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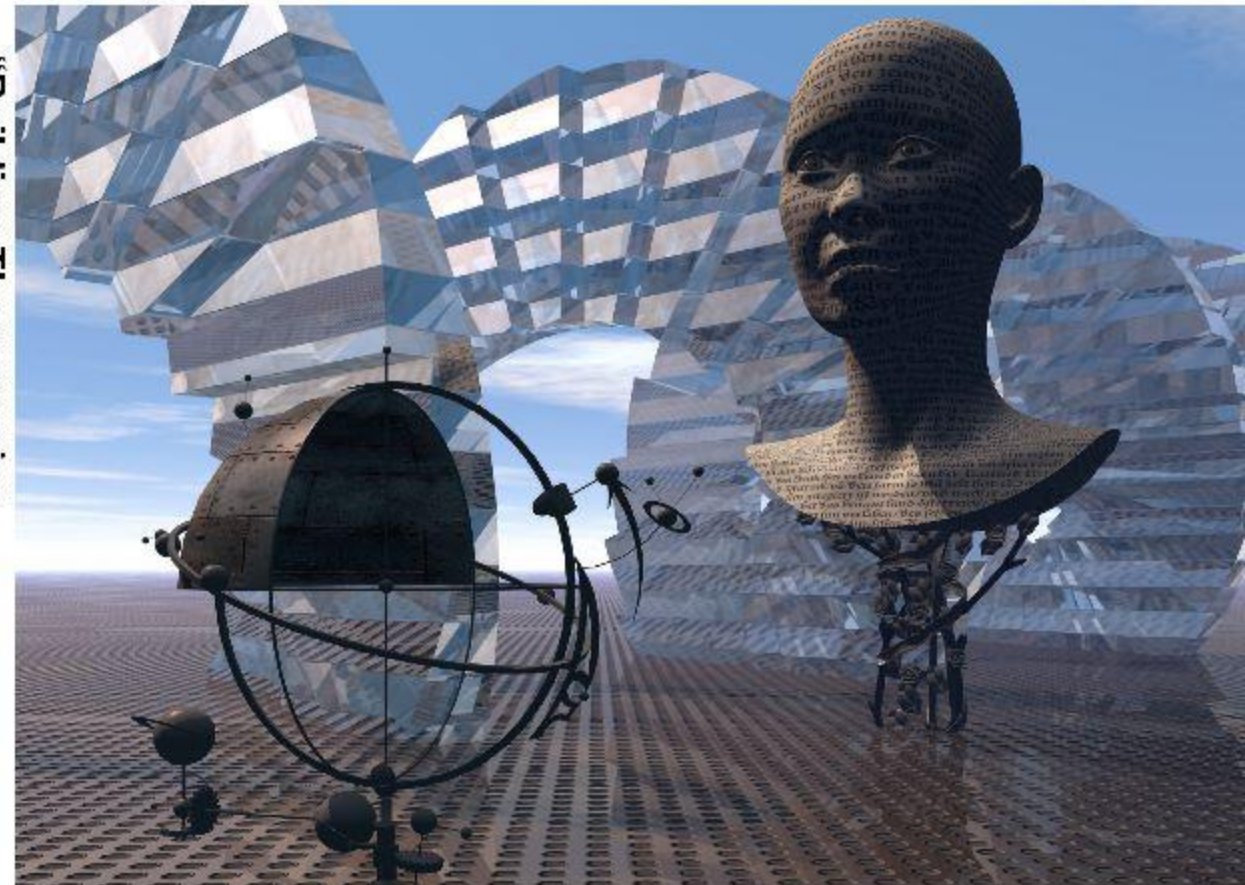
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# “Building Theory using Classical Grounded Theory”

This book complements the existing books on qualitative research methodology by explaining classical grounded theory techniques in the preparation of thesis, dissertation, and articles. The authors are using classical grounded theory to build the so-called PHC Theory which stands for Parenting to equip, Harmonizing to prosper, and Collaborating to endure in large family businesses. This book explains simple steps to apply the concept of perpetuating family businesses through knowledge management to manage and educate business successors. This book can also be used for various management research to provide optimal results. This book was composed by using scientific techniques as used by various articles in high-index journals with the context of developing novelty concepts. The authors envisage that this book can be used by graduate students to obtain master's and doctoral degrees and penetrate journals of international calibre.

“Building Theory using  
Classical Grounded Theory”



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# "Building Theory using Classical Grounded Theory"

Practical Guide to Grounded Theory Methodology

Dr. Hadi Cahyadi, SE, MBA, MCL (Writer)

Dr. Ardi, MMSI, Ak, CA (Editor)

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**Perpustakaan Nasional RI**

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**BUILDING THEORY USING CLASSICAL GROUNDED THEORY**

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# PREFACE

The writing of this book intended to share knowledge about techniques for building novelty concepts in theses, dissertations, and journals by building theories using classical grounded theory, and second, the application of classical grounded theory in the development of theory in conglomerate family businesses. Third, the application of classical grounded theory in the development of propositions, Parenting to Equip, Harmonizing to Prosper, and Collaborating to Endure.

This book begins by discussing the background related to classical grounded theory. This book specifically discusses techniques for developing or building novelty theories of theses, dissertations, and journal articles with examples of large businesses, Parenting to Equip, Harmonizing to Prosper, and Collaborating to Endure in a conglomerate family business.

This book uses scientific techniques that have been carried out by various articles with the context of developing the theory of novelty Parenting to Equip, Harmonize to Prosper, and Collaborate to Endure.

The book sings on techniques that graduate students can use to obtain master's and doctorate degrees and penetrate journals of International caliber.

This book is far from perfect; suggestions for improvements from readers are highly appreciated. On this occasion, the author would like to express his gratitude to the parties involved in making this book. The author thanks God has bestowed mercy, wisdom, time, and opportunity on the author.

The author would also like to thank the editor's partner of this book, Dr. Drs. Ardi, M.M.I.S., Ak., CA. has spent much of his time on improvements and proposals in the writing of this book.

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Jakarta, 1 February 2023

Dr. Hadi Cahyadi, SE, MBA, MCL (Writer)

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# CHAPTER I

## INTRODUCTION

### Background

This book's objective was to generate a substantive theory with classic grounded theory (CGT) methodology of Indonesia's Large Family Businesses on preserving multi-generational family business sustainability. This theory does not rule that every business family must follow to be using the theory to be successful generation after generation. However, we may consider it a "best practice" of the successful, keeping its longevity families in business. Hence, the study would generate an inductive data-based theory of Indonesian large family businesses. In other words, this book would neither make any hypothesis from any pre-existing theory nor generate deductive theoretical propositions.

As many books have concluded the benefits of using the rigorous, qualitative, grounded theory methodologies, the researcher would generate theories on the family business with Indonesia's Large Family Businesses as the research

subjects and outside the context of Western countries (Brockhaus, 2004; Le Breton-Miller, Miller and Steier, 2004; Nordqvist, Hall and Melin, 2008). Moreover, (Meyer 2006, p. 124) contended that “grounded theory-building research should play an important role in the indigenous research agenda because many phenomena are substantially new or different in ways that are not clear from earlier research.”

Therefore, the intention to build a theory of Indonesian Large Family Business based on their concern is indeed the unknown/unexplored area. This book undeniably has its originality of grounded theory methods and its access to Large Family Business's uncharted part and will lead to social and theoretical significance. We may borrow from (Charmaz 2006, p. 197) for clarifying the originality; he said that the researcher could elaborate on the following questions to check for originality: (i) does your topic offer new insights? (ii) does the study build new conceptual data? (iii) Is there a social and theoretical significance of this work? (iv) how does the research challenge, expand, refine current concepts?

Transferability in qualitative research is synonymous with generalizability, or external validity, in quantitative research. Transferability is established by providing readers with evidence that the research study's findings could apply to other contexts, situations, times, and populations (Lincoln and Guba, 1985; Korstjens and Moser, 2018). Undeniably,

this research has transferability to Southeast Asia and Asia context at large in the book of Large Family Business and especially for any family that momentarily in transfer to the next generation.

Given the complex nature of the research situation, it is not unusual that grounded theorists find it challenging to locate the research question. The questions are typically kept general, flexible, and open; with what is happening here? (Dick, 2002).

A substantive Grounded Theory gives an understanding of actions in a substantive area from the perspective of participants. It can account for the patterns of behavior relevant for the participants as it revolves around their main concern and how they continually resolve that concern (Glaser 1998, p. 115). As such, this book was not based on a specific, pre-formulated research problem; instead, the research problem was allowed to emerge from the participants to represent their concerns (Glaser 1998, pp. 115-118). To facilitate this, the research questions for this book were framed to allow for openness, flexibility, and exploration to understand what is going on in the substantive area. Following Glaser's recommendation that research questions should revolve around the main concern and how that concern is continually resolved (Glaser 1998, p. 115), the broad research questions used to guide this study were: 1/ What is the main concern of Indonesian large-family firm's Founder in order to



sustain the business and to preserve the family business over-generation, and 2/ how do the founders of Indonesian large family business go about addressing, resolving, and managing the main concern.

This book describes the steps of the rigorous classic grounded theory, which involves collecting data in the simultaneous and iterative process, writing the coding, and analyzing data using the constant comparing method. From the conducted procedures, the researcher will generate a theory. As a result of these procedures, the researcher will stay so close to the data that the generated theory can emerge with proper relevance to study the participants (Glaser, 1978), called "grab, fit, and relevance."

The book describes gathering the data from interviews with participants, which will be obtained through a convenience sampling method. The interview participants included several founders of large family businesses, their successors, the family members who are not involved in the business, and the non-family business members (staff and friends) who are close to the family.

As concepts began to emerge from analyzing data with the constant comparison method, the researcher gathered more data by observing the participants and conducting informal conversations through opportunistic sampling and relevant literature.

The classic grounded theory (GT) model, which uses theoretical sensitivity, coding, and constant comparative analysis of the data. The methodology characteristic in GT design guided the subsequent interview selection and process. Relative to analytic rules to promote a single explanatory variable,

While theoretical coding establishes the relationship among variables, analytic rules guide the construction of the theory as it emerges. They guide the theoretical sorting and the subsequent writing of the theory. The detail operations specify and delimit and select the use of data and concepts. Analytic rules can be on and about anything that is related to generating the theory. Analytic rules provide the necessary disciplines for sticking to and keeping track of the central theme as the total theory is generated. (Glaser, 1978, pp. 120–121; Schurch, 2015, pp. 13–14)

This book persists aware of the following basic analytic rules as a researcher needs to remain open to what emerged during research in alignment with the goal above (Glaser, 1978, pp. 121–125):

1. Commence sorting memos as soon as the first interview is finished and data coded.
2. Start On sorting all other categories and properties only as they relate to the core category.
3. Because the goal is to promote a single variable to explain some variation in a problem as it is processed,

one core variable must be promoted to the center, and the others should be demoted to a subscore variable.

4. A proliferation of memos will facilitate saturation when the constant comparisons generate many new ideas.
5. Conceptually carry-forward related categories to subsequent sorts and the use of each concept from the point of its first introduction into the theory.
6. All ideas must fit somewhere in the outline using constant comparison methods to constantly question and compare each idea to the emerging outline.
7. The conceptual sorting occurs on at least two using sorting and resorting, which constantly confirm integrative fit.
8. Upon theoretical completeness, stop sorting (Schurich, 2015)

Grounded theory is an inductive, comparative methodology that gives the researcher systematic guidelines to gather, synthesize, analyze, and conceptualize qualitative data to construct a theory. A grounded theory study does not work to produce any factual and detailed data descriptions. In contrast, the purpose is to make integratively related concepts that identify the main problems for participants and the underlying and unrealized pattern of how they continuously resolve their main concern (Glaser, 1998).

This grounded theory study presents the participants' overt latent patterns of behavior. The following limitations need to be considered in evaluating the implications and recommendations of the study: (a) the book was limited to founders, primarily, and their successors of the large family business in Indonesia; the theory generated is limited to leaders within the scope of the large family business; (b) this book examined a retrospective view of the participants' perceptions and descriptions of experience and perception within their activities, which may include levels of reminiscence bias; and (c) this book used interviews, which is planned to utilize the field observation (participant observation/PO ) in authentic life experience. However, the interview was mostly conducted virtually due to the large-scale social restrictions (PSBB) of the COVID-19 pandemic. It hampered the planning. Instead, the researcher tried to maximize long encounter observation with the family and informants as a substitute.

Finally, the book used the constant comparative analysis method, which delimited the amount of data needed. The method is unique for generating emergent concepts from codes resulting in theory emergence. The researcher combined field experience and observations with families-members, with interviews, which contributed to theoretical completeness.

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## CHAPTER II

# THE CLASSIC GROUNDED THEORY

The classic grounded theory as the employed methodology for this book. Glaser and Strauss (1967) first developed the original grounded theory methodology during their study on “the Awareness of dying.” It is a qualitative research method for studying complex social behavior from a sociological point of view. Since the introduction of grounded theory by Glaser and Strauss (1967), it has evolved as its originators have further articulated and adopted the same method of grounded theory (Locke, 2003).

Various grounded theory models or versions, in particular, have taken various philosophical or paradigmatic stances. Glaser and Strauss's original Grounded Theory is rooted in American pragmatism and the symbolic interactionism school, which indicates that grounded theory could be located within the interpretive paradigm (Howell *et al.*, 2000; Locke, 2001, 2003; Heath and Cowley, 2004; Modell, Humphrey and Gurd, 2008). As such, it assumes a relativist

ontology and objectivist epistemology. However, Denzin (1994), Guba & Lincoln (1994) considered that the classic grounded theory has realist ontology and objectivist epistemology, which thus belongs to the post-positivist paradigm (Annells, 1996; Locke, 2003).

The book began by briefly discussing ontology and epistemology in this research. The following is where the researcher traced the beginnings of grounded theory to the author, Barney Glaser, and the researcher argued that the later versions of grounded theory do not hold the scientific rigor of the original method. The following three sections explained the descriptions of the classical grounded theory approach, the use of academic literature in the classical grounded theory analysis, and the data sources for this book. The following two sections defined the data collection process and the ethical considerations for this book. The following section included a note about the research from the researcher's viewpoint, as a former member of a small family business from the Indonesian Chinese ethnic. The last section described the use of computer-assisted software.

### **Philosophical Position**

In commencing any study, consideration of methodological and philosophical principles is essential. Crotty (1998) claimed that a clear articulation of one's philosophical stance helps maintain greater philosophical coherence in one's

analysis. Crotty's (1998) researcher thought this study is put within a vital, realistic ontology that aligns with a constructivist epistemology.

