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## CHALLENGES OF WOMEN IN SUCCESSION PROCESSES IN FAMILY BUSINESSES: LEADERSHIP, COMPETENCIES, AND LESSONS LEARNED

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**Abstract:** the objective of this exploratory study was to investigate the difficulties faced by women in succession processes in family businesses. We used a survey with a sample of 126 people (men and women), who expressed their opinions on the subject. Later, two female heiresses were interviewed in order to obtain more in-depth data and analyses. The results show that gender bias issues are still present both in social and family relationships and in complex organizational structures. It also points out that women need to develop skills that strengthen their emotional intelligence, resilience and self-confidence to overcome the challenges imposed by their female condition. The limitation of the study lies in the non-probabilistic sample, and it is suggested that new, more comprehensive studies be carried out.

**Keywords:** family business; gender; female leadership; knowledge management; succession.

## INTRODUCTION

Despite being inserted in the labor market and under conditions that have advanced a lot in the last decades, women still have to go through several difficulties due to their gender when it comes to leadership positions. Regarding family businesses succession processes, recognized by Freire et al. (2010) as a fundamental mechanism of knowledge management that faces significant resistances, difficulties are even more keenly felt and difficult to overcome.

For this reason, several national and foreign authors have addressed the topic of female leadership (Bhat & Sisodia, 2019; Chiquet, 2019; Dalpra & Rodrigues, 2021; Estés, 2018; Fernandes & Roma, 2017; Gates, 2019; Jironet, 2012; Mandelli, 2015; Sandbert, 2013), the enormous challenges inherent in managing family businesses, especially with regard to business succession (Bernhoeft, 2019; Coelho et al., 2013; Ferreira, 2021; Gersick et al., 2017; Goldsmith & Helgesen, 2019;

Gordon, 2008; Kignel & Werner, 2007; Prado, 2019; Prado, 2022; Salmeron, 2018; Seabra et al., 2019) or both topics (Dumas, 1989; Chua et al., 1999; Machado, 2005).

Thus, the objective of this exploratory study was to investigate the difficulties of the trajectory of women in leadership succession processes in family businesses to obtain descriptive and interpretative information to identify the main challenges they face, without intending to extend the results to the entire population. The hypothesis is that one of the greatest challenges women face in family businesses successions may be related to the thought that there is no meritocracy, that is, that women assume important positions only because they are the owner's daughters and not because of their skills (this can also happen with men).

Besides, women carry all the emotional and social burden that comes with their gender, starting with lower wages, on average, even though having more qualifications than their male colleagues, as shown by data from *Instituto Brasileiro de Geografia e Estatística - IBGE* (2018, 2019, 2020) and *Instituto de Pesquisa Econômica Aplicada - IPEA* (2019). These data, which show unjustifiable inequalities between men and women in the labor market, already justifies the conduct of this research.

## FAMILY BUSINESSES AND SUCCESSION

Regardless of how businesses are set up, there are always characteristics that help and hinder their management, and it is no different for family businesses - even though they are set up by the people who love each other the most. In fact, all proximity can be an aggravating or mitigating factor in problems. In fact, it is a complex process of knowledge management (Freitas et al., 2010). According to Bornholdt (2005), some characteristics of a family business are: shareholding control belongs to a family and/or its heirs; family ties as

determinants in the succession of power; relatives in strategic positions in the company; or organizational values in line with family values; the acts of family members have repercussions on the company, regardless of whether they act in it or not, and the absence of total or partial freedom to sell their inherited stakes/quotas in the company.

After a review of 250 studies, Chua et al. (1999) came up with three possible definitions for family businesses that combine ownership and management, which are the following: Family-run and family-owned businesses, Family-owned businesses but managed by a third party and, finally, Family-run but not family-owned businesses.

Other characteristics that have a great influence on family businesses regarding their composition are size, distance between generations, and the distribution of power. Size can interfere in two ways: very large companies imply a larger number of potential successors, and very small families can suffer from the disinterest of the only successor and close down. The gap between generations also has a great influence, since different generations usually have different visions for business, and, in addition, the relationship between the successor and the succeeded can be longer or shorter depending on this age range. The last aspect, power distribution, is perhaps the most interesting of all - changes over the years in family composition, especially when it comes to female autonomy (Machado, 2005). That is why, Passos et al. (2006) point out that the dynamics of a family business involve emotional, business, property, and legal issues.

