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Navigating the politics of innovation in family firms: The role of political capital

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Abstract

In family firms, innovation poses distinct challenges due to the social complexity resulting from the intertwining of the family and business systems. While prior research has focused primarily on the powerful role of the dominant family coalition in leadership positions, much less attention has been paid to middle managers who must navigate the social complexity in family firms to implement management innovations. Through a multicase study of two highly innovative family firms, we theorize and demonstrate how middle managers engage in coalition building to address the social complexity in family firms when pursuing management innovation by creating a new organizational unit dedicated to managing innovation at the corporate level. Our study shows that middle managers change the social evaluation of the transfer of political capital from the dominant family coalition through *enforcement* and *detachment*. Subsequently, they convert, invest, and then mobilize different sources of political capital to gain power through *pragmatic persuasion* and *altruistic evangelizing*. Finally, we find that the dominant family coalition employs two distinct modes of *political stewardship* with respect to family and nonfamily middle managers.

KEYWORDS

dominant coalition, family business, family firm innovation, management innovation, political capital, power

1 | INTRODUCTION

In recent years, scholarly interest has grown in the political factors that influence how innovation is implemented in firms (Radaelli et al., 2017; Röth et al., 2019). Among different types of firms, the influence of political dynamics is particularly important in family firms (De Massis et al., 2018), defined as firms that are "governed and/or managed with the intention to shape and pursue the vision of the business held by a dominant coalition controlled by members of a family in a manner that is potentially sustainable across generations" (Chua et al., 1999, p. 25). In particular, family firms are characterized by concentrated power and particularistic decision criteria that arise from the tendency of family members to view the firm as "our business" (Carney, 2005, p. 255) and the pursuit of noneconomic goals (Chrisman et al., 2015). Prior research has emphasized the prominent role of the dominant family coalition in shaping the firm's ability to innovate (Calabrò et al., 2019; De Massis et al., 2013). However, it is commonly assumed that the distinctive innovative behavior of family firms is a direct consequence of the influence and power of family members in formal leadership positions (De Massis et al., 2016). This perspective has led scholars to focus extensively on how the family uses its concentrated control to direct and shape the inputs, outputs, and processes of technological innovation (Duran et al., 2016; Matzler et al., 2015), and less on the important political dynamics between the dominant family coalition and other key actors who shape how innovation is implemented in the organization. Therefore, the widely held assumptions about the direct and uncontested political influence of the dominant family coalition merit further investigation.

Specifically, the intertwining of family and business relationships in family firms leads to increased social complexity, which is likely to be particularly evident in the middle ranks of the organization (Casprini et al., 2017; Villani et al., 2023). Prior studies suggest that the relational complexity of family firms may lead to the asymmetric treatment of family and nonfamily managers (Verbeke & Kano, 2012). While recognizing the importance of the social context in family firms for the success of innovation initiatives, research has yet to address the complexity of the political dynamics in these organizations. Relatedly, research on family firm innovation has paid little attention to the importance of middle managers in garnering support for innovation. It is generally recognized that middle managers play a critical role in implementing innovation because they can use resources to gain influence and legitimize the innovation, both horizontally and vertically (Bunduchi, 2017; Pfeffer, 1981). However, the assumption of family dominance in decision making in family firms has limited our understanding of the complex political dynamics that may affect the ability of middle managers to rapidly implement innovation (König et al., 2013).

To advance our theoretical understanding of these issues, we adopt the political capital perspective (Ocasio, 2002; Ocasio et al., 2020), which theorizes political processes and outcomes in organizations as the accumulation, investment, conversion, and mobilization of various sources of tangible or intangible political capital. Extending the assumptions about family firm innovation from a political capital perspective, we theorize that the formal and positional power of the dominant family coalition is not derived solely from one form of political capital (organizational), but from several forms. Conversely, we argue that middle managers may be more important and agentic than family firm innovation research has assumed, as they can leverage multiple and alternative forms of political capital. Finally, we contend that the value of the forms of political capital leveraged by internal change agents is shaped by the social complexity of the family firm. Therefore, we address the following research question: *How and why do family and nonfamily managers in family firms leverage political capital to gain support for innovation*?

Practitioner points

- Practitioners in family firms should recognize the importance of navigating political dynamics, especially the role of middle managers in leveraging political capital. Understanding and effectively managing the complex interplay between family and non-family members can be crucial for driving innovation and handling organizational change.
- It's important for practitioners, particularly middle managers, to understand how to build, convert, and mobilize different forms of political capital to gain support for innovation. This involves recognizing the unique challenges and opportunities presented by their status (family vs. non-family) and strategically utilizing their political capital to influence key stakeholders and decision-making processes.
- Practitioners, especially those in leadership positions, should aim to develop a sense of political stewardship. This involves not only direct support for innovation initiatives but also the nuanced understanding of when and how to provide this support. For family firms, this means balancing overt and covert forms of support to middle managers, depending on their familial status and the specific political dynamics of the firm.

We do so by elaborating theory through an embedded multi-case study of two management innovation projects. Management innovation, defined as "the generation and implementation of a management practice, process, structure, or technique that is new to the state of the art and is intended to further organizational goals" (Birkinshaw et al., 2008, p. 829), changes "what managers do and how they do it", challenging the status quo and potentially triggering resistance to implementation. Therefore, middle managers can leverage political capital to gain support for the management innovation. Following the guidelines of polar case study design (Eisenhardt, 1989), we selected two projects carried out in two highly innovative Italian family firms. In both cases, the management innovations were mandated by top family managers but led by specifically appointed newcomer managers. In particular, one project was led by a family member and the other by a nonfamily manager, thus providing an ideal context to investigate the similarities and differences resulting from the family and nonfamily status of middle managers.

We found that middle managers catalyzed innovation support differently depending on their social status, managing their respective stocks of political capital through two distinct mechanisms. The first mechanism, which we refer to as political perceptual (*reinforcement* and *detachment*), is aimed at altering the social judgment of the value of their stock of political capital in terms of the liability of newcomers and their perceived association with the dominant family coalition. The second mechanism, which we refer to as political relational (*pragmatic persuasion* and *altruistic evangelizing*), is aimed at accumulating, converting, and investing varieties of political capital. Interestingly, we find that the dominant family coalition engages in distinct and previously unexplored political behavior, specifically *political stewardship*, which varies with the manager's social status and does not necessarily rely on the dominant coalition's formal power (organizational capital). In the nonfamily manager case, the dominant coalition engaged in *overt promoting*, while in the family manager case, it engaged in *covert sheltering*. Finally, because the two managers were responsible for the management innovation, their stock of political capital was "tied" to the success and legitimacy of the management innovation, leading them to engage in different *support catalyzing* strategies.

Overall, our study contributes to research on the political game of innovation by demonstrating the different strategies and mechanisms—resulting from the social complexity of the family firm's organizational context—with which multiple actors invest, convert, and shape the value of multiple forms of political capital. Therefore, we advance a political ecology perspective on innovation in family firms, situating the dominant family coalition within a broader context consisting of multiple political actors, emphasizing the latter to explain the successful implementation of innovation. Finally, we contribute to the management innovation literature by elucidating the important political mechanisms that middle managers can use to navigate the social complexity of an organization to gain political influence and catalyze support for management innovation.

2 | THEORETICAL BACKGROUND

Research on innovation in family firms has produced a consistent body of knowledge on the effects of the dominant family coalition's involvement in governance roles. The "concentrated control" (Chrisman et al., 2015) of the dominant family coalition in the family firm creates "authority structures" (De Massis et al., 2016; Kammerlander & Ganter, 2015) that provide family members with significant influence over decisions related to innovative activities. Involvement in formal governance roles is seen as a source of family power and political influence over the innovation process agenda (Calabrò et al., 2019; Chrisman et al., 2015). Thus, the pursuit of particularistic organizational goals, such as employing family members and maintaining family control (Carney, 2005; Chrisman et al., 2012), and the distinctive innovative behavior of family firms (Duran et al., 2016; König et al., 2013), may be the result of a formal power structure in which the family occupies a key position. As the dominant coalition, the family sets the rules of the game, and lower-level managers and employees are expected to follow these rules. Goals are simply cascaded from the top down, and the rest of the organization, including middle managers, is merely the executor of orders from above, albeit at the risk of "isolating the family" (Kotlar et al., 2020). This perception derives from the idea of personalism that characterizes the dominant perspective of power in family firms, referring to "the unification of ownership and control [that] concentrates and incorporates organizational authority in the person of an owner-manager or family" (Carney, 2005, p. 255). Notably, the implementation of innovation initiatives in family firms is still considered a dominant family coalition matter (Chrisman et al., 2015). Therefore, the presence of family members in both controlling ownership and top management positions increases monitoring and control over the innovation process (Duran et al., 2016) and outputs (Kraiczy et al., 2015; Matzler et al., 2015), as well as the likelihood of adopting discontinuous technologies (Kammerlander & Ganter, 2015; König et al., 2013). In this view, the involvement of family members in formal governance and management roles (dominant family coalition) is considered a sufficient mechanism to explain why family firms exhibit different innovation implementation outcomes than nonfamily firms.

Other studies, mostly qualitative, have taken a different stance, showing the importance of looking at how innovation is embedded in the organizational environment and adopting a design perspective on the innovation project itself. For example, in a multiple case study of new product development (NPD) teams, De Massis et al. (2016) show that family governance can have both functional and dysfunctional effects on the design of NPD projects, focusing on elements such as incentives and leadership. They find that family members can use their status to generate support for the project and facilitate interdepartmental coordination, but they may also evaluate team members according to non-rational, particularistic criteria, and may be not as skilled in their leadership role. Kotlar et al. (2020) consider the concentration of power in family ownership as a driver of potential and realized absorptive capacity in family firms, emphasizing that the power wielded by the dominant family coalition "reduces the incentive of lower rank managers and employees to actually implement such new knowledge in existing processes and products" (Kotlar et al., 2020, p. 14). Even recent research that explicitly considers variance in the power of the dominant family coalition views it as a one-dimensional concept derived from the family's involvement in key governance positions (Kotlar et al., 2020).

