Family Business Review

Advising in family firms: shaping relational dynamics and trustful connections in strategy work

Journal:	*Family Business Review*
Manuscript ID	FBR-20-07-0095.R3
Manuscript Type:	Revised Manuscript
Keywords:	advisor, family firms, strategy practices, strategizing, trust and emotions

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Abstract

The purpose of this article is to explore strategy advisors' actions and interactions with family actors and nonfamily managers for strategy work in family businesses. By combining the strategy-as-practice perspective with the concept of emotional engagement practices, we interpret the case of a family firm collaborating with an external advisor over a 15-year period. We add to prior studies by showing how advisors work to build trustful and emotional connections that shape relational dynamics within evolving spaces of strategic discussion. We highlight the implications for strategy work, which changes as relational dynamics develop over time.

Keywords: advisor, family firms, strategy practices, trust and emotions, strategizing

Introduction

Over the past few years, research on family business (FB) strategy (e.g., Nordqvist & Melin, 2008; 2010) relying upon a strategy-as-practice (SAP) perspective (e.g., Jarzabkowski et al., 2007; Vaara & Whittington, 2012) has underscored the complexity of *strategy work* (or *strategizing*) in FBs, defined as the "actions, interactions and negotiations of multiple actors and the situated practices that they draw upon" (Jarzabkowski et al., 2007: 8).

In comparison with other types of organizations, actual strategy work in FBs can be accomplished by both family actors and nonfamily managers (Hall et al., 2006; Nordqvist & Melin, 2008). The latter are increasingly involved in strategizing since they can bring specific capabilities (Waldkirch et al., 2018) and objectivity (Hall & Nordqvist, 2008) to the FB, thereby facilitating strategic initiatives (Nordqvist & Melin, 2010). However, despite their growing inclusion in the FB context, the nonfamily manager's voice is often excluded from strategic debates because it may be at odds with the typical family actor's emotional resistance to change (Hall et al., 2001). In fact, as suggested by a number of studies, family actors are generally entrenched in inherent "values, traditions, and ways of thinking" (Hall et al., 2006: 254) that push them to often make strategic decisions in isolation (Gómez-Mejía et al., 2011) and that also tend to make them more reluctant to change strategic directions and/or engage in strategic adaptations (Fang et al., 2021). This reluctance can prevent family actors from opening up to nonfamily managers' views, thereby exacerbating the risk of falling into the "strategic simplicity trap" (Ingram et al., 2016: 3).

In this context, some studies hint that strategy advisors, here defined as professional advisors externally hired by the family to provide specialized knowledge and services for planning, implementing, and controlling strategy, can somehow help balance the involvement of family actors and nonfamily managers in strategy work (Nordqvist, 2012; Nordqvist & Melin, 2008). However, to date, the ways in which such advisors can actually facilitate these interactions, thus affecting strategy work over time, remain unexplored. Given recent insights on advisors' capacity to ease tensions between family actors and nonfamily managers (van Helvert-Beugels et al., 2020) as well as to build trustful relationships (de Groote & Bertschi-Michel, 2021; Strike, 2013), we argue that advisors could be those who create connections with (and between) the actors involved in this triad. These relational dynamics merit more investigation in order to delve into the micro-level activities of strategy work that could bring family actors and nonfamily managers closer. This is particularly significant nowadays since intra-family relationships are increasingly "embedded in a social context of exchange with other actors" (Nason et al., 2019: 846), such as nonfamily managers and advisors.

Therefore, the aim of this article is to gain a better understanding of strategy advisors' actions and interactions with other family and nonfamily actors for strategy work in FBs. The research questions are the following: (a) How do advisors' activities shape the relational dynamics between them, family actors, and nonfamily managers? and (b) How do these relational dynamics influence strategy work over time?

To answer these questions, we draw upon SAP research (e.g., Jarzabkowski et al., 2013; Vaara & Whittington, 2012) to conceptualize strategy advisors' actions and interactions with family actors and nonfamily managers in strategizing. We combine this perspective with the concept of emotional engagement practices (Sloan & Oliver, 2013) to explain how advisors can generate trustful connections and emotional bonding with the other actors in strategy work. Using this theoretical lens, we interpret the case of an Italian family firm operating in the packaging industry, which collaborated with a strategy advisor over a 15-year period. We found that the advisor developed a trustful connection and emotionally based collaboration with the nonfamily Chief Financial Officer (CFO) first, then with the family owner Chief Executive Officer (CEO). These relational dynamics changed the strategy work by bringing the actors closer.

By combining theoretical insights with the empirical findings of the case study, this article offers multiple contributions to the literature. First, it extends strategy research in FBs (e.g., Hall et al., 2006; Nordqvist, 2012; Nordqvist & Melin, 2008, 2010) by delving into the family-nonfamily relational dynamics and their emotional dimension. It outlines the strategy advisors' activities that shape these dynamics and affect strategy work by (1) activating empowerment mechanisms with nonfamily managers; (2) activating openness to change mechanisms with family actors; (3) forging shared spaces of strategic discussion.

Second, this article provides insights into recent literature on trust building in FB advising (e.g., Bertschi-Michel et al., 2020; de Groote & Bertschi-Michel, 2021; Strike, 2013) by showing that trustful and emotional connections with the advisor originate from forms of relational security.[1] It suggests that these forms are nurtured by the advisors' activities that reassure nonfamily managers (about exerting more control over strategic actions) and family actors (about undertaking safe pathways towards new strategic discoveries).

Finally, the article also contributes more broadly to the streams of literature on strategizing (e.g., Jarzabkowski & Spee, 2009; Vaara & Whittington, 2012) and client-consultant relationships (e.g., Nikolova et al., 2015; Sturdy et al., 2009). It does so by shedding light on the role played by strategy experts in affecting the influential relationship between strategic actors, as well as on their activities that enable trusting as a "leap of faith" (Nikolova et al., 2015).

The article is organized as follows. We first provide the theoretical background which informs our research. Then, following the explanation of our research design, we present and discuss the findings showing the main contributions of this work. Limitations and suggestions for further research conclude the article.

Theoretical background

[1] We are indebted to one of the anonymous reviewers for this suggestion.

Family actors and nonfamily managers in strategy work

The concept of strategy work (or strategizing) has its roots in the SAP perspective (e.g., Jarzabkowski & Spee, 2009; Vaara & Whittington, 2012) that is focused on what actors do when they enact strategy, seen as "a situated, socially accomplished activity" (Jarzabkowski et al., 2007: 7). In this view, strategy work is brought about through multiple strategic actors' daily actions and interactions. They could be entrepreneurs or senior managers but also middle managers (Rouleau & Balogun, 2011) and external agents (Whittington, 2003), all of whom are involved in the *doing* of strategy (Vaara & Whittington, 2012) or who try to affect strategically important issues (Mantere, 2005).

These actors typically draw upon some institutionalized strategy practices, i.e., "accepted ways of doing things, embodied and materially mediated, that are shared between actors and routinized over time" (Vaara & Whittington, 2012: 3), through which strategy is enacted. At the same time, the actors shape these practices in their day-to-day activities by engaging in a set of micro-practices (or praxis), i.e., "the flow of work, such as meetings, number-crunching, analyzing, form-filling and talking within which strategy is accomplished" (Jarzabkowski et al., 2013: 42). For instance, strategic planning is an example of an institutionalized strategy practice (with its associated routines, concepts, and techniques) involving situated micro-practices (e.g., negotiating objectives, reviewing strategy, collecting data, drafting plans, etc.) that determine an organization's strategic direction (Wolf & Floyd, 2017).

Given the attention the SAP perspective places on human actions and social interactions, a stream of FB research has relied on the SAP literature to take a closer look at the micro-level activities involved in strategy work in the specific context of FBs, where interactional dynamics play a significant role (e.g., Hall et al., 2006; Nordqvist, 2012). This research has emphasized that a unique feature of strategy work in FBs, compared to nonfamily businesses, is that strategic actors can be distinguished according to whether or not they belong to the family (Hall

& Nordqvist, 2008; Nordqvist & Melin, 2010). An FB can be defined as “a business governed and/or managed on a sustainable, potentially cross-generational, basis to shape and perhaps pursue the formal or implicit vision of the business held by members of the same family or a small number of families” (Sharma et al., 1997: 2). Therefore, family actors are typically the main strategic actors who “have control over the business’ strategic direction” (Astrachan & Shanker, 2003: 211-212). However, while family members have always been recognized as having a significant impact on strategy making (Chrisman et al., 2005), the involvement of nonfamily managers as strategic actors has been debated (Neubaum & Voordeckers, 2018; Sharma et al., 1997).