Lourenzo (2022) also defines that the main difficulties in the succession process are lack of planning, inadequate preparation of successors, family conflicts and divergence between partners, internal and external influences, centralization of power by the founder, and successors with no vocation or lack of interest.

Sanchez et al. (2021) clarify that the essential factors to be worked out in family business succession processes are preparation of the successor and transparency in choosing. The preparation of the successor is related to his/her integration to the business routine and culture so that the transition is not disorganized and ends up hindering the company's sustainability. Transparency avoids misunderstandings or family conflicts. Reinforcing the importance of the first factor, Câmara et al. (2021) studied that the insertion of the successors in companies before the succession process itself is part of the acceptability stage, which begins with simpler tasks that become more complex over time.

## **FEMALE SUCCESSION IN FAMILY BUSINESSES**

The choice of a successor within any company is usually a careful and meticulous process, since the future of the organization and all its stakeholders depends on the good management of this new leader. In fact, the succession process is a very complex matter that encompasses countless legal issues, such as inventory, property sharing, wills, charters, petitions, etc. (Sanchez, 2022); tax and fiscal matters, with emphasis on taxes of transmission *causa mortis* and donation (Valentin, 2021); and accounting discussions about balance sheets, standards, and assets (Rodrigues, 2018).

Furthermore, it is almost never comfortable to even think about management succession in family businesses, let alone face this process when there is no solution but to transfer power. In practice, the succession process, especially in family businesses, goes beyond these issues. In fact, there are personal and affective relationships that require individualizing the succession project, since each family nucleus has different characteristics and needs, that is, emotions, which according to several studies, are one of the most relevant

factors, if not the most important (Bertschi-Michel et al., 2020; Makó et al., 2016; Manzoor et al., 2018; Radu-Lefebvre & Randerson, 2020; Umans et al., 2020; Yezza et al., 2019).

Academic research on family has historically been based on the patriarchal view of society, and therefore the vast majority of case studies on business succession were based on the relationship between parents and sons, even because some cultures and families rule out the possibility of a female successor. Even with the adoption of “unisex” words and forms of approach to refer to the subject, female and male successors are commonly assessed and judged in the same way, which hardly portrays the reality (Dumas, 1989).

Regarding the process of choosing a successor for family businesses, Constantinidis (2008) considers that it often occurs progressively, with the introduction of the future successor in the organization in order to make him/her learn about the environment. This is seen by Teston and Filippim (2016, p. 535) as a process of legitimization and socialization of the successor with all those involved in the process, including the “legal, traditional and charismatic domination”. The first would be through the signing of the documents, the second is the father-child complicity, in which both wish the succession to succeed, and the last is the admiration of the collaborators.

## **FEMALE LEADERSHIP**

As the anonymous saying goes “Leaders are made, not born”, leadership is not an innate trait. Even if it is, it can also be developed by those who are not lucky enough to be born with it. Commonly known as a competence, the set of knowledge, skills, and attitudes is increasingly discussed in universities and in the labor market. Menezes et al. (2013) identified by means of 64 semi-structured interviews with women leaders and the use of discourse analysis, four main characters of the imaginary that

dictates the executive profile: the Commander, the Noble, the Politician, and the Focused.

Finally, women face difficulties when entering the job market and struggle to keep themselves in it, even though they have arduously conquered their space.

## **METHODOLOGY**

This research study was classified as exploratory according to Gil (2019) since it aimed to provide greater familiarity with the problem to make it more explicit, involving bibliographic survey and interviews. The technical process adopted in this study was a survey, which seeks information directly from a group of interest regarding the data to be obtained and is, therefore, very useful in social sciences and especially in exploratory research.