Therefore, research on family firm innovation has maintained two key assumptions. First, innovation in family firms occurs because of their distinctive power structures deriving from the involvement of family members in formal power positions, such as the Chief Executive Officer (Kammerlander & Ganter, 2015), top management team (Kraiczy et al., 2015), board of directors (Bendig et al., 2020), and ownership (Kotlar et al., 2020), giving them almost unlimited authority over the entire organization and seamless control over the innovation process. Instead, innovation management research has made significant contributions by showing that middle managers are important political actors when it comes to effectively implementing innovation (Radaelli et al., 2017). Middle managers can "champion" projects and exert political influence, such as issue selling, to gain support for specific innovation initiatives (Markham, 2000). Middle managers are also carriers of multiple roles and expectations, and the specific enactment of one role over another can enable or constrain the latitude of action that the middle manager can exercise (Mantere, 2008). Overall, emerging research questions the unity and behavior (Waldkirch et al., 2021) of the dominant family coalition as a result of the governance-based authority structure.

Second, and as a consequence, the conceptualization of organizational power and politics in family firm innovation has been biased toward the power granted by formal governance structures in the upper echelons of the organization, leading on the one hand to overlooking the social complexity that middle managers navigate in family firms, and on the other hand to a reductionist view of the power dynamics in family firm innovation without considering the micro-relational aspects. This is surprising because family firms are also socially complex organizations due to the intertwining of the family and business systems where multiple forms of relationships occur simultaneously (Li & Piezunka, 2020; Verbeke & Kano, 2012). Research has found that because the dominant family coalition views the family firm as "our business," altruistic decisions that favor family managers over nonfamily managers can lead to perceptions of nepotism and incompetence (Jaskiewicz et al., 2013). This situation provides family and nonfamily managers with different perceptions and different resource endowments. In particular, when it comes to implementing innovation, middle managers have to navigate a complex set of informal networks and cliques, expectations, and ambiguities (de Massis et al., 2016), albeit in different ways depending on their family versus nonfamily status.

2.1 | The political capital framework

Innovation management scholars have emphasized that due to the uncertainty of innovation processes, political behavior, defined as influencing the behavior of others in order to "get things done" (Pfeffer, 1981), is an important element of the successful innovation implementation. Indeed, political behavior is crucial because it affects whether, how, and which organizational goals are pursued by the organization (Röth et al., 2019). One theoretical perspective that is helpful in explaining such dynamics is political capital, which focuses on understanding "the variety of economic, social, and cultural resources available to individuals and groups to affect organizational decisions, actions, and outcomes" (Ocasio, 2002, p. 380). This framework rests on different assumptions. First, the extent to which different resources can be considered political capital is "socially constructed as valuable by the local and field-level rules of the game and by the direction of organizational attention, as well as those that are objectively critical to the organization" (Ocasio et al., 2020, p. 323). Second, political capital can be activated and mobilized, but its valence lies in the relationships and social interactions between individuals. Third, like any capital, different forms of political capital can be converted and invested in others. For example, economic capital can be invested and converted into reputational capital through the perception of financial success. Importantly, the political capital framework allows understanding power and political behavior and processes beyond the resource dependence perspective, which emphasizes power as a consequence of an individual's dependence on the resources of others (Ocasio et al., 2020).

Management innovation is defined as "the generation and implementation of a management practice, process, structure, or technique that is new to the state of the art and is intended to further organizational goals" (Birkinshaw et al., 2008, p. 829). This concept draws on earlier concepts of non-technological innovation, such as organizational innovation (Damanpour, 1991), to focus on the social and relational dimensions that shape the organizational context. Because management innovations are new to the organization and reconfigure the status quo, they often generate resistance from organizational members (Birkinshaw et al., 2008; Khosravi et al., 2019; Volberda et al., 2014). For this reason, Birkinshaw et al. (2008) emphasize the role of internal change agents in the successful implementation of management innovations. As a result, they argue for the need for political behavior to gain support from the rest of the organization, and "the implementation process is therefore likely to involve careful maneuvering by internal change agents as they focus their efforts on those parts of the organization that are more amenable to change" (Birkinshaw et al., 2008, p. 836). While this calls for a political perspective on the managerial antecedents of the successful implementation of management innovation, empirical research lags behind. Khosravi et al. (2019) emphasize the importance of political structures in the business organization for the implementation of management innovation, but only consider formal processes and structures that facilitate participation in decision-making, overlooking the importance of interpersonal sources of influence that often occur outside of these structures (Röth et al., 2019).

The implementation of management innovations in family firms is especially complex compared to other organizational contexts. In particular, the social complexity of family firms, driven by the intertwining of family and business relationships and logics, makes this context theoretically interesting for the study of management innovation. Since family firms are characterized by multiplexity, namely the simultaneous presence of multiple forms of relationships (Li & Piezunka, 2020; Schubert & Tavassoli, 2020), it is likely that there are differences in how family change agents engage politically compared to nonfamily change agents. Due to the nature of multiplexity, it is also likely that the political capital perspective can provide interesting insights into the varieties of political capital that can be leveraged. As political capital is a relational resource that depends on the evaluation of salient audiences within the organization, the simultaneous presence of multiple types of ties may lead to idiosyncratic mechanisms for converting and investing political capital to catalyze support for the implementation of the management innovation. However, we do not know much about this because research on innovation in family firms has focused mainly on technological innovation processes and outcomes.

3 | METHODOLOGY

For this study, we adopted a multiple case study research design (Eisenhardt, 1989; Eisenhardt & Graebner, 2007; Yin, 2003) to develop a theory of trajectories explaining how and why middle managers catalyze support for management innovation by leveraging political capital in family firms. According to Eisenhardt (2021), the multiple case study approach is appropriate for theory elaboration when "there is little or conflicting prior theory and/or empirical evidence, and so no obvious answers" (Eisenhardt, 2021, p. 149). The selection of cases was driven by theoretical sampling (Eisenhardt, 1989), with specific cases chosen "because they are particularly suitable for illuminating and extending relationships and logic among constructs" (Eisenhardt & Graebner, 2007, p. 27).

3.1 | Research context

The polar multiple case study design (Battilana & Dorado, 2010; Brattström & Richtnér, 2014; Yin, 2003) ensures similarities in some dimensions and differences in others that are central to our research question, with contrasting patterns that allow for the elaboration of robust theory from qualitative data. In particular, the two firms selected, ProdCo and SkyCo, have structural similarities in that they are both medium-sized enterprises with a relatively lean organizational structure, and the owning family is involved in ownership and management as well as in the board of directors. Specifically, ProdCo is a second-generation B2B family firm founded in 1940, with almost 430 employees. SkyCo is a third-generation B2B family firm founded in 1948, with almost 250 employees. Both have contextual similarities in that they are located in Italy and operate in the high-tech manufacturing sector of industrial components and machinery. They also share strategic similarities in that they are developing management innovations through new dedicated organizational units (O'Connor & DeMartino, 2006) to improve their ability to pursue more radical innovations and capture distant innovation opportunities. These management innovation initiatives are our embedded units of analysis. Both firms compete in a highly dynamic technological environment where customers continuously demand new technical solutions and where the continuous identification of new market applications for technologies is essential for business sustainability. Finally, both units have a middle manager in charge of the unit appointed by the top family managers.

On the other hand, the cases differ in terms of the relationship between the middle manager and the business-owning family. In the ProdCo case, the middle manager is a family member (hereafter Jennifer), while in the SkyCo case, the middle manager (hereafter Philippe) is not a family member. In both cases, the dominant family coalition is recognized by organizational

TABLE 1 Overview of ProdCo and SkyCo.

Information	ProdCo	SkyCo
Year of foundation	1940	1948
Industry segment	Manufacture of industrial, electrical, and electronic machinery	Manufacture of industrial, electrical, and electronic machinery
Location	Italy	Italy
Turnover (2021)	70 mLn €	94 mLn €
No. of employees (2021)	430	250
Family generation in charge	First and second generation	Second and third generation
Level of family ownership	Majority of shares	Total control
Level of family involvement	Family involved in management and the board of directors	Family involved in management and the board of directors
Number of family members working in the company	5	3
Number of family members on the board of directors	1	3
Number of family members in the top management team	2	2
Number of family members in non-managerial positions	3	0
Top management positions held by family members	• Group CEO • Head of Innovation Hub	• Managing Director • Vice President Sales and Marketing

members as the main sponsor and enabler of management innovation. Finally, both are newcomers to the organizations and were hired as managers responsible for initiating and developing the management innovations. The characteristics of the theoretical sample add strength to the research design, as they allow us to observe how the middle managers accrued, invested, converted, and leveraged political capital from scratch, without previously accumulated stocks of political capital in the organization. As newcomers, they also share a number of challenges and liabilities, and have had to "learn the ropes" (Van Maanen & Schein, 1979) and how things are done in the organization. Table 1 summarizes the two cases.

Both firms shared the need for an innovation unit to support the development of more radical innovative projects. In the ProdCo case, the goal was to create a unit capable of managing projects targeting a business-to-consumer market instead of the tradition business-to-business market. This unit would manage the product development phases in an end-to-end logic, from ideation to commercialization, using innovative approaches such as design thinking and agile innovation. The initiative is led by Jennifer, daughter of the chief innovation officer and firm owner, supported by a team of young employees, nonfamily members, and newcomers. The decision was made to create an innovation unit that would work on areas of knowledge not necessarily related to the core business, using skills that had previously been accessed via external consultants. In the SkyCo case, the aim of the management innovation was to give greater scale and structure to the innovation projects along the strategic process by tapping into innovative ideas to be co-developed with users and suppliers according to identified market needs. In this case, the purpose of the management innovation was to define a structured process for identifying market needs, generating, collecting, and selecting new ideas, developing and testing new solutions, and bringing new products to market. The leadership of this new unit was assigned to Philippe who had recently been hired because of his work experience in other firms. Table 2 provides comparative information on the management innovations pursued by the two family firms.

3.2 | Data collection

In addition to our two cases, we conducted a pilot study with six other family firms. In line with the methodological approach recommended for case study research (Goffin et al., 2019), the pilot study focused on the political factors in the innovation process of family firms. First, we asked a very broad research question ("How does the complexity of the social structure in family firms affect the organizational efforts of the innovation process?"). As

TABLE 2 Comparative analysis of the management innovations at ProdCo and SkyCo.