Prior studies (outside an explicit SAP perspective) agree on the positive impact of nonfamily managers’ inclusion in strategy making. They found that nonfamily managers can bring in a higher level of professionalization (Songini, 2006), specific capabilities (Waldkirch et al., 2018), and objectivity (Hall & Nordqvist, 2008), thus offering diverse strategic perspectives that can help the family to make more informed strategic decisions (Stanley, 2010).

Nevertheless, family actors have such a unique way of experiencing the FB (Hall & Nordqvist, 2008; Stanley, 2010) that they may be unresponsive to nonfamily managers’ views. In fact, studies suggested that in strategy making family actors are typically driven by a set of inherent affective endowments (Gómez-Mejía et al., 2011; Kammerlander & Ganter, 2015), including emotional commitment to the business with which they identify (Brundin & Melin, 2006; Humphrey et al., 2021). These aspects can entrap FBs in a cognitive frame (Nason et al., 2019) and, thus, heighten family actors’ propensity for emotional resistance to change (Brundin & Melin, 2012), especially when they hold top management positions (Fang et al., 2021).

When this attitude prevails, nonfamily managers could be excluded from particular spaces of strategic discussion. Elaborating on the SAP perspective, some studies have depicted such spaces as strategic arenas, i.e., formal or informal spaces for dialogue around issues that are strategic for the organization (Hall & Nordqvist, 2008; Nordqvist, 2012; Nordqvist & Melin, 2010). In FBs a number of informal arenas, although connected to more formal ones, often include only family members (Brundin & Melin, 2012). The exclusion of nonfamily managers could compromise the extent of interaction with the family that, according to recent studies, is needed to develop mutual understanding (Waldkirch et al., 2018) and good quality work relationships (van Helvert-Beugels et al., 2020).

In this context, we argue that a relevant consequence is that FBs, by limiting the potentiality of their human resources (i.e., nonfamily managers, who find it difficult to make a contribution), risk hampering their strategic development. To date, there remains a lack of knowledge in the FB literature on how interactions between family actors and nonfamily managers in strategy work can be fostered and sustained to avoid this risk. In the next subsection, we address this lack of attention by adding the strategy advisor as a third strategic actor who could take part in (and act upon) family-nonfamily relational dynamics to trigger changes in strategy work.

Strategy advisors: trust and emotional engagement practices

Despite the recent growing interest in examining the role of advisors in FBs (Perry et al., 2015; Reay et al., 2013; Strike, 2012; Strike et al., 2018), the literature has overlooked the specific role of strategy advisors in aiding FBs in strategy work. A few notable exceptions (e.g., Nordqvist & Melin, 2008, 2010) have highlighted that strategy advisors can act as strategic actors by introducing practices adapted to the local FB context and occupying an intermediary position that is "neither too close, nor too far" (Nordqvist, 2012: 31) from other internal actors.

Nevertheless, the relational dynamics involving advisors, family actors, and nonfamily managers, as well as their implications for strategy work, remain underexplored. This is quite surprising given the recent insights gained on the role that advisors could play in easing the tensions between family actors and nonfamily managers (van Helvert-Beugels et al., 2020).

These insights suggest that advisors could facilitate the connections between the actors involved in strategy work.

Furthermore, recent literature on the advising process in FBs (e.g., de Groote & Bertschi-Michel, 2021; Strike, 2013), although not specifically focused on strategy, has demonstrated the capacity of the advisors to build trust with family actors. Studies have shown that family actors are more accepting of the advisor's influence when there are affective forms of trust (e.g., de Groote & Bertschi-Michel, 2021; Salvato & Corbetta, 2013; Strike, 2013), which grows with feelings of liking the advisor as "a good person" (de Groote & Bertschi-Michel, 2021: 143). In this case, the advisor can mediate the family's emotions (Bertschi-Michel et al., 2020), sustain intra-family relationships (such as in the case of FB succession, e.g., Michel & Kammerlander, 2015; Salvato & Corbetta, 2013), and help family actors change "the way they interpret and filter their environment" (Nason et al., 2019: 847) by, for instance, facilitating their sensemaking (Strike & Rerup, 2016). The literature is quite silent, instead, on the possibility for the advisors to build trustful relationships with nonfamily managers. As an exception, albeit marginally, Nordqvist and Melin (2008) suggest that trust in the advisors is also needed from nonfamily actors to allow advisors to move seamlessly between multiple strategic arenas.

Overall, these studies suggest that trusted advisors may have the power to break down the family's resistance to change as well as affect relationships. This article delves into these issues by focusing on the emotional basis of trust (Barbalet, 2011) to interpret the connections that could be built by the advisor with family actors and nonfamily managers in strategizing. In this perspective, forms of affect-based trust can be interactively created between the advisor and the other (family and nonfamily) actors when it is based on confidence. Brundin and Melin (2006: 282) highlighted that confidence is an important emotion in strategizing as it is a "future-oriented emotion that introduces a sense of certainty" regarding an expectation of the future. Thus, trust requires confidence in terms of a "positive feeling of expectation regarding another's future actions […] [and] is supported, then, by a feeling that one can rely on, be dependent on, another" (Barbalet, 2011: 41). Sloan and Oliver (2013) explain how this form of trust can be built through emotional engagement practices. They define them as specific relational practices (Dutton & Dukerich, 2006) that, during daily work, can enable the emotional connection to others in their interaction. As suggested by Sloan and Oliver (2013: 1862), these practices can be seen as "taking leaps of faith" (see also Nikolova et al., 2015) and, thus, contribute to affect-based trust building between actors by enhancing confidence.

With specific reference to strategy work, the notion of emotional engagement practices can be usefully combined with the SAP literature. This literature has widely acknowledged that micro-practices of strategy are always in relation to other actors (e.g., Rouleau, 2005) and influenced by a variety of relational aspects such as trust (Pregmark & Berggren, 2021) that have not been fully investigated, however. Emotional engagement practices can provide the theoretical lens to characterize the relational nature of these micro-practices by explaining the rise of trustful and emotional connections in strategizing. In the specific case of this article, emotional engagement practices can help explain how and why external actors can be allowed to intervene in strategic issues that could affect the future of the family (Perry et al., 2015).

To sum up, in this article, we combine the SAP perspective with the concept of emotional engagement practices to interpret the micro-practices through which advisors can create connections with (and between) family actors and nonfamily managers. In particular, what these actors actually do is informed by the SAP notion of micro-practices through which strategy practices are introduced and enacted in FBs. We argue that, while engaged in micro-practices of strategy work, advisors partly engage in micro-practices of emotional engagement. This approach allows us to understand and explain how an advisor's activities can shape the relational dynamics among the actors involved, thus affecting strategy work in FBs. We explain the overall research design in the next section.

Research design

The article builds on an in-depth interpretive case study whose potential to explore organizational phenomena in practice has been widely acknowledged in the literature (see Denzin & Lincoln, 2017). In the specific context of FBs, there is a call for more case studies (e.g., De Massis & Kotlar, 2014), underlining the aptness of qualitative methods (Fletcher et al., 2016) and particularly of interpretive approaches (Nordqvist et al., 2009), for studying the complex dynamics that characterize FBs. Scholars have used case study research to investigate the local understanding of strategy practices and strategic roles in FBs (e.g., Nordqvist & Melin, 2010; Nordqvist, 2012). Adopting the case study method enabled us to grasp the relational dynamics within FBs by gaining close proximity to the field and the actors involved.

Case selection

The case study selected for this article is Co-Pack (a pseudonym[2]), an Italian family firm operating in the packaging industry. The owner has always been the CEO of the firm, since its foundation in the mid-Eighties. However, Co-Pack's origins go back further, to the CEO's father's original company. Co-Pack's value chain covers all activities related to the design, manufacturing, delivery, and sales of packaging. Its traditional business has always relied upon two product lines: industrial packaging and boxes for retailers.