The primary data were collected in an online questionnaire, which included 4 sections, prepared and available on Google Forms®. The first section was used for segmenting the public; the second included nine questions of quantitative approach using a Likert scale from 1 to 5 (1 for “strongly disagree” up to 5 for “completely agree”); the third section included two multiple-choice questions; and the last section was more informative and open, aiming to know a little more about the respondents’ opinion on the topic.

The questionnaire was open for two months (from 05/19/2022 to 07/27/2022) and sent to various social media groups of the researchers (personal, college, work etc. via WhatsApp, Instagram, and Facebook). The chain and non-probability technique known as snowball sampling was used, applied in sociological research through social media, in which the initial subjects of the research recruit future subjects (Bockorni & Gomes, 2021). A total of 126 valid answers were obtained using this technique.

The answers were exported to a Microsoft Excel® spreadsheet for data analysis and treatment. Dynamic tables makes it easier to perform analysis with basic statistics and correlations with age and gender, for example.

Additionally, two semi-structured interviews were made, which are “a meeting between two people so that one of them obtains information about a certain subject through a professional conversation” (Lakatos & Marconi, 2003, p. 195). For the first interview WhatsApp was used, and for the second a video call. The two interviewees were chosen based on their life experiences. The first (I1) worked for a period in her family’s company but chose to leave, and the second (I2), who is 50 years old, has been in her family business for more than 15 years. The identities of both interviewees were kept confidential. The interview script divided the questions into the following categories: The Family Business; The Successor’s Trajectory; Leadership, Succession and the Succession Process; Family Relationship x Family Business; Difficulties in the Family Business and the Successor’s Opinion on the Issue. Discourse analysis (Bardin, 2015) was used in order to individually extract what was possible to understand between the lines and relate it to the objective of the present work.

It is noted that, because it is a survey - a type of research in which “the respondent is not identifiable, therefore, confidentiality is guaranteed” (Gerhardt, Silveira, 2009, p. 39) and two confidential interviews, it was not necessary to obtain registration from the Research Ethics Committee as recommended by Resolution N° 510 of the National Health Council (2016). Nevertheless, the interviews and the questionnaire were answered after acknowledging the Informed Consent Form (ICF).

## **PRESENTATION AND DATA ANALYSIS**

The online questionnaire (open to the public) received 126 answers, 71.4% were female and 27.8% male, and 0.8% identified themselves as other. As for the age group, the following results were obtained: 50.8% from 40 to 59 years old (generation X), 36.5% from 18 to 28 (generation Z), and the other 11.2% equally divided between the age groups of 29 to 39 years old and 60 to 74 years old, with only 1.6% under 18 years old and no respondent over 75 years old.

Regarding the level of education, most of the respondents had completed or were in the process of completing a post-graduation course (34.1%), some were attending an undergraduate course (33.3%), followed by 22.2% with complete undergraduate education and 9.5% with complete high school education, but incomplete undergraduate education, and 0.8% with incomplete elementary school education. Therefore, the person of the questionnaire is a woman in the 40 to 59 age group in higher education or graduate school.

Regarding the following statement “Leaders who inherit family businesses (from parents, uncles, grandparents...) generally face fewer difficulties than leaders who have not inherited businesses”, 50.8% of the respondents chose 4 or 5, without a big difference in gender or education. Of the 13 participants who answered “1” (completely disagree), 9 were from the 40 to 59 age group. Considering that a large part of the Brazilian companies is family owned, this may indicate that their experience in family owned companies proved otherwise. The perception that a leader who inherits a business will face fewer difficulties is in some way related to the sense of meritocracy; however, it is not necessarily true since an inherited company has the advantage of being already established, but also has vices and problems that a new company does not have.



There was quite a consensus among the respondents regarding the statements “Women, generally, face more difficulties in a leadership position due to prejudice and stereotypes in society and “Female leaders need to prove themselves more competent than their male counterparts” since 62.7% and 60.3% respectively chose option 5 of the Likert scale. For the first statement, no one under 40 strongly disagreed, and 70% of the 42 respondents who selected 1, 2 or 3 were men. Regarding the second statement, there was not much difference between gender, age group, or education. From these results, it is clear that most respondents perceive that women do indeed face more obstacles than men, and apparently this reality is clearer for women and young people. These disadvantages are evidently the result of a society that has always benefited men to the detriment of women.