Management innovation	ProdCo	SkyCo
Description of the management innovations	Creating a unit capable of managing projects targeting a business to consumer (B2C) market, managing the product development phases in an end-to-end logic from ideation to commercialization and integrating design expertise	Establishing a business development unit to implement a structured process to identify market needs, generate, collect, and select new ideas, develop and test new solutions, and bring new products to the market
Stated objectives of the management innovations	• Explore the opportunities of opening up the innovation process to B2C products and innovative solutions to bring to the market • Explore the potential application of internal design expertise and know-how to internal projects and activities	• Formalize customer needs to identify new technologies to be developed • Increase the number of innovation opportunities and new projects through the analysis of customer needs
Selection of the middle manager responsible for the management innovation	Leadership of the new unit assigned to the Chief Innovation Officer and company owner's daughter, newly hired and without previous experiences in the firm	Leadership of the new unit assigned to an external manager, newly hired and without previous experience in the firm
Formalized phases of the innovation process	• Concept development • Concept presentation and approval at innovation board level • Project prioritization and budget allocation • Project team allocation and activity planning • Feasibility • Development • Production • Monthly update to the innovation board members	• Discovery • Scoping and concept development • Identification of market needs, selection and technology matching • Project prioritization and budget allocation • Project team allocation and activity planning • Feasibility • Development • Production
Key stakeholders of the innovation process	• Innovation board–five members (CIO, Head of the Strategic Innovation Office, Head of Research, Head of IP, Head of Innovation Hub) • Company research laboratories • Strategic innovation office including the technology scouting unit, the innovation hub, the design unit, and corporate accelerator	• Managing director and board • Business development unit
Decision-making mechanisms for the innovation process	Centralized for strategic decisions related to advanced/disruptive projects or projects not part of the "business as usual" activities, directly handled by the innovation board at the group level on a bi-weekly basis	Centralized for strategic decisions and directly handled by the board, then cascaded to managers and the operative teams

Yin (2003) suggests, we developed a memo report for each pilot case. The pilot study examined the innovation processes of family-controlled business organizations for two reasons. First, to learn about potential concepts related to the context, as there is not that much research on political factors in family firms. Second, to learn how to approach organizational gatekeepers when addressing issues that have the potential to be contested. We compared and contrasted each memo to refine our research question, our research positioning, our interview questions, and our fieldwork approach. We chose the ProdCo and SkyCo cases because they had the most visible political factors, shared the introduction of a management innovation, and provided reasonable access to data.

The study of power and politics within organizational processes led us to interpret the empirical organizational context as political arenas characterized by a multiplicity of interests, agendas, and coalitions. These considerations led us to reflect on the design of the data collection strategy and the role of the researchers' supposed "neutrality" within political networks in organizations (Buchanan & Bryman, 2007, p. 489–90) to ensure trustworthiness throughout the research process. When entering the field and negotiating the research

TABLE 3 Summary of data sources.

Data source and type	ProdCo	SkyCo	Use of data in the analysis
Interviews	26 interviews with: Head of Innovation Hub (6: 282 min, FM), Head of Strategic Innovation Office (7: 308 min, NFM), Head of Development Lab (2: 87 min, NFM), Strategic Design Specialist (2: 75 min, NFM), Head of Design (2: 91 min, NFM), Project Manager (2: 101 min, NFM), Industrial division Deputy Head (5: 247 min, NFM) Memos derived from interviews (73 pages)	18 interviews with: Product and Business Development Director (8: 342 min, NFM), Managing Director (2: 112 min, FM), Vice President Sales and Marketing (2: 94 min, FM), Project Manager (4: 218 min, NFM) Memos derived from interviews (61 pages)	Enabling a rich understanding of the mechanisms adopted by managers in charge of the creation of a new innovation unit to leverage political capital to gain support for their innovation initiatives in the family controlled firms
Observations	Field visits: In-person visits to the firm in 2019 (2) and 2020 (1) Online and in-presence meetings for a research project from 2020 to 2022 (2) Public speeches by the Head of Innovation Hub (3)	Field visit: In-person visits to the firm in 2021 (2) Public speeches by the Product and Business Development Director (2)	Enabling triangulation of interview data with additional evidence of the mechanisms adopted to legitimize the manager of the new unit
Archival data	Internal archival data • Internal project presentation (3) • Presentation related to ProdCo's innovation process (2) Publicly available documents and data sources: • Annual report (6)	Internal archival data • Internal project presentations (2) • Presentations related to SkyCo's innovation process (4) Publicly available documents and data sources: • Annual report (6)	Enabling a better understanding of the contextual characteristics of the two cases, as well as precise details of the purported functioning of the two management innovations and their expected benefits

Note: FM, family member; NFM, nonfamily member.

objectives with the field gatekeepers, we as researchers did not emphasize the terms "(organizational) politics," "power," or "political power," but instead used more neutral euphemisms, such as "social dynamics in innovation" or "innovation leadership". As is common in qualitative studies of politics and power in organizations (Madison et al., 1980), we did this to avoid raising sensitive and controversial issues before we had established rapport with key informants so as not to jeopardize permission to enter the organization and obtain rich descriptions. We explicitly stated the true objectives of our study after establishing rapport and gaining the trust of more than one stakeholder group within the organization. We believe this enhanced the trustworthiness of the informants' statements.

We conducted two waves of data collection. In the first wave, we conducted 30 semi-structured interviews and obtained 15 archival data items. In the second wave, we conducted an additional 16 interviews and obtained 8 archival data items. The interviews lasted from 46 min to 2 h and 20 min, and were recorded and transcribed within 48 h. The interviews were conducted by the first two authors. The first author took a more active role, leading the conversation with informants, while the second author focused mainly on taking notes and asking specific questions to clarify issues. Both authors developed memos that were extremely useful in sketching a preliminary conceptual and theoretical understanding of the phenomenon at hand. The memos were discussed between the first two authors and then debriefed with the rest of the author team. Informants were mainly selected through snowball sampling, using the networks of the family and the innovation unit manager. We also collected nonparticipant observations that were helpful in triangulating our data. Table 3 summarizes the data collected for each organization and how these were used in the data analysis.

3.3 | Data analysis

The data analysis involved multiple steps and actors. The first two authors initially coded the data independently to avoid confirmation bias that might result from a single individual analyzing the data. The researchers read and coded the interview transcripts and met regularly to compare their understanding, discuss divergent views, and converge on a common interpretation of the data. We also actively engaged the subjects of the study in the theorizing process, facilitated by the generous availability of the two organizations for follow-up interviews and informal conversations about the study. The informants also provided feedback on whether our interpretation of the mechanisms at play was consistent with their lived experiences.

The first step in the data analysis was to contextualize the two cases. The two first authors jointly developed narrative case descriptions for the two firms (Eisenhardt, 1989) to familiarize with the cases. We became acquainted with the historical context of the two firms, especially with regard to the strategic challenges they faced, which led to the decision to implement specific management innovations to face these challenges more effectively. In this phase, we paid particularly attention to two elements: first, how innovation and the technological strategy had been embedded over time in the firm's long-term strategic planning, and second, the role of family involvement in the innovation process, with particular attention to the presence of generational continuity or discontinuity. We began by tracing the long-term technological and strategic trajectory of the two firms, and then zoomed in on the specific innovation initiative. For the latter, we mapped the stated needs it would address, as well as the organizational and managerial changes needed to make it work.

In the second step, we conducted a within-case analysis. We delved deeper into the political processes in the two firms, and specifically how decision-making had unfolded in the two innovation initiatives. The coding fed into the narrative case reports to create a longitudinal story of the management innovation initiatives (Eisenhardt, 1989). Because of our focus on political capital, we began by coding the different sources of political capital leveraged in each interaction by the family leaders, what we call the "dominant coalition." In this phase, we attempted to code in relation to the political capital framework using established categories from the literature, and when this was not possible, resorted to open or in vivo coding. Specifically, we used the theoretical mechanisms of political capital conversion described in Ocasio et al. (2020) to theorize from the data to ensure our theorization was grounded in the political capital framework. We then conducted a cross-case analysis and began to look for similar constructs or relationships when comparing the two cases, using replication logic. We relied on tables (Cloutier & Ravasi, 2021) to tentatively identify the categories and dimensions that might be meaningful and systematic in explaining the similarities and differences between the two cases. In addition, moving from within-case to cross-case analysis allowed pattern matching (Yin, 2003). This step enabled us to distill the meaning of each construct, retain the relevant dimensions, and disregard the rest. In this step, we also moved iteratively from the data to the emerging literature to identify what has been done and what has not. We found interesting insights when comparing what the two middle managers did to accrue political capital. In particular, the family middle manager (Jennifer at ProdCo) accrued social capital by altruistically offering support to other colleagues in different departments and functions, while the nonfamily middle manager (Philippe at SkyCo) accrued cultural capital that was converted into social capital by demonstrating the potential benefits that the management innovation could bring to everyday tasks. This was not simply a matter of accrual, but also of political capital investment and convertibility (Ocasio et al., 2020). We initially and tentatively coded these processes as respectively "creating exchange relationships" and "socializing to organizational micro-politics". Finally, a set of codes in both cases related to how the middle managers portrayed themselves in the organization, particularly in relation to the dominant family coalition. After cycles of revision, these categories were either relabeled, dropped, merged, or split (Grodal et al., 2021) to ensure the novelty of the construct through theory building. The next step was explanation construction. In this phase, we reviewed all our categories and clarified the theoretical links between each. This last step was essential to ensure theoretical consistency across categories. For example, the idea of "symbolic capital liability" was introduced at this stage to make sense of nepotism judgments using the political capital framework. Figure 1 summarizes our coding process, showing our first-order codes, second-order themes, aggregate theoretical dimensions, and the theoretical explanation of the political capital logic.