Guba and Lincoln (1994) mentioned that ontological realism connects more to an epistemology of objectivism than constructivism, but Crotty (1998) argued that such a relation does not always come with that requirement. Realism in ontology is compatible with constructivism in epistemology. Realism argues that the truth can exist beyond the mind, which insists that reality exists only in mind (Crotty, 1998), whereas idealism is on the other way around. Crotty (1998) added more to discuss constructivism, which bases its reasoning that every knowledge, and thus all meaningful reality as such, depends on human activities formed and communicated in and out of a relationship between human beings and their environment inherently social sense. In his study, N. T. Wright (1992, p. 35) articulated a realist ontology consistent with a constructivist epistemology and aligned well with critical realism. Wright noted that a realist ontology is a way of describing the "knowing" process accepting the reality of the known thing as something other than the knower (thus "realism"), while fully understanding that reality lies along the spiraling path of appropriate dialogue or conversation between the knower and the thing known (hence "critical"). Hence, he concluded that knowledge is never itself independent of the knower, even though the



knowledge theoretically concerns realities independent of the knower (Wright, 1992, p. 35).

In contrast to other researchers who attempted to classify classic grounded theory as objectivist, Charmaz (2006) offered a reformulation of grounded theory along a constructivist paradigm and criticized the classic grounded theory leaning towards more objectivist tendencies. In the beginning phase of understanding the grounded theory from different literature versions, the researcher in this book observed grounded theory's tendency as a more objectivist voice. The development of the classic grounded theory was influenced by constructionist thought, as Glaser (1998, p. 32) explained that he learned from Strauss about the social construction of realities by symbolic interaction, which made meanings through self-indications self and others.

Without constructivist reformulations, the classic grounded theory approach can be implemented in its complete set, regardless of whether a scholar holds on to objectivist or constructivist epistemologies. A researcher with objectivist leanings can propose a theory as a "truth" behind the data, but a researcher working within a constructivist paradigm only needs the social construction for their acknowledgement. It already represents one theoretical lens to explain that the data has been rigorously generated and become a defensible theoretical lens. Moreover, the classic grounded methodology pays careful attention to the emer-

ging theory from data and the modified versions through more data collections, and it is consistent with a constructivist epistemology.

### **Origins of Classic Grounded Theory Methodology**

Two sociologists first developed grounded Theory, Barney Glaser and Anselm Strauss, in 1967 in their book "The Discovery of Grounded Theory," as an action against the extreme positivism that had permeated most social research. Glaser & Strauss (1967) argued that researchers needed a method that would allow them to move from data to theory so that new theories could emerge.

Multiple versions of grounded theory now exist since their first published book, and it must have been so influential that it becomes necessary to explain the theory's origins. Bryant & Charmaz (2007) listed three leading schools that declared the mantle of grounded theory methodology: the classic or Glaserian school (Glaser, 1978; Glaser & Strauss, 1967), the Strauss and Corbin school (Strauss and Corbin, 1990) and the constructivist school (Charmaz, 2006). Still, the origins of grounded theory methodology were rooted in Barney Glaser's work (Glaser, 1992; Glaser & Holton, 2004); despite the Strauss and Corbin popularity, other constructivist schools have blossomed.

Barney Glaser is considered the founding father of the grounded theory, initiated in his doctoral work at Columbia

University, in which Paul F. Lazarsfeld significantly influenced him (Locke, 1996). Later, Glaser collaborated with Anselm Strauss on their book “Awareness of Dying” in 1965. However, in the book “Discovery,” Glaser (1998, p. 32) later declared that he was the creator of the coding, analysis, and theoretical data conceptualization. He wrote:

The ‘Discovery’ book was written by me as a response to constant queries about how we [Glaser and Strauss] did the ‘Awareness’ book.

*I wrote 90% of the book while he [Strauss] was in Europe and gave it to him as a surprise present when he returned. In true collaborative fashion, he reviewed my eight chapters, added here and there, and then wrote three more chapters himself: an introduction, one on libraries as cachets of data, and one on insight. (Glaser, 1998, pp. 21–22)*

At a later time, Strauss & Corbin (1990) published “Basics of Qualitative Research” in the Strauss and Corbin school, resulting in the difference of methodology between Glaser and Strauss. To clarify that he was the author of the grounded theory, Glaser responded:

*Anselm [Strauss]’s methodology is one of full conceptual description, and mine is grounded theory. It is a new conceptual method, uniquely suited to qualitative research, that simply uses the grounded theory name, with the author having no realization of what grounded theory was in the first place—what it was in goals, methodology, freedom, level of abstract-*

*tion, constant comparison, naturalism, emergence, trust and care about what the participants perceive and what their problems are (Glaser, 1992, pp. 122–124).*

Glaser criticized Strauss and Corbin for using axial coding, which forces theoretical codes on data rather than relies on emergence. He wrote:

*In grounded theory, we do not link properties and categories in a set of relationships denoting casual conditions, phenomena, context, intervening conditions, action/interactional strategies, and consequences [i.e., axial coding]. This would be preconception and forcing theoretical coding concepts on data [---].. It teaches the analyst to force a full conceptual description on data with no questions about whether the links are relevant to any emerging theory that really explains how the participants process their main concerns. (Glaser, 1992, p. 63)*

As the differences arose, Charmaz (2006) developed the constructivist approach to grounded theory to represent a combination of Glaser's theory and Strauss and Corbin's approach. Charmaz (2006) made both axial codes, forming a core category and theoretical code (which is critical to the original method), as an option to generate a theory by stressing a constructivist acceptance of various ways of knowing. However, Holton (personal communication, April 19, 2009) clarified that the generated theory does not vary from the full conceptual explanation of thematic data analysis when

there is the potential to reduce the need for a central category and theoretical codes to connect broken concepts. If one were to do this, one could report having used thematic qualitative data analysis as a methodology and call the results full conceptual description.

Nevertheless, it does not necessarily contravene constructivist epistemology to produce a theory according to the original grounded methodology theory, as stated previously. Glaser (1998, p. 32) acknowledged that constructionist thinking also affected how he thought of things, but he clarified that it was different from grounded theory, even though he could agree that qualitative data analysis was legitimate. With Holton's advice, Glaser confidently believed that qualitative data analysis of grounded theory would erode grounded theory's intellectual power (Glaser & Holton, 2004, p. 3).

Despite any reformulations to the original grounded theory methodology and the plethora of mix-and-match approaches claiming the grounded theory term, Glaser preferred to use the word classic grounded theory when necessarily differentiated (Glaser & Holton, 2004). Table 3.3 shows the Grounded Theory Comparison in terms of its epistemological paradigm, research problem identification, data collection, and others.

## The Methods

Glaser (1992, p. 16) defined classical grounded theory as a research framework for analyzing data collection using a systematically applied set of theory generation methods within a substantive field. He allowed the use of both qualitative or quantitative data for the methodology, although it tends to use more qualitative data. This methodology's product is an interconnected collection of conceptual hypotheses or arguments about the relationship between concepts (Glaser, 1998, p. 3).

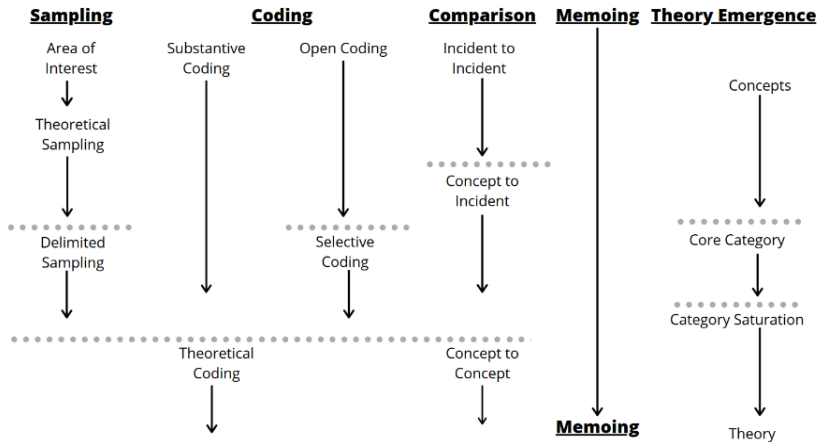
The classic grounded theory has been widely documented in the literature (e.g., Glaser (1978); B. G. Glaser (1992, 1998, 2001, 2003); Glaser & Holton (2004); Glaser & Strauss (1967); Holton, (2007)). When a researcher enters into an inquiry of interest, there the methodology starts. The researcher in this book began collecting data in various ways, with no necessary prior background knowledge on the area. The researcher has been following the classic grounded theory concept that all is data, as Glaser (1998, p.8) stated:

*The briefest of comment to the lengthiest interview, written words in magazines, books and newspapers, documents, observations, biases of self and others, spurious variables, or whatever else may come to the researcher's way in his substantive area of research is data for grounded theory (Glaser, 1998, p. 8).*

Regarding data collection in the research using the grounded theory, Glaser and Strauss (1967, p. 68) further added that gathering different data types on the same substantive field offers a reasonable view of the facts because individuals' assumptions and approaches appear to reconcile as the researcher finds the underlying causes of variance.

Glaser and Strauss (1967) added that Grounded Theory methodology involves theoretical sampling, a simultaneous and iterative data collection, coding, and constant comparative analysis procedure. The theoretical emergence of definitions and categories leads the researcher to subsequent data collection. According to Silverman (2011), Constant Comparison Analysis (CCA) is a continual process of analysis in a grounded theory study involving data comparison from all sources - including field notes and memos - compares code to code, code to category, and category to category to enable the full development of each source (Silverman, 2011).

The grounded theory proposes using conceptual memo writing as an integral part of analyzing the whole process, along with theoretical sampling—tables 3.1 and 3.2 highlights the overview of the iterative progression in the grounded theory analysis.



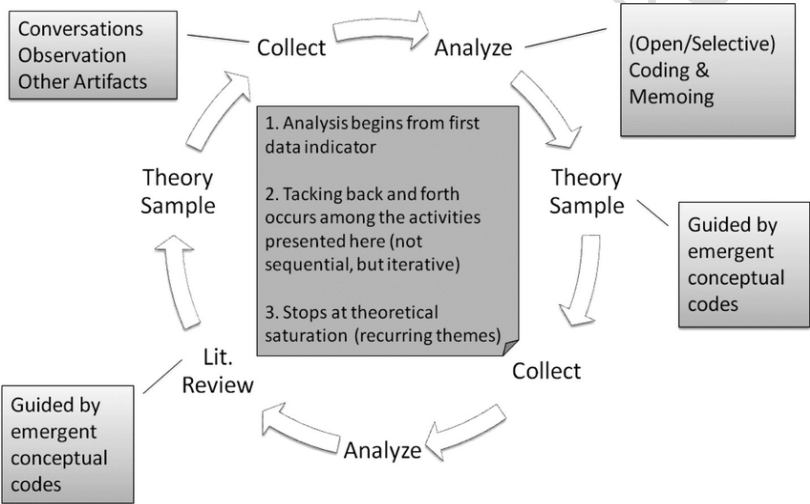
**Figure 1** Iterative Progression of Grounded Theory Analysis, Source: Adapted from (Glaser, 1978; Glaser & Holton, 2004; Holton, 2007; Loy, 2010)

In the grounded theory, we recognize two types of coding: substantive coding and theoretical coding, with the former preceding the latter. Holton (2007, p. 265) summarized the substantive coding process as the way the researcher deals directly with the data, fracturing and evaluating it through open coding to identify a core category and related concepts, and saturate them through theoretical sampling and selective data coding theoretically.

The constant comparative process, as the researchers (Glaser & Strauss, 1967; Holton, 2007) described, make comparisons on three things as follows: (1) incident to incident for concepts identification, (2) concepts to more incidents to



theoretically elaborate, saturate, and densify concepts, and (3) concepts to concepts to integrate the emerging concepts through theoretical coding. Holton (2007, p. 283) concluded that theoretical coding was the final stage in conceptualizing how the substantive codes could relate to each other as theories to be incorporated into theory.



Source: Adapted from Glaser (1978)

**Figure 2** Grounded theory's iterative data collection, analysis, and sampling process adopted from (Glaser, 1978)

The researcher began open data coding line-by-line in the part of substantive coding, engaging in incident-to-incident comparison analysis driven by a collection of questions

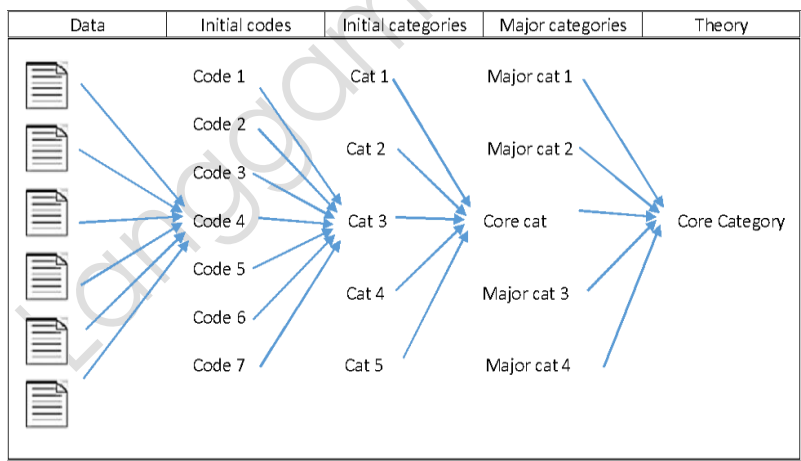
(Glaser, 1998, p. 140) as follows: “what category does this incident indicate?”, “what property of what category does this incident indicate?”, “What is the main concern faced by the participant?” and “what accounts for the continual resolving of this concern?”. Asking these questions allowed the researcher to go beyond descriptive information and remain at a conceptual level based on the patterns of incidents that generate codes and are promoted by Holton (2007, p. 275).

As data results in more concepts, the researcher conducted the next step of comparative analysis, comparing concept-to-incident for the saturation of categories. Potential core categories started emerging as the researcher wrote memos on concepts. They can be any kind of theoretical code such as follows: process, typology, continuum, range, and so forth. The researcher kept the process until integrating the sub-core categories to explain how the main concern of participants is continually processed or resolved (Glaser, 1998; Holton, 2007).

