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Learning Resources for Family Business Education: A Review and Directions for Future Developments

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As business schools are expanding their offering of family business courses and programs, educators are challenged to identify and select useful learning resources that could be used to teach family business topics. To assist these efforts, we reviewed a repository of learning resources for family business education that includes an extensive list of books, teaching case studies, films, and magazines. This resource review organizes and maps existing learning resources for family business education, discusses the potential usefulness of different types of resources, identifies gaps in current family business education, and outlines directions for future work. The guidelines developed in our review will help expand and further enhance the pool of resources available for family business education, and ideally, will contribute to reducing the gap between family business research and practice.

For many reasons, the case for family business education is being assertively advanced by several scholars (Hoy, 2003; Sharma et al., 2007; Steier & Ward, 2006), and a growing number of business schools are introducing family business courses and programs in their curricula (e.g., Sharma et al., 2007). Because family business scholarship is still a relatively young field (Gedajlovic et al., 2012) that tends to grow quickly and eclectically (De Massis et al., 2012), the increasing demand for family business education puts educators in special need of guidance about how to identify and

select learning resources, such as books, teaching case studies, films, and magazines that can be used to teach it. This need motivated us to develop this resource review to organize and map existing learning resources for family business education at undergraduate, master's, and executive levels. The review is intended to be especially useful for instructors teaching stand-alone family business courses or emphasizing family business issues in other core management courses. Our goal is to provide a comprehensive overview of resources for family business educators, as well as to identify areas in need of further development.

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CONTENT ANALYSIS OF COURSE SYLLABI

We carefully read and thoroughly examined the syllabi of family business courses from around the world, first by downloading the course syllabi included in the list of Family Business Course Outlines provided by the Family Enterprise Research

Conference (FERC; see website).¹ Next, to extend this list, we identified the academic institutions that have been most active in contributing to family business research as listed in Debicki et al. (2009) and searched their websites to identify courses related to family business. This resulted in a sample of 94 courses held in 58 universities, and we were granted access to 35 syllabi.² The distribution of sample syllabi across course levels and geographical regions is reported in Table 1.

From these syllabi we identified the types of learning resources commonly used: books (present in 25 of the 35 courses examined); teaching case studies (32 courses); films (7 courses); and magazines (7 courses).³ In the following sections we review each learning resource, address what is missing, and outline directions for future developments.

BOOKS

To develop a comprehensive list of relevant family business books, we searched multiple information sources including the 35 syllabi discussed above; all reviews of books that explicitly focused on family business published in academic journals that regularly publish this type of article (*Family Business Review*, *International Small Business Journal*, and *Journal of Entrepreneurship*); the websites of major academic publishers serving the higher education market.⁴ This procedure led us to a final list of 120 books that we organized into an indexed database with structured information about year of publication,

TABLE 1
Distribution of Family Business Syllabi Across Course Levels and Geographical Regions

| | Number of family business syllabi | Percentage |
|----------------------------|-----------------------------------|------------|
| Course level | | |
| Executive | 9 | 26% |
| Master's | 16 | 46% |
| Undergraduate | 10 | 28% |
| Geographical region | | |
| South America | 1 | 3% |
| North America | 23 | 65% |
| Europe | 9 | 26% |
| Asia | 1 | 3% |
| Middle East | 1 | 3% |
| Total | 35 | |

authors, title, publisher, type of publication, geographical region, and target readership.⁵

The most common types of books in our sample were manuals (31 of 120 books); textbooks (29 books); collections of articles and cases (28 books); and handbooks (15 books). Biographies and bibliographies, graphic novels, and research books were also present in the sample. Forty-four books take an international perspective, and 36 are not explicitly contextualized in terms of geographical region. The majority of books that focused on a specific geographical region refer to the United States (16 books) and European countries (10 books), whereas only a few books focused on other regions, such as Latin America, the Middle East, Africa, and Asia. Hence, the development of books that focus on family firms in Latin America, the Middle East, Africa, and Asia appears as an important direction for future work. With very few exceptions, books in our sample were written in English, suggesting that the translation of existing family business books into other languages is an important direction for future work. Most books do not have students as their primary target; rather, they focus on family business owners and managers or scholars. We therefore observe a strong need for more books that focus on knowledge essentials and use a basic language that is most appropriate for students.