4 | FINDINGS

The initial efforts of our two cases were focused on a common form of management innovation: the creation of a new organizational unit to help them structure their enterprise-wide innovation processes. Due to their deeply rooted organizational processes, both families had foreseen that for the innovation initiative to be successful, they had to hire and assign a leadership role to a newcomer, a professional manager appointed for this specific purpose. In fact, both managers needed a transitional period of socialization into the organizational culture and routines in order to "fit in" and counteract their "liability of newness" (Bauer & Erdogan, 2014). As mentioned,

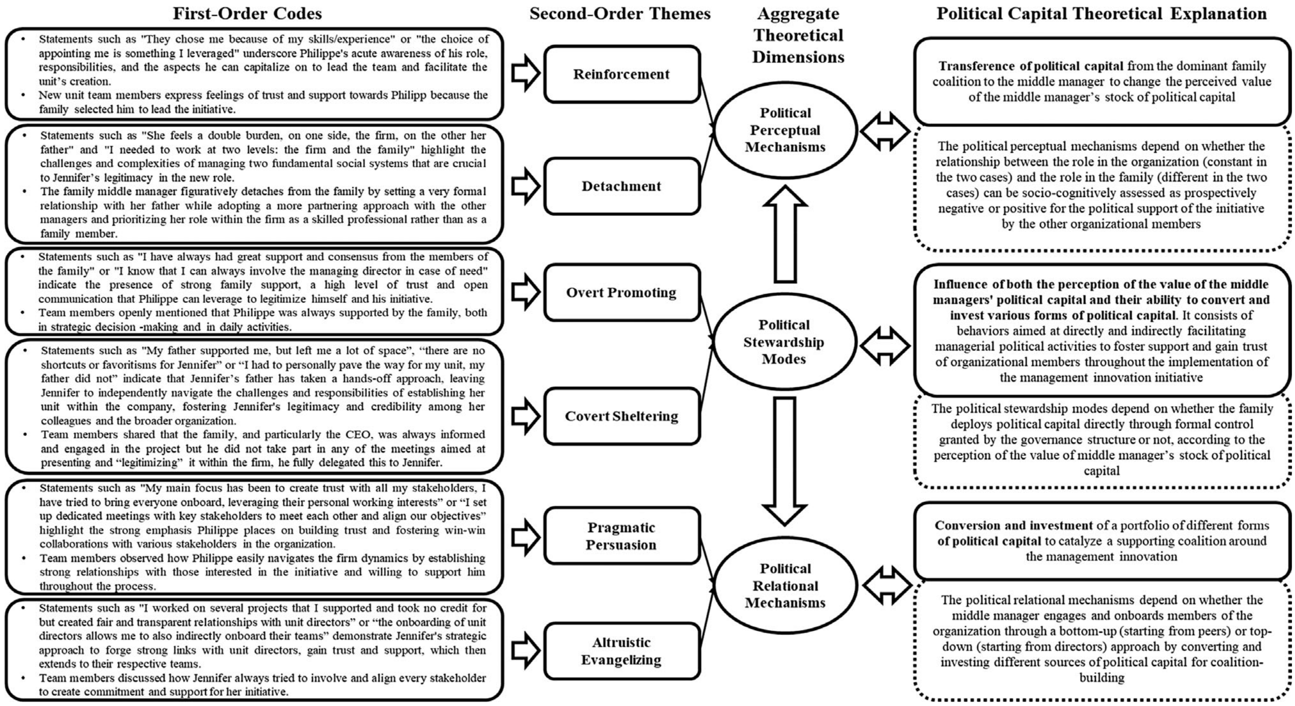

FIGURE 1 Data structure.

while one manager is a family member and the other is not, their common goal was to catalyze support for the management innovation.

Our initial analysis of the two cases was inspired by the theoretical categories proposed by Ocasio et al. (2020), which provided an initial general framework for identifying and analyzing the rich empirical material into coherent sets of information relevant to the conversion of political capital, namely "social perception of the value of the political capital stock," "conversion and investment of political capital," and "activation and mobilization of political capital." Consistent with each theoretical category, our analyses led us to identify different political dynamics between the two cases, which we conceptualize as political perceptual mechanisms (*reinforcement* and *detachment*) and political relational mechanisms (*pragmatic persuasion* and *altruistic evangelizing*). Our analysis also identified *political stewardship* as crucial to understanding the different political roles of the dominant family coalition in the two cases, revealing *overt promoting* and *covert sheltering* as two key mechanisms shaping the relationship between the dominant family coalition and the family/nonfamily manager.

4.1 | Political perceptual mechanisms

The interview data show that in both firms the managers consistently engaged in different behaviors to manage the social perception and evaluation of their connection to the dominant family coalition, which then translated into the value of the stock of political capital they had at a given time. In fact, the value of the political capital one has depends on the shared meaning system of the organization and on the social evaluations of relevant stakeholders. In family firms, this is influenced by the transfer of political capital from the dominant family coalition to the middle manager, generated by the perception of association of one with the other. However, this can lead to stigma and negative social judgments of nepotism and incompetence, especially in the case of newcomer family members, as there is a lingering judgment of decisions based on criteria that are not necessarily rational and professional (Jaskiewicz et al., 2013). Such judgments may ultimately have a negative impact on the perception of the value of the stock of political capital. Table 4 summarizes the key dimensions of this concept.

4.2 | Detachment

One of the first challenges that Jennifer faced after being hired at ProdCo was the generalized perception that other members saw her as a byproduct of nepotism, referring to the tendency of one of the owners favoring his relatives because of their family ties rather than their actual abilities and skills. She revealed that her role in the innovation unit was directly assigned by her father, "The world of innovation is led by my father, there are few

TABLE 4 Political perceptual mechanisms: Theoretical dimensions and evidence.

Political perceptual mechanisms	Reinforcement	Detachment
Objective of political perceptual mechanisms	Manage the social perception and evaluation of the transference of political capital from the dominant family coalition to the middle manager	
Actors engaged	Nonfamily manager	Family manager
Liability of transference of political capital by family dominant coalition	Null	High
Explanation of the political perceptual mechanisms	The choice of nonfamily manager by the dominant family coalition was perceived as based on rational criteria of professionalism and competence. The transference of political capital by the dominant family coalition heightens the perceived value of the political capital stock of the nonfamily manager, based mostly on reputational capital. Through legitimating enforcement, the transference of political capital from the dominant family coalition is accepted and leveraged.	The choice of family manager by the dominant family coalition was perceived as based on nepotistic criteria running counter to the rest of the organization. The transference of political capital by the dominant family coalition reduced the perceived value of the political capital stock of the family manager, generating a liability of symbolic capital due to being perceived as part of the family group. By symbolic detachment, the family manager sought to alter the social perception of symbolic capital transference, compartmentalizing, and diminishing it.
Evidence	"Philippe was chosen by the family for his skills, and we know that [...] He was perfectly aware of why he was at SkyCo. He accepted and leveraged that to foster consensus and onboarding of the creation of the new unit" (Project Manager) "I knew that my working background in large multinationals was extremely valuable to the firm, the expectation was that I would leverage my personal experience to apply it to the new context, limiting potential cultural barriers because I've already done it and they (the family) chose me because of that" (Product and Business Development Director) "In conceiving this project, I started from a great awareness of the need to transform the firm to make it more proactive in managing new business opportunities and innovation. After a series of failures, we decided to tidy up, create a dedicated unit and select a person with the skills, experience, and leadership to govern it and lead the team" (Managing Director) On different occasions, and especially when activities were slowing-down, Philippe shared tangible examples from his previous experience with his team to foster their commitment and engagement in the project.	"Jennifer feels a double burden, to be recognized for her abilities without being labeled as "the father's daughter," and then to be recognized by her father for her skills, know-how, and the value she can bring to the firm" (Strategic Design Specialist) "Jennifer's hiring process started from an idea of the CEO, her father, but it took years to convince her to join [...]She has always feared being recognized solely as her father's daughter and not for her own skills. Jennifer was used to considering the firm as "something" belonging to her father [...] and he only succeeded by entrusting her with the responsibility of a dedicated innovation project that would allow her to demonstrate her competencies and be acknowledged for them" (Head of the Strategic Innovation Office) "I am the boss' daughter, which is both positive and negative, people in the team have a hard time saying no to me [...] but it is not easy to gain their trust [...] only when they see that I work more than they do and that I always try to do my best, then I gain their respect [...] Every day I have to prove that I deserve the position I hold, beyond the ties with my father" (Head of Innovation Lab) Jennifer, within the company walls, never calls her father "dad", but she always tries to maintain a certain formal distance, like all the other managers and employees, downplaying her position as a family member.

(Continues)

TABLE 4 (Continued)

Political perceptual mechanisms	Reinforcement	Detachment
Link to the literature	Research on the political behavior of leaders stresses the importance of ingratiating with the leader to exchange resources (Ellen et al., 2021). Theoretical research on management innovation explicitly highlights the importance of "political maneuvering" by internal change agents (Birkinshaw et al., 2008, p. 836)	
Differentiation from the literature	Political perceptual mechanisms seek to shape the social value judgment of relevant audiences in the organizational field about the value of the transferred political capital by association from the family dominant coalition. This concept supports the idea of the value of political capital as hinging on organizational contingencies, and depends on the cultural schemas and attention devoted to specific cues. Our theory elaboration also stresses that, in relation to research on the political behavior of leaders: (1) it is not necessary to ingratiate with the leader to extract resources, and (2) there can be political capital liabilities when one middle manager is associated with a powerful person (Goldstein & Hays, 2011).	

people directly involved, he decided and put me in immediately, but it took time to deeply understand my role and responsibilities." As a result, Jennifer recognized the importance to building reputational and cultural capital as a manager on two levels: the firm and the family. On the one hand, she needed to be recognized by the members of the firm and as part of the system (cultural capital), and on the other hand, by her family, especially her father, confirming that she had the skills and the abilities to be part of the firm and to be able to bring added value (reputational capital). The problem for Jennifer, however, was that the two needs seemed to be in conflict. As one of her colleagues noted, "Jennifer feels a double burden, to be recognized for her abilities without being labeled as "the father's daughter", and then to be recognized by her father for her skills, know-how, and the value she can bring to the firm." And she confirmed that for her "[…]it was challenging to secure a certain level of recognition from the people/colleagues and my father […]especially on certain occasions when I've felt the need to choose and prioritize one over the other".

In the process of structuring the innovation unit, she realized that gaining political support depended on the extent to which she could become credible as a professional rather than as someone who was appointed to the position because she is part of the business-owning family (symbolic capital). She perceived this as a liability to her ability to be a change agent responsible for management innovation at ProdCo. One of her team members shared "her desire to separate her "image" as a family member from her "image" as an effective manager, highlighting her expertise and capabilities." Therefore, she engaged in a detachment process to decouple the negative effects that the transfer of ascribed status had on her stock of political capital from her ability to influence the organizational goals. The role and the impression that Jennifer projected to the firm and its employees was certainly central to building trust and acceptance.