The next step after having the potential core categories emerged is the theoretical sampling, which is limited to data collection from adding more properties and dimensions of the core category. At this stage, the researcher employs selective coding by focusing on the core and related categories. The researcher confirmed true that during this stage, as Holton (2007, p. 280) stated, that subsequent data collection pro-

cess can occur for a little while only, and we will get a few field-notes to be observed and analyzed.

The book would achieve the theoretical saturation the available additional data longer does not contribute to the development of properties of the category (Glaser & Strauss, 1967, p. 61). When it comes to theoretical saturation of the core and related sub-core categories, the researcher would move to theoretical coding. The concept-to-concept analysis of comparisons is the next step to ensure that the emerging potential theoretical codes of concepts can enable the theoretical integration of the core and related categories. Figure 3 describes the process of abstraction of major categories from data.



**Figure 3** Process of abstraction of major categories from data

These steps are the researcher's processes to formulate a grounded theory, consisting of a collection of hypotheses or relationships between concepts that illustrate the underlying social behavior phenomenon intended to address the key concern in a substantive area.

### **Data Sources**

As the researcher understands that 'all is data' in the classic grounded theory, the next step is to include data from various sources when opportunities come out. Holton (2006) stated that researchers could benefit from serendipity, unplanned and unanticipated opportunities when collecting data using the opportunistic sampling approach. The researchers concluded their book, with concepts and categories that had emerged, and it was time to collect data from academic literature, interviews with family members in the media and books, and biographies from founders of the family business.

The research gathered data from interviews. Mostly, all the data for this research were from interviews with participants that the researcher obtained through a convenience sampling method.

To obtain the book objective, the researcher interviewed respondents who are involved in the family business; The participants included in the book are: the founders/ the patriarch (also known as the first generation), the descen-

dant/the successors (also known as the second-generation), the third-generation members of the immediate or extended family, and other family members or acknowledged non-family member executives or formal executives.

### **Data Collection**

Using the researcher's personal and commercial contact recommendations, the researchers engaged the participants for formal interviews through a snowball sampling method. As the large family businesses tend to keep their matters private, especially Chinese families, personal recommendations became an integral part of (Zheng, 2002; Kiong, 2005). Personal recommendations assured the level of trust to increase between a researcher and family business participants, leading to increasing the deeper level of accessibility. The researcher solicited five prominent businessmen as recommenders leading to the recruitment of interview participants, with ethical considerations maintained to protect potential participants' anonymity. This part was discussed more in-depth in the next section.

Through a snowball sampling method, the researcher interviewed four large family business. Other than the snowballing, the researcher executed opportunistic sampling and observed formal and informal gatherings of family business events and several informal conversations with family and non-family business people.

## Doing Fieldwork & Data Collection

The solution is interviewed in mediated forms, which still achieve similar ends (Lupton, 2020; Teti, Schatz and Liebenberg, 2020). Consequently, most of the interviews had to be done through virtual conferences and thus lacked an observational process. The situation is revealing, reinforcing, and catalyzing new social and cultural relations. However, the in-depth interview sessions can be acquired enriching and saturated data to explain the founders' concerns.

The disruption made everybody embrace all kinds of faster technology conference that is predicted to be adopted in the future. As a general rule, computer-mediated communication offers greater flexibility in time and location of data collection (Jankowski and Selm, 2005; Cater, 2011), which can be described as a highly socialized form of interaction (Joinson, 2005), which can also conform to health and safety restrictions.

The social distancing obligation makes face-to-face-qualitative data collection to a virtual method become a new normal. The most informant, who are mostly high profile with busy schedules, loves to interact virtually. Internet-based communication offers many opportunities, and it fits with the participants' preferences. Most of them fitted with Zoom, which offers more convenience but is considered risky. Some of them are eased with WhatsApp Video calls or

simply video calls. All platforms have given a learning curve for the researcher and participants.

Further, special consideration should be given to ethical issues and consent processes when transitioning research efforts to online venues learning curves. Despite some of these challenges, online interviewing via video conferencing provides a valuable opportunity to rise to the challenge of social distancing while maintaining our data collection efforts (Lobe, Morgan and Hoffman, 2020).

When each event or interview was completed, the researcher would take field notes on the emerging concepts and categories. All of the interviews were written on paper. Some were recorded on voice-recorder with informant consent and kept with care. The researcher then transferred the notes to a word processing tool on the computer, protected and encrypted with passwords.

The planning to carry out field observations with interviews, which is intended to contribute to theoretical completeness, and continuous participant observation (P.O.) could not be applied flawlessly due to restricting traditional face to face investigation. However, as shown by Appendix K, the Interview Protocol and Observation were conducted in an optimum way of physical distancing obligation, even though it only took note of informants' gestures and responses. Nevertheless, the interview observation protocol can be superseded by the long-life observation that the re-

searcher has been doing for the last two decades to the informant's family by noticing relationships and interactions among family members and professionals.

### **Credibility, Transferability, Dependability, and Conformability**

Qualitative researchers speak of trustworthiness, or which merely stances whether the findings are trusted. We can find several definitions and criteria of trustworthiness exist, but the best-known criteria are credibility, transferability, dependability, and confirmability (Lincoln, Guba and Pilotta, 1985; Korstjens and Moser, 2018).

Moreover, in specific to Grounded Theory methodology, according to Sikolia et al. (2013), the trustworthiness in grounded research methodology, from the perspective of a quantitative-positivist researcher, as summarized in Table 3.1, equals to internal and external validity, reliability, and objectivity. Trustworthiness and credibility match internal validity. Transferability matches external validity, and dependability matches reliability (Sikolia et al., 2013). However, these are two different research paradigms, and hence the above matching is not and cannot be a perfect fit (look at Table 1).

According to Sikolia et al. (2013), we can employ ways to increase grounded theory's trustworthiness. The following are the acceptable practices: use of audit trails, peer de-



briefers, negative case analysis, triangulation of data sources, prolonged engagement with informants, sharing with participants individual interview transcripts and emerging concepts and categories, and having a peer review the process. Sikolia et al. (2013).

**Table 1** Comparison quantitative positivist with grounded theory methodology research. Source: Compile from (Sikolia et al., 2013)

Qualitative	Quantitative
Trustworthiness credibility	Internal validity
Transferability	External validity
Dependability	Reliability
Confirmability	Objectivity

Table below is provided a listing of these steps to improve the trustworthiness of grounded theory methodology:

**Table 2** Trustworthiness in Grounded Theory Methodology Research, Source: (Sikolia et al., 2013)

Trustworthiness dimension	Steps to improve Trustworthiness
Credibility (Internal validity)	<ul style="list-style-type: none"><li>• Prolonged engagement with participants (Brown et al., 2002; Jacelon and O'Dell, 2005; Morrow, 2005);</li></ul>

	<ul style="list-style-type: none"> <li>• Triangulation of data (data from interviews, observations, documents, etc. (Brown et al., 2002; Jacelon and O'Dell, 2005; Bowen, 2009))</li> <li>• Thick descriptions of data and sufficiency of data assessment or saturation (Morrow, 2005)</li> <li>• Respondent validation of interview transcripts and emerging concepts and categories (participant checks) (Brown et al., 2002; Jacelon and O'Dell, 2005; Morrow, 2005)</li> <li>• Participant guidance of inquiry or theoretical sampling (Cooney, 2011)</li> <li>• Use of participant words in the emerging theory (Cooney, 2011)</li> <li>• Negative case analysis (Brown et al., 2002; Morrow, 2005)</li> <li>• Peer debriefers (Brown et al., 2002; Jacelon and O'Dell, 2005; Morrow, 2005)</li> </ul>
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Transferability (External validity)	<ul style="list-style-type: none"> <li>• “Thick descriptions” of the research, the participants, methodology, interpretation of results, and emerging theory (Brown et al., 2002; Morrow, 2005; Bowen, 2009; Cooney, 2011)</li> </ul>
Dependability (Reliability)	<ul style="list-style-type: none"> <li>• Examination of a detailed audit trail by an observer (Brown et al., 2002; Morrow, 2005)</li> </ul>
Confirmability	<ul style="list-style-type: none"> <li>• Examination of a detailed audit trail by an observer (Brown et al., 2002; Morrow, 2005)</li> </ul>

As mentioned, increasing the trustworthiness of grounded theory methodology by peer debriefing is a technique used by many qualitative researchers for multiple reasons. Janesic (2007) stated that an excellent qualitative researcher plans ahead and includes a space for peer debriefing or variation. Peer debriefing allows a qualified peer researcher to review and assess transcripts, emerge and final categories from those transcripts, and the final themes or findings of a given study. A peer may also conduct a peer-review selected site documents, observational notes, and possibly another researcher's written work. The peer may assess whether a researcher has missed a key point, overemphasized a minor one, or repeated one or more points. Besides,

a peer acts as a sort of critical detective and is similar to an auditor auditing the finance ledgers. Many writers have suggested that peer debriefing enhances a research project's trustworthiness and credibility (Lincoln, Guba and Pilotta, 1985; Spall, 1998; Janesick, 2007). The peer review may include information on a continuum from a complete review of every single data set to a purposeful sampling of the data sets.

Finally, the researcher can review either all parts or a portion of interview transcripts, documents, and photographs or a portion of them. The peer and the researcher provide a rationale for the selection (Janesick, 2007). Appendix A. presents the detailed procedure taken for the trustworthy check.

In seeking the right methodology to be applied and peer debriefing, and as suggested by Loy (2010), the researcher would agree with Lobe et al. (2020); Dewalt et al. (1998); and Kawulich (2005), who advised the research dissertation committee to get informed with the work of an expert in methodology within the research tradition and access the expertise. With the permission of promoters, the researchers were granted an opportunity by finding mentoring from experts such as Dr. Helen Scott of Grounded Theory Online and Dr. Jacob Tan, the GT expert from our university. (Dewalt, Dewalt and Wayland, 1998; Kawulich, 2005; Loy, 2010; Lobe, Morgan and Hoffman, 2020).

The research adopted the classic approach of grounded theory, which includes making analyses of constant comparison with memo-ing to identify the emergence and integration of concepts, parallel, iterative, and yet progressive. Glaser and Strauss (1967) stated that the constant comparative analysis is intended to establish concepts using interchangeable indicators (indices) to simplify and integrate them into a coherent explanatory theory. Every piece of data is compared with existing concepts to determine if it enhances existing categories, forms a new category, or links two of them. By iteratively comparing incidents, codes, categories, and categories' properties and dimensions, the level of abstraction increases until the theory emerges (Birks and Mills, 2015).

In conclusion, according to Schurch (2015), the quality of grounded theory methodology can be enhanced by increasing the research's trustworthiness. Using audit trails, peer debriefers, negative case analysis, triangulation of data sources, prolonged engagement with informants, sharing with participants individual interview transcripts and emerging concepts and categories, and having a peer review the process, researchers can improve the trustworthiness.

### **Protocol for Observation**

Grounded theory study must remain open to new, unanticipated findings and avoid the "hypothesis testing" style

of inquiry (Schurch, 2015). If a researcher is interested in testing hypotheses, they should use other methods. Many Researchers confuse between qualitative and grounded theory, but that is common. Grounded theory is not suited for verification/falsification of pre-existing propositions. Within current regulations and incentives in the academic field, there is a pragmatic necessity to review literature pieces before entering the field.

Grounded theory researchers must have the skill to keep their knowledge of the literature's background when entering the field. They supposedly not force their data into a prior category, which bears some resemblance to hypothesis testing. It involves employing unstructured or lightly structured interview guides (consisting of "open" questions) or protocols for observation and other data generation formats and remaining flexible throughout the data collection to capture data in a maximally open way (Timonen, Foley and Conlon, 2018).

A book using grounded theory is likely to use observation as one of the vital data collection tools. In grounded theory study, observation aims to explore the social process in human interaction. Observation methods are useful to researchers in a variety of ways. They provide researchers with ways to check for nonverbal expression of feelings, determine who interacts with whom, grasp how participants communicate with each other. Moreover, to check for how

much time is spent on various activities (Glaser, 2003, p. 36). Also, a researcher must be aware of a biased human when participating in participants' life due to his background, gender, ethnicity, the effect on observation, analysis, and interpretation. Thus, it is essential to clarify the stances of the researcher as a participant. We only observe and collect the data; however, the researcher must have the skill to keep their knowledge of the literature in the background when entering the field.

However, in times of unprecedented change and disruption due to distance, qualitative researchers face unique opportunities and challenges. The general rule, the virtual meeting, which is computer-mediated communication, surprisingly offers greater flexibility in time and location of data collection and can be described as a highly socialized form of interaction can also conform to health and safety restrictions. The flawless participant observation that was prearranged can not be applied; instead, it is substituted by the decades of a long-term relationship and long term observation of the researcher to all family members. Nonetheless, the minimum level of observation on virtual interviews still can be documented and recorded.

### **Ethical Considerations**

According to Loy (2010), there is nothing in grounded theory that entails deception, and no protected populations

are targeted for this book. Concerning participant confidentiality and anonymity of participants and data, the grounded theory focuses on patterns of behavior, not individual people. Consequently, the only purpose for identifying individual data sources would be for contact purposes in a follow-up interview. Hence, once this need has passed, there is no need to associate names with interviews. We can identify the interviewees/informant with a number. In the write-up, short quotes from the data (e.g., an interview or field notes) may be used to illustrate a concept. Individuals or any type of identifying information is never connected to quotes (Loy, 2010).

The researcher necessarily made efforts to minimize the risks of participants for this book; this is one of the key ethical considerations to do concerning Interview Protocol for the formal interviews and to reduce participants' risks, the researcher informed them of the consent forms regarding the study, requirements, methods, confidentiality of the study, risks, and advantages as well as the nature of the voluntary study. The researcher also used a PowerPoint presentation to explain the purpose of the research when doing a video call interview in an unpredicted situation such as Social Distancing due to unforeseen event. The researcher reviewed the informed consent forms, and the participants could ask some questions and obtain responses before the



participants finally signed the consent forms to start the interviews includes a preview of the consent form used.

The research also attempted to minimize the possibility of coercion to participate in the study by inviting the potential participants in person to have a meeting with them and getting the response in the following 24 hours. The researcher made the second time contacts by phone/WhatsApp messengers to know if they agreed to participate. All participation invitations, agreements to participate, and thank-you notes are recorded. By doing so, the researcher could protect the anonymity of participants from people who recommended them. All of the interview recordings were done electronically, secured, and encrypted with passwords.

Then, the researcher labeled the transcripts and field notes with de-identified alphanumeric codes for further protecting confidentiality. The researcher minimized coercion by confirming that no financial compensation was offered to the participants to participate.

