, these norms might be less overt yet still operate subtly to undermine daughter-successors' leadership. Investigating these variations can provide insights into how patriarchal norms are embedded within industry practices and perceptions and how they may be dismantled. Therefore, further research is needed to broaden the investigation into varied industry contexts, especially those with a feminine orientation, to provide a more comprehensive understanding of the challenges and strategies of daughter-successors.

### *Company Age*

The businesses in this study were well-established, with the youngest being in operation for 24 and 25 years and the average business age of 56.1 years. This led me to speculate whether the longevity of these companies allowed the founding fathers time to embed their management styles within the organizational culture and cultivate a masculine business culture that prioritized masculine traits. Over the years, this culture became a fundamental aspect of the organizational identity, making it challenging for daughter-successors to assert their legitimacy and navigate leadership roles traditionally seen as a domain for men. Furthermore, as explored in the analysis chapters, the daughter-successors faced the challenge of being compared to their fathers and dealing with expectations that they, as women, did not possess the same leadership qualities as their patriarchal predecessors. Such entrenched perceptions and corporate cultures in these older firms may have contributed to daughter-successors' difficulties asserting their legitimacy as

leaders. Thus, a comparative study between older and younger companies could illuminate how organizational age influences perceptions of the leadership legitimacy of daughter-successors.

### ***Insights of Employees and Family Members***

Conducting research involving employees and family members would significantly enhance the depth and breadth of understanding of why it is difficult for daughter-successors to achieve leadership legitimacy. Interviewing employees and family members would triangulate the data from various perspectives, providing a more comprehensive view of the challenges the daughter-successors experienced in achieving and negotiating leadership legitimacy. For example, as direct subordinates and beneficiaries of the leadership of the daughter-successors, employees could offer valuable perspectives on their perceptions of their legitimacy as leaders. By examining employees' views, it may be possible to uncover the explicit and implicit biases that may exist within the family business regarding gender and leadership. For instance, employees may reveal that gender is not a significant factor in perceptions of a daughter-successor's legitimacy, but her lack of experience is. Moreover, employees can provide insights into the effectiveness of negotiation strategies used by daughter-successors. Feedback from employees on these strategies can offer the daughter-successors valuable information to refine their negotiation approach.

Similarly, family members, particularly those involved in the business, can provide critical insight into the familial dynamics, gender-based expectations, and patriarchal norms that may affect the daughter-successor's perceived legitimacy. It can also explore the complex interplay between personal relationships and professional roles within the family business,

revealing how these factors influence the acceptance and support of daughter-successors as leaders. Furthermore, family members' perspectives can offer a view of the negotiation strategies daughter-successors use within the familial context. Understanding family members' responses to these strategies can help identify the factors contributing to their effectiveness.

### ***Mental Health Implications***

Finally, my analysis focuses on external perceptions and structural barriers but does not delve into the psychological effect these challenges have on daughter-successors. Exploring the emotional and psychological toll of facing skepticism, resistance, exclusion, failure to construct a leader identity, and comparisons to their legendary patriarchal fathers could provide insight into the personal costs of these systemic issues and how they affect the overall well-being and leadership of daughter-successors. For example, Ella mentioned constantly battling self-doubt and anxiety and consequently faced the challenge of leading with conviction, inspiring confidence in her team, and driving their businesses forward. While the self-doubt and anxiety negatively affected her leadership legitimacy, her description of the personal costs of these challenges was palpable. It revealed her grave uncertainty about her future as the family business leader. Similarly, Chelsea showed deep-seated anger with her incapacitated father, who left her responsible for the family business without support and faced a plethora of skeptics, rivals and competitors who hoped for her failure. Other narratives suggested that the daughter-successors' encounters with skepticism and resistance caused considerable stress and anxiety as they continually navigated doubt from employees, peers and, in the case of Barbara, their own family members about their capabilities and ability to lead.