For this reason and to increase her credibility, Jennifer began to downplay her position as a family member and constantly tried to be open to talking and discussing with other managers and members of the firm to get to know them better, understand their needs, and identify possible guidelines for support. In particular, as mentioned by the Head of the Strategic Innovation Office, "She actively seek opportunities to collaborate with colleagues and peers outside her family circle, and she prioritized building professional relationships with other managers (nonfamily members), showing a willingness to understand their perspectives, needs, and goals." This allowed her to integrate seamlessly into the firm structure, to the extent that a colleague remarked, "It is often forgotten that Jennifer is a member of the family […] She blends in effortlessly with both family and nonfamily members." In particular, one of her team member stressed "the attention Jennifer has in her language and communication style is truly high. She avoid mentioning her family ties (she never uses the word father, but she refers to him with name and surname) in professional conversations and she always focus on discussing her work, projects, and contributions." On the other hand, Jennifer felt that she needed to assert herself in the eyes of the family to confirm that she was the right person to lead the new initiative and to cover all the assigned activities and roles within the organization, often related to more operational tasks. She admitted that, "For me it was difficult to deal concurrently with many roles and responsibilities, on some occasions I have to contribute to decisions, on others I need to focus more on operative tasks. [...] I am fully aware that this is my father's way of supporting my growth within the firm, and this motivates me, but I always struggle to meet his expectations."

4.3 | Reinforcement

In contrast, at SkyCo, Philippe had limited knowledge and experience of how management innovations had been developed in the past and what potential barriers had to be overcome or drivers to leverage. As a nonfamily manager, Philippe did not perceive any particularly salient contrasts between this identity and his role within the organizational structure. The issue of other organizational members' perceptions of competence, which was an important hurdle in legitimizing Jennifer's actions and decisions, was not as important for Philippe. On the contrary, it was an advantage, since his nonfamily role and credibility and status as a competent, professional manager with important work experience in other firms allowed him to substantially enforce the legitimacy of the business-owning family's decision. David, family member and managing director at SkyCo and Philippe's boss, stated "In conceiving this project, I started from a great awareness of the need to transform the firm to make it more proactive in managing new business opportunities and innovation. After a series of failures, we decided to tidy up, create a dedicated unit and select a person with the skills, the experience and the leadership to govern it and lead the team." Therefore, the transfer of political capital from the dominant family coalition to Philippe was seen as something to leverage and did not create a liability in terms of how others perceived the value of his stock of political capital. In particular, such transfer had a positive and reinforcing effect on the perception of his initial stock of reputational capital in the organization. In managing the business development unit and the associated tasks, Philippe did not feel the need to establish himself and be recognized because he had been selected and hired by the family to lead the business development unit. The recognition of his competencies and skills was validated by a formal and rational recruitment process, and he considered it as legitimizing his role at SkyCo. The project manager of his team stated: "for us, the formal recruitment process that brought Philippe on board at SkyCo played a pivotal role in legitimating his role within our team and the organization. It provided a solid foundation for his leadership and Philippe was aware of that." On the other hand, being a newcomer, Philippe still perceived friction stemming from the lack of embeddedness in the organization's cultural and social fabric of shared beliefs and practices—a lack of cultural capital. "Philippe continuously shared case studies and success stories from his previous experiences that highlight how his knowledge could have lead us to positive outcomes (that is the reason why he was selected by the family). These real-world examples illustrated the mechanisms in action and confirmed us Philippe was the key person we needed.[...], this was a good "trick" he used to enforce his position and credibility," noted one of his team members. Testifying to the initial lack of support for Philippe's activities, one of his team members noted, "many people thought Philippe would not last more than 3 months". In contrast to this belief, Philippe worked on results to legitimate himself "He showed performance and results. He believed that actions speak louder than words, and he steadily proved his worth to both the family and the organization as a whole" stated one of the project managers.

4.4 | Political relational mechanisms

The analysis of the two cases reveals that the innovation project managers pursued different strategies for accruing, converting, and investing managerial political capital. While radically different in nature, they shared the common purpose of accumulating political capital to be invested and converted to catalyze a supportive coalition around the management innovation. Our data show that converting and investing a portfolio of different forms of political capital is important and even critical in catalyzing support for management innovation in family firms. We theorize two different relational mechanisms: *altruistic evangelizing* (for the family middle manager at ProdCo) and *pragmatic persuasion* (for the nonfamily middle manager at SkyCo). With respect to the first mechanism, the family middle manager developed a boundary-spanning network of altruistic exchange relationships with directors of other divisions and functions, thereby accumulating social capital. By investing social capital, they indirectly convince their subordinates of the usefulness and appropriateness of the management innovation. With respect to pragmatic persuasion, the nonfamily middle manager sought to convince a small group of organizational members (mostly peers) who were already dissatisfied with the current way of doing things of the usefulness of the management innovation. Pragmatic persuasion allows the manager to invest social capital in cultural capital by gaining more knowledge about the informal networks, turfs, and fiefdoms in the organization, which is then used for coalition building. Table 5 summarizes the main dimensions of the coalition building relational mechanisms.

4.5 | Altruistic evangelizing

At ProdCo, Jennifer understood that organizational members who had different roles in the family firm (division managers, centralized function teams, etc.) had little trust in her and did not fully understand her initiative. It was clear that the success of the initiative would be severely limited by the lack of commitment and support from division managers and their team members. The first step in building acceptance and trust was at individual level. Jennifer recognized that by being visible and available to support other initiatives across boundaries, she could channel positive judgments about herself, the team, and the initiative. As she noted, "I worked on several projects that I supported and took no credit for." Her personal involvement in the projects of other teams fostered recognition of her position within the firm, created expectations for social exchange, and accruing social capital. Jennifer affirmed that through building such relationships, she "found her space and trying to get her hands on things that didn't work was good because it brought confidence and trust." She also noted, "in many instances, once the directors/heads of divisions were on board, my communication and explanation efforts became more streamlined, as I could rely also on their word-of-mouth and support to spread my messages."

The second step in the acceptance and trust building process involved the innovation initiative team. Jennifer emphasized that to gain the trust of other divisions, she had to approach the relationship at the team level and integrate it into her outreach efforts. The goal was to introduce the team slowly, according to the needs of the individual divisions and corporate teams, to achieve significant outcomes and support the trust building process. As the team affirmed, "there were several difficulties in collaborating with internal entities [...] we were aware that our initiative made things (tasks, activities, processes) more difficult especially for corporate supporting entities. The most functional approach was always to meet each other and together define the needs." The team found that resistance from the divisions diminished when they began to receive requests for support and collaboration rather than relying on external collaborators/consultants or centralized functions. Team members observed that "this was certainly enabled by a word-of mouth between different units'stakeholders." Although Jennifer placed great emphasis on the team's role in building trust, team members recognized Jennifer as the true enabler of developing the innovation initiative and building relationships with other divisions and entities. As one team members stated, "Jennifer's presence was fundamental, and is the only reason that the initiative moved forward and allowed for interaction, especially in the beginning."

4.6 | Pragmatic persuasion

Aware of the limited level of stakeholder support, Philippe developed very different tactics than in the ProdCo case. He realized that reducing resistance to change required proceeding step by step, identifying key stakeholders who had a more open mindset and greater curiosity, interested in the results of the project and in understanding the potential impact of the planned activities on their work. The sales function played a key role in the development of the project, but at the same time was the main obstacle. Initially, the sales managers did not understand the value of Philippe's project and were seemingly unwilling to collaborate. However, two opposing coalitions emerged within the sales function. On one side, sales managers with longer tenure affirmed that they saw no value in changing the practices and processes that had been consolidated over time. On the other side, sales managers with less experience in the firm showed and proved to be more interested in contributing and discussing Philippe's solution. In this initial phase, he considered it extremely strategic to identify possible early adopters who were curious about Philippe's project and willing to discuss their involvement. Philippe identified the latter group as a subset of sales managers and began working with them to understand how to structure the processes and activities to meet the managers' needs and become an enabling tool for their daily work.

The constant exchange of feedback with this initial group of salespeople allowed Philippe to review and improve the outputs and the tools in a logic of continuous improvement but also to work on building trusting and reliable relationships with stakeholders willing to collaborate. Philippe stated, "the activities began to improve when, after the sharing and explanation meetings, sales managers understood they could benefit from the required activities." Over time, Philippe saw the opportunity to leverage the already committed stakeholders to facilitate the onboarding

TABLE 5 Political relational mechanisms: Theoretical dimensions and evidence.

	SkyCo	ProdCo
Political relational mechanisms	*Pragmatic persuasion*	*Altruistic evangelizing*
Objective of political relational mechanisms	Converting and investing different sources of political capital for coalition-building	
Actors engaged	Nonfamily manager	Family manager
Direction of the political relational mechanisms	Horizontal (peers)	Mostly vertical (directors of other divisions and functions)
Explanation of the political relational mechanisms	The nonfamily middle manager sought to convince a small group of organizational members (mostly peers) who were already dissatisfied with the current way of doing things of the usefulness of the management innovation. Pragmatic persuasion allows the manager to invest social capital in cultural capital by gaining more knowledge about the informal networks, turfs, and fiefdoms in the organization, which is then used for coalition building	The family middle manager developed a boundary-spanning network of altruistic exchange relationships with directors of other divisions and functions, thereby accumulating social capital. By investing social capital, they indirectly convince their subordinates of the usefulness and appropriateness of the management innovation. Through the director's downward evangelizing, the accrued social capital is converted into reputational and knowledge capital, offsetting the symbolic capital liability
Evidence	"Many activities proceed thanks to Philippe's extreme focus on key stakeholders, his ability to nurture and manage relationships and identify the right time to talk to the right people" (Project Manager) "My main focus has been to create trust with all my stakeholders, I have tried to bring everyone onboard, leveraging their personal working interests. In particular, I have identified 2–3 stakeholders who were more open to the new initiative and willing to change, and I've tried to personally work and discuss with them to gain their onboarding and trust.[…] Once they were on my side, the 'enlarged onboarding process' became much smoother" (Product and Business Development Director) "Philippe immediately entered into the firm dynamics and started establishing relationships with those who, in his opinion, could support him in setting up his initiative" (Managing Director) During his first year of activity in the firm, Philippe's agenda included at least 1 meeting per week with a stakeholder (external to his team) to discuss the project and its goals.	"I worked on several projects that I supported and took no credit for […] you have to accept your mistakes, celebrate others' successes and create fair and transparent relationships […] It is essential to propose yourself proactively, without expecting anything in return to build trust and gain support" (Head of Innovation Lab) "My bond with the family (my father) is clear and naturally allows me to use levers that others in the firm do not have […] therefore, when needed, some people in my team or other stakeholders I engage with may leverage this, asking me to support them, to share a certain initiative (as they do with mine) or simply to talk to my father" (Head of Innovation Lab) "Jennifer has always tried to involve everyone in the project, her team, by creating a continuous updating routine on all the activities, both the more strategic and the operational ones […] the rest of the firm, to tell them and explain what they were working on, focusing first on the division heads and counting on an initial word-of-mouth to get to the functions and onboard people when needed or just inform them of the existence of the initiative when an active contribution to the project is not required" (Strategic Innovation Office Manager) The majority of individuals within the firm's divisions were informed about Jennifer's initiative through the Division Head. Subsequently, a portion of them actively engaged in the Q&A sessions and meetings organized by Jennifer to present the results.