### **Use of Computer-Assisted Software**

The research utilized several packages of computer software to store, organize, and do a presentation of the study. However, to learn further about classical grounded theory, we found that Glaser (2003) supports his argument against using the software. Glaser even dedicated two chapters to express his disapproval of software. By the way, Glaser re-

jects not only the use of software but also the use of recording devices (Glaser 1998). One of the arguments that he and Holton makes is the inability of computers to replace human thinking. "Experienced classic grounded theorists continue to await a 'package' that can replicate the complex capabilities of the human brain for a conceptualization of latent patterns of social behavior" (J. A. Holton, 2007, p. 287). Another reason Glaser was against the use of the software is a quote from a Ph.D. student who wrote: "I wrote day and sometimes night. I got into the 'drugless trip' and eventually, the core variable of balancing came to me almost as a revelation. Joy to the world the core has come" (Loy, 2010).

Besides, our mentor from Grounded Theory Institute also inferred that the commercial software is not necessarily useful when she suggested me to update the constant comparison (document to raise the conceptual level as we progress with analysis. She suggested that a constant comparison document is useful at the moment and in the future. As the document (or whatever system you use) grows, we might merge codes; thus, the constant comparison is dynamic, and fluid and the codes are slippery. "This is why it is important not to lock incidents and codes up in commercial software as the relationship can solidify too quickly whether they are the optimal relationships or not" – a note by Helen Scott as stated on her email as of July 31, 2020, 10.43 PM.

In conclusion, the researcher did not rely on any software on this research, yet solely concentrates on classic grounded theory methodology to memoing and constant comparison and the emergent of concepts and integrating the concepts.

### **Summary**

This chapter is about the employed research methodology of the classic grounded theory, to help the researcher generate a substantive theory for Indonesian large family businesses. The researcher explained the study method using classical grounded theory, starting with data collection procedures until the emergence of the theory and extending the existing literature reviews. Next, the sources and methods for collecting data were also discussed in the sections and ended with a review of ethical issues. This chapter then concluded with the researcher's viewpoint and the use of computer-aided software for this analysis.

# CHAPTER 3

## THE CONCEPTUAL DEVELOPMENT PROCESS

### Introduction

While the research described the methodology of classic grounded theory for this book in the previous chapter, the current will discuss the data collection results from the study. The research findings were presented in order to respond to the research questions posed in the first chapter.

To explain the process of conceptual development undertaken, the researcher will describe it into three parts. The first part shows the data collection. The second part explains in search and understanding of procedures in the classic grounded theory method containing constant comparative analysis, the memo writing of concepts, the emergence and integration of interconnected concepts. The next section of this chapter presents sufficient knowledge about the methodology of classic grounded theory and its implementation. The fourth part in this chapter shows the result.

## Data Collection

The research began contacting the initial five informants/participants/respondents (Informants) from the four Large Family Businesses. Perform research has provided unprecedented insights into qualitative, especially grounded theory research approaches and methodology. To virtually replicate the face-to-face interview, video-calling with Zoom or text-based instant messaging, especially WhatsApp, has been the preferable data collection method. Video conferencing is a reasonable substitute for in-person interviews. It enables data collection across vast geographical areas even though social distancing policies are not in place. It is supposed to minimize the foreseen issues, such as participants who couldn't use the technology or have weak WI-FI connectivity. Due to border restriction and domicile, several informants were followed up with cross-border interviews.

In conjunction with this research, the purposive sampling group included participants from four Large Family Businesses in Indonesia. The sample of Large Family Businesses fit with criteria set forth. The business lines are so diverse from maternity to the cemetery, media diversified, property diversified, pharmaceutical, and health care provider. Referring to Gimeno et al. (2010), all forms of the family business serve as all large family business samples chosen to fall under the corporation model. They have the characteristics as follows: their complexity in structure, the

high degree of a family member in top management collaborates with non-family business professionals, and the interlocking structure of shareholders, primarily.

The total informants were twenty-seven, which most of them were contacted simply through the WhatsApp Messenger service. The message always stated the research subject and requested the informants' willingness to become respondents. Most of them agreed and provided the day and time to be interviewed. Most participants agreed to perform the interview virtually. Zoom Video Conferencing was used in most of the interviews, which helped the researcher to clarify the study and follow the procedure. Due to the participants' nature, the consent is taken by obtaining their print screen of the invitation requests, thank you note, and Zoom or WhatsApp Call photos after interviews. In the post-interviews, the researcher always conveyed gratitude and send the pictures' print screen. All data and protocols are kept as valuable records for five years in the secure safety box.

The handwritten memo has been mainly composed in English. Later stages in methodology, for example, in the coding, constant comparison, and the written memo, were all in English.

The research consistently followed the planning that this book seeks out two significant figures. First, the research seeks out the founders (if still available) who established the business alone or along with others (either male or female).

Secondly, the research seeks out any person who has access to the founder when he/she started the business and work for him/her in the founders' early years.

Consistent with the informants' data, the researcher also obtained data from books written regarding the Founders and their Family Businesses. The books enriched understanding of any statement, sentences, and word of the family members' informant interviews. Due to the accessibility and gained the researcher's trust, there was no barrier to the appointment request.

### **Methodology Classic Grounded Theory in Practice – in search of the right methodology**

As suggested by Loy (2010) and Schurch (2015), who had experience attending the Barney Glaser Seminar and was suggested by Barney personally, the researcher adhered to their advice to “not taping and transcribing interviews yet taking note a lot.” As suggested by Barney, using ourselves as 'tools' persuaded the researcher to take notes when conducting interviews and then continuously compare and give many codes. Barney urged researchers to do “Constant Comparison, Memoing, Emergence, and Integration” and follow the dictum that “all is data.”. Hence, the Grounded theory is a research method that creates a theory directly from data. The methodology is distinguished by its constant and rigorous comparative analysis, which results in the con-

ceptual integration of core and related/integrated concepts, producing a hypothesis that explains the relationship between concepts or patterns of social behavior and forms the basis of a theory (Glaser, 1998; Holten, 2011). By utilizing a constant comparison method for analyzing data in a substantive area, grounded theory produces theory that can explain and hold meaningful relevance to a social phenomenon for scholars, students, and non-specialists (Glaser & Strauss, 1967, p. 3). Conceptual categories are generated from data and facilitate the theoretical framing of a social phenomenon. Theoretical categories will not change, while the individual data sets may change within a substantive area (Glaser, 1998).

Consequently, as possibilities presented themselves, the researcher started to include data from multiple sources, became excited like popping popcorn, and ideas could finally emerge. Barney described the incident as "theory building" and not "quantitative analysis." When the researcher had the opportunity to meet Loy in person, Loy (2019) remarked that there are at least for reasons for researchers not to tape or transcribe interviews as follows: (1) that the purpose of grounded theory is a theoretical conceptualization; (2) transcribed interviews may cause the researcher to be overwhelmed with data and prevent the researcher from describing the conceptual analysis; (3) unnecessary taping and transcribing forestall can consume the



researcher's time in theoretical sampling; (4) the process disables the researcher to make a conceptual analysis and trust his or her creative pre-conscious processing for theoretical emergence (Loy, in a personal meeting with the researcher at Kuala Lumpur, 6 Nov 2019).

As Dr. Loy suggested, the researcher took many notes and used them as "a tool," then conducted constant comparison and gave many codes. Following the interview, reviews and transcribed by typing for coding were made.

After finishing the interviews and scripting them using Microsoft Word, the researcher presented the interview, and "limited," due to social distancing obligation. In the interview, the researcher explained his background of the book, methodology, and research objectives to the respondents. The researcher also asked for their consent verbally because most of the respondents were inaccessible prominent people. It would have been almost difficult to sign the Consent Letter. The rigid procedure would have driven them away. Therefore, because of the informants' nature, the verbal consent, taking pictures after meeting, sending 'thank you' notes using WhatsApp Messenger, and sending the screenshot photos taken at the end of the sessions became the consent.

Having scripted the interviews from informants (interviews were taken earlier) was overwhelming and confused the researcher on furthering this precious information. Nobody has ever obtained it in Indonesia due to having no ac-

cess and the trust to gain the information. The researcher recalled what Loy said, amid the confusion, that the researcher must stay close to the methodology. The researcher asked promoters permission to seek advice on the right methodology. With the permission of promoters, the researchers were granted learning opportunities by finding mentoring from the experts.

The researcher then interacted with fellow Grounded Theory Institute in the USA fellows if possible for their guidance in the research methodology through this book's duration (<http://www.groundedtheory.com>). The researcher followed the notes from one of the prominent Classic GT researchers:

*"...also sought top expertise in CGT that was unavailable at my university. These experts, particularly fellow grounded theorists, served as mentors, offered me support and advice, and challenged me to learn. There are many ways to access grounded theorists and CGT expertise. I recommend reading the Sociology Press books and the Grounded Theory Review and contacting authors whose work you admire. Locate and review completed CGT dissertations, analyze these documents in terms of their structure, degree of conceptualization, and their strengths and weaknesses (Glaser, 1998).*

You can also connect with CGT experts through the Grounded Theory Institute Forum and seminars (<http://www.groundedtheory.com/>). Most importantly, find a men-

tor for your work. Seek constructive feedback and take this feedback seriously (Roderick, Carol, 2009)“

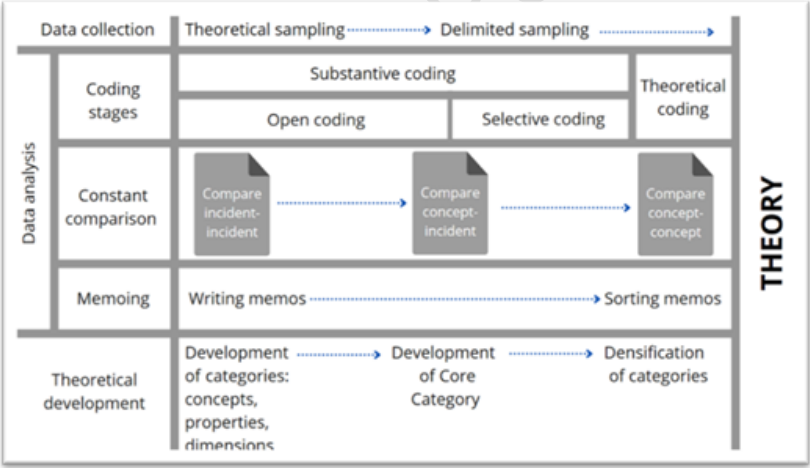
Having surfed [www.groundedtheory.com](http://www.groundedtheory.com) and found an avenue to learn from one of the experts, the researcher found the information regarding mentoring and stated Dr. Helen Scott at <http://www.groundedtheoryonline.com/>. The researcher had successfully contacted and made her agree to become the mentor for four sessions. The researcher learned that the research questions are the right research questions to define Indonesian large-family businesses' main concern for sustaining and preserving their company inter-generation. At every session, she allowed the researcher to get even more familiar with coding, constant comparison, and memoing simultaneously.

Dr. Scott emphasized that Constant Comparison is the way for analysis and conceptualization. Every set of data is compared to existing concepts to see if it expands existing categories, form new ones, or links them. The abstraction level rises before the theory emerges by iteratively comparing events, codes, categories, and categories' properties and dimensions. Subsequently, Dr. Scott typically offers some guidance on more activities to sharpen the researcher's ability after the mentoring session, such as memo-ing immediately after the constant comparison to increase the book's conceptual level and progress. Again, Dr. Scott reminded the merging codes of present and future constant compari-

son because it is fluid, and the codes could be slippery. As she mentioned, it is important not to lock incidents and codes up in commercial software as the relationship can solidify too quickly whether they are the optimal relationships or not (Dr. Scott, H., Personal Communication, July 31st, 2020). The software tends to solidify the relationship too quickly regardless of their optimum relationship. The researcher then decided not to use the commercial such as NviVO.

The statements above align with Glaserian's belief that concepts emerge by comparing incidents with other incidents. Then, from the comparison of concepts with more incidents, categories emerge. A process of higher theoretical development, densification, and saturation is included. Lastly, by comparing categories, theoretical integration works. Helen argued above that memo-ing, since ideas are fragile, should be written down at the earliest possible moment. They should take precedence, simultaneously with comparing incidents, because it is the actual write-up of what is emerging from the data and the analysis. Data is always available and can be analyzed at any time. Nevertheless, ideas can vanish if we do not make a note in the memo. During the mentoring session, the researcher further understood that the above procedure is in line with Glaser's suggestion (1978). Glaser (1978) proposed that the codes are sorted everywhere, and anything relevant to the core catego-

ry is sorted. Further, when sorting and including codes in the sorting, he suggested writing more memos to establish new relationships between categories (theoretical codes) and reach density and saturation. As for each memo, by continually questioning and comparing each concept with the emerging outline, the fitting action ('where does it fit in?') occurs as the analyst goes back and forth as he sorts through outline and ideas (Glaser, 1978, p. 123). The following Figure 4 highlights the Illustration of the Classic Grounded Theory procedure, as the researcher learned from mentoring and implemented it along the way and followed it up.



**Figure 4** Illustration of the Classic Grounded Theory procedure adopted from Helen Scott Presentation 6th July 2020 and Lim (2016)

Additionally, Dr Scott added “interchangeability.” in the process of theoretical samplings. As learned in the process of mentoring, constantly comparing incidents will generate new properties of a concept. It can only go so far until the researcher encounters saturation of ideas due to indicator interchangeability (incidents). This interchangeability also makes the theory more transferable to other subject areas and makes room for formal grounded theory development.

### **Constant Comparison, Memoing, Emergence, and Integration**

The research found that grounded theory methodology involves instantaneous, simultaneous, iterative, and yet progressive constant comparative analysis with memoing for the emergence and integration of concepts. The constant comparative analysis is the data-analytic process where every piece of interpretation and its finding is compared with existing findings because of its emergence from the data analysis. The researcher acknowledged that constant comparative analysis could help develop the emergence of concepts through interchangeable indicators (indices) to integrate into a coherent explanatory theory (Glaser & Strauss, 1967). Constant comparison, written in document so-called C/C document, is useful for reference while implementing the constant comparison and as a reference in the future. We might merge codes as the document grows, which explains

why the constant comparison is dynamic and fluid, unlike the codes which are slippery. As advised by Glaser & Holton, 2004, p. 14, the researcher made comparative analysis by employing the following theoretically explaining questions as part of the process in guiding the coding: "What is the data a study of?", "What category does this incident indicate?", "What is actually happening in the data?", "What is the main concern being faced by the participants?", and "What accounts for the continual resolving of this concern?".