I also discovered that being constantly compared to a "legendary" father or patriarchal figure within the family business placed immense pressure on the daughter-successors. The weight of living up to an often-idealized legacy fostered a perpetual sense of underachievement, where the daughter-successors felt they could never truly "measure up." This comparison trap stifled their leadership legitimacy as they were constrained by the need to adhere to the established norms and expectations associated with their fathers. For some participants, the psychological burden of these comparisons and the pressure to perform were often overwhelming. It would be valuable as a follow up study to this project to consider how the persistent questioning of their legitimacy eroded the daughter-successors' self-confidence and exacerbated feelings of imposter syndrome. Furthermore, it would be helpful to understand how exclusion from critical business networks and decision-making processes, often seen as integral parts of leadership, not only isolated them but may have negatively affected their business.

### **Reflection and Conclusion**

In carrying out this research, I hoped to discover why daughter-successors like me struggle to be perceived as the legitimate leaders of our family businesses. In doing so, I looked forward to implementing some "magic formula" revealed by the participants, which I could implement to achieve leadership legitimacy. Unfortunately, after the interviews with daughter-successors, I confirmed what I suspected – that powerful social structures make achieving legitimacy difficult because we are both women and daughters of our patriarchal fathers.

The participants in this research were extraordinary women with exceptional education and experience credentials. They were industry experts, and most had spent their entire careers

devoted to their family business, often making enormous sacrifices because of their role. For example, Georgia said, “I sacrificed a lot, you know, being a woman in a business, trying to raise kids, which is not easy. But yeah, I worked my way up, and I built my reputation”. The need to sacrifice family life for leadership of the family business was echoed by Olivia, who explained,

You know, there are sacrifices that you make. Like I wasn’t able to be home with my children, they often did not see me. I would walk through the door, and we would sit down for dinner at 7:30. I was rarely home before seven. Yeah, so there are sacrifices that go along with leadership.

Others described how they gave up the care of their children to their nannies as they travelled back and forth across Canada to monitor their businesses.

The daughter-successors were also continuously tested, doubted, discounted, and abused by employees, customers, competitors and advisors. Customers told Chelsea her business would fail because she was a woman leader. Employees told other daughter-successors they did not want to work for a woman and left the company. Olivia mentioned hostility against her because she was appointed leader instead of men who were senior managers. She described her frustration with her role as needing to be “twice as good as a man to be considered half as good.”

Despite often suffering daily hostility and skepticism about their legitimacy as leaders from multiple sources, the daughter-successors pressed on. They expressed enjoyment and passion for their role. Several participants mentioned how they loved their job. Georgia explained, “I love having - controls the wrong word - but I like being able to shape the company's direction and to set goals with the team and work together. I love being able to get

everybody excited about it.” I asked Abigail, who experienced significant opposition because she had a different career before taking over her family business, whether she enjoyed her role. She said, “Oh, I love it. It's a second career. It's something new. I love what I'm doing and what I've created. I can't even imagine not doing this now.” When I asked her whether it was what she expected, she replied, “No. It's way better.” Abigail also explained that she loved her job because of the responsibility for the lives of her employees. She said, “It's knowing that the decisions that I make an impact so many lives. I find it really challenging to make sure everybody's got a job and make sure everybody's okay”. Ella also explained how she eventually gained respect from her employees, signalling that she had successfully negotiated her legitimacy as a leader. She explained,

I think the employees respect me. I think they've got a lot of respect for me now, but I had to earn it. And I appreciate that. I get it. But when I first started, I'd be at the team meeting and couldn't get a word in edgewise. In management meetings or the board of directors' meetings, they would mansplain or something like that. I don't know. They like to hear their own voices, I guess. They would just talk right over me. And now, nobody talks. They wait for me to talk, and it's little things like that that you really notice. It's those little social cues when you can tell that there's a lot of respect there now.