Following an interpretive approach, the case was selected because it provides us with a thorough understanding of "the deeper social dynamics" (Dyer & Wilkins, 1991: 615) characterizing strategy advisors' actions and interactions in FBs, for two main reasons. First, Co-Pack presented a rich context of actions, actors, and their interactions. Preliminary research revealed that, over time, strategy making at Co-Pack relied on multiple changing interactions between the family actors, nonfamily managers, and a strategy advisor. In addition to the CEO, his two sons joined Co-Pack as sales managers. Later, nonfamily managers (e.g., Heads of

[2] For reasons of confidentiality, details that could directly identify the company (e.g., names, places, and some financial data) have been changed.

Operations, Production, and Administration & Finance) gradually joined the firm and took part in strategy making; moreover, an external strategy advisor had followed the firm since the early 2000s. Therefore, the case was suitable for our study of how interactions between family actors and nonfamily managers can change through the actions of an external advisor. Second, thanks to our previous contacts with the advisor, we gained easier access to the organization and full access to rich sets of data, including all the (formal and informal) materials produced during his long advisory relationship with Co-Pack. Thus, we found fertile terrain in which to analyze in detail the advisor's activities.

Data collection

Data were collected from June 2018 from a mix of different sources (Langley & Abdallah, 2011), for the period under investigation which extends from 2004 (when the advisor initiated a formal collaboration with Co-Pack) to 2019 (see Table 1 for all details on data collection).

The primary data sources were semi-structured interviews. The main informants included the advisor and both family and nonfamily members who might have been involved in strategic decision-making and had interfaced with the advisor, over the years. The interviews were carried out in two rounds and each one was recorded and immediately transcribed. The initial interviews focused on general questions on Co-Pack, its strategy and main control mechanisms, and collaboration with the advisor. As data analysis progressed, we recognized the advisor's relationships with the CEO and the CFO as central to the enactment of strategy practices. Subsequent interviews were then aimed at evoking contextual narratives (Czarniawska, 2000) about these relationships. During the interviews, notes on the informants' non-verbal responses (e.g., tone of voice, facial expressions, body language) were taken, as they were deemed useful for understanding the informants' emotional reactions. Interviews were also triangulated with field notes on informal conversations that occurred during our stay in Co-Pack.

Furthermore, documentary research was conducted on both public and internal documents produced by Co-Pack at the time of the events under study. The advisor also provided us with all the material produced over the course of the family firm-advisor relationship. All of these documents helped us to triangulate the data collected from the interviews, thereby reducing the limitations of retrospective data (Golden, 1992). While we acknowledge that direct real-time observation could have provided more detailed data, we follow other studies (Orlikowski, 2002; Paroutis & Pettigrew, 2007) that have mainly used interviews and documentary research to analyze strategic activities. Accordingly, we based our data collection on the assumption that "practitioners are able to express in retrospect their activities" (Paroutis & Pettigrew, 2007: 107). As suggested by Raitis et al. (2021), we attempted to facilitate memory retrieval. For instance, some documents that were part of the data collected (e.g., old e-mails and memos, reports, etc.) were used during the interviews as stimuli for framing memories and rekindling feelings related to experiences while the informants narrated their stories.

[Insert Table 1 around here]

Data analysis

Our data analysis was informed by abductive reasoning (Locke et al., 2008) which allowed us to be sensitive to the data while also using theory as a source of interpretation of patterns within an interactive process (Kennedy & Thornberg, 2018). It was conducted in an iterative interplay with data collection by the three authors. The data items were analyzed separately and then regularly discussed at each step of the analysis, which followed different stages. All the material collected was read several times in order to develop a preliminary general understanding. We agreed on a first narrative of the case covering part of the company's lifespan, starting from 2004.

This narrative provided us with a useful background for subsequent steps of the analysis, which were informed by our theoretical framing. Specifically, the data were progressively coded according to insights provided by the SAP literature on strategy practices, micro-practices, and the role of actors in multiple strategic arenas. This allowed us to recognize and focus on strategic planning as a specific, relevant strategy practice at work in Co-Pack. Here, coherently with the SAP perspective, strategic planning practices have been broadly defined to include a range of more or less formalized activities for "strategy formulation, implementation, and control" (Wolf & Floyd, 2017: 1757) in all their manifestations and occurring in different spaces (Whittington & Cailluet, 2008). For example, we included in the analysis activities at the heart of strategy making aimed at both assessing and determining strategic directions (e.g., forecasting, scenarios analysis, etc.) and building and controlling goals (e.g., performance targeting, business planning, etc.). Accordingly, we identified the CEO, the CFO, and the advisor as important strategic actors, and we represented the prevailing strategic planning practices in which they engaged through visual mapping (Langley & Ravasi, 2019) to aid the analysis of strategy work at Co-Pack, over time (see Figure 1 for an example).

As the data analysis progressed, we realized that trust was emerging as an important driver in the advisor's interactions with the CEO and the CFO. Therefore, we re-examined and coded all the empirical material in our database by noting instances of trust (e.g., "*I felt more confident with him by my side*", "trust"). Interesting findings emerged related to the fact that trust was often associated with different actors' positive expectations for the future, i.e., "exerting more control over strategic actions" for the CFO (e.g., "*the chance to clarify what will happen in the next years*") and "undertaking safe pathways towards new strategic discoveries" for the CEO (e.g., "*It isn't easy to question one's own strategic path*"). Also, we identified issues of "empowerment" in the case of the CFO (e.g., "*I could go to the CEO and show him the impact on our strategic direction*") and "openness to change" (e.g., "*you have to dive into the blue ocean!*") in the case of the CEO. Thus, we focused on those sequences of activities the advisor engaged in, connected with these codes (e.g., "*the chance to clarify what will happen in the* *next years*" was related to the activity "building possible future scenarios"). We then noted patterns (Maguire & Hardy, 2013) among these activities (in terms of self-reassurance, trust, and activating mechanisms), which allowed us to group them into four micro-practices of "caretaking" (regarding the advisor and the CFO) and three micro-practices of "pathfinding" (regarding the advisor and the CEO) (see Table 2). In a back-and-forth movement between data and theory, we re-engaged with the literature to conceptualize these micro-practices with the notion of emotional engagement practices (Sloan & Oliver, 2013).

Finally, we considered these micro-practices in relation to the case narrative and the mapping from previous steps of the analysis to generally interpret our findings (Figure 2). We identified three main phases, characterized by "a certain continuity in the activities within each period and […] certain discontinuities at its frontier" (Langley, 1999: 703). "Frontiers" between each phase relate to evolving relationships between the key actors involved and the implications for strategy work. The phases are connected in that the actions of one phase (i.e., the advisors' micro-practices) lead to changes (i.e., in the trustful connections that emerge from strategic arenas) that affect actions in the subsequent phase (Langley, 1999). Specifically, the three phases are: (1) phase 1, involving the empowerment of nonfamily managers through the enactment of micro-practices of caretaking; (2) phase 2, involving the broadening of the family actors' perspective through the enactment of micro-practices of pathfinding; (3) phase 3, involving the creation of shared spaces of strategic discussion. The results of this analysis are reported and discussed below.

[Insert Figure 1 around here]

[Insert Table 2 around here]

Findings

Our main findings are organized around the three phases we identified from the data analysis and are represented in Figure 2.

[Insert Figure 2 around here]

Phase 1: Empowering nonfamily managers

Since Co-Pack's inception, the CEO has been emotionally attached to Co-Pack's traditional product lines. Therefore, his main goal has always been to strengthen these lines by investing heavily in technological development. Strategic decisions were typically made by the CEO. Although there were formal Top Management (TM) team meetings (composed of the CEO, the CEO's sons, the CFO, and the Heads of the Production and Operations departments), they did not include actual debate around strategic issues. In this context, the nonfamily CFO[3] often felt excluded from strategic discussions. Despite being part of the TM team meetings, he struggled to make his voice heard, especially when there was the need to discuss planning and monitoring of the financial resources for new strategic initiatives. In his words:

"*When the CEO made his investment decisions, he always went his own way without paying much attention to my suggestions*" (CFO).