¹ FERC is the acronym for Family Enterprise Research Conference, an association dedicated to developing a community of scholars interested in conducting research to understand family firms and create usable knowledge in this field (FERC list of Family Business Course Outlines).

² The full list is available at the following URL: <http://www.lancaster.ac.uk/media/lancaster-university/content-assets/documents/lums/family-business/Appendix1-SyllabiOfFamilyBusinessCourses-1.pdf>. The authors are committed to keep this list updated. Please report any errors, omissions, or updates to the authors.

³ We excluded research articles from our review for reasons of space and focus. Nonetheless, we acknowledge that research articles can certainly be a rich resource for family business educators, and examining how research articles are selected and used in family business education programs is worthy of future research.

⁴ We considered the following publishers: Cambridge University Press, Edward Elgar, Harvard Business Press, McGraw-Hill, Oxford Press, Palgrave Macmillan, Sage, Springer, and Wiley. Some of these, such as Palgrave Macmillan, offer book collections covering several specific topics related to family business.

⁵ The full list and detailed information is available at the following URL: <http://www.lancaster.ac.uk/media/lancaster-university/content-assets/documents/lums/family-business/Appendix2-BooksForFamilyBusinessEducation-1.pdf>. The authors will update this list periodically. Please report any errors, omissions or updates to the authors.

TABLE 2
Classification of the Sampled Family Business Books in the Strategic Management Topics
Classification Framework

| Strategic management topic classification | Family business books | | Family business research ^a | |
|--|-----------------------|---------|---------------------------------------|---------|
| | Topics | Percent | Topics | Percent |
| 1. GOALS AND OBJECTIVES | | | | |
| 1.1 Economic Goals | 11 | 9.6% | 9 | 4.2% |
| 1.2 Noneconomic Goals | 10 | 8.8% | 20 | 9.3% |
| 1.3 Goal Formulation Process | 9 | 7.9% | 1 | 0.5% |
| 2. STRATEGIC FORMULATION AND CONTENT | | | | |
| 2.1 Strategic Planning | 21 | 18.4% | 13 | 6.0% |
| 2.2 Resources and Competitive Advantage | 39 | 34.2% | 38 | 17.7% |
| 2.3 Environment Opportunity and Threats | 31 | 27.2% | 9 | 4.2% |
| 2.4 Corporate Strategy | 32 | 28.1% | 11 | 5.1% |
| 2.5 Business Strategy | 24 | 21.1% | 11 | 5.1% |
| 2.6 Functional Strategy | 11 | 9.6% | 1 | 0.5% |
| 2.7 International Strategy | 12 | 10.5% | 11 | 5.1% |
| 2.8 Entrepreneurship and Innovation | 35 | 30.7% | 24 | 11.2% |
| 2.9 Stakeholders, Ethics, Social Responsibility | 24 | 21.1% | 6 | 2.8% |
| 3. STRATEGY IMPLEMENTATION AND CONTROL | | | | |
| 3.1 Corporate Governance | 54 | 47.4% | 64 | 29.8% |
| 3.2 Structure | 34 | 29.8% | 14 | 6.5% |
| 3.3 Systems, Processes, and Networks | 35 | 30.7% | 14 | 6.5% |
| 3.4 Behaviors and Conflict | 50 | 43.9% | 28 | 13.0% |
| 3.5 Culture and Values | 53 | 46.5% | 20 | 9.3% |
| 3.6 Evolution and Change | 50 | 43.9% | 13 | 6.0% |
| 4. MANAGEMENT AND OWNERSHIP | | | | |
| 4.1 Leadership and Ownership | 65 | 57.0% | 26 | 12.1% |
| 4.2 Professionalization | 19 | 16.7% | 9 | 4.2% |
| 4.3 Succession | 61 | 53.5% | 36 | 16.7% |
| 5. ORGANIZATION PERFORMANCE | | | | |
| 5.1 Economic Performance | 44 | 38.6% | 62 | 28.8% |
| 5.2 Noneconomic Performance | 11 | 9.6% | 13 | 6.0% |
| 6. Other Topics Relevant to Strategic Management Perspective | 57 | 50.0% | 30 | 14.0% |
| 7. Nonstrategic Management Topics | 12 | 10.5% | 10 | 4.7% |