(Continues)

TABLE 5 (Continued)

	SkyCo	ProdCo
Link to the literature	Research on the managerial antecedents of management innovation implementation highlights learning routines as a key mechanism (Khanagha et al., 2013). Research on impression management has already looked at similar forms of ingratiation of stakeholders (Bolino et al., 2008), while research on issue selling has looked at how middle managers can ingratiate with top managers to focus their attention on specific issues (Dutton et al., 2004).	
Differentiation from the literature	Linking our study to the research stream on management innovation implementation, we find that the success of the management innovation needs to be considered as necessarily having a political side. Comparing our analysis with impression management research, some synergies emerged: while impression management research looks at how an individual's image can be actively managed, we bring it further into a political perspective where it can be a form of social capital accumulation that can be prospectively invested in different forms of political capital. We also show that the direction of the relational mechanisms for coalition building is not necessarily bottom-up, but can be horizontal or even top-down. We also highlight the indirect conversion of sources of political capital into other sources when enrolled stakeholders convince others to enroll in the management innovation project.	

of new stakeholders, convinced by the opinions and feedback of their more trusted colleagues. One colleague confirmed he "was pleasantly surprised by Philippe's surgical ability to gradually convince key stakeholders to support our project. He quickly grasped the need to save the toughest for last, instead initiating by persuading those who deemed the existing process weak and ineffective. He greatly emphasized that our project would address all the issues they perceived as not working or inefficient."

4.7 | Political stewardship modes

To gain the support of organizational members in the implementation of the management innovation initiative, the family's political support through the mobilization of political capital was fundamental. Our data show that the family does not always deploy political capital directly through formal control over the governance structure, namely organizational capital, but skillfully deploys it according to the middle manager's perception of the value of political capital. We call this *political stewardship* because this form of mobilizing political capital is consistent with the middle managers' political objectives and enhances their political capital. In the SkyCo case, we call this political stewardship *overt promoting*, where the dominant family coalition mobilizes political capital directly, specifically in the form of organizational capital, reputational capital, and symbolic capital, through frequent and explicit microactions initiated by the nonfamily manager to overcome the many incremental obstacles in the coalition-building process. Instead, in the ProdCo case, this type of political stewardship is referred to as *covert sheltering*, where the family preemptively deploys political capital in an indirect way so as not to clash with the perceptual-evaluative mechanisms put in place by the family middle manager. Instead of explicitly and frequently reiterating support for the initiative, the sheltering mobilization of political capital occurs more rarely and outside the formal political arena in the organization (Röth et al., 2019), and is intentionally not mobilized by the family manager. Table 6 summarizes the main dimensions of the political stewardship concept.

4.8 | Overt promoting

Throughout the development of the management innovation, the family constantly supported Philippe, exemplified by the direct involvement of the Managing Director (David, family member) in the initiative. Philippe received constant support from the family at various levels, not only strategic but also operational, by

TABLE 6 Political stewardship modes: Theoretical dimensions and evidence.

	SkyCo	ProdCo
Political stewardship modes	Promoting	Sheltering
Objective of the political stewardship modes	Influencing both the perception of the value of middle managers' political capital and their ability to convert and invest various forms of political capital. It consists of behaviors aimed at directly and indirectly facilitating managerial political activities to foster support and gain trust from organizational members along the implementation of the management innovation initiative	
Actors engaged	Members of the dominant family coalition (i.e., top managers belonging to the business-owning family)	
Type of mobilized political capital	Mostly organizational capital, reputational capital, symbolic capital	Mostly social capital, symbolic capital
Social performance of political capital mobilization	Front-stage, overt. Political capital is always directly mobilized when there are conflicts between different units or divisions *outside* the middle manager's jurisdiction.	Mostly back-stage, covert. Political capital is directly mobilized very rarely and only when there are conflicts between different units or divisions *outside* the middle manager's jurisdiction.
Targets of political capital mobilization	Diffused: organizational upper echelons, middle managers, line supervisors	Concentrated: organizational upper echelons
Explanation of the political stewardship modes	The dominant family coalition *directly mobilizes* sources of political capital (organizational, symbolic, and reputational capital) to support the nonfamily middle manager to overcome many incremental roadblocks in the coalition-building process.	The dominant family coalition (mostly) *forbears* to mobilize sources of political capital to avoid reinforcing nepotistic judgment over the reputation of the sponsor manager, which would damage the process of coalition-building.
Evidence	"I've always felt David [Managing Director] backs me up and is on my side" (Product and Business Development Director) "David [Managing Director] has always had great leadership over the family and the firm. He has created a board of directors made up not only of internal family and firm members but also external members with proven business experience [...] I have always had great support and consensus from David (and the family) about the necessity of my work, which has been fundamental in earning everyone's trust" (Product and Business Development Director) "David's brother, Vice President Sales and Marketing, has always been present in case of need and very supportive with respect to the execution of the project especially with regard to his team, with whom we have had several difficulties related to dynamics of resistance to change [...] he helped us by interceding on	"I had to personally pave the way for my unit. He (Jennifer's father) did not foster any "special" relationship with other directors, and it was complex to manage this alone [...] He intervened only in a specific case when there was a problematic moment at the top because it was not understood that products would come out and investments were required. The administration and the innovation units are in contrast, especially in investment approval. Everything was solved with my father's direct intervention [...] in all the other circumstances, I had to manage everything on my own" (Head of Innovation Lab) "The presence of the CEO's daughter provided us [the employees] with a compelling signal of the family's motivation and commitment to Jennifer's project [...] However, the CEO gave her full freedom to act on this brand-new project, to allow her to add value to the firm by showing her

(Continues)

TABLE 6 (Continued)

	SkyCo	ProdCo
	several requests made to his team and by speeding up the process" (Project Manager) David, the Managing Director, was very often "copied in" on the emails related to important transitions in the creation and implementation of the unit. This had a positive effect on overcoming resistance to change.	independence, responsibility, and vision of the project development and expected results" (Head of Development Lab) "The CEO has always been informed and involved in the most crucial phases (e.g., launch of the project/budget), as for any other project, but then he has always delegated and given a lot of autonomy to Jennifer[...] both in terms of operations and decision-making" (Strategic Innovation Office Manager) The Chief Innovation Officer, Jennifer's father, never attended the team meetings of the new unit or the discussions organized by Jennifer with the divisions heads and other stakeholders regarding the impact of the new unit.
Link to the literature	Research on the intra-organizational power of the business-owning family has generally considered it the dominant coalition (Chua et al., 1999; Cyert & March, 1963; Kotlar & de Massis, 2013), where the decision-making process is substantially and almost completely in the hands of the family. Furthermore, it has been assumed that the authority of the dominant family coalition rests on unlimited organizational capital derived from having economic capital. Family firm innovation decisions and processes are distinct because the family is distinct (Chrisman et al., 2015; Kammerlander & Ganter, 2015; König et al., 2013; Kotlar et al., 2020). Research on organizational and management innovation (Birkinshaw et al., 2008; Volberda et al., 2014) has looked at the "patronage" posture (Leifer et al., 2001) of top managers as a way to protect new-to-the-organization innovations that can be discrepant with the firm's dominant logic.	
Differentiation from the literature	Contrasting much family business research, we show that considering the business-owning family as the only political actor in the family business misses the opportunity to have a broader view of the varieties of political capital and their mobilization. The business-owning family can have another political role: skillfully and agentically choosing how to mobilize which source of political capital to favor and be consistent with the middle manager's objective, thereby shaping the context in which the management innovation occurs. Family firm innovation decisions and processes are distinctive because the social complexity of family firms is distinct. We also stress the importance of the "back-stage" mobilization of social capital, which opens up different research avenues, especially regarding the ability to alter the contingent value of political capital depending on the "stage" in which it is mobilized (to some extent implicit but not theorized in Kotlar & de Massis, 2013). Our conceptualization of "political stewardship" also differs from the concept of "patronage", which essentially falls into the same theoretical shortcomings indicated above (primacy of organizational capital and nothing else, lack of a relational perspective on the political process of management innovation).	

allocating additional resources to the initiative. As he pointed out in one interview, "I've always felt David backs me up and is on my side." Indeed, as the initiative evolved, the Managing Director was directly involved in reviewing the strategic development process, unblocking operational bottlenecks. His involvement was not only in the councils or committees, but was constantly signaled in daily micro-actions and practices, such as email exchanges, investing his organizational and symbolic capital. As one team member put it, "David has always been there, Philippe asked for his support and got it. An email from David moves heaven and earth and keeping him copied in on difficult situations has helped. When you have no answers, just copy David in the email to get everything moving." The family's direct and generally supportive approach allowed Philippe to create the space to move around the organization and exploit activities related to the development of the innovation initiative.