In 2004, the CFO informally expressed his concern to an external advisor he had met a couple of years before for another project. The advisor proposed the introduction of strategic planning practices in order to foster strategic thinking around the financial viability of Co-Pack's strategy. Although initially not fully convinced, the CEO agreed to officially start collaborating with the advisor as encouraged by the CFO. This triggered phase 1 during which the CFO and the advisor started to work closely together and their interaction became increasingly more intense. The advisor and the CFO acted as strategic actors who gradually drew upon new planning practices (e.g., drafting business and financial plans, assessing external variables as inputs, formulating target objectives, constructing future scenarios) that involved a host of micro-practices (e.g., talking on performance targets, filling excel spreadsheets, gathering materials on possible future scenarios, etc.).

[3] The CFO was Head of the Administration & Finance department since the founding of Co-Pack. His main role was to provide specific financial expertise to the CEO.

Some of the micro-practices that took place during the joint work, which we categorized as "micro-practices of caretaking", can be conceptualized as emotional engagement practices. They enabled the CFO's emotional connection to the advisor by enhancing his confidence that he could rely on the advisor to fulfill his expectation of exerting some forms of control over strategic actions. Below, we present these micro-practices by providing evidence on how each of them acted as an empowerment mechanism through which the CFO was reassured about gaining a voice in strategic discussions with the CEO.

Revealing instruments of persuasion. The advisor proposed engaging in planning activities which would lead to easier access to financial resources, thereby helping Co-Pack to manage and control the financial feasibility of new strategic initiatives. While discussing tailor-made plans with different scenarios together with the CFO, the advisor often invoked the importance of these plans to provide Co-Pack with an instrument of "*persuasion*" (in the advisor's words) for financial institutions. The emphasis on the power of plans to attract external funds reassured the CFO about the possibility of monitoring the amount of resources needed for the CEO's investment ideas. Moreover, revealing the persuasion power of ad hoc plans acted as an empowerment mechanism for the CFO, strengthening his belief that he could use this argument to undertake discussions with the CEO on the intended strategic initiatives. The CFO was thus reassured that through tailor-made plans he could become more influential with the CEO by having more chances to prove the significance of thinking strategically on financial issues. This also strengthened the CFO's trust in the advisor who he saw as the one to rely on for learning how to use planning practices to support and advance his own arguments. As highlighted by an e-mail he addressed to all members of the TM team:

> *"The plan we drafted thanks to the support of* [the name of the advisor] *has an extraordinary strategic importance, because it allows us to make projections and go deeper into the financial effects of Co-Pack's activities over a period of three to five years. It has a*

fundamental importance for us in light of the investments that the CEO intends to make" (extract from the CFO's e-mail to the members of the TM team, dated 10/30/2012).

Encouraging charting the future. During their conversations to develop future scenarios, the CFO and the advisor often ended up having deep discussions on a number of detailed strategic variables (e.g., market share, industry growth rate, etc.). Typically, the CFO provided some data while the advisor "*made tweaks on the Excel file*" (in the CFO's words). Then, debates on the data brought to the fore an endless chain of cause-and-effect relationships among multiple sets of variables. Drawing on these relationships, the advisor and the CFO worked together on several simulations of the impact different organizational activities might have on Co-Pack's strategic outcomes. The CFO was fascinated by these simulations that he perceived as a way to "*represent*" (in the CFO's words) and, thus, oversee the future, thereby making strategic decisions with confidence. As he once commented while doing simulations for a business plan on a specific project:

"Business planning means knowing and 'representing' [emphasis added] *today what will happen tomorrow! We* [the CFO and the advisor] *had so much fun changing some variables to glimpse what the future would look like* [smiling]" (CFO).

Building up simulations together and discussing possible scenarios acted as an empowerment mechanism by encouraging the CFO to develop strategic thinking around cause-and-effect relationships. This reassured the CFO, helping him to feel better prepared for the future and possibly gain more influence in depicting Co-Pack's strategic directions to the CEO. Feelings of assurance contributed to creating trust in the advisor who was the one to rely on for developing and sharing deep discussions about the dynamics that could affect the future of Co-Pack. As claimed by the CFO:

"Knowing today what happens tomorrow: that's the way you run a business! No one has a crystal ball but thinking about multiple variables with the advisor gave me the chance to

clarify what will happen in the next years […] *I could go to the CEO and show him the impact on our strategic direction, indicating the right time to intervene"* (CFO).

Serving as a constant inspiration. The advisor supported the CFO by working with him on plans and projections. The advisor did not simply transfer his knowledge and technical expertise but he and the CFO worked side by side because "*creating something new together could be really successful*" (in the advisor's words). This strong collaboration was evident also during reporting activities. For example, when there were official presentations, the advisor supported the CFO by simplifying the explanation of the projections that were then commented on together with the CFO. This reinforced the CFO's feeling of confidence in having the advisor as an ally in projecting the future. As noted on an advisor's project report:

"The Co-Pack project is going very well; we are collaborating in an excellent way. Positive work environment […] *working side by side as a team"* (personal notes in the advisor's project report, dated 09/07/2006).

The fact that they worked side by side and struggled together created a trust based on common experience and on the satisfaction of achieving goals together. This also acted as an empowerment mechanism since the CFO could rely on a sort of role model by seeing the advisor in action day-by-day. By directly observing and closely interacting with the advisor, the CFO could follow his example and take cues from him on how to engage in strategic activities, thereby potentially gaining more influence in his interaction with the CEO. As recalled by the CFO:

"*Presenting and working together helped me a lot because* [the name by the advisor] *was able to say some things in a way that really resonated, making them more understandable, because an advisor may have a different take on representing the same topic"* (CFO).

Amplifying the presence. The advisor guaranteed his physical presence during formalized ad hoc meetings but also in more informal encounters. He was always available to provide suggestions about how to interpret different issues emerging from the daily activities. Whenever the CFO had some doubts (e.g., on analyzing financial models, evaluating certain performance measures, etc.), he contacted the advisor who popped into his office or phoned in order to offer his help "*in a very spontaneous and natural interaction*" (in the advisor's words). Help was also offered to other members of the Administration & Finance (A&F) department, especially to the management accountant who was progressively involved in data collection and analysis. These activities reinforced the CFO's feelings of being reassured about the future thanks to constant support. This strengthened a trust that was based on a climate of cooperation, mutual understanding, and reliability. The continuous presence of the advisor acted as an empowerment mechanism by reassuring the CFO that, whenever a problem arose at Co-Pack that the CEO had to address, the CFO could intervene and provide a solution with the support of the advisor. As the CFO stated:

> *"I felt more confident with him by my side. Every time I had a question, he* [the advisor] *was there, ready to answer proactively. He always managed to be around the corner* […] *When the CEO raises a question or a problem, I know I can count on him to fix it. This has consolidated our relationship"* (CFO).

In sum, in this phase, the emotional connection, built through the micro-practices of caretaking the advisor engaged in, consolidated the trust between the advisor and the CFO. As commented by the two of them:

> *"We had a sort of doctor-patient relationship. The CFO acted as the patient who feels free to text the doctor saying: 'I have some problems with my neck, what would you suggest?'* […] *At some point, we achieved such a level of trust*" (ADV).

> *"He* [the advisor] *is always there if you need him. This strengthens a relationship and makes it long-lasting"* (CFO).

These relational dynamics had implications for strategy work throughout this first phase. While engaging in planning practices, the advisor and the CFO interacted in evolving formal (e.g., planned meetings at Co-Pack, working groups) and informal (e.g., phone calls, casual conversations, coffee breaks) strategic arenas. Within these arenas, the conversations between the advisor and the CFO unfolded around issues that were strategic for the organization. For example, as stated above, they discussed the chains of cause-and-effect relationships between multiple variables and reflected on the feasibility of possible strategic directions. Importantly, micro-practices of caretaking occurring within these arenas also built up the CFO's confidence in making his contribution to Co-Pack's strategy. He started to be self-assured about the power of his voice and the opportunity to have a say in orienting strategic directions, especially about the financial viability of Co-Pack's investments. This self-assurance led the CFO to increasingly provide the CEO with strategic information on the intended investments, along with comments and recommendations. An example is provided by an investment in a machine press that the CEO intended to acquire. Although the CEO was convinced that buying the latest generation machinery was fundamental for Co-Pack's growth, the CFO made his voice heard by showing the financial unfeasibility of the initiative. As the CFO recalled:

"At that time, the CEO was abroad for a huge investment which would have cost 1,5 million euros. He called me asking: 'How's that sound?' I replied: 'According to the business plan we would lose 250 thousand euros' […] *He came back without having made the investment!"* (CFO).