The research conducted the coding of data interviews that could be generated from the interview data and two files (videos) from the previous interviews with the prominent informants. While coding the data, the researcher took note in the C/C document - comparing incidents, as this will generate further ideas, which the researcher wrote the memo straight away since ideas can be very fragile. The conceptual memos of comparative analysis are carried straight away and the questions and ideas that arise. The researcher was able to focus theoretically on the data and assess alternative ways to code and compare it as a result of the memoing activities. (Glaser & Strauss, 1967, p. 107). Glaser (1978, p. 84) explained that a memo could be in the form of a sentence, several sentences in the form of a paragraph, or several pages that extracted the data-based momentary ideation on the researcher's mind with a little elaboration of the concept.

The researcher could generate a separate memos from the initial of collecting data until the theory building.

Theoretical saturation is achieved through constant comparison of incidents (indicators) in the data to elicit the properties and dimensions of each category (code). This constant comparing of incidents continues until the process yields indicators' interchangeability, meaning that no new properties or dimensions are emerging from continued coding and comparison. At this point, the concepts have achieved theoretical saturation, and the theorist shifts attention to exploring the emergent fit of potential theoretical codes that enable the conceptual integration of the core and related concepts to produce hypotheses that account for relationships between the concepts, thereby explaining the latent pattern of social behavior that forms the basis of the emergent theory.

Memoing occurs all the way; however, it is initially at the substantive coding level and proceeds to higher conceptual abstraction levels as coding proceeds to theoretical saturation. The theorist begins to explore conceptual reintegration through theoretical coding.

The classic grounded theory is not easy for a novice researcher, especially for me. Indeed, this requires the researcher to understand the distinctions between substantive coding and theoretical coding, between open coding and selective coding, and the cycling nature of constant compari-



son and theoretical sampling in progressing the analysis toward higher levels of conceptual abstraction, core emergence, and theoretical integration. Beyond understanding these distinctions comes the ability and the confidence to employ all aspects of coding as developed over time and with continued experience. Lastly, the ability to intuitively trust in knowing when to move from one stage in the process to another builds with experience as the analyst gains confidence in exploring and confirming conceptual ideas as they emerge.

After the execution of open coding, the interconnected codes went through further comparative analysis and memoing, which resulted in a reduced set of higher-level conceptual codes. The researcher viewed the broader set of original codes as indexes or properties of the second set of codes. However, the remaining initial codes that did not fit into the higher-level ones were briefly set aside for further necessary integration upon another theoretical emergence.

A researcher is said to have done the substantive coding when he or she has finished the process above. The researcher in this book has worked with the data directly, breaking them down and analyzing them from the open coding process to the theoretical sampling, and eventually, selective coding. The open coding functions help generate the emergence of core categories and their interrelated concepts. In contrast, theoretical sampling and selective data coding help

determine the core and related concepts. The process constant comparing of incidents continues until the process yields the interchangeability of indicators, meaning that no new properties or dimensions emerge from continued coding and comparison. Theoretical saturation is achieved through constant comparison of incidents (indicators) in the data to produce the categorized properties and dimensions of each code.

As the researcher proceeds with constant comparison, a core category begins to emerge. This core variable can be any theoretical code: process, type, continuum, range, dimensions, conditions, consequences, etc. Its primary purpose is to incorporate and saturate the theory. In appearing to illustrate how the main concern is processed or addressed continuously, the core becomes the object of more limited selection and coding efforts. We found three potential core categories, ten sub-cores, and many concepts.

The researcher started looking for new insights for further theoretical sampling because the theoretical sampling with participants did not add new insights to the concepts. The researcher consulted literature explicitly involving to the large family business, family business succession, familiness, social-emotional wealth, transgenerational; entrepreneurship, and sustainability because these noun phrases were the emerging concepts that appeared. The relevant works of literature (Bond, 1991; Bond & Hwang, 1986; Han-

dler, 1990; Tsao, 1993; Redding, 1993; Habbershon & Williams, 1999; Stafford et al., 1999; Habbershon et al., 2003; Ward, 2004; Miller & le Breton-Miller, 2005; Tong, 2005; Carstens, 2005; J. C. Collins et al., 2005b; Yan & Sorenson, 2004, 2006; Gomez-Mejia et al., 2011; Berrone et al., 2012; J. Collins, 2016) are integrated into the theory, by sorting it with the memos.

Up to the point where the saturation of theoretical concepts occurred, the researcher explored the emergent synthesis of potential theoretical codes, making it possible to produce the conceptual integration of the core and related concepts, accounting for connections between concepts. Thus, as the emergent theory framework, describing the latent pattern of social behavior becomes the founders' main concern for Indonesian large family businesses.

The categories emerged as the researcher did further comparative analyses with data from the literature and through the sorting of memos. Higher-level conceptual codes have been assigned to these categories. As core categories, intergenerational parenting, harmonizing, and collaborating emerged. Theoretical coding is used to link the different subcategories and concepts.

## **The Conceptual Emergence of Intergenerational Perpetuating through Parenting, Harmonizing and Collaborating**

The researcher did the coding of interview data. A total of codes were generated from the all interviews with the prominent informants. This section will show how the pop-ups of incidents, the development of ideas, the emergence of concepts and categories were more fundamental to the core categories. Next chapter will elaborate deeper on the whole-some of theory. This section offers an illustrative sample to only outline the procedure, particularly the memos showing the development of emerging and more fundamental ideas, concepts, and categories.

As it was written at the start of the research, this research uses the grounded theory methodology to discover the founders' Indonesian large-family businesses' prime concern to maintain the overgeneration of family businesses. The grounded theory seeks to explain from the participating actors the action in a substantive field. As the researcher carried out constant comparative studies, each category's basic characteristics are subsequently identified, the interconnecting relationships between the categories are recognized, and pattern recognition is promoted. The core category captures the main concerns of participants and accounts for most differences in a behavior pattern. In the above memo, we can conclude they have a similar main concern and have con-

tinued a similar trend. The earlier and later memo reveals the interpretation revolving around the participants' main concern, whose conduct consistently resolves their problems. The core variable is their continuous resolving. It is the major driver of the most of the actions observed and discussed in a substantive area. What is going on is what is important. It appears as the defining factor (Glaser, 1998, p. 115).

### **Coding, Properties, Concept: Practicing the Right Methodology of Classic Grounded Theory**

Dr. Jacob Tan, a fellow writer who has undergone his thesis using Constructivist GT, also found that it was a good idea to learn from the expert. It is conformed with the researchers' early seeking grounded theory methodology. The enlightenment came when the researcher remembered what Dr. Jonben Loy stated. Dr. Loy shared the advantage of using the Classic Grounded Theory. He advised that the researcher could attend the workshop. Moreover, the researcher then would be able to consult the research with them and register it, which no other GT has."

The researcher eventually obtained the link on The Grounded Theory Institute website to contact Dr. Helen Scott from Grounded Theory Online, one of Grounded Theory Institute's fellows. She confirmed to review the research and agreed to become the mentor for learning the

correct methodology of Classical Grounded Theory for the researcher. The first enlightened the researcher's knowledge, and a wish to have sought the advice earlier came across the researcher's mind. The researcher was encouraged to remain conceptual and to keep memoing, the researcher wrote a memo after mentored sessions lightheartedly.

The researcher and the mentor practised making constant comparison analysis and memoing, and the researcher discovered data transformation, such as "pure descriptions" or "storytelling," to be included as the substantive concepts and theoretical codes describing what has been evolving in the main concern's recurrent solving.

The constant comparative data analysis method in the grounded theory has been one of the primary principles in generating a theory. It makes the identification of a core category possible to become a key part of the process. Glaser (1978, p. 93) asserted that the theory produced resulted from processing around a core category and served as the main theme of the substantive area of inquiry. The core category captures the research participants' main concerns, and it accounts for much variance in behavior patterns.

The concepts of harmony and collaboration have emerged when coding and evaluating their inter-relationships to move data to a higher abstraction level. Since coding aims to identify as many tentative categories and their potential properties, the researcher closely followed the metho-

dology and took further selective coding and theoretical sampling steps.

### **Selective Coding and Theoretical Coding**

At this point, except for the ability, the researcher almost needed to generate a theory. The next steps were to selectively code 'perpetuation'-related incidents to saturate those codes and theoretically sample for comparison groups within the family business's substantive population. By revisiting the data from the initial interviews, the researcher then decided to start selective coding. The researcher found it easier to meet virtually and to discuss regardless of the distance. However, most informants feel comfortable with the invitation to speak using video conference and similar video calling with a new-normal habit. The researcher called five informants who represented four family businesses and all three generations and discussed it.

The following is a memo showing Core Categories' development and their subcategories/concepts due to selective coding. The method is parallel to the hypothesis that the purpose of the research is to discover a core variable as it resolves the main concern (Glaser, 1998, p.115) that any theoretical code can be a core category: process, condition, two dimensions, result, and others.

## Receiving Feedback on Theory and Methodology

Among other items, to ensure trustworthiness is to verify that an observer examines the audit trail. We should employ ways to enhance the reliability of grounded theory, according to Sikolia et al. (2013). One of the Promotors suggested implementing the “backtest” to confirm back to the respondents. Subsequently, the researchers received support from Dr. Jacob Tan and Dr. Helen Scott of the Grounded Theory Center. Another confirmability checks experts, family business advisors, and researchers for analytical 'objectivity.'

The researcher discussed the result with the informants, the researcher could check the confirmability and the credibility of the result. Through conversation, the researcher presented the result with him and the emerging theory title, after which he immediately exclaimed, as Glaser (1978) defined as “grab, fit and relevance” for all people studying large family businesses.

The researcher also presented the result and the title of the emerging theory to a mentor and promotor when taking the halted doctorate program at the University of Melbourne 2 decades ago, Professor Howard Dick. Howard is a Professor fellow in the Faculty of Business and Economics at the University of Melbourne and Asia, a specialist working primarily in Indonesia and the Southeast. He also gave positive feedback “I am amazed and overwhelmed. I have never



done Grounded Theory, but I like how the theory tries to revolve around the main concern of the participants whose behavior continually resolves their concerns". He also addressed a corporation's issue and its abusive conduct and compared it to the family business attitude. Nevertheless, he advocates that family business conforms to growing shareholder value compared with what large corporations do.

Dr (HC) Setyono Djuandi Darmono, Founder and Chairman of Jababeka Group and founder and Chairman Board of the Trustee of President University Foundation. He acclaimed that this research is world-class, using a serious and credible methodology. The research result is believed to be a masterpiece before his eye. He also suggested that the researcher spend more time advocating family businesses to the Indonesian Government so that Indonesian's family businesses can grow into perpetuation.

The researcher argued that Grounded theory is not a preconceived theory or a priori theory. It is a theory grounded in data that is methodically acquired during the study (Glaser & Strauss, 1967). Nevertheless, he praised the researcher for successfully obtaining all the sensitive information that nobody had ever done so far. As a result, it creates the trustworthiness of the research.

The researcher then consulted with Dr. Scott, the mentor, to inquire whether the GT understudy solution becomes the core category. She responded:

*“The key is the word often. So the answer is that the solution to the problem is often the core category but not always. It does not help that Barney appears to contradict himself here.”*

The above description complied with Glaser's findings. Glaser (2001, p.99) claimed that this awareness revolves around the participants' main concern, whose behavior consistently resolves their concern. The core variable is their continual resolution.

Another question the researcher inquired about is whether the core category is better to be one or more. In discussion with promotor and mentors, the researcher found that the Key Behavior of Perpetuating the business is Parenting to Perpetuate and the Harmonizing to perpetuate and Collaboration of Family Non-Family Perpetuate, to resolve their main concern. The researcher resolved that the analysis should involve both behavior: parenting to perpetuate and to collaborate to perpetuate. The researcher, however, required the concept that characterizes both trends.

The researcher obtained more methodological guidance from promoters and mentors. By integrating the theory with theoretical codes, working on the abstract could further enhance the researcher by shifting from concrete explanation to more abstract conceptualization. The researcher subsequently reviewed the book on theoretical coding by Glaser (2005) again and returned to the written memos for further sorting and comparison. Further notes refined some of the

concepts. The essence of the theoretical enhancement was the more logical integration of concepts into emerging theoretical codes.

### **Emergent Theoretical Codes**

The result of emergent core categories convinced the researcher that the resolution of Indonesian founders Large Family Business's main concern to preserve and sustain its business over inter-generation lies in the core categories of parenting, harmonizing, and collaborating to perpetuate. The three core categories explain how founders respond to their main concern: a fundamental social process, including central structural social processes and fundamental social psychological processes.

One of the most challenging areas, particularly for inexperienced researchers, including the researcher, is the theoretical coding method, which involves finding the theoretical code incorporating the emerging substantive theory.

The possible reason for this confusion is that many researchers have not understood that classic GT (also known as Glaserian) and Straussian GT are two very different methods (Hernandez, p. 44). As a result, many research articles list references from Glaser and Strauss as their methodological underpinning studies. However, Glaser (1978) clarified that theoretical coding had not been a part of Strauss's approach to grounded theory data analysis (Strauss & Cor-

bin, 1998). Hence, The enhancing substance to the theory integrates the concepts more abstractly through emergent theoretical codes.

The researcher remarked that grounded theory is the sophisticated methodology that a researcher might have to avoid. Moreover, not too many researchers have expertise in the methodology. Some people debated without understanding that the expert nevertheless argued for the idea of Glaserian, Straussian, and Charmaz even within the dictum of the grounded theory itself. Because of its meticulous method, almost as religious dogmatic, the Glaserian or the Classic should probably be avoided, among others. However, the researcher needs to write all of the applied methodology experience by receiving advice from the promotor and two examiners. Grabbing the result is such an encouragement to the researcher.

The researcher followed the procedure carefully, sought the expert's time, and obtained a mentor from offshore to understand the approach to data in the methodology of classic grounded theory, consisting of two fundamental processes. Indeed, it is not a comfortable journey. First, the data is broken down into substantive codes (either in vivo codes or sociological constructs) during the open coding process as the interview. The researcher then coded the field notes and/or other written data in a line-by-line manner and compared one incident with another to look for similarities and diffe-

rences (Glaser, 1978) until the researcher found the core category. As selective coding results in saturation of all categories by theoretical sampling, the researcher then built up the substantive codes into a substantive theory. The evolving theoretical code incorporates them into a coherent framework.