^a Based on De Massis et al.'s (2012) analysis of the 215 most cited family business research articles from 1996 to 2010. The numbers include both topics classified as primary and secondary.

To gain further insights, we classified the topics covered in each book by adopting the classification of strategic management topics developed by Sharma et al. (1997). Topics such as goals and goal formulation processes are discussed in very few books (see Table 2). The coverage of topics concerning strategy formulation and content is also relatively short, especially when considering specific topics, such as functional strategy and international strategy. Topics in the strategy implementation and control category received the most attention. The category of management and ownership was also extensively represented, where leadership, ownership, and succession are the topics with the highest coverage. Conversely, few books included professionalization topics. Those we examined devoted considerably greater attention to economic

performance than noneconomic performance. Finally, about half the books included other topics relevant to the strategic management perspective, such as definitional and methodological issues, but few focused on nonstrategic management topics (e.g., organizational behavior).

Following Sharma et al.'s (2007) call for a close alignment between research and education practice, we compared the figures reported above with the analysis of family business research by De Massis et al. (2012).⁶ By doing so, we gained important insights into gaps between books and research

⁶ De Massis et al. (2012) present a classification of the topics examined in the 215 most cited family business research articles from 1996 to 2010, and adopt the same strategic management classification framework used in our analysis.

that represent promising areas for future work (see Table 2). Our analysis emphasizes discrepancies between books and research concerning strategy formulation and content topics, especially strategic planning, environment opportunity and threats, and corporate, business, and functional strategy. A similar trend, with topics discussed to a much greater extent in books than in research, is evident for the strategy implementation and control and management and ownership categories. Overall, this suggests that future work is needed to align research with the needs of educators, who are closest to family business students and see such topics as important for their education. Moreover, topics concerning goals and goal formulation processes, as well as noneconomic performance, have received very little attention in both research and books. This is surprising, especially given the central role of these concepts in theories of the family business (e.g., Gagné et al., 2014; Kotlar & De Massis, 2013; Steier & Ward, 2006), and indicates a strong need for more work in both research and education that examines the goals of individuals and groups in family firms, the processes through which family business goals are formed and changed through time, and how such goals influence the strategic behavior and outcomes of family firms.

We also noted a preponderance of books on concepts and relationships, whereas there is a lack of books that focus on *processes and execution*, by which we mean how family businesses identify decisions and actions that must be made to resolve issues and problems, how they set organizational goals, how and to whom decisions and tasks are delegated, in what sequence the decisions are made and actions taken, and the accountabilities and deliverables demanded from each person involved. Similarly, we noted a lack of books on enterprising families (i.e., family-influenced ownership groups in pursuit of transgenerational wealth; Habbershon & Pistrui, 2002) as compared to family businesses, and the motivations and behaviors of families in business appear to be overlooked. Researchers increasingly acknowledge that these aspects are crucial to understanding the distinctive behaviors and performance of family firms (e.g., Chrisman et al., 2015; De Massis et al., 2014). Hence, future books that take these perspectives are warranted to support family business courses in endowing students with the knowledge and capabilities to effectively execute management processes as they unfold in family firms. In sum, we identified 120 family business books that cover a considerable

number of topics taught in family business education programs and shed light on a number of areas that warrant attention in future work. In the next section, we review the teaching case studies used in family business education.