One of the most inspiring narratives was that of Chelsea, who had initially struggled with significant skepticism about her legitimacy. She explained,

Probably one of my biggest lessons was I had to learn to deal with rejection. People would say, “No, I don't believe in you,” or “No, I don't want to work for you. No, I don't want you doing this”. People saying no and rejecting me all the time. And now it's like, I don't even care because I believe I can, and my team believes I can, and our clients do. But there were a couple of years when it was hard. So, you gotta believe and know you will do it because you can, you will. And there will be those detractors. You need to use them as rocket fuel.

In sum, I found that when daughter-successors persist against significant opposition to their leadership and maintain a passion for their role, they could come closer to negotiating their legitimacy as family business leaders. When I asked Olivia if she would like to add anything else, she closed her interview with the following message:

Society needs to allow women to truly be equal, or, you know, they're not going to be able to take advantage of these opportunities. I'm aware of the statistic that 67% of companies don't make it to the second generation, and about 88% don't make it to the third. However, women-owned businesses have higher engagement and a better possibility of succeeding in intergenerational transition. So, if you're a family and you own a business, and you want to keep it in the family, encouraging your daughters to take on the leadership role, I think, is a winning strategy for seeing a successful intergenerational transition. Because women naturally tend to be, you know, better at multi-tasking and maybe a little bit higher on EQ [emotional intelligence] than men. You need the EQ. You need the IQ [intellectual intelligence]. You need collaboration. They're complementary skill sets. We really

need to leverage [women's] natural abilities and recognize that women bring a particular strength, and one of them is a more successful intergenerational transition. So that would be my big message to anybody. Let's use that to encourage women to want to take on [leadership] roles. But also, to encourage the fathers who've grown their businesses to take a hard look at their daughters as successors.

Despite the participants' struggle to be seen as legitimate leaders, the interviews gave me hope. The daughter-successors I interviewed were passionate about their businesses. Even after years of demanding work and sacrificing family life and time with their children, they continued because they loved what they did. They genuinely cared about their employees and understood the importance of carrying on the business so their employees could provide for their own families. They also cared about their father's legacy and were determined to be successful so they could continue what their father had built during his lifetime. While some saw it as a burden, others saw it as an opportunity to build on something already a great business. Without this passion, they would have given up a long time ago.

In conclusion, I accept that I may never be seen as the legitimate leader of my family business. I will continue to be doubted as knowing what I am talking about, even after nearly 50 years of involvement with my business. Customers will still want to speak to "the guy in charge," accountants will ask if I understand what the numbers mean, my employees will continue to ignore my ideas, and when I am in the boardroom with men, I will be expected to pour the coffee. However, maybe, in the end, it doesn't matter. After all, I own the sandbox.

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## **Appendix A: Interview guide**

### **The Daughter-successor**

1. *Tell me a little about you.*

#### *Prompts*

- *Where you grew up, your age, your education, married?*
- *Do you have children? What are their ages?*
- *How do you manage work-life balance?*

### **The Family Business**

2. *Tell me about your family business.*

#### *Prompts*

- *How it began, what it does, number of employees, location?*
- *Organizational structure?*
- *Culture?*

### **The Father**

3. *Tell me about your father as the leader of the business.*

#### *Prompts*

- *Describe his management style.*
- *How did employees, competitors, etc., perceive him?*
- *How does your management style differ from his?*

### **The Family**

4. *Tell me about your family.*

#### *Prompts*

- *Brothers, sisters? Are they involved in the business? How?*

- *What values and norms did your parents instill in you while growing up about the role of women in the family? How about the role of women in business?*

### **The Succession Process**

5. *Tell me how you became the successor leader of the business.*

#### *Prompts*

- *What was the process? Did it occur slowly or quickly?*
- *Were there any specific things your father or family did to prepare you for the successor-leader role?*
- *Any things you did to prepare?*