### **Substantive Theory of Intergenerational Perpetuation: An Overview**

This book generated a theory of intergenerational perpetuating that addressed participants' main concern in this book: Perpetuating the business. Intergenerational Perpetuation is the conceptualization of the founders/parents of the large family business in Indonesia preparation to transfer of the family business to a later generation in order for the family to strive the business and involvement of family members. Using classical grounded theory and derived from convenience sampling of 4 large family businesses in Indonesia shows that family business transfer is a lifetime and continuous process. The family must address and foster the soft elements of the transfer process utilizing parenting to equip the next generation. The parenting intends to equip, foster, molding and cultivate the next generation with the soft elements of the process: modest and robust character, embracing founders' compelling purposes, adopting family values, embracing education, gaining outside experience. As earlier as possible, the family also needs to formalize the

family constitutions to regulate family governance and involvement. Furthermore, a business family can develop their family dynasty into perpetuation, if only when it embraces the understanding that harmonizing among the family member is a must to prosper and adopt the understanding that they can not do everything by themselves. They need non-family members, executives, or employees to collaborate to endure the business.

Langgam Pustaka

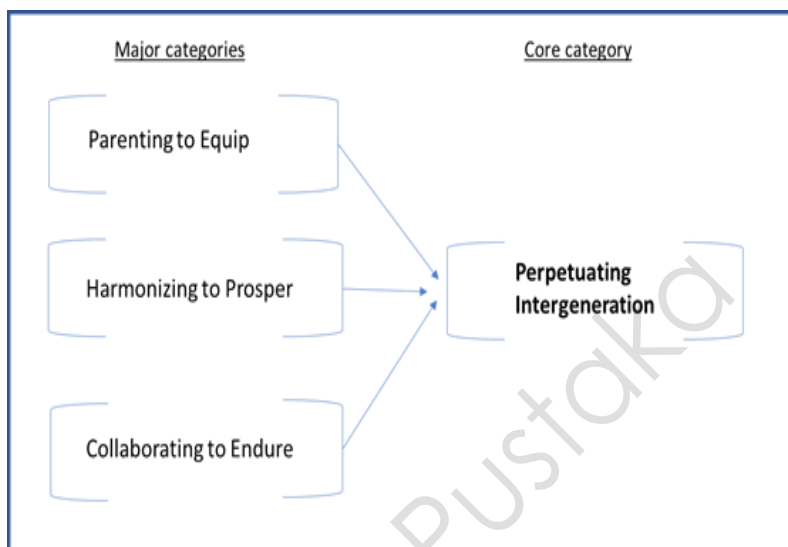
# CHAPTER 4

## THE THEORY BUILDING PROCESS

### **The Core Category: Perpetuating Intergeneration**

The substantive Theory on Intergenerational Perpetuation is based on the main category of Perpetuating Intergenerational Business in this report. The core category of Perpetuating Intergenerational conceptualizes 1) the main concern of the founders of a family business and the participating family members, and 2) and their continued resolution of this concern in the form of a process parenting to equip the next generation with a particular skill, character, and value in order for them to be the next leader. In equipping the skill, the founder forging their character and molding them strategically. They also encourage to harmonize among the family members and work toward the business's sustainability by collaborating with non-family members, thus helping the firm attain healthy performance.





**Figure 5** The substantive theory of the Theory on Intergenerational Perpetuation of Large Family Business showing the core category as composed of three major categories

The three major conceptual categories of Parenting to Equip, Harmonizing to Prosper, and Collaborating to Endure, represent three overlapping stages that individuals pass through in the process of Perpetuating Intergenerational. The Parenting strategy is included forging the children's character, molding strategically, and cultivate their entrepreneurship skill to become a future leader. Most of the family emphasize the importance of raising and educating a child from birth until adulthood and making sure that the

expected traits and family values are acquired during one's childhood training. The preparation to become successful successors must be well equipped with a righteous character, specific skill, values, and embracing founder compelling purposes. Furthermore, this process must be initiated as early as possible, and the equipping process must be repeated inter-generationally.

The major category Harmonizing to Prosper refers to actions of keeping family intact and cohesiveness. They take care of each other and understanding that harmony is essential to prosper. They understand that overlapping professionals with blood affiliation make the relationship more complex. The further generation with additional of siblings and spouse makes the relationship even more complicated; however, they must understand that “blood is thicker than water”, relationships and loyalties within a family are the most important ones, compare to the business. To be realistic, most families create the structure called “Decentralizing Autonomous Structure” by splitting the business or geographically, yet they keep accountable each other. In order to harmonize, it is essential to cast a Family Constitution that regulates family members' rights and obligations of family members and involvement in family involvement, among others. Nevertheless, if we cannot achieve perfect harmony, this may create power-sharing harmoniously and conflict control.

In the major category of Collaborating to Endure, the founders realize that collaborating with employees who fit the business's culture, strategy, and operational requirements is necessary. The family members' and key non-family members' collaboration is crucial, as the family members realize they cannot work independently. They need their non-family executives to work hand-in-hand to build their businesses. The founder and their predecessors understand that their non-family member's professionals are the vanguard of the firms' sustainability; hence they must grant them room to perform, esteem, and respect. Merit-based professionalism must be adopted, so loyalty and accountability can be expected. With merit-based professionalism, the collaboration of family members and non-family members produces equality and fair reward. The professionals will work wholeheartedly as family members to leave their legacy.

The core variable that emerged from this classic grounded theory study was Perpetuating Intergenerational. Since this was a grounded theory study, the core variable emerged from data collection, constant comparative analysis, memoing, and theoretical sampling. Classic grounded theory or the Glaserian model provided the framework for the research design of this book.

Thus, in this book, the process is the main theoretical code, while complimentary theoretical codes associated

with the major categories include context, structures, models, practices, mechanisms, strategies, stages, trajectories, and conditions. The major categories underpinning Intergenerational Perpetuation Theory, consisting of Parenting to Equip, Harmonizing to Prosper, and Collaborating to Endure, and theoretical codes are summarized in table below.

**Table 3** The Major Categories and Theoretical Codes that Underpin the Theory Intergeneration Perpetuation.

Major Categories	Theoretical Codes	Description
<u>The Core Category:</u> Perpetuating Business Intergeneration	Basic Social Process	The intergenerational perpetuation of large family businesses' process by founders and their family, concerning their businesses' sustainability and the continuation of family members' involvement.
<u>Major Category 1:</u> Parenting to Equip	Values Forms Stages	The process of developing a particular skill,

	Content	character, and value through Parenting to Equip, in order for them to be the next leader by Forging their Character, Moulding them Strategically, and Cultivate their Entrepreneurship skills.
<u>Major Category 2:</u> Harmonizing to Prosper	Values Context Structures Processes Practices	The circumstances must be maintained in order to pursue prosperity, even though there are complex relationships with siblings and cousins or might be with their spouse, with the belief that 'blood is thicker than water'. To achieve the conditions, The family Constitution must exist, and the split

		<p>structure such as Decentralizing Autonomous Structure is mandatory to be applied. The Harmonizing leads to the preservation of prosperity.</p>
<p><u>Major Category 3:</u> Collaborating to Endure</p>	<p>Strategies Mechanisms</p>	<p>Family members cannot only execute the deployment of business strategy alone. The family member needs to entrust the professionals as Vanguard of the business's endurance by giving them self-esteem and respect so that the Collaboration between family members and non-family members will</p>

		endure the business sustainably.
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In the next section, the emergence of the core category in accordance with Classic Grounded Theory principles is discussed.

### Emergence of the Core Category

Perpetuating Intergeneration was identified as the core category in this book as it is the category that is most able to meet these criteria. Perpetuating Intergeneration occupies a central position among the major categories that emerged in this book as it is most able to relate meaningfully and easily with these categories. It is also able to integrate and subsume the other major categories.

Perpetuating Intergeneration, this book's core category is a basic social process (Glaser & Strauss 1967). Basic social processes are described as pervasive,

*"...fundamental, patterned processes in the organization of social behaviors which occur over time and go on irrespective of the conditional variance of place"* (Glaser & Holton 2005).

Stages are a key feature of a simple social mechanism that allows researchers to distinguish and account for differences in the problematic pattern of behavior under investi-

gation (Glaser & Holton 2005). While at least two clear stages should be present to allow a basic social process to process out (Glaser & Holton 2005), the process of Perpetuating Intergenerational Business in this book consists of three overlapping stages: Parenting to Equip, Harmonizing to Prosper, and Collaborating to Endure, which account for the behavioral patterns of large family business participants.

Additionally, Perpetuating Intergenerational Business's basic social encompasses basic social structural and basic psychological processes (Glaser 1978, p. 102). A basic social structural process refers to social structures that accommodate a process, such as Working hard to Perpetuate intergenerationally and Enduring the Business. In contrast, a basic psychological process refers to individual processes such as Parenting, Harmonizing, and Collaborating (Glaser 1978, p. 102). The major categories Parenting to Equip, Harmonizing to Prosper, and Collaborating to Endure present these social structural, and social psychological processes in terms of the Values, Forms, Stages, Trajectories, Transitions, Conditions, Context, Structures, Models, Processes, Practices, Strategies Mechanisms in the process of Perpetuating Intergenerational Business.

The core category Perpetuating Intergenerational Business emerged from the process of Constant Comparison of incidences and concepts and memoing. It is one of four major categories conceptualized from initial codes yielded from



the data. Constant Comparison and memoing Higher Lever Conceptual Codes to be developed from all refined codes, which served as properties of these categories. The categories and sub-categories were then ordered into four major categories, with the initial categories/ conceptual codes about each major category ordered into its subcategories. Although most categories are discreet, the presence of overlaps, particularly 'Enduring the Business' and 'Working Hard to Perpetuate Intergenerationally', suggests the process nature of the emergent theory. The four major categories were Perpetuating Intergenerational Business, Parenting to Equip, Harmonizing to Prosper, and Collaborating to Endure, with Perpetuating Intergenerational Business as the core category as it is most able to meet the criteria set forth by Glaser (1978, pp. 94-95), discussed earlier.

The determination of Perpetuating Intergeneration as the core category was done under the criteria set forth by Glaser (1978, pp. 94-95) as listed below:

1. It must be central in that it relates to as many categories and their properties as possible (more than other candidates for the core category).
2. It must occur frequently
3. It takes more time to saturate the core category than other categories
4. It relates meaningfully and easily with other categories
5. It has clear and grabbing implication for formal theory

6. It has considerable carry through
7. It is entirely variable
8. It is also a dimension of the problem at hand

Perpetuating Intergenerational Business was identified as the core category in this book as it is the category that is most able to meet these criteria. Perpetuating Intergenerational Business occupies a central position among the major categories that emerged in this book as it is most able to relate meaningfully and easily with these categories.

It is also able to integrate and subsume the other major categories. The evolution of parenting, harmonizing, and collaborating into perpetuating intergenerational business undertakings located in founders/ parent effort to solve the main concern is a noticeable and cohesive pattern throughout the data. The category Perpetuating Intergenerational Business emerged quickly from many codes, particularly a key code called 'Working hard to perpetuate intergenerationally.' which occurred early and frequently in the data. Appendix F and G show these vividly.

A Negative Case study by several informants revealed that, after emerging theory, the absence of one of the three major categories created "disability" to perpetuate the business inter-generationally. To achieve conformity, the dialog with the family business expert, scholars, and Executives on prominent large family business, convinced the researcher

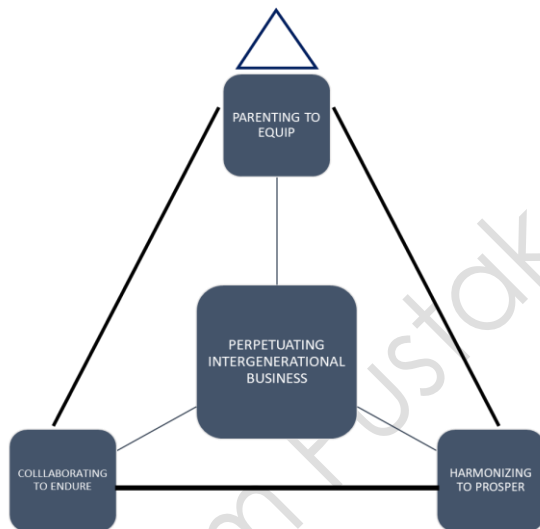
that these three closely related things, parenting, harmonizing, and collaborating, must exist altogether. It could not stand alone. It is possible not to prioritize one over another further. One should not be emphasized any more than another.

*I think this is the right concept of family perpetuation. Family needs to balance parenting, harmonizing, and collaborating to sustain its business over generations and perpetuate the family legacy. Lack of one of these or, in the extreme case, no existence of one of those, will create “disability”*

He gave an idea to name the theory easily so that scholars may readily recognize, cite, or further investigate for the research purpose. Then we called it, eventually, “The Triangle of Theory on Intergenerational Perpetuation.” However, the “Triangle Model” will be replaced by another model with a better description in the next chapter (look at Figure 6).

In conclusion, the carry-through and transcendence of Perpetuating Intergenerational Business and its possible implications for formal theory building was supported by the results of theoretical sampling. The general patterns of Parenting to Equip, Harmonizing to Prosper, and Collaborating to Endure were discernibly prominent. In other words, Perpetuating Intergenerational Business appears to be a significant process that seems able to occur in diverse founders and

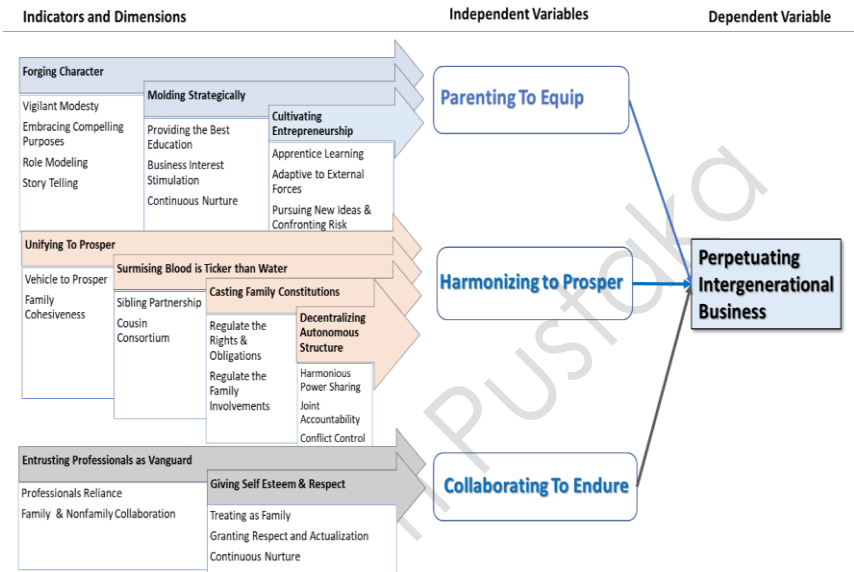
parents of large family business contexts who try to solve their main concern.