TEACHING CASE STUDIES

Of the 35 family business course syllabi considered in our review, 32 used teaching case studies. This reflects the influence of an increasing number of business schools that rely on teaching case studies as a primary means for delivering education contents, but also it indicates the special attention that family business scholars have been paying to the links between theory and practice (e.g., Sharma et al., 2007) rather than compartmentalizing academic work into mutually exclusive realms.⁷ Teaching case studies can be used to improve students' theory-building capabilities as well as their ability to match concepts and theories to actual problems, and to react to case situations (e.g., see Christensen & Carlile, 2009). Teaching case studies are also helpful for students to understand real family business situations using the case of "others," thereby eliminating the biases and limits posed by the sensitive and private nature of these issues.

In the course syllabi, the most recurrent reference sources for teaching case studies were Harvard Business School, Harvard Kennedy School, Stanford Business School, Kellogg School of Management, Richard Ivey School of Business Foundation, and NACRA (North American Case Research Association). Also, some teaching cases studies were sourced from academic journals (e.g., *Entrepreneurship Theory & Practice*, *Journal of Business Venturing*), or books.⁸ Overall, we identified 101 teaching case studies, of which we systematically read the title, abstract, and keywords to categorize the main topics examined in each one. Fifty nine of the initial 101 teaching case studies focused explicitly on family business issues; the remainder was nonfamily business cases, concerned with more general topics used

⁷ The Global Family Enterprise Case Competition (FECC) is an exemplar of attention paid by the family business community to develop and apply knowledge to real-world cases. This annual competition, held at the University of Vermont, prepares undergraduate and graduate students from all over the world to understand the critical issues that are unique to family business by applying the knowledge and expertise they have developed in the classroom toward solving complex family business cases.

⁸ As noted earlier, some publishers offer collections of cases that cover complementary topics.

to provide students with management basics instrumental to discussing family business-specific issues. We focused our analysis on the 59 teaching case studies explicitly relating to family business.⁹

Our analysis revealed that 40 of the 59 teaching case studies examined North American family businesses, mostly based in the United States. Teaching cases involving companies in Europe (7), Asia (5), Latin America (5), and Africa (2) were much less represented in our sample. Although our analysis cannot be accurate due to the relatively higher representation of North American family business programs, this highlights a special need to further expand the geographical coverage of teaching cases used in family business courses. This might be achieved by extending the set of sources used (e.g., the *Case Research Journal* and the *Asian Case Research Journal* are renowned sources for teaching case studies absent from our sample of syllabi), but also by focusing future teaching case studies on more diverse geographical regions. Also, and similarly to the books reviewed above, the sampled teaching case studies tend to overlook issues of enterprising families as compared to those of family businesses. Finally, we found that the highest number of teaching case studies focused on succession and governance issues. Other topics examined in the teaching case studies were leadership, exit and business valuation, growth, and conflict management. We did not find any teaching case study examining how family firms face broader strategic management issues such as finance, strategy, entrepreneurship, innovation, and social responsibility, which are increasingly popular in research and commonly discussed in more advanced family business education programs. Future work is therefore needed to reduce this gap and develop more teaching case resources for use in advanced family business education programs.

FILMS

The use of films has long been common practice in management education, with several scholars advocating their benefits in terms of increasing students' attention and offering a means to visualize

theoretical concepts and issues (Shipper, 2013). Moreover, the specific complexity of family business issues that are extremely intangible and often involve sensitive and private aspects suggests that family business education would especially benefit from expanding the current use of films.