### **Leadership**

6. *Tell me about your experience as the leader of your family business.*

#### *Prompts:*

- *Did you change the business when you became the leader? If so, describe how.*
  - *Do you feel like the leader? If so, give me an example.*
  - *Have you ever not felt like the leader? If so, give me an example.*
  - *Is there anything you do to ensure you are perceived as the leader? How effective are those strategies?*
  - *How do you handle situations when you are not perceived as the leader?*
  - *Does being a woman make it more difficult to be perceived as a leader? What about as a daughter?*
7. *What will you do differently when it is time to appoint and support your successor?*

#### *Prompt:*

- *Would your answer differ if your successor was a son or a daughter?*

### **Conclusion**

8. *Is there anything else you want to mention that we have not discussed?*

**Appendix B: Invitation to participate**

[Date]

Principal Investigator (Researcher):  
Lynn Hamilton  
lynn.hamilton@shaw.ca

Supervisors: Dr Janice Thomas, Athabasca University [janicet@athabascau.ca](mailto:janicet@athabascau.ca)  
Dr Rhiannon Bury, Athabasca University [rbury@athabascau.ca](mailto:rbury@athabascau.ca)  
Dr Stefanie Ruel, Cape Breton University [stefanie.ruel@icloud.com](mailto:stefanie.ruel@icloud.com)

Dear \_\_\_\_\_,

Re: DBA Research Project

My name is Lynn Hamilton, and I am a Doctor of Business Administration student at Athabasca University. As a requirement to complete my degree, I am conducting a research project about daughter-successors of family businesses. I am conducting this project under the supervision of Dr Janice Thomas, Dr Rhiannon Bury and Dr Stefanie Ruel.

I am inviting you to participate in this project because it is my understanding that you are the daughter-successor leading your family business. The research aims to learn about the experiences of daughter-successors who inherited their family business from their father and how they achieved legitimacy as the leader of their family business.

Your participation in this project would involve a one-hour video interview (e.g., Microsoft Teams) at your convenience, during which I will ask you questions about your succession experience. Your interview will be recorded and transcribed for analysis. I will use portions of your interview to understand daughter-successors and legitimacy.

The benefit of the research is that it could help daughters and their families implement strategies so that they are accepted as the legitimate leaders of their family business. I do not anticipate that you will experience any risks from participating in this research. All information you provide will be kept confidential, and at no time will you or your company be identified. Any information connecting you or your business to the research will be excluded or altered to protect your or your company's identity.

Thank you for considering this invitation. If you have any questions or want more information, please contact me by e-mail at [lynn.hamilton@shaw.ca](mailto:lynn.hamilton@shaw.ca) or by telephone at 780-966-1227 or my lead supervisor, Dr Thomas, by e-mail at [janicet@athabascau.ca](mailto:janicet@athabascau.ca). If you want to participate, I will forward you more detailed information about the project and a consent form for completion at your convenience. Once I have received the consent form, we can arrange a mutually convenient time and date for the interview.

Best regards,

Lynn Hamilton

**This project has been reviewed by the Athabasca University Research Ethics Board. Should you have any comments or concerns regarding your treatment as a participant in this project, please contact the Research Ethics Office by e-mail at [rebsec@athabascau.ca](mailto:rebsec@athabascau.ca) or by telephone at 1-800-788-9041, ext. 6718.**



**Appendix C: Letter of information / informed consent form**

## Achieving Legitimacy: Daughter-Successors Leading the Family Businesses

[Date]

Principal Investigator (Researcher):

Lynn Hamilton  
lynn.hamilton@shaw.ca

Supervisors:

Dr. Janice Thomas, Athabasca University  
janicet@athabascau.caDr Rhiannon Bury, Athabasca University  
[rbury@athabascau.ca](mailto:rbury@athabascau.ca)Dr Stefanie Ruel, Cape Breton University  
[stefanie.ruel@icloud.com](mailto:stefanie.ruel@icloud.com)

Dear \_\_\_\_\_,

You are invited to take part in a research project titled Achieving Legitimacy: Daughter-successors  
Leading the Family Businesses:

This form is part of the process of informed consent. The information presented should give you an idea of what this research is about and what your participation will involve should you choose to participate. It also describes your right to withdraw from the project. To decide whether you wish to participate in this research project, you should understand enough about its risks, benefits and what it requires of you to make an informed decision. This is the informed consent process. Take time to read this carefully, as it is important that you understand the information given to you. Please contact the principal investigator, Lynn Hamilton, if you have any questions about the project or would like more information before you consent to participate.