Nevertheless, strategic discussions between the CFO and the advisor remained mostly between them and were not revealed during more formal arenas involving the CEO, such as the TM teams meetings. As a strategic actor, the CEO persisted with his traditional vision of the business without really questioning the viability of his strategic decisions.

Phase 2: Broadening the family actors' perspective

Phase 2 was triggered when, in 2016, the CEO decided to call the advisor for suggestions about an important strategic choice. Although the CEO was reluctant to open up to others' strategic views, he had increasingly appreciated the CFO and advisor's close collaboration and the results they had achieved while interacting together in strategic arenas. In fact, the trustful connection between the advisor and the CFO that emerged from these arenas gave the advisor more visibility ("*I could perceive their feeling*", in the CEO's words). As stated by the advisor:

> *"The relationship with the CFO somewhat extended to the CEO. He* [the CEO] *could see our closeness, the work we had done together, the results we produced; he saw us working, not just in a meeting once a year!"* (ADV).

Therefore, the CEO asked for the advisor's help to disentangle a strategic choice he was struggling with. Given some poor sales' results, the CEO's son was pushing to invest in a new luxury segment (in addition to Co-Pack's two traditional product lines) but the CEO was emotionally resistant to following this strategic direction. In his perspective, investing in the luxury segment would have meant distorting the traditional identity of the company.

The advisor set up a project, which he called 'New Frontiers', that initially involved the CEO and then, the CFO and the CEO's son. This project increased the frequency of the interactions between the advisor and the CEO, thereby creating a new strategic arena that was later expanded to include further strategic planning practices (e.g., competitor analysis, ad hoc financial simulations, market analysis, etc.). These practices involved day-to-day micro-practices (e.g., determining the products offered by competitors, forecasting sales volume, identifying potential customers, etc.) in which the actors engaged together.

Some of the joint work micro-practices, which we categorized as "micro-practices of pathfinding", can be conceptualized as emotional engagement practices. They enabled the CEO's emotional connection to the advisor by enhancing his confidence that he could rely on the advisor to fulfill his expectation of undertaking safe pathways towards new strategic discoveries. Below, we present these micro-practices by providing evidence on how each of them acted as openness to change mechanisms, through which the CEO was reassured about projecting Co-Pack into the future without the fear of exploring uncustomary strategic routes.

Giving tough love. While working with the CEO, the advisor began to show him how planned strategic decisions could be reviewed and questioned in order to consider alternative routes. For instance, the advisor sometimes provided information about Co-Pack's competitors, making provocative comparisons and giving the CEO food for thought. As noted by the CEO:

> *"When he showed me that there were companies that earned good money hand over fist with that idea, I wanted to take a closer look"* (CEO).

Furthermore, when addressing strategic issues, the advisor did not mince words and spoke in a forceful way, especially when saying something negative regarding specific strategic actions. In the advisor's words:

> *"I'm not a yes man* [...] *I remember once I told the CEO: 'The choice to focus on this customer doesn't make sense'. In the end, neither of us was happy: I because I had been a bit rude and he because he hadn't liked what I had said* [laughing ironically]" (ADV).

These activities acted as a mechanism of openness to change by instilling in the CEO a sense of bewilderment due to the unsettling of his beliefs but, at the same time, stimulating his curiosity towards previously unnoticed issues. In this manner, the advisor gained the CEO's trust by reassuring him of the potential generative effects of uncertainty in rethinking strategic decisions already made. As stated by the CEO:

> *"Reflecting together is useful to bounce things off each other, rethink ideas, see new opportunities* […] *It isn't easy to question one's own strategic path; however, I have the utmost respect for what he* [the advisor] *tells me"* (CEO).

Fostering exploration of the unknown. During their meetings to analyze the choice to invest in the luxury segment, the advisor would engage the CEO in conversations by launching powerful and evocative images. For instance, the advisor constantly used the 'Red and Blue Ocean' metaphor[4], as a way of saying that the luxury segment could represent a Blue Ocean for Co-Pack, in the near future. The image of the blue ocean symbolized an unexplored market space, outside of Co-Pack's traditional boundaries, that is deep and vast in terms of new opportunities, and does not necessarily imply the loss of the 'sailor's' identity but rather, his enrichment. The image of the blue ocean left such a strong impression on the CEO that he still remembered these words years later. Moreover, some strategic activities (e.g., analyzing how to reach customers within key geographical strategic areas) included other organizational members (e.g., other people working in the sales department) in the strategic arenas of the New Frontiers project. This joint effort helped to emphasize the feeling that there were challenges to be overcome together by a community of people.

These activities acted as a mechanism of openness to change by stimulating in the CEO a sense of courage and audacity to strive for destinations outside of the well-known boundaries, but without necessarily distorting Co-Pack's identity. For the CEO, the advisor was the one to rely upon as a guide who not only marks the path to follow but also throws out the challenge to step outside of one's comfort zone, thus enhancing one's confidence in being able to 'sail' new, previously unimaginable 'seas'. As recalled by the CEO:

> *"As he* [the advisor] *told me: 'We have to choose the sea in which we want to sail* […] *I tried to keep this metaphor in mind over the years* […] *because as the good* [the name of the advisor] *said: you have to dive into the blue ocean!"* (CEO).

Stimulating thoughtful discoveries. Evocative images used in the CEO and advisor's discussions were often associated with insights from strategic analysis. This made the discovery images more real by building a frame of strategic initiatives. Moreover, financial projections

[4] The Red and Blue Ocean metaphor refers to the so-called 'Blue Ocean Framework' (Kim & Mauborgne, 2005). It is beyond the scope of this article to provide a detailed description of the framework since it was not actually applied by the advisor. He only used this metaphor in his face-to-face discussions with the CEO.

were used by the advisor to address the plausibility of strategic choices as well as to point out their financial soundness. For instance, in the case of the strategic choice to invest in the luxury segment, by shedding light on cost reductions and positive margins, the advisor pointed to the financial opportunities deriving from some strategic actions to put in place (e.g., the launch of e-commerce sales). Furthermore, during some training sessions with the CEO and his sons, the advisor presented some case simulations in which they discussed the results of the balance sheet analysis for strategic planning purposes.

These activities acted as mechanisms of openness to change by building up in the CEO the realization that not only do new strategic directions not necessarily threaten the organizational identity, but that they could also be safely pursued without being incautious. Thus, the advisor was again confirmed as the one to rely upon to avoid running too many risks; he would help to guide the business in new innovative directions with prudence and control over their plausibility and financial soundness. As commented by the CEO:

"One has to live on dreams on things like this, [but] *if you only see the reality that sometimes is bitter* [...] [the name of the advisor] *helped me to see the glimmers, and this gives the strength to go forward and be optimistic without risking too much"* (CEO).

In sum, in this phase, the emotional connection, built through the micro-practices of pathfinding the advisor engaged in, consolidated the trust between the advisor and the CEO. As the CEO commented:

"I trust him [the advisor] *very much. Obviously, if you want to find and reach new destinations it is necessary to have the tools and the collaborators that help you to know your strengths and weaknesses. On this point, he helped us a lot"* (CEO).

These relational dynamics had implications for strategy work during the second phase. While engaging in planning practices, the advisor created new arenas for strategic discussions in which the CEO was more directly involved. In these spaces, the micro-practices of pathfinding contributed to bolstering the CEO's confidence and breaking down his resistance to change. For example, by realizing that the investment in the luxury segment could be a concrete opportunity without necessarily distorting the family identity, the CEO finally decided to invest in this segment. As highlighted by the CEO:

> *"We made the right choice to invest in luxury, now we are the leader in that segment.* […] *It is fundamental to stop, reflect on, and evaluate the right road to follow, as we did"* (CEO).

Phase 3: Forging shared spaces of strategic discussion

The trustful connection between the advisor and the CEO led the latter to gain awareness that strategy making could be done in a polyphonic way because hearing and comparing other voices (such as those gradually involved in the enlarged arenas for the New Frontiers project) can be beneficial to discover new strategic routes. This pushed the CEO to take significant actions to strengthen planning practices, experienced as a positive way of questioning strategic decisions. Phase 3 was triggered from 2018 onward when the CEO decided to schedule and increase the frequency of some planning practices in order to exploit their function of supporting strategy formulation and reformulation. For example, he scheduled recurring meetings for assessing strategic directions through forecasting, scenario analysis, or projections revision. As highlighted by an e-mail addressed to all the members of the TM team:

> *"The timing and modalities of our main meetings have been redefined: the TM team meetings will be held once a week on Monday* […] *during these meetings the activities of forecasting and predictive analysis will be improved* […] *the timing for the preparation of the performance targets will be brought forward to September"* (e-mail extracted from an internal report, dated 4/20/2018).