Nowadays, a plethora of films of different types and duration are available on the Internet, and many are free. For example, the Business Families Foundation, the Canadian Association of Family Enterprise, and the Family Firm Institute offer repositories of webinars, webcasts, and short video-clips on topics such as succession planning, governance, and communication. The BBC series *Hidden Histories: Britain's Oldest Family Businesses* includes three documentaries about the extraordinary history of Britain's longest running family businesses. Moreover, many TV shows, such as *Arrested Development*, *The Sopranos*, *The Sons of Anarchy*, and *Veronica Mars*, as well as some animated sitcoms, such as *Bob's Burgers* represent valuable resources for family business education. Finally, we identified 26 movies useful for engaging students in discussions about family business issues.¹⁰

Family business educators could benefit substantially from leveraging more such resources in their courses and programs. The increasing importance of visual culture in modern society also suggests that films can be effective in capturing the history of family firms, communicating their legacy of culture, identity, and values to external stakeholders, and enabling intergenerational learning. Therefore, the use of films in various forms will help students in family business courses appreciate the importance of family business history and they will also be useful to educators in cultivating the heritage of family firms and their business dynamics over time.

MAGAZINES

Magazines can be another valuable resource for family business education. To our best knowledge, a limited number of published magazines explicitly focus on family businesses, such as *Campden FB*, *Family Business Agenda*, *Family Business Magazine*,

⁹ The full list of 59 teaching case studies and detailed information is available at the following URL: <http://www.lancaster.ac.uk/media/lancaster-university/content-assets/documents/lums/family-business/Appendix3-TeachingCaseStudiesForFamilyBusinessEducation-1.pdf>. The authors will update this list periodically. Please report any errors, omissions, or updates to the authors.

¹⁰ The full list of 26 movies that we identified and detailed information is available at the following URL: <http://www.lancaster.ac.uk/media/lancaster-university/content-assets/documents/lums/family-business/Appendix4-MoviesForFamilyBusinessEducation-1.pdf>. The authors will update this list periodically. Please report any errors, omissions, or updates to the authors.

Tharawat magazine and *The Practitioner*. Moreover, many general business magazines, such as *Entrepreneur*, *Business Insider*, *Business Week*, *Forbes*, *The Economist*, *Wall Street Journal* and *Washington Post* frequently feature family business articles. Finally, several blogs and forums with the focus on family business are published on the Internet.¹¹

Magazines can contribute considerably as a learning resource to family business education for several reasons. First, they offer updated information, discuss up-to-date and "hot" issues relevant to family businesses, including many real cases. Second, they offer a wealth of international perspectives, including real cases and reports, and for this reason can effectively supplement other resources, especially teaching case studies that, as discussed above, tend to overrepresent Western countries. Magazine articles often include opinions from industry leaders and other experts who can be contacted by students and become invaluable resources for connecting their theoretical knowledge with practice. Finally, magazine articles cover a very broad range of topics and geographical regions. For example, through a survey of 22 issues published in *Tharawat* magazine since 2008, we identified 251 articles covering 21 distinct topics, 62 family business profiles, and 45 countries.¹² Interviewed about the benefits of the use of magazines in family business education, *Tharawat's* Editor-in-Chief, Ramia El Agamy Khan, commented that "magazine articles can be used by students to research family businesses around the world and create cases around them, providing students with a window into real-life family business issues and illustrating such situations as they unfold in the 'now.'" In this vein, we encourage a wider use of magazines in family business education as a means of encouraging and supporting the research endeavors of students, as well as promoting their interaction with real-life scenarios.

DISCUSSION AND CONCLUSIONS

As management schools expand their offering of family business programs, educators are challenged to identify and select useful resources to teach family business topics. To assist these efforts,

we developed a repository of learning resources for family business education that includes an extensive list of books, teaching case studies, films, and magazines. It is up to family business educators to critically evaluate these resources so as to build syllabi that best reflect their pedagogical objectives, but we hope that our work will be used as a guide to help them select the resources that will best fit the needs of their courses.