It is entirely up to you whether you take part in this research. If you choose not to take part, or if you decide to withdraw from the research once it has started, there will be no negative consequences for you now or in the future.

**Introduction**

My name is Lynn Hamilton, and I am a DBA student at Athabasca University. I am researching how daughters who have inherited their family business achieve legitimacy as family business leaders. Therefore, the focus is on daughters in leadership roles. I am conducting this project under the supervision of Dr Janice Thomas and Dr Rhiannon Bury of Athabasca University, and Dr Stefanie Ruel of The Open University, UK.

**Why are you being asked to take part in this research project?**

You are being invited to participate in this project because you inherited your business from your father, and you are now leading your family business.

**What is the purpose of this research project?**

The purpose of the research is to understand the experiences of daughters who have inherited the leadership of their family business.

**What will you be asked to do?**

You will be asked to participate in a video interview. The interview will take approximately one hour and will be arranged for a time and method convenient to you. The interview will be recorded and later transcribed for analysis. Data from your interview will be used to understand leadership legitimacy and daughter-successors. You may withdraw your consent for the interview within seven (7) days after your

interview. After seven (7) days, it will form part of the research project and may be disseminated or published.

**What are the risks and benefits?**

There should not be any adverse effects, including physical, psychological, social, economic, and spiritual risks associated with the interview. Should you not wish to answer any questions during the interview, you may decline to answer those questions. You may also stop or pause the interview at any time.

The Primary benefit of your participation in the research project is the development of both practical and scholarly knowledge about the experiences of daughter-successors of family businesses.

**Do you have to take part in this project?**

As stated earlier in this letter, involvement in this project is entirely voluntary. Should you agree to participate in the interview, you may stop and/or end the interview at any time. If you do not wish any part of your interview or the interview in its entirety to be part of the research project, you may inform the researcher of this fact within seven (7) days from the date of the interview, and the data associated with the section of the interview or the interview in its entirety will be destroyed. There are no consequences to you for withdrawing any portion of the interview or the entire interview.

**How will your privacy and confidentiality be protected?**

The ethical duty of confidentiality includes safeguarding participants' identities, personal information, and data from unauthorized access, use or disclosure.

At all times, your identity will be protected by me. The information you provide will be kept confidential and not revealed to anyone else. Your name, email, telephone number, other

personal information you provide and information about your company or family will not be revealed to anyone.

**How will my anonymity be protected?**

Anonymity refers to protecting participants' identifying characteristics, such as the name or description of physical appearance. At all times, your identity will be protected using a pseudonym. A pseudonym will also protect your company information, and if necessary, facts about the company (e.g., geographic location, type of industry) will be altered to eliminate any risk of identification. In short, every reasonable effort will be made to ensure your anonymity.

**How will the data collected be stored?**

The recording from your interview will be transcribed and stored on a memory stick. Your personal information will be stored separately from the interview recording and transcript. Both memory sticks will be maintained in a locked cabinet at my home office and password protected.

All data you provide will be disposed of within five years of the date of the interview. It will be erased from the memory stick(s) upon which it is stored, and the memory stick(s) will be destroyed at that time.

**Who will receive the results of the research project?**

The results of the research project may be disseminated as follows:

- Publication in an academic journal
- As a conference paper or poster at a conference
- As part of my graduate DBA thesis

In the case of the DBA thesis, the research will be listed in an abstract posted online at the Athabasca University Library's Digital Thesis and Project Room, and the final research paper will be publicly available.