Regarding the statement “Female leaders tend to adopt a stereotyped masculine behavior”, 41.2% of the respondents chose 1 or 2, and 38.1% chose option 4 or 5, showing no significant variation as to gender, age group or education. The view that women need to be masculine to be more respected leaders comes from the perception that only male leaders achieve satisfactory results. That is because they are persuasive, strategic and impose themselves; whereas women need to be more flexible and when they take a more assertive position, they are seen as overbearing (this theory was put to the test in the third section of the questionnaire). A majority does not see it this way, which may be due to the advances in women’s and leadership agendas that are increasingly part of the discussions brought up in schools, companies, and the media in general.

The statement with the highest disagreement among the respondents was “I believe that children of women leaders are more neglected compared to children of non-leaders” since 57.1% chose option 1 and 2, 24.6% gave

a score of 3 (neutral), and 18.3% responded of 4 or 5. In this case, 57.7% of those who agreed were in the 40-59 age group, but contrary to common sense, 56.5% of those who answered 4 or 5 were women. It was not possible to identify if the respondents were women leaders or if some of them had a mother leader, but the fact is that society still sees, less recurrently than a few years ago, women leaders as women who fail to exercise their motherhood completely.

Regarding the affirmations “I consider leaders who inherit family businesses to be less deserving than leaders who do not” and “Women who inherit family businesses face more difficulties than female leaders who do not” 48.4% and 38.9% (respectively) of the respondents disagreed (considering answers 1 and 2); and 32.5% and 36.5% (respectively) also took a “neutral” stance (option 3). This may show that the respondents have never reflected much on the subject or do not see a strong relationship between inheriting companies and meritocracy, or, in the second case, difficulties faced by female successors and non-successors.

Even though the vast majority was “neutral” (37.3%), there was more agreement (44.4%) than disagreement (18.3%) in relation to the statement “Working in and managing a family business tends to be more complicated and generates more internal conflicts in the organization”. However, at the beginning of the questionnaire the majority stated that they believe that leaders who inherit family businesses face fewer difficulties, which should indicate just the opposite, i.e., more disagreement than agreement.

For the statement: “Women leaders who inherit companies need to prove themselves more competent than women leaders who have not inherited family businesses” there was not much convergence among the respondents. Of the total, 31.7% chose options 1 or 2, 23.8% remained neutral with 3, and 44.5% opted for 4 or 5. Of those who agreed,

59% were in the 40-59 age group. It is worth noting that most people perceive that women need to prove themselves more competent, but that the differentiation between successors and non-successors still does not have much impact on public thinking, even though there was a small majority who saw the position of the female successors as more challenging than the rest.

The inquiries included in the third section of the questionnaire were: “When you picture a male leader in your mind, what are the 3 words that most closely match the image?” and “When you picture a female leader, what are the 3 words that most closely match the image?,” and the results are showed in Table1. The top rated words for male leaders were Self-confident, Strategist, and Negotiator, while the words chosen for women were Committed, Proactive, and Communicative. This difference in the adjectives attributed makes clear the view that women are more passive, receiving attributes closely linked to the concept of mother, caregiver, and “responsible”, whereas men received more “aggressive” adjectives, focused on the vision of planning. Even in the same hierarchical position (leader), women are still not seen as firm, capable of being as “rational” as men are.

Adjective	Men	%	Women	%
Proactive	17	4,5%	43	11,4%
Persuasive	44	11,6%	17	4,5%
Detail-oriented	4	1,1%	30	7,9%
Strategist	72	19,0%	34	9,0%
Self-confident	66	17,5%	28	7,4%
Versatile	10	2,6%	26	6,9%
Communicative	30	7,9%	46	12,2%
Focused	26	6,9%	44	11,6%
Committed	34	9,0%	77	20,4%
Negotiator	75	19,8%	33	8,7%
TOTAL	378	100%	378	100%