We discussed the potential usefulness of different types of learning resources, and we recognized areas that are in need of further development. We summarized these insights in Table 3 by formulating directions for future work that are organized, where possible, in terms of geographical coverage and content. Concerning family business books, our review encourages future books to focus on emerging regions, such as Latin America, the Middle East, Africa, and Asia, to meet the specific needs of the increasing number of international students. Translation of existing books into other languages will also contribute to ensure quick development in this direction. Also, we identified gaps between topic coverage in family business books and research, thereby emphasizing areas that deserve particular attention in family business research, in family business books, or in both, to support a better alignment of family business research and education (details about topics and future directions are reported in Table 3).

We also highlighted important directions for future work in terms of teaching case studies, films, and magazines. We noted a lack of teaching case studies that focus on regions besides North America, including Europe, Latin America, the Middle East, Africa, and Asia. Future work that addresses this gap and a greater consideration of sources for teaching case studies beyond those conventionally used in business schools are hence endorsed to help students better appreciate the role of context in shaping family firms' behavior and performance (Wright et al., 2014). Moreover, our review emphasizes a number of gaps in terms of topics covered by teaching case studies (see Table 3) that also represent important directions for scholars interested in developing family business teaching case studies. With regard to films, our review highlighted a great availability of visual resources that could be potentially very useful for family business education, including movies, TV shows, and documentaries. These resources should be leveraged to a greater extent to help students visualize abstract concepts, to examine sensitive family business

¹¹ Some examples are EY Family Business Blog, Family Business Place, Family Business United, Family Business Wiki, and the Institute for Family Business (IFB) Forum.

¹² We gratefully acknowledge the Editorial Office of *Tharawat* magazine for providing this data.

TABLE 3
Future Directions for Family Business
Education Resources

| Learning resource type | Future development needs for family business education |
|------------------------------|--|
| Books | <p><i>Geographical coverage:</i></p> <ul style="list-style-type: none"> • Books that focus on Latin America, Middle East, Africa, and Asia. • Existing books translated into other languages than English. <p><i>Content:</i></p> <ul style="list-style-type: none"> • Research that aligns to the educators' needs by examining topics that are overlooked in the academic literature but commonly discussed in family business books. • Family business books that focus on nonstrategic management topics. • Integrations of concepts such as noneconomic goals and performance in both family business research and books. • Books that focus on processes and execution, as compared to concepts and relationships. • Books that focus on enterprising families and their distinctive issues. • Books that focus on knowledge essentials, use a basic language that is most appropriate for students, and adopt smaller/pocket formats that are more easily accessible. |
| Teaching case studies | <p><i>Geographical coverage:</i></p> <ul style="list-style-type: none"> • Teaching case studies that focus on family businesses in Europe, Latin America, Middle East, Africa, and Asia. • Expansion of sources for teaching case studies beyond those already known and conventionally used. <p><i>Content:</i></p> <ul style="list-style-type: none"> • Teaching case studies on broader strategic management topics, such as finance, strategy, entrepreneurship, innovation, and corporate social responsibility. • Teaching case studies that focus on enterprising families (as opposed to family businesses) and their distinctive issues. |
| Films | <ul style="list-style-type: none"> • Greater use of movies, TV shows, documentaries, and journalistic broadcasts in family business courses. • Better appreciation of subtle concepts, such as history, legacy, heritage, and tradition in family business courses. |
| Magazines | <ul style="list-style-type: none"> • Greater use of magazines, on-line blogs, and forums in family business courses. |

issues in an "other" setting, and to better appreciate subtle and important aspects of family business management, such as history, legacy, and tradition. Finally, our review of family business magazines

highlighted their potential in stimulating students' interest and increasing their ability to deal with real-life issues.

In sum, our review revealed a number of learning resources that are potentially useful for helping business school students to appreciate and deal with family business issues. We also noted the divide between research and education that could limit the possibility of students benefitting from research findings, as well as prevent research studies from being rooted in the realities of the classroom. To address this divide, we offered a number of promising directions for future work. We hope that these will be used by scholars to expand and further enhance the pool of learning resources available for family business education.

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