This had significant implications for strategy work. TM team meetings were progressively transformed into a dominant strategic arena. The TM team meetings started to be a place where a growing debate on strategic issues among family actors and nonfamily managers unfolded.

Importantly, the effects of the relational dynamics between the advisor and the CFO and between the advisor and the CEO appeared evident in these meetings. On the one hand, the CFO took on a more active role by extending his voice; he went from only discussing financial issues to evaluating strategic decisions (e.g., helping evaluate competitors' threats). Furthermore, during the TM team meetings, he started to regularly present future projections on strategic initiatives. In doing so, localized discourses from interactions with the advisor started to be revealed during the more formal arena of the TM team meetings where new ideas were now explored. On the other hand, the CEO became more inclined to open up to other managers' views in order to "*find together the right path to make the decisions*" (in the CEO's words). During these meetings, for example, he usually asked the CFO for further explanations and opinions about the projections and conversations developed around their construction and meaning. As the CFO claimed:

> *"Now, he looks at the projections, and every now and then he puts his finger on a number and asks: 'Are you sure? Is it really that?'"* (CFO).

Moreover, these conversations extended to other team members as well. During the discussions, some managers focused quite frequently on specific items, which sometimes fueled the debate among the participants around issues that had not previously been considered but that were strategic for the organization. As commented by the management accountant (who was gradually included in the TM team meetings to present the projections with the CFO):

> *"Sometimes during the meetings, the CEO and the managers are interested and ask me where a specific projection comes from. Then, the conversation may continue and they* [participants in the meetings] *start to talk about something that for various reasons has not been talked about before*" (MA).

Beyond the TM team meetings, the CEO and the CFO created other, more informal arenas where the CFO's voice was more influential. Within these spaces, the CEO did not avoid making changes to Co-Pack's strategy, thus no longer perpetuating what had worked in the past, as he used to. For example, the CEO had been recently evaluating the possibility of pursuing a merger and acquisition strategy. He discussed the feasibility of the initiative with the CFO, who helped him to make more informed strategic decisions by identifying and assessing the right targets. For his part, the advisor did not lose influence in strategic arenas, despite the more active role played by the CFO. Rather, his relationship with Co-Pack continued to grow stronger as he became increasingly more involved when important decisions had to be made. For instance, in the example of the merger and acquisition, the CEO stated:

> *"We are thinking about the possibility of engaging in mergers and acquisitions. Now the time is right!* [Addressing the CFO] *We should call* [the name of the advisor] *to have some insights on what may happen!"* (CEO).

Discussion and conclusion

Implications for theory

This article contributes to the literature on FBs by advancing the research stream on strategy work (e.g., Brundin & Melin, 2012; Hall et al., 2006; Nordqvist, 2012; Nordqvist & Melin, 2008; 2010) as well as the stream on trust building in FB advising (e.g., Bertschi-Michel et al., 2020; de Groote & Bertschi-Michel, 2021; Michel & Kammerlander, 2015; Strike, 2013).

As regards the strategy stream, we respond to calls for "more empirical accounts of the details of strategy work" (Nordqvist & Melin, 2010: 16) by delving into the underexplored relational dynamics between different strategic actors. Building on extant theory from SAP and the concept of emotional engagement practices, we focus on such dynamics and expand this limited literature in at least three ways.

First, we provide evidence of the emotional dimension that affects the relational dynamics between family actors and nonfamily managers in the doing of strategy. Consistently with prior research (Hall & Nordqvist, 2008; Stanley, 2010), we acknowledge that they are driven by diverse ways of experiencing the business. However, we show that when it comes to strategy work, their mutual understanding and good quality work relationships (van Helvert-Beugels et al., 2020; Waldkirch et al., 2018) can be threatened by different forms of emotional resistance and vulnerability that pertain to an intimate and deeply rooted way of living the making of strategy. These subjective influences can affect the relationships between family actors and nonfamily managers, causing them to avoid sharing spaces of strategic discussion.

Second, we extend previous studies by outlining how family-nonfamily relational dynamics are shaped and fostered by a third strategic actor, i.e., the strategy advisor, who has remained surprisingly peripheral in the current debate on strategy in FBs. Rather than merely easing tensions, as highlighted by very recent studies (van Helvert-Beugels et al., 2020), we show that advisors can actually build ad hoc relationships with nonfamily managers and the family, through which all sides strengthen their willingness to take into account one another's views.

Specifically, our findings reveal that, on the one hand, advisors can activate empowerment mechanisms for nonfamily managers through micro-practices of *caretaking*. Advisors provide them with instruments of persuasion, encourage their strategic thinking on the future, act as inspirational models, and provide constant support. In so doing, nonfamily managers feel more confident that they can intervene in strategy work with the family. These mechanisms represent novel insights into the FB literature, which, thus far, has mostly focused on the family affective endowments driving strategic decisions (Gomez-Mejia et al., 2011; Kammerlander & Ganter, 2015). Instead, we demonstrate that also nonfamily managers' uncertainties can impact strategy work and, thus, should be taken into account. If nonfamily managers do not feel reassured and valued for the strategic contribution they can make, their expectations of working in the FB, as well as their contribution to strategic development, can be undermined.

On the other hand, through micro-practices of *pathfinding* advisors can activate openness to change mechanisms for family actors. Advisors speak openly and frankly to draw attention towards unnoticed issues, foster the exploration of the unknown, and stimulate thoughtful arguments about new possible discoveries. Thus, family actors feel reassured about undertaking new strategic directions and they are more likely to take notice of nonfamily managers' voices, as well. Recent research on advising in FBs has highlighted that advisors change the way family members interpret the environment (Nason et al., 2019) and they slow down the decision process to facilitate sensemaking (Strike & Rerup, 2016). We add to these studies by demonstrating that family actors' critical rethinking can actually be fostered only when advisors strike the right emotional chord and are able to channel family actors' typical fear of exploring uncustomary strategic directions.

Third, our article provides evidence that the relational dynamics shaped by the advisor lead to changes in strategy work taking place in three main phases. In so doing, we answer the call to identify different patterns of strategy work and how they change over time (Nordqvist, 2012). Specifically, we show that the micro-practices enacted by the advisors enable them to trigger strategy work by creating distinct spaces of strategic discussion, conceptualized as strategic arenas, with both nonfamily managers and family actors. We show that the trustful connections that emerge from these spaces allow the transition from one phase to another, driving changes in strategy work. Our article advances the idea that advisors do not move seamlessly between different arenas (Nordqvist & Melin, 2008), but there is a specific order that might help to set the stage between the different phases. At first, micro-practices of caretaking give rise to strategic arenas between advisors and nonfamily managers (phase 1). Their trustful connection, manifest within the arenas, allows advisors to acquire visibility and thus gain the family actors' attention needed to enact micro-practices of pathfinding. The enactment of these practices implies the emergence of new enlarged arenas where family actors and nonfamily managers are gradually involved (phase 2). The additional trustful connection, formed within these spaces, between advisors and family actors leads the latter to be more inclined to accept other voices in the strategic debate. This provides the ground for the third phase in which strategy work is accomplished in shared spaces of discussion with nonfamily managers and family actors who, eventually, will be ready to make their own voices heard and to listen to the others', respectively.

As regards the stream on trust building in FB advising, this article addresses recent calls for more research on the nature of the relationships between trusted advisors and FBs (Strike, 2012; Strike et al., 2018). We provide novel insights on trust building in the context of strategy work, which has not been specifically analyzed within this literature stream, to date. Our findings show that through micro-practices of caretaking and pathfinding advisors can build trustful connections and emotionally based collaborations by nurturing a sort of relational security towards nonfamily managers and family actors. This finding offers at least two main implications for the way we should think about trust building in FB advising as far as strategy is concerned.