Table 1 - Adjectives attributed to men and women leaders

Source: research

In the last part of the questionnaire, the respondents were informed that only 1 of the 10 richest men in Brazil inherited their fortune through family businesses, while this number goes up to 10 when it comes to women. It was found that only 14.65% of those surveyed knew this information (Forbes, 2020, 2021). Then, they were asked what this information provoked in them, and some of the most significant answers considered were (the others practically repeat the contents presented below):

1. It makes me think about how women, compared to men, have more difficulty in building a career to reach a leadership position. It seems that it is easier for them to “inherit” than to actually achieve, while men already have more opportunities, and it is more standard for them to build a career to reach a leadership position (Respondent 26).
2. In the job market, people tend to stereotype women in leadership positions and therefore they have more difficulties. In a family business, people no longer stereotype them because they are the owner’s daughter, etc. So, it is easier for women to have a leadership position (Respondent 47).
3. The difficulty that women have in growing in non-family businesses is mostly because of unfounded prejudices (Respondent 78).
4. I believe that family pressure to take on a company is greater on women, since often men in a family are encouraged to follow their own chosen careers (Respondent 101).

According to the respondents’ reports, the most common perception is that women find it more difficult to build their career outside the family business due to stereotypes, lack of recognition, and social pressures to perform various roles. On the other hand, respondents perceive women as more capable of managing family assets and dealing with the family issues that come along with the family business.

## INTERVIEWS

As the subject discussed in this paper is directly dependent on the gender issue, we initially tried to understand how this relationship between men and women works within the family, which is the first organization with which the individual has contact, and invariably influences the management of the family business:

In my family, there is a lot of difference in treatment between men and women. It still seems to me to I still follow an old pattern in which the woman stays at home to take care of the children and the housework, and the man is responsible for working and taking care of the family's financial resources (I1).

The gender issue is very strong, I see my mother as submissive to my father, but I don't see myself that way anymore, probably because of my foreign education, even in a male-centered culture, I see myself differently. Apart from the culture, the case of my mother I also think that... she never worked outside, she always supported my father (I2).

Women that financially depended on their husbands was recurrent a few years ago and this has been decreasing because they have greater autonomy and education, and consequently greater insertion in the labor market; however, it is still a very important factor in family building, especially in the creation of new generations that mirror their mothers. It can be said, therefore, that both interviewees grew up in more chauvinistic families, in which women play a much more submissive role than men did. Especially for the second interviewee, the cultural issue was a topic that was brought up as something that influenced not only the creation but also the business management.

From my experience, it was very painful because it is more difficult to be part of an Oriental family... Brazilian or American parents have a different mentality. Oriental

fathers are more rigid, they expect a higher level of respect, even in the company. They think that "here you are my employee, and you work for me, but you need to respect me as a parent." Maybe in other cultures women have more voice and more space. Oriental-origin companies are more difficult. I suffered a lot from it. (I2)

Joining the organization was almost a form of challenge for I1. On the other hand, I2 was faced with the reality that her father preferred to have a son to take over the business and that even though she was willing to step in, she still did not have the necessary confidence for him to delegate more strategic tasks to her. This situation could have been a source of unresolved conflict, and therefore the interviewee's determination and self-confidence were key skills to prevent generating resentment and a feeling of inadequacy in her father's eyes.

It is known that imposing opinions and points of view on employees and managers is a challenge all people face, regardless of the company structure; however, women have a greater difficulty and those who are incisive are seen as arrogant, contrary to the flexible and malleable personalities society had inculcated in them. Men and women who work in family businesses confront their parents or relatives, who often still see them as "children" with the obligation to obey them. This burden is even greater for women, as reported by the interviewees:

Many times, I had to speak in a firmer way so that other people would listen to me. I believe that because I am the owner's daughter I was more easily heard. Although I have already had some difficulty with the staff. (I1)

[...] but even in situations that were my responsibility and that I had more information about, I needed his approval to proceed - this was my conflict with him, I did not have the freedom to make my own decisions and grow from my mistakes. (I2).