In all cases, neither you nor your organization will be identified or identifiable as part of the project.

You will be provided with a copy of or online access to any journal, conference, or other publication, such as the DBA thesis, so that you may receive the research project results.

**Whom can you contact for more information or to indicate your interest in participating in the research project?**

Thank you for considering this invitation. If you have any questions or want more information, please email me (the principal investigator) at [lynn.hamiltona@shaw.ca](mailto:lynn.hamiltona@shaw.ca) or my lead supervisor, Dr Janice Thomas, at [janist@athabascau.ca](mailto:janist@athabascau.ca). If you are ready to participate in this project, please complete and sign the attached Consent Form and return it to me by email at your convenience.

Thank you.

*Lynn Hamilton*

The Athabasca University Research Ethics Board has reviewed this project. Should you have any comments or concerns regarding your treatment as a participant in this project, please contact the Research Ethics Office by email at **rebsec@athabascau.ca** or by telephone at 1-800-788-9041, ext. 6718.

## Informed Consent

Your signature on this form means that:

- You have read the information about the research project.
- You have been able to ask questions about this project.
- You are satisfied with the answers to any questions you may have had.
- You understand what the research project is about and what you will be asked to do.
- You understand that you are free to withdraw your participation in the research project without having to give a reason and that doing so will not affect you now or in the future.
- You understand that if you choose to end your participation during data collection, any data collected from you up to that point will be destroyed.
- You understand that if you withdraw after data collection has ended, your data can be removed from the project at your request up until you have reviewed and approved the data that applies to your interview. After such time, it cannot be removed.

YES      NO

I agree to be audio-recorded		
I agree with the use of direct quotations.		
I allow all data collected from me to be maintained by the principal researcher for up to five years from the date of the interview, and I understand that the data will be maintained on a secured, password-protected memory stick separate from all information that would identify me.		
I am willing to be contacted following the interview to verify that my comments are accurately reflected in the transcript.		

Your signature confirms:

You have read what this research project is about and understood the risks and benefits. You have had time to think about participating in the project and had the opportunity to ask questions and have those questions answered to your satisfaction.

You understand that participating in the project is entirely voluntary and that you may end your participation at any time without any penalty or negative consequences.

You have been given a copy of this Informed Consent form for your records and agree to participate in this research project.

---

Signature of Participant

---

Date

I have explained this project to the best of my ability. I invited questions and responded to any that were asked. I believe that the participant fully understands the potential risks involved in participating in the research project and that they have freely chosen to participate.

---

Signature of Principal Investigator

---

Date

**Appendix D: Ethics approval****CERTIFICATION OF ETHICAL APPROVAL - RENEWAL**

The Athabasca University Research Ethics Board (REB) has reviewed and approved the research project noted below. The REB is constituted and operates in accordance with the current version of the Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans (TCPS2) and Athabasca University Policy and Procedures.

**Ethics File No.:** 24022

**Principal Investigator:**

Ms. Lynn Hamilton, Graduate Student  
Faculty of Business\Doctor of Business Administration (DBA)

**Supervisor:**

Dr. Janice Thomas (Supervisor)

**Project Title:**

"Achieving Legitimacy: Daughter-successors Leading Family Businesses."

**Effective Date:** July 19, 2023,

**Expiry Date:** June 05, 2024

**Restrictions:**

Any modification or amendment to the approved research must be submitted to the AUREB for approval. Ethical approval is valid *for a period of one year*. An annual request for renewal must be submitted and approved by the above expiry date if a project is ongoing beyond one year.

A Project Completion (Final) Report must be submitted when the research is complete (*i.e., all participant contact and data collection are concluded, no follow-up with participants is anticipated, and findings have been made available/provided to participants (if applicable)*) or the research is terminated.

**Approved by:**

**Date: June 06, 2023**

Barbara Greene, Chair  
Athabasca University Research Ethics Board