**Figure 6** “Triangle Model” of Large Family Business Perpetuation System (PHC Model)

The core category of Perpetuating Intergenerational Business conceptualizes the main concern of the founders of a family business and the participating family members, and their enduring resolution of this concern in the form of a parenting system to equip the next generation with a specific ability, character, and value to be the next leader. In equipping the skill, the founder forges their character and molds them strategically. They need to harmonize with all the family members and work toward the business's sustainabili-

ty by collaborating with non-family members, thus who help the firm attain healthy performance.



**Figure 7** An Explanatory “Perpetuating Intergenerational Model” of Low Theory of Perpetuating Intergenerational of Large Family Business.

It became clear to the researcher that the resolution of the Founder's main concern, namely, the core category of perpetuating the intergenerational market, could best be described as a basic social process involving basic social structural processes and basic social psychological processes (Glaser, 1978). The researcher also began to identify other theoretical codes that further abstract theoretical integration

of the concepts and categories. The “Perpetuating Intergenerational model” of the Theory on Intergenerational Perpetuation of Large Family Business, as described in Figure 4.4, emerged as a theoretical code to tie together concepts. It provides a conceptual framework to explain the basic social structural processes undertaken by Founders of Indonesian Large Family Businesses.

There is a consensus in the nation that family businesses are not necessarily a special phenomenological environment but substantially different from non-family businesses (Luis R. Gomez-Mejia et al., 2011). According to (Tagiuri and Davis, 1996), family business results indicate relationships between family and business needs. These businesses follow goals that combine economic and financial goals, as with any other business, and non-economic goals that arise from family involvement (e.g. Chua, Chrisman, De Massis, & Wang, 2018). Feelings and emotions play a role in family business management (Morgan & Gómez-Meja, 2014). This influence stems from family owners' willingness to maintain family relations over time (Chrisman, Chua, & Sharma, 2005; Litz, 1995; Zellweger, Eddleston, & Kellermanns, 2010). Other than economic goals, the family incorporates in the firm what is referred to in the literature as socioemotional wealth, known as SEW (Gómez-Mejía, Cruz, Berrone, & De Castro, 2011; Berrone, Cruz, & Gómez-Mejía, 2012). The differences in SEW between each family managing a firm

(Chrisman, Chua, Pearson, & Barnett, 2012; Chirico & Nordqvist, 2010; Gómez-Meja et al., 2007; Gómez-Meja et al., 2011) are due to the special characteristics of each family managing a firm (Gómez-Meja et al., 2011). As the involvement and essence approach stated (Chua, Chrisman, & Sharma, 1999), those discrepancies in authority, experience, and culture are the foundation for family firm diversity. As a result, familiness has an effect on SEW goals (Gómez-Meja et al., 2007).

The main concern of a family business's founders and participating family members is conceptualized as Perpetuating Intergenerational. The founders recognize the importance of maintaining long-term business productivity, financial and economic goals, and non-economic goals to perpetuate. According to some research findings, family businesses outperform their peers in terms of financial performance (e.g., Anderson and Reeb, 2003; Craig and Dibrell, 2006; González-Cruz and Cruz-Ros, 2016; Tsao, Chen, and Wang, 2016; Basco, 2017; Madison et al., 2016; Williams, Pieper, Kellermanns, and Astrachan, 2018). Correspondingly, it may mean more effective management in the following areas: reduced agency costs resulting from the overlap in the interaction between the company's owner (principal) and manager (agent), general long-term focus of ownership structure in parallel with the value system, the family-to-business bond, and lower debt levels due to risk aversion of family mem-

bers (Gomez-Mejia, Nuñez-Nickel, and Gutierrez, 2001; Le Breton-Miller and Miller, 2009). As a result, we can ascertain that family businesses vary from other types of businesses in a variety of ways. They face unique challenges and circumstances, such as the never-ending struggle to achieve both financial and socioemotional wealth (Stafford et al., 1999; Olson et al., 2003; Lucia et al., 2018).

This phenomenon of various variables and links among family businesses can be summed up in a single word: familiness. It is a collection of principles and resources that family businesses possess that non-family businesses do not. It has advantages and disadvantages and different business results (Daspit et al., 2019) due to their various socioemotional wealth (SEW). Familiness is another common word with a broad meaning.

Family businesses tend to place a higher value on socioemotional wealth than publicly listed firms (Cleary et al., 2019). Founders and family value background affect their family business. As research indicates, there may be no context in which the influence of non-financial objectives is more pronounced than in family business where they are often considered equal or even more significant than the development of financial value as the company's primary objective (Gomez-Mejia et al., 2008; Berrone et al., 2010). Our study supports previous research that found family businesses' nonfinancial goals often include: fulfilling needs for



belonging, affect, and intimacy; continuation of family values through the firm; perpetuation of the family dynasty; preservation of family firm social capital; discharge of family obligations based on blood ties; ability to act altruistically toward family members using firm resources (Gomez-Mejia et al., 2007); and social status (Zellweger & Astrachan, 2008). Undeniably, the founders aiming to create the family business are often expressed by and communicated through the nonfinancial goals they establish for the family firm. The more congruent these non-financial goals are with the family's values and each family member's personal values, the more likely it is that family members will endorse these non-financial goals and expect the business successor. Family culture values influence founders' personal value, such as Confucians and their ethnic background and religion (Jacobs, Guopei and Herbig, 1995; Yan and Sorenson, 2004, 2006; Efferin and Hopper, 2007; Loy, 2010; Sorenson, 2013; Astrachan et al., 2020; Cahyadi et al., 2021; Ng et al., 2021).

### **The modified Sustainable Family Business Model for Large Family Business (SFB Model)**

The closest term for perpetuation is achieving business sustainability, which is described as meeting current needs without adversely affecting future generations' ability to meet their own needs (Svoboda, 2019). Sustainability is a concern that impacts all types of businesses, not just family

businesses. Nonetheless, a family business aims, particularly a large family business, to suggest a method for creating long sustainable value. The Sustainable Family Business Model (SFB Model) was proposed by Stafford et al. (1999), which combines family business profitability with a functioning family and engagement to achieve sustainability. The prevailing view claims that families and businesses are believed to be two “naturally separate” institutions or systems (Ibrahim & Ellis, 1994). From this perspective, a business is results-oriented and objective, basing decisions on contribution to output, whereas a family is emotion-oriented and irrational. Businesses are motivated by the pursuit of profit, and families are motivated by biological imperatives and social norms (Ibrahim & Ellis, 1994). One of the advantages of a systems model that guides research design is that it provides aggregating research results to provide a picture of the whole system. The theoretical model is built on the prevailing paradigm of overlapping systems, family, and business.

Heck et al. (2006) studied this model's extension by combining it with a FIRO model to create a new type that follows the inner dynamics. It was developed by Schutz (1958) and took into account the inner dynamics of the ties. It can also be used to manage a family business transition (Danes et al., 2002).

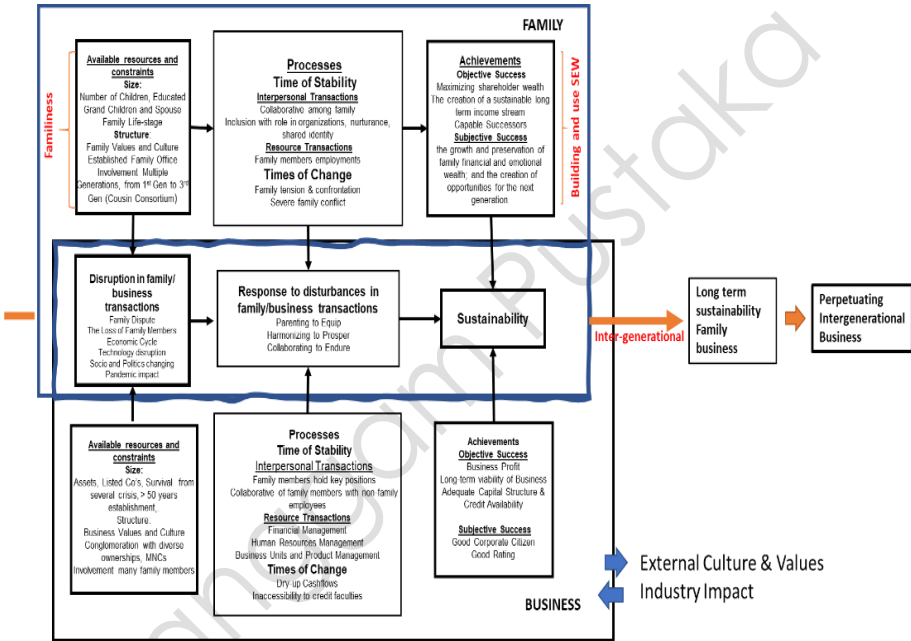
In Figure below, discussing the Sustainable Family Business Model by Stafford et al. (1999), we can enlist the restrictions that businesses typically have to face: concern for the long-term sustainability, family interaction, individuals included in the family, and business increase. Both the family and the business are viewed as social structures in family businesses that transform resources and face restrictions in their effort to obtain specific results or achievements. The Sustainable Family Business Model (SFB Model) is based on general systems theory. It proposes a business model that interacts with a functional family model that aims to achieve long-term financial and economical, and non-economic sustainability and short-term financial viability (Stafford et al., 1999). They argued that both the company and the family are deliberate and logical social structures that transform available resources and deal with constraints. They accomplish objectives through interpersonal or resource transactions, which Olson et al. later classified as either objective or subjective (2003).

On the specific this book, the large family business somehow different from the merely Founders Firms, Post founder firms, or even Cousin Consortia as described as a family business life cycle (Le Breton-Miller and Miller, 2013). When it comes to size, form, and structure, there is still a large percentage of family involvement in top management collaborates with non-family business professionals,

and the interlocking structure of shareholders, primarily, all large family business in the sample to fall under the "corporation model" (Gimeno, Baulenas and Coma-Cros, 2010). Hence, the FAMILY's dimension describes the size and characteristics of the "Available Resources and Constraints," indicating the size, such as the involvement of multiple generations and educated antecedents. The structure also shows a large family business (LFB) character, establishing the Family Office and Family Council as stated in the Family Constitution. Moving from left to right in the figure, any one of the characteristics or processes to the left or in the top or bottom row could affect those to the right or the center. The general goal of research based on this model is to identify family and business resources and constraints, progressions, and dealings that are most likely to lead to business and family achievement and sustainable family businesses (look at Figure 8).

The focus of the Modified SFB for Perpetuation Inter-generational (SFB-LFB Model), is the sustainability of the family business, a function of both family and business achievements, and the family-business transactions—a necessary criterion for a family business. Concurrently, there are family resources and constraints (both broadly defined to include family structure and family processes), which can be viewed as occurring more or less independently of the business. The resources and the constrain of large family

businesses specifically insert in the model. The availability of family constitutions, the family life stage, and many members' complications due to intergenerational and spouse due to married are among the size and structure of available resources and constraints.



**Figure 8** Modified SFB Model for Perpetuating Intergenerational Large Family Business (SFB-LFB Model)

The modified SFB aligned with central principles of SFBT include: (a) family is a rational social system (Stafford et al., 1999), (b) family business sustainability is a function of both business success and family functionality (Danes et al., 2008),

(c) resource and interpersonal processes differ during times of stability and change (Danes, 2006), (e) owning families rationally manage the family and business jointly to optimize achievement of their objectives (Paul et al., 2003) (f) family or business can be destroyed if the boundaries are too diffuse (Stafford et al., 1999) (g) conflicts arise when there is a mismatch between demands and resources (Danes, 2006), and (h) during times of disruption, managers must reconstruct processes to ensure sustainability (Winter et al., 1998) (Winter et al., 2004; Danes, Haberman and McTavish, 2005). It is interesting to go beyond the available resources and constraints. We found that the family's available resources and constraints are idiosyncratic of any business-level bundle of resources and skills from the connected system (Habbershon and Williams, 1999). Using the construct created by Astrachan, Klein, and Smyrnios, (2002) and the emerging independent variables of Parenting to Equip, Harmonizing to Prosper, and Collaborating to Prosper, we discover the familiness that exist in the family.

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# CHAPTER 5

## A THEORY ON PERPETUATING INTERGENERATIONAL OF LARGE FAMILY BUSINESS

### Introduction

The main objective of this book was to generate a substantive theory of Indonesia's Large Family Businesses on how the family business prevails and sustains multi-generational family business utilizing classic grounded theory methodology. Grounded theory is an inductive, comparative methodology that provides systematic guidance for the collection, synthesis, analysis, and conceptualization of qualitative data in order to create a theory. A grounded theory study does not work to produce any factual and detailed data descriptions. Nevertheless, the purpose is to make integratively related concepts that identify the main problems for participants and the underlying and unrealized pattern of how they continuously make efforts to resolve their main concern (Glaser, 1998). The final step of this method is to develop a theory that addresses participants'



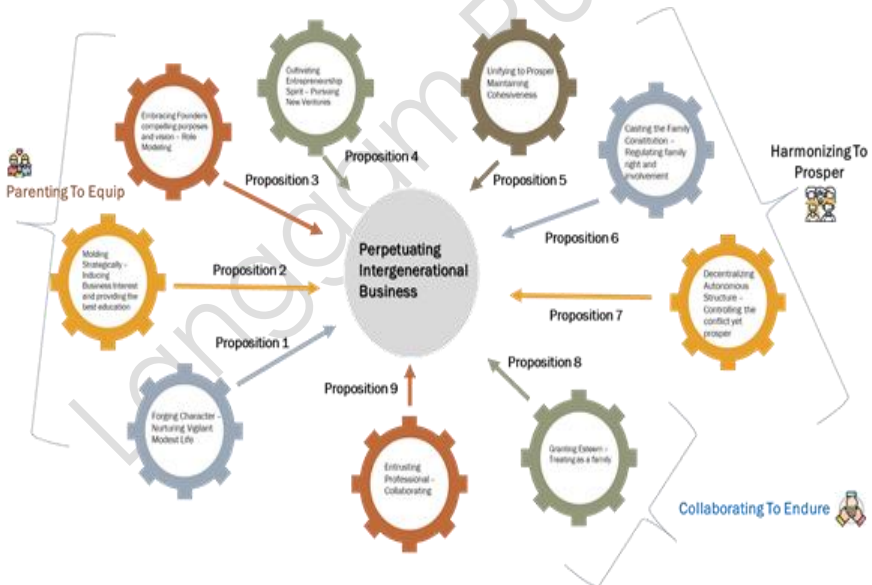
main concern and how they continually work to resolve this concern. In writing up the theory, a summary of the pattern of behavior underlying how participants work to resolve their main concern, also known as the core category which becomes the name of the theory (Loy, 2013). Concerning the core category, the researcher agreed with what Glaser stated (2001, p. 99) that this knowledge is focused on the participants' main concern, whose action is constantly resolving that concern. Their continuous resolution is the core variable.