As the father has the Commander profile (Menezes et al., 2013), the interviewees need to have a greater competence of persuasion and above all resilience to be constantly assertive, even if contradicted by the people closest to them, who are their family. Especially in the second case, we can see how important it is for the successor to work hard on her emotional intelligence to manage the roles of daughter and director and not to revolt because of her own father's lack of trust. Regarding the succession process, in the case of the first interviewee there is no succession plan because the owners still manage without problems. In the second case, the company has already gone through its first succession and, although it has not yet designed a succession plan for the next generation, I2 made an observation regarding the process when addressing the gender issue:

"I think it demands more from a woman, because a man just says, 'I am the owner', the father presents him as the one who will take over the business. Women do not do that, they have to fight, show their knowledge, and convince others of their value. It is more work, but it is also more enjoyable. This recognition and the gradual conquest of your space... for me is the best" (I2).

We can see how, in this case, the interviewee has the perception that she had to gain her position more incisively (use of the word fight, convince) than men, supposedly her cousin, who works together and was introduced as the son of the other owner, the interviewee's uncle.

Despite the speech of the current managers that the entry of the daughters would be positive and that they would have autonomy, the new generation manages to contribute with ideas with difficulty, "As it is a family and traditional company, innovation ideas and the use of new technologies are not very well accepted (I1).

I remember an expression that my father always used to say to me, and that I put up with for many years until I could not take it anymore [...] which translated from Chinese would be: "It's my decision, you just do what I tell you to do (I2).

Even so, there is constant pressure for children to take over their parents' businesses, as expressed by interviewee1 in the excerpt below.

My decision to leave the family business was driven by the desire to learn about larger companies, their technologies and management tools. At some point I intend to set up my own company. Unfortunately, I cannot find more opportunities in the family business. My father does not like it; he still says that I have to go to work with him and everything, even my brother is in trouble. He says his hard work would be 'thrown away' if none of his children take over the business (I1).

According to I2 the most important competence is communication and knowing how to balance, as Floriani and Rodrigues (2000, p. 304) report, the hats of family member, shareholder and executive, and the lack of skill in not overlapping these roles can even generate a deep discouragement. It is perceived that something that seems so simple like the father's trust can be a source of conflict in a family business and, when solved, gives a sense of relief and satisfaction. Thanks to personal efforts, the executive, and no longer a daughter, has earned the trust not of the father, but of the owner, and is even the personal validation that the father feels contemplated, even without a son.

## CONCLUDING REMARKS

Being successful in the corporate world is not simple, nor does it have a ready-made formula, there are steps that each professional takes according to his or her vocation and capacity towards a goal. Women have to double their efforts due to the stereotypes and prejudices still extremely rooted in society. Even though debates on the subject have made women evolve a lot over the years, it was possible to observe by the results of this study that they still face challenges even at home, adding one more barrier to professional success, especially in family businesses. This is why the family relationship plays an extremely important role in the decision to enter the family business, as well as to continue. Even if successors are socialized from an early age, either physically in the company or in just following their parents' trajectory, the challenges of managing a complex relationship that is the business structure are worsened when there are internal family conflicts. This is because in this case, the family business becomes an extension of the family environment itself.

The initial hypothesis was that the biggest challenges faced were linked to the sense of meritocracy, in which the people around saw female successors as less deserving because of their blood relation to the owners; however, we observed that the biggest challenge is emotional, since there is a constant feeling of insufficiency and comparison with other men in the family.

Therefore, women leaders of family businesses must work on their emotional intelligence and show themselves, above all, resilient to overcome the constant challenges without affecting their family relationship: self-confident so that the constant comparison with male relatives does not affect their self-esteem; and flexible and patient to be able to transmit and manage all the emotional load that goes hand in hand with this type of entrepreneurial society. It is noted that this research has limitations since its qualitative approach (interviews) and non-probabilistic sampling nature do not allow its findings to be generalized. However, this does not invalidate the applicability of the results because this type of sampling and approach is commonly used in exploratory research, whose goal is to obtain descriptive and interpretative information without pretending to extend the results to an entire population.

Therefore, this study does not exhaust the subject because there is still much to be done so that women, including in their family businesses, can assume leadership positions according to the competencies they have and not have their career paths delayed or even blocked due to their gender. This is a sensitive topic that requires further research and discussion.

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