4.9 | Covert sheltering

In the ProdCo case, the family, represented by Jennifer's father, mobilized political capital by supporting her through a sheltering approach. In ProdCo's management innovation, the Chief Innovation Officer (CIO), Jennifer's father, never had a formal role in its development, especially at the operational level. The family was directly involved only on a couple of occasions in more than 2 years of developing the initiative. For example, nearly a year into the project, the CIO personally stepped in to decide who would lead the initiative before the project began and to support and approve the investments needed to develop the project. Investment approval was needed because internal communications had been limited, leading to unclear messages and misunderstandings, skepticism about the value of the initiative, and an apparent lack of justification for the investment. This decision to intervene directly in support of the initiative was necessary to allow Jennifer and her team to continue to develop the initiative and find their own space within the firm. Jennifer affirmed, "My father supported me, but he left me a lot of space [...] He never overruling my decisions or plans [...] he only directly intervened on a few occasions that required his presence as board member and CEO, especially in cases of budget conflicts."

This vignette clearly illustrates that the sheltering approach does not completely exclude the mobilization of political capital, but only allows it indirectly and outside of Jennifer's evaluative jurisdiction. This meant making a clear and imperative decision because of a conflict between two different parts of the organization outside of Jennifer's control. Importantly, mobilizing political capital through a sheltering approach was useful to counter other organizational members' perception of "entitled nepotism," which might have created an obstacle to the overall buy-in of the innovation initiative. A member of Jennifer's team noted, "Jennifer and her father have a very professional relationship, there are no shortcuts or favoritism. There is no blood dynamic, and it is often forgotten that Jennifer is a member of the family."

TABLE 7 Management innovation outcomes at ProdCo and SkyCo.

	ProdCo	SkyCo
Innovation unit outcome	• Launch of the first B2C product in summer 2022 • Two new B2C projects under development • External design consultancy contract not renewed, activity development assigned to the new unit	• +40% of voice of customer modules filled out by sales to collect customer needs • All 2022 opportunities that emerged from the customer needs analysis matched existing technologies
Level of satisfaction of internal and external stakeholders	• New unit leader: Medium-high • New unit people: High • External stakeholders: Medium-high	• New unit leader: High • New unit people: High • External stakeholders: Medium-high

4.10 | Catalyzing management innovation support

Through the middle managers' political mechanisms, the two management innovation projects obtained widespread support from key stakeholders within and outside the family firms. Table 7 summarizes the results of the two management innovations.

Both middle managers were able to successfully mobilize political capital and catalyze support for their initiatives. Recurring themes from both cases, in addition to the objective metrics, centered on the "incremental feasibility" of the management innovation through a "small wins" strategy (Weick, 1984) and potential "synergy" with the rest of the organization. This convergence of perceptions among informants in both organizations underscores the ultimate acceptance of the management innovation, no longer seen as a cost center or an "alien" element in the organization.

At SkyCo, Philippe established a development strategy for the new unit based on "small steps" and creating "sharing moments" among employees. They "worked on small results and step by step to progressively involve and engage other firm members" (Project Manager) to avoid the perception of a cash-burning project. Philippe ensured success through targeted participatory meetings that communicated the initiative's goals, activities, and tools. This strategy effectively addressed trust issues and solidified the project's credibility. One of Philippe's team members shared, "Philippe works in a logic of governing by objectives and he is strongly results-oriented [...] he believes that they are not friends but they (the team) work together for a goal and this certainly helps a lot in achieving results." Philippe and his team sought to align the management innovation with day-to-day operations, promote synergy between the processes, and conduct annual pilots of the innovation project roadmap for testing, feedback collection, and continuous improvement.

At ProdCo, Jennifer faced company-wide resistance to a new internal innovation unit distinct from corporate R&D labs. To overcome this resistance, she introduced a "quick wins" development strategy that produced tangible results for skeptical managers and validated the unit's work. As Jennifer's colleague noted, "There was a need for quick wins ... Projects were developed so that they could meet those needs." Jennifer gave open presentations, reshaped perceptions, and emphasized the value of the new unit through targeted communications. With the support of the head of the strategic innovation office, she addressed concerns in an inclusive manner. Jennifer adopted an open approach to position the unit not as an "enemy" within the organization, but as a driver of systematic radical innovation. As one of her team members noted: "Jennifer has consistently shown her willingness to engage with all potential stakeholders of the firm, she was always available to clarify doubts, aiming to ensure that our unit and our work were not perceived as "foreign" or "distant" from theirs [...] she envisioned us as catalysts for innovation projects that had a more revolutionary essence." By sharing the mid- to long-term strategy and showing the potential synergies, Jennifer fostered strong alignment and awareness of the potential benefits they could achieve by activating focused collaboration between her team and the other functions and divisions. As the head of the strategic innovation office and the strategic design specialist noted, "Jennifer always tries to share the unit's objectives, vision, strategy [...] She believes the best approach is to show that we can help and support them with their own projects [...] It took time, but at a certain moment there was a kind of turnaround in the functions and divisions' approach to us and they started asking for our support because they realized we were more effective than previous collaborators."

5 | DISCUSSION

Using a polar multiple case study design, we examined how middle managers leverage a variety of sources of political capital to gain support for management innovation in family firms. Our study demonstrates the importance of the idiosyncratic political strategies and mechanisms that emerge from the situated roles of family and nonfamily middle managers, thereby repositioning the dominant family coalition within a broader political ecology of the family firm. In so doing, we respond to calls to investigate the complexities of the social structure of family firms (Zellweger et al., 2019) by advancing a political ecology of family firm innovation. Figure 2 provides a visual representation of the theoretical logic of our findings.

Our study suggests that *political perceptual mechanisms* seek to shape the social value judgments of relevant audiences within the organization about the value of the political capital transferred by association with the dominant family coalition. We identify two main perceptual evaluation mechanisms: *detachment* and *enforcement*. Contrasting our theorizing with research on the political skills of leaders, we find that it is not necessary to ingratiate with the leader to extract resources, and there may be political capital liabilities when the middle manager is associated with a powerful person (Goldstein & Hays, 2011). Therefore, we believe that is critical to be able to navigate the multiplexity of relationships in a social context to understand how the association with others can transfer benefits or liabilities to one's stock of political capital, and to skillfully alter the perception of its value by modulating the perceived association with that individual.

Research on the intraorganizational power of the business-owning family has generally considered it as the dominant coalition (Chua et al., 1999; Kotlar & de Massis, 2013), where the decision-making process is substantially and almost completely in the hands of the family. We find that the business-owning family can have another political role: skillfully and agentically influencing the social perception of the value of the political capital stock by the middle manager, considering the role and social position, and favoring the investment and conversion of multiple sources of political capital. We refer to this as *political stewardship*, and identify two modes: *overt promoting* and *covert sheltering*. We theorize that the dominant family coalition can be a steward of the middle

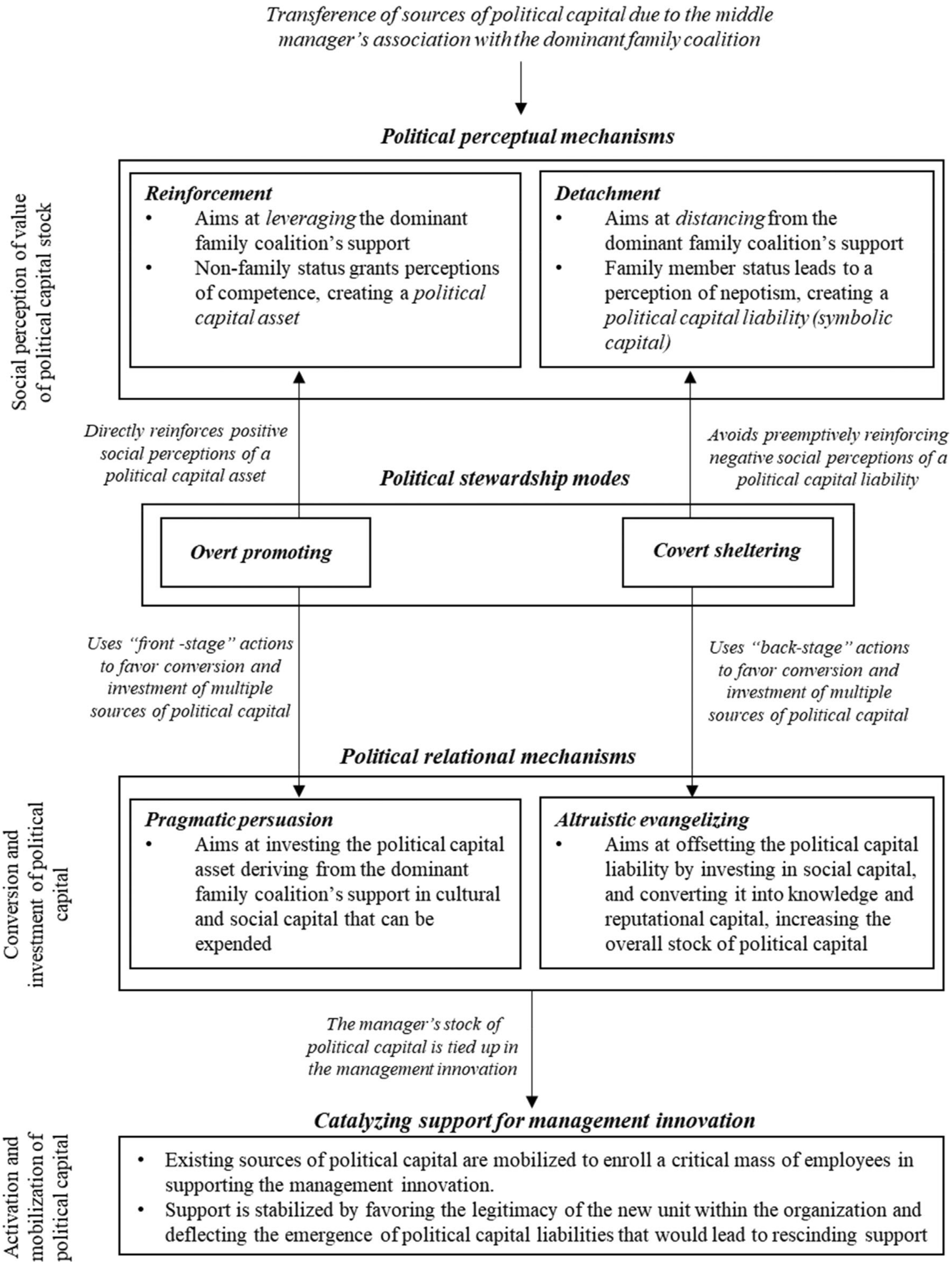

FIGURE 2 Visual representation of the theoretical logic.

manager without exercising pure formal authority, and that this stewardship role differs depending on whether family membership implies political liability due to nepotism judgments. In contrast to research highlighting the advantage of family managers over nonfamily managers due to particularistic criteria (Carney, 2005) and asymmetric treatment (Verbeke & Kano, 2012) by the dominant family coalition, we find that the political support of the dominant family coalition to nonfamily managers is more easily and directly deployed with respect to family managers. This finding is consistent with recent innovation management research (Röth et al., 2019) emphasizing that covert political behavior can be functional for innovation.