First, previous studies suggest that family actors' forms of affective trust can derive from the "feeling of liking the advisor or the belief that the advisor is a good person" (de Groote & Bertschi-Michel, 2021: 143). Going a step further, our article suggests that, when the advisor is especially involved in strategy work, besides likeability and good impressions, it is the very creation of a sense of relational security that leads to emotionally based collaborations between the advisor and the family. Trust derives from the actors' sense of being able to count on the advisor to reduce their uncertainties in undertaking new strategic directions. Thus, more than "I like you and therefore I trust you", the family actors' feeling is: "you make me perceive my uncertainties as less troublesome and therefore, I trust you".

Second, the literature on advising in FBs has mostly focused on the relationship between the advisor and members of the family (Michel & Kammerlander, 2015; Salvato & Corbetta, 2013; Strike & Rerup, 2016) but has overlooked what happens when the advisor must interface extensively with nonfamily managers. Our article fills this gap by showing that forms of emotional trust should also imbue the relationship between the advisor and nonfamily managers in order to reassure the latter about being able to exert control over strategic actions. Given the growing involvement of nonfamily managers in strategy work, emotionally based collaborations between internal and external nonfamily actors could be the premise for effectively supporting the family actors in their strategic decisions.

Finally, our insights on the relationship between company chairmen, executives, and external strategy advisors contribute to broader management and organization literature outside the FB context. Above all, we enrich studies on strategizing that have explored the various actors involved in strategy work (e.g., Mantere, 2005; Rouleau & Balogun, 2011) but overlooked this particular relationship. Rather than focusing on specific strategizing episodes in which actors interact and convey different emotions (e.g., Kouamé & Liu, 2021), this article advances knowledge on how their relationship changes over time thanks to the emotional dimension underpinning the advisor's connections with the other two actors. This can have implications for the SAP literature where there is scope for more research on the role of external strategy experts (Vaara & Whittington, 2012). Importantly, our findings reveal that experts influence strategy work by not only acting upon the content of strategic ideas but also by shaping influential relationships between actors in strategizing contexts.

In so doing, this article also adds insights into the wider literature on client-consultant relationships (e.g., Nikolova et al., 2015; Sturdy et al., 2009) by shedding light on the relational practices that connect the actors involved in such relationships. In this vein, we build upon prior research that understands trust in external experts as "leaps of faith" (Nikolova et al., 2015). We add to this research by showing that emotional connections underlying the leap of faith can be more deeply explained by the expert's micro-practices that grasp the way in which each actor experiences his/her uncertainties and expectations. Furthermore, we demonstrate that when these forms of trust characterize the relationship between experts and core executives, they can lay the foundations for both groups to effectively gain influence with company chairmen.

Implications for practice

Our study shows the potential benefits for each of the actors in a three-way relationship between family actors, nonfamily managers, and advisors. First, we suggest that family actors should not be reluctant to take advice from external advisors. In fact, a strategy advisor may be a significant source of strategic rethinking and, above all, be beneficial in terms of establishing a collaborative work environment by enhancing the competencies of internal nonfamily strategic actors. Thus, our findings reveal that the advisor may have a fundamental role to play in developing the quality of FB's unique human capital. This is particularly useful in those contexts in which family actors are not able to exploit nonfamily managers' potentialities due to their blind preference for the family circle.

Second, we suggest that internal nonfamily managers should not feel threatened by the presence of an external agent. Rather, the advisor should be seen as an actor who can help them gain the self-confidence to be more autonomous and empowered within the FB. Finally, our findings suggest that the advisor should consider the value of starting collaborations with (and gaining trust from) nonfamily managers who can open the door to stronger relationships with family members.

Limitations and further research

In closing, we acknowledge the limitations of this article and suggest future research directions. The use of a single case study provides rich data and permits the researchers to disentangle the various advisor's actions and interactions affecting strategy work. However, a possible limitation could be that the types of connections observed in this case may be linked to specific personal and professional features of the actors involved, making them very case-specific. Nevertheless, the framework of how strategy work changes through the nexus between (family and nonfamily) actors, strategy practices, and micro-practices of emotional engagement may be used in future longitudinal case studies to interpret similar contexts, in which trustful connections are critical in strategizing. Indeed, these studies could explore other types of connections an advisor can build with FB members as well as their development over time. Broadly speaking, future SAP studies could go further in drawing on the concept of emotional engagement practices to explore strategy work in contexts (other than FBs) where emotional connections among individuals may be meaningful in affecting strategic influential relationships. This may provide more insights into other ways in which relational forms of trust may be enabled.

An additional limitation of our article is that it does not focus on the influence of external institutional forces that could affect the enactment of strategy practices advisors introduce in FBs from the outside. Future research could extend our findings by delving into how possible variations in strategy work in FBs could derive from the interplay between external forces and internal dynamics. Finally, our article provides only a glimpse of the importance, for strategy advisors, of combining a variety of resources (discursive, material, bodily) in their work. Future studies could explicitly address this topic by focusing on the implications these different resources might have for strategy work in FBs.

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Table 1 – Collected data

Interviews			
Informant	**Code**	**N. of interviews**	**Total duration (approx. n. of hours)**
Chief Executive Officer	CEO	5	6
Chief Financial Officer	CFO	5	7.5
Management accountant	MA	2	4.5
Son 1	SON1	2	2
Son 2	SON2	1	1
Advisor	ADV	6	11
Member A&F department-1	A&F1	2	2
Member A&F department-2	A&F2	1	1.5
Head of the Operations department	HOP	2	2
Total		**26**	**37.5**

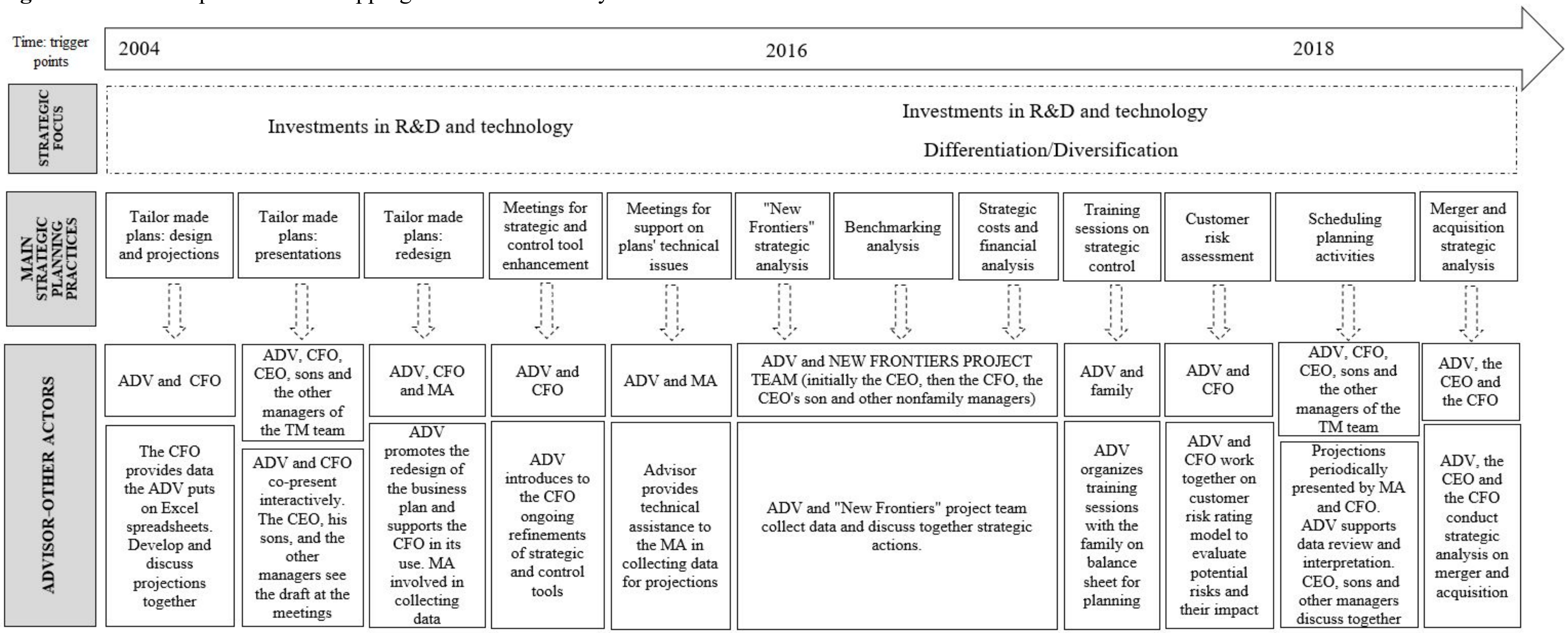
Documentation data	
Document	**Number**
Annual reports (2012-2019)	3
Ethics code (2018)	1
Business plan (2004-2019)	4
PowerPoint presentations of business plan (2010-2019)	3
Budget/internal reports (2012-2019)	3
Advisor's project reports with meeting notes (2004-2019)	6
Advisor's PowerPoint presentations (2004-2019)	4
Excel spreadsheets with financial simulations (2004-2015)	5
Online newspaper articles, press releases (2011-2019)	10
E-mails (2004-2011; 2013-2019)	15
Company website	1
Booklet on the history of the company (published in 2015)	1
Videos about the company	2
Total	**58**