We also find that relational mechanisms are important for converting multiple sources of political capital into other types of capital, and for investing them effectively. We identify two *political relational* mechanisms: *altruistic evangelizing* and *pragmatic persuasion*. Comparing our analysis with impression management research, some synergies emerged: while impression management research looks at how an individual's image can be actively managed, we bring it further into a political perspective where it can be a form of social capital accumulation that can be prospectively invested in different forms of political capital. We also show that the direction of the relational mechanisms for coalition building is not necessarily bottom-up, but can be horizontal or even top-down. We also highlight the indirect conversion of sources of political capital into other sources when enrolled stakeholders convince others to enroll in the management innovation project.

Finally, we theorize the activation and mobilization of political capital to *catalyze support for the management innovation*. We conceptualize that the investment in political capital and subsequent activation and mobilization in the management innovation, like those in equipment or fixed capital, is "tied" to the early success of the management innovation. Therefore, sustaining stakeholder support for the management innovation implies protecting the value of the stock of political capital of middle managers. Extending Ocasio et al. (2020), who conceived the mobilization of power as having consequences at either the individual or the organizational level of analysis, we show that the consequences of the mobilization of political capital as power can occur simultaneously at multiple levels of analysis and can be interdependent.

5.1 | Theoretical implications

Our study contributes to the literature in three ways. First, we contribute to the emerging research stream on the political perspective of innovation by adopting a theoretically generative framework, namely political capital (Ocasio, 2002; Ocasio et al., 2020). By focusing on how newcomer middle managers catalyze support for management innovation in family firms, we advance current understanding of this framework by demonstrating the importance of performing simultaneous roles that lead to different stocks of political capital, but also entail trade-offs. Prior research has mainly focused on the political tactics and impression management behaviors that can support the legitimacy of the innovation (Bunduchi, 2017), or conceiving political processes in innovation as a matter of resource dependence. By applying the political capital perspective to innovation, we provide a more fine-grained account of how political processes unfold in innovation. In particular, we highlight the importance of considering a portfolio of sources of political capital that can be converted and invested in each other and explain the mechanisms for doing so, thereby filling a significant gap in political capital research. As Ocasio et al. (2020, p. 323) note, "the convertibility of a broader range of forms of capital, beyond reputational and economic capital, presents a substantial lacuna," and future research directions "might investigate the limits and dynamics of actors' ability to accumulate political capital, areas that have so far been neglected." Finally, we advance the political capital framework by conceptualizing potential transfers of political capital through association with other individuals, termed "transference" (Goldstein & Hays, 2011). We show that such transference is not always positive, and that political capital liabilities can also be transferred.

Second, we contribute to research on innovation in family firms by advancing a political ecology perspective. Prior studies mainly focus on the family as the dominant coalition, thus conceiving the innovation processes and outcomes as a function of family involvement in the upper echelons, such as ownership (Kotlar et al., 2020), the top management team (Kraiczy et al., 2015), or the board of directors (Bendig et al., 2020). Instead, we consider the role of middle managers largely neglected in family business research. Contrary to the assumption of middle managers in family firms as "pure implementers," we show that they are important for innovation in family firms because they can modulate their political behavior by accessing sources of political capital and managing its value accordingly. In doing so, we advance a political ecology perspective on family firm innovation by proposing that the political dynamics of innovation are multiple and relationally, socially, and symbolically complex, moving away from the dominant view of power as something the family possesses and deploys as a result of governance-derived advantages. As such, the family's political influence is not merely top-down, as virtually all research on family firm innovation has highlighted, but is based on the political ecology of the family firm. This political ecology is socially constructed, given that power is based on the management of shared understandings in organizational contexts (Ferris & Judge, 1991), and has value only in the eyes of the recipient. Consistently with this perspective, Ocasio et al. (2020, p. 323) state, "the value of political capital to shape power in organizations is contingent on the organizationally or field-determined valence attached to it. The resources relevant to political capital are those that are socially constructed as valuable by the local and field-level rules of the game and by the direction of organizational attention, as well as those that are objectively critical to the organization." In this sense, we believe that political capital is a generative theoretical lens that can provide new explanations of family firm innovation by considering the intangible and symbolic components that make family firms innovate over time. We show that there is not just one dominant coalition, as previous family business research has suggested, but that coalitions are continuously formed and broken as issues become political. Moreover, the concept of "political stewardship" that we propose is somewhat related to recent research suggesting the heterogeneity of the role of the dominant coalition in innovative family firms (Waldkirch et al., 2021). We seek to advance this line of research by suggesting that there are different micromechanisms of political influence by the dominant coalition, and that middle managers play an important role in managing the value of the overall portfolio of political capital with which they are endowed. Finally, we propose the importance of studying the "political microfoundations" (de Massis & Foss, 2018) of innovation in family firms.

Third, we contribute to management innovation research by identifying the key mechanisms through which internal change agents—middle managers—can leverage political capital to catalyze support. Management innovation research has considered the political environment at the intra-organizational level as consisting of formal governance structures that systematize and govern the participation of organizational members in the decision-making process, such as the presence of unions in the firm (Khosravi et al., 2019). Theoretical management innovation research has explicitly emphasized the importance of "political maneuvering" by internal change agents (Birkinshaw et al., 2008, p. 836), but empirical accounts are scarce. By linking political capital to management innovation, we suggest a management innovation perspective that views the organization as a political field in its own right, where structural, economic, and cultural contingencies in the organization interact with the ability of internal change agents to leverage a variety of sources of political capital. In addition, we link to recent work on political behavior in innovation (Röth et al., 2019), highlighting that formal governance structures for decision-making are often insufficient to enable innovation, and thus a more interpretive, grounded, and relational analysis of power is needed. We believe this is an interesting finding, as it may explain how and why management innovation affects performance (Mol & Birkinshaw, 2009). Finally, we highlight the specificity of successful implementation of management innovation in family firms, which has been overlooked in previous family firm innovation studies that focus almost exclusively on technological innovation and NPD processes.

5.2 | Practical implications

Our study offers a number of practical implications. We highlight the importance of paying attention to formal and informal organizational structures, especially their impact on the development of organizational innovation projects. The effectiveness of the implementation of these projects depends not only on the formal power provided by the formal structure, but also on the informal power derived from the shared system of meaning within the organization. Our study suggests that the shared meaning system can be either beneficial or detrimental, depending on whether the manager is a family member or not. Furthermore, the family that controls the family business is clearly powerful and politically relevant, but as in any other organization, this should not lead to underestimating the challenge of implementing innovation. Managers leading the innovation are particularly important, even in closely held firms where (formal) power is concentrated. Our study shows that, assuming managers are equally competent, it is being seen as reputable and credible by other members of the organization that makes the difference, as it reflects the legitimacy of the team and the project as a whole. Our study also suggests that innovative family firms seeking to appoint a newly hired external manager to lead a new organizational unit to structure their innovation projects should be aware of the potential credibility and trust deficits that s/he might face in the early stages, which are often crucial for long-term success. We find that the often-heard advice that innovation units engaged in exploratory innovation should obtain "support from top management" is generally correct, but should also be contextualized and refined according to the specific situation. Indeed, overt and direct support can backfire and have the opposite effect of legitimizing the innovation unit.

5.3 | Limitations and future research directions

Our study has several limitations, including the extent to which the results are generalizable. We selected family firms from the machinery industry with similar structural, strategic, and contextual characteristics to keep the "noisy" elements constant, and we focused on two projects deliberately planned by the family that organized the long-term innovation process. Our objective was not to maximize the generalizability of our findings, but to develop theory about political capital and middle managers from the rich description of the two cases. Our study provides some potential avenues for future research that could explore the nexus between innovation, political capital, and family firms more deeply. Quantitative studies could use survey methods to test whether the legitimacy of newly hired middle managers influences their political will and capability to innovate effectively (Ferris et al., 2019), and compare the robustness of the results between family and nonfamily firms, as well as within family firms, drawing on research on the heterogeneity of family firms. Survey methods may also be useful to quantify the stock of various resources controlled by middle and top managers that can be converted into political capital, and to understand whether such resources are in fact converted into political capital. This idea reconceptualizes the "ability and willingness paradox" of family firm innovation (Chrisman et al., 2015) through a political capital perspective on innovation. In addition, historical research on innovation could take a *longue durée* perspective on the innovation trajectory of a firm or group of firms, analyzing the historical managerial conditions that enabled specific innovations to be adopted or rejected by the organization itself. For example, a recent study explored the importance of tradition for designing incentives and strategies that can link innovation and attachment to the past, and that there are multiple pathways (Villani et al., 2023). Future research could explore how middle managers leverage attachment to tradition as a political resource to generate support for innovation projects. This novel line of research could overcome the tendency to view "tradition" and "innovation" as two incompatible and paradoxical forces in family firms, and instead consider political capital as the mechanism that can make the former an antecedent of the latter. Quantitative studies could also directly measure the potential boundary conditions of our case study of two highly innovative and entrepreneurial family firms in the same industry. Future research could examine, through testable hypotheses, whether variables such as industry, age, environmental dynamism, munificence, or slack influence the effectiveness of political behavior for innovation by middle managers.

CONFLICT OF INTEREST STATEMENT

The authors declare no conflicts of interest.

ETHICS STATEMENT

The authors have read and agreed to the Committee on Publication Ethics (COPE) international standards for authors.

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