Table 2 – Illustration of coding of micro-practices of caretaking and pathfinding

	Micro-practices	Example of activities (constituting the micro-practice)	Empowerment	Fulfilled expectation (control over strategic action)	Trust in the advisor	Illustrative extracts from the empirical material
MICRO-PRACTICES OF CARETAKING *Through which the nonfamily manager is reassured about gaining a voice in strategic discussions. Act as empowering mechanisms*	***Revealing instruments of persuasion***	-Often reiterating the need to grant funding -Developing a tailor-made plan with scenarios to convince banks -Asking questions/reasoning about project feasibility	Ability to support and advance one's own arguments	Confidence generated due to the opportunity to have persuasion power for ensuring resources	Working on ad-hoc tools increases trust based on collaboration and the certain provision of useful solutions	ADV: "I told him [the CFO], we have to ask the banks for money, so we have to understand a little more by planning" ADV: "We made different scenarios to discuss how to convince the banks about the feasibility of the initiatives" CFO: "Working together he made me understand that the business plan was useful in engaging with financial institutions, it helped me a lot, without the business plan it would have been hard! […] it gave me confidence about how to fund investments" Notes from advisor's project report (May 2007): "The CFO could use the plan to suggest future developments to the CEO and the TM team"
	Encouraging charting the future	-Increasing the level of detail and the complexity of simulations -Figuring out the cause-effect relationship among multiple sets of variables -Building possible future scenarios -Providing examples on what may happen in the future -Tweaking the Excel-files with projections	Strategic thinking to gain more influence in depicting strategic directions	Safety fostered by avoiding feelings of being found unprepared for the future	By digging together into the dynamics that can affect the future creates a trust based on the sharing deep strategic discussions	CFO: "I like to think about what can happen in the future and have the opportunity to see today what will happen over the next years to get ready! […] If you think carefully and see difficulties on the horizon, then you have time to intervene […] We started reasoning about critical operational variables […] and we started to think about what that could entail for our strategic direction […]" ADV: "The CFO was passionate about simulations. It has gradually become more and more complex, we have included variable costs, incidence of materials, specialization by product line, by customer, by area such as Italy, abroad, the rest of the world and we constantly discussed these simulations"
	Serving as a constant inspiration	-Setting up working groups -Designing the structure of plans and reports together -Sharing the office to work together on plans and projections -Preparing PowerPoint presentations for the TM team meetings	Deep understanding of how to engage in strategic activities by following a role model	Relief for having one's back covered in projecting the future	Working side by side and struggling together creates a trust based on 'common experience' and on the satisfaction gained from goals achieved together with effort	ADV "I typically suggest a general framework (such as workflow schemes or prototypes on Excel spreadsheets), but then we implement it together [...] By working side by side we are a team and I am for him a support. What a wonderful adventure!" CFO "Typically, I went to his office and we worked together on the business plan. [...] so many times we stayed in the office until late to work on those numbers! […] We struggled together through all the work we did" Notes from advisor's project report (April 2011): "Constant support to the CFO to review plans together"
	Amplifying the presence	-Guaranteeing the physical presence within the company whenever necessary -Providing support virtually (by phone or e-mail) -Guaranteeing availability	Ability to always find a solution when problems arise	Reassurance about the possibility to direct the course of the future thanks to constant support	Always guaranteeing constant support creates a climate of mutual	ADV: "The CFO often asks me for quick advice. He calls me and then I go, even when he needs some advice about his daily activities. Sometimes it's a simple exchange of opinions. This creates a beautiful relationship"

		-Providing flash or on demand suggestions -Responding to emergencies quickly			understanding and reliability	CFO: "I often ask him for a quick opinion or ask him for his input. He might be able to notice aspects that I had totally overlooked because they hadn't even occurred to me" CFO's e-mail (12/3/2013): "Hi! Can you give me your opinion about the performance of the branch in [the name of the city]?"
	Micro-practices	**Example of activities (constituting the micro-practice)**	**Openness to change**	**Fulfilled expectation (safe pathways)**	**Trust in the advisor**	**Illustrative extracts from the empirical material**
MICRO-PRACTICES OF PATHFINDING *Through which the family actor is reassured about projecting the company into the future without the fear of exploring uncustomary strategic routes. Act as openness to change mechanisms*	***Giving tough love***	-Making comparisons with competitors -Giving the CEO food for thought with provocative observations -Bringing "disorder" with sincere and open discussions/dialogue	Curiosity towards previously unnoticed issues	State of bewilderment due to the unsettling of one's own certainties but openness to possible fruitful new pathways	Questioning choices already made provides a trust based on mutual respect by showing sincerely potential generative effects of uncertainty	ADV: "He [the CEO] goes like a train, he has a great passion for technological investments, but when he had to decide on the opening of a new branch, at a certain point he had doubts about what to do. At that point I told him 'now I'll show you what others are doing'. I always express my opinion to the CEO, even when it hurts" Online newspaper article (interview to the CEO, 2017): "We have no strengths, but choices that over the years have turned out to be successful"
	Fostering exploration of the unknown	-Using metaphors/evocative images -Involving organizational managers as a community of people -Emphasizing the need to believe in the same dream	Challenge to step outside of one's comfort zone	Enthusiasm and courage to strive for destinations beyond well-known boundaries, without necessarily distorting one's own identity	Showing the possibility for new strategic directions leads to a trust linked to the certainty of having a guide, a fresh pair of eyes	CEO: "Blue ocean. I remember very well his [the advisor's] words. […] it is the dream and the determination to see the business grow and carry on for the future generations the fuel for success and innovation" ADV: "These meetings enabled inclusivity and opened other managers to some important strategic reflections, in order to reach our goals together […] the effect of the [New Frontiers] project was to believe all together that it was possible to focus on a business sector beyond the one he [the CEO] was used to thinking about" CEO: "I asked him for insights on some data in the report, he suggested possibilities and I decided to dig deeper to understand what the outcome might be from a new possible incorporation strategy"
	Stimulating thoughtful discoveries	-Framing strategic initiatives through insights from strategic analysis -Using financial projections to reveal the financial soundness of a strategic idea -Highlighting cost reductions and positive margins -Doing training sessions to better read balance sheet numbers for strategic planning	Openness to new strategic directions with prudence and control over their plausibility and financial soundness	Safety due to the opportunity to take new paths without being incautious	Developing the plausibility of strategic initiatives creates trust linked to having someone who helps avoid running too many risks	AD: "We did some training sessions that the CEO liked a lot [...] in the end it became clear that the area was perhaps not even able to cover the specific operating costs" CEO: "In the end I always take risks with my intuition, but actually doing strategic analysis helps you a lot to avoid too many risks […] the relationship with [the name of the advisor] has consolidated" ADV: "He [the CEO] and also his sons have gained awareness about the importance of marginality analysis, planning of actions to be done, reasoning in terms of economic convenience" Internal report (May 2016): "The choice could also be convenient; the transfer of machineries in the new manufacturing plant will result in an increase in the contribution margin of 500 thousand euros per year"

Figure 1 – An example of visual mapping from our data analysis



Main company's information

Information	**Data**
Industry	Packaging
Size	Medium
Employees	125
Revenues	40
Generation	Third

Legend

ADV = Advisor
CFO = Chief Financial Officer
CEO = Chief Executive Officer
MA = Management Accountant
TM = Top Management

Figure 2 – Relational dynamics between strategy advisors (ADV), family actors (FA), and nonfamily managers (NFM) for changes in strategy work in FBs