This chapter offers the theory of perpetuating across-generation in three parts, the first parts providing theory underpinning. The second part offers the elaboration of the core category in detail. Finally, in the last part, I write the conclusion of the emergent theory, the credibility of the theory, the theory's contribution, and implications to future research. More explanation in this study will be elaborated in the later part.

The following are the 9 (nine) propositions can be contributed to Perpetuating Intergenerational of Large Family Business as described by Figure below (look at Figure 9).

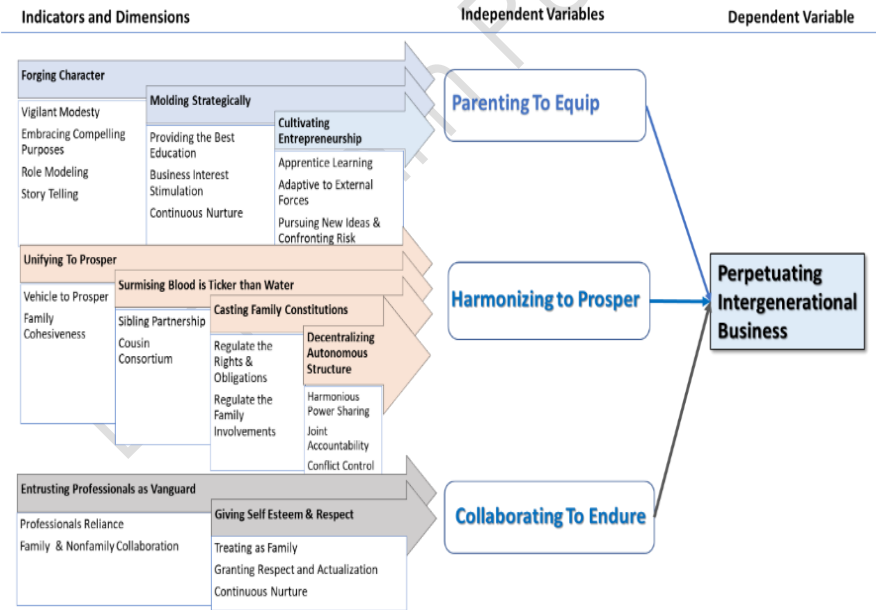
Perpetuating Intergenerational Business, as the core category in this research, is the basis of the substantive Theory on Perpetuating Intergenerational of Large Family Business. The core category of Perpetuating Intergenerational conceptualizes the main concern of the family business founders

along with the participating family members and their continued resolution of this concern in the form of a process parenting to equip the next generation with a particular skill, character, and value for them to be the next leader. In equipping the skill, the founder forging their character and molding them strategically. They also encourage to harmonize among the family members and work toward the business's sustainability by collaborating with non-family members, thus helping the firm strive its entrepreneurial performance, financial performance, and social performance intergenerational.



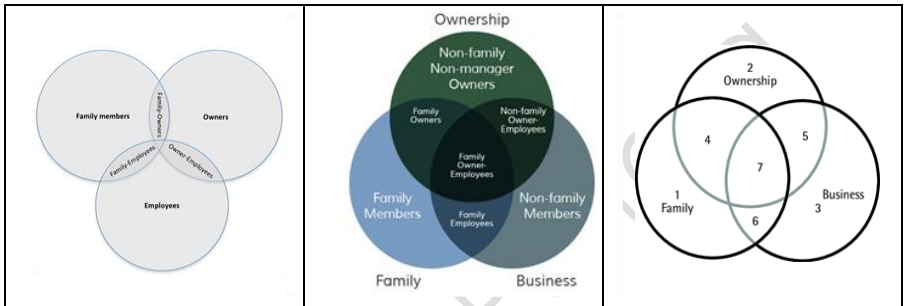
**Figure 9** Low Theory of “Perpetuating Intergenerational” of Large Family Business and the Propositions.

There is a continuous interaction among individuals, family, and business during passing through the knowledge transfer in parenting in the model. They are passing through the familiness, socioemotional-wealth (SEW), and entrepreneurship spirit. The individuals are the founders (grandparents), parents, and children. The grandmother and mother and other family members who may or may not be involved in the business have been included in the family. The family as a whole plays a critical role in family businesses. Figure 10 the Low Theory of Perpetuating Intergenerational of Large Family Business.



**Figure 10** An Explanatory Low Theory of Perpetuating Intergenerational of Large Family Business.

“Triangle Model” of Large Family Business Perpetuation System, to show the complete models contain the Perpetuating Intergenerational Business Dependent Variable, and its dependents variables, its dimensions, and indicators.

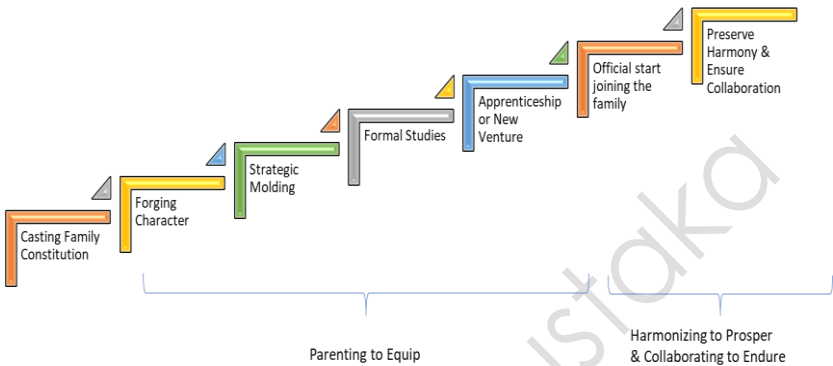


**Figure 11** Evolution of Three-Circle Model, The Venn Diagram that Revolutionized Theories on Family Businesses Design. Source: <https://www.lexology.com>

### How is Intergenerational Perpetuation prepared?

If the Western has "the Seven-league boot" European folklore, we have "Rara Jonggrang- The Legend of Prambanan Temple." The families understood that the family business entrance to perpetuation could not be entered with "Rara Jonggrang" request to Bandung Bandawasa to build a thousand temples and two wells in one night. The step of Lambrecht (2005) and Longenecker & Schoen (1991) encourages me to create the **Seven stepping-stones of Intergenera-**

**tional Perpetuation** for preparation and implementation in a family business, as described in Figure below.



**Figure 12** Seven stepping-stones of Intergenerational Perpetuation

This study illustrates the seven stepping stones for the intergenerational perpetuation of family businesses: Casting the Family Constitutions as an initial step, Early child forging Character, Strategic Molding to become the next leader, Obtain the best formal education to follow their passion, and develop the talent, Forgo apprentice or start a start-up, Join the family business, Ensure to collaborate to synergize especially with non-family professionals, and Preserve harmony among family members.

Therefore, most of the family realized that the business is the house of unity, the reason for being and vehicle for the family to prosper; hence, family cohesiveness resulting from

harmony preservation is essential to maintain by the next generation to maintain order perpetuating inter-generational business.

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# CHAPTER 6

## CONCLUSIONS

### **The Conclusion of the Emergent Theory**

This study generated a Theory on Perpetuating Inter-generational Business of Large Family Business, addressed participants' main concern in this study: Perpetuating inter-generational business. Classic grounded theory supports the notion of grab at the conceptual level rather than a descriptive level; the substantive theory builds credibility with greater levels of applicability and connection with conceptual framing and explanation of how the phenomenon is resolved or managed. Likewise, this study captures the pattern of founders attempting to perpetuate their family business and family participation.

There are several ways to make sense of a phenomenon. The classical grounded theory approach provides a systematic framework for addressing participants' primary concern in a phenomenon. Perpetuating is a more appropriate word than Longevity or Sustainability because it captures the purpose and encouragement of the founders and family of Indonesia's largest family company: the continuation of



what they have achieved, continuing to expand the business and family members involved in perpetuity. Although the majority of the research focuses on succession, family wealth formation, organizational effectiveness, and long-term family business sustainability, this study emphasizes and aims to address the participants' primary concern about intergenerational family business perpetuation.

The underlying reason for large family businesses to continue seems to be intrinsic. The founders established the company, grew it to prominence, and saw it grow into a massive conglomeration corporation. They wish to maintain it, and this is normal or widely agreed. Their family business is deserving of intergenerational success. According to Britannica, any animal has an inherent capacity for perpetuation. In all animals, reproductive behavior refers to any behavior aimed at perpetuation (Darwin et al., 1858). Additionally, organisms emerge by hybridization, persist through heredity, and are eventually exterminated by the fight for survival, with the last exterminated acquiring the epitheton-ornans or "selected ones" (Lotsy, 1916, pg. 157). Natural selection occurs as animals cross-breed with other species to obtain the best trait from the other species. To be the "selected one," which refers to the species that possesses the superior trait. In the human application, if a child inherits negative characteristics from his or her parents, he or she will most likely die and therefore will not have children.

Those who "survive" this annihilation are designated as the "chosen one." This is also true for wildlife. In a large family enterprise, the founders and their descendants, including their children and grandchildren, may be cross-breeding with other species (evolutionary struggle) to obtain the best traits from other species. To be the "selected one," which refers to the species that excel in their respective business fields, industry contexts, or on a national or global scale.

Every founder is worried about the perpetuating existence of Indonesia's big family business. Logic would imply that not every Chinese businessperson is concerned with perpetuation. Chapter 5 proposed that when a business reaches the stage of a large family business (business group or conglomeration), survives many crises, is sufficiently profitable and has available successors, the possibility of perpetuation is established. Additionally, the researcher hypothesized that when the founder's parenting initiative succeeds or improves, conflict decreases, cooperation with non-family executives increases, and the probability of perpetuating increases. This proposition can be quantified and empirically checked to determine the likelihood of Indonesia's big family business perpetuation.

What about the perpetuation of intergenerational business? Given the context, is every large family-owned Indonesian company involved? Chapter 5 summarized the criteria once more, considering the relationship between the par-

ent and successor, both influenced by the parent - founders. The Parenting to equip is the parent's influence to successors by Forging Character – Nurturing Vigilant Modesty Life, Embracing founders compelling purposes and vision – Role Modeling, Cultivating Entrepreneurship Spirit – Pursuing New Ventures. A further influence is Harmonizing to Prosper by Unifying to Prosper – Maintaining Cohesiveness, Casting the Family Constitution – Regulating family right and involvement, and Decentralizing Autonomous Structure – Controlling the conflict yet prosper. Finally, Collaborating to Endure by Entrusting Professional – Collaborating and Granting Esteem – Treating as a family. Like perpetuating, this proposition that Indonesian family businesses are perpetuating intergenerational business can be quantified and tested as well.

While the models referred to above are cross-sectional, quantifiable and tested, the following are the longitudinal models that Indonesian big family businesses are able to follow in order to solve their main concern for perpetuating intergenerative businesses. Before imagining to take other steps, the Stepping-stone Casting Family Constitution is the most crucial. Then, it forges the character of the successor and later takes strategic shape. The best formal study available must be taken, and the way to "sharpen the saw" is to train or undergo new undertakings. Afterward, when they are considered ready to join the family business, maintain

harmony and work with non-family executives. When a large family-owned business follows these steps, it should achieve a permanent intergenerational business. The description of the Seven stepping-stones of the Intergenerational Perpetuation process is also connected with literature—especially the stage in developing other family succession studies. The special points between the intergenerational phases in the perpetuation and the other stages that are presented in the literature seem to be familiness and socio-emotional wealth, which have been preserved for the preservation of family values and culture. Confucians, ethnic groups, and religions apparently influence families' ways to do Parenting, Harmonizing, and Collaborating. Familiness becomes the distinctive possessions to preserve the family's social and emotional richness to perpetuate intergenerational business.

### **Credibility of the Theory**

The researcher used the grounded theory as the methodology to answer the research objectives. Once Glaser points out, the classical grounded theory (Classic GT) is just one set of systematically generated and integrated conceptual hypotheses that lead to an inductive theory about a substantial area. Classic GT is a structured yet highly flexible approach (Glaser and Holton, 2004b). Its procedures for data collection and analysis are explicitly followed by the simultaneous

pacing, sequence, subsequent, scheduled, and sequential forming of an integrated 'whole of' methods that allow conceptual theory to emerge as distinct from the characteristic thematic analysis qualitative data research (QDA). In the case of qualitative data, the explicit goal is the description. The clear issue articulated in much of the literature regarding qualitative data analysis methodology is the accuracy, truth, trustworthiness, or objectivity of the data. Subjectivity, interpretability, plausibility, data voice, and constructive are the main focus of this concern. Accuracy with a QDA methodology is always worrying. Grounded Theory, on the other hand, is a simple methodology. It is a comprehensive, integrated, and highly structured yet remarkably adaptable process that takes a researcher from the first day in the field to the completion of a written theory. Following the full suite of GT procedures based on the constant comparative method made results in a continuous emergent analysis that is smooth and uninterrupted, intending to develop a substantive or formal theory. When GT procedures are interlinked with the exhaustive and numerous QDA methodology requirements, GT becomes distorted, squandering significant amounts of valuable research time and endangering GT's knowledge—and thus its grounding to what is truly occurring. Because GT is inextricably linked to pre-conceived conjecture, preconceptions, forced concepts and organization, logical connections, and prior-to-the-fact pro-

fessional interest, GT methodology is remodeled into a mixed-methods QDA methodology. This results in multiple impediments to conceptual GT. (2004) (Glaser & Holton, p.5).

A grounded theory's purpose is not to articulate factual data or provide accurate descriptions. The product of this rigorous, systematic analytic process is "an integrated set of conceptual hypotheses . . . [or] probability statements about the relationship between concepts" (Glaser, 1998, p. 3). Its multivariate nature stemming from social behavior's complexity can also yield complex integrated hypotheses not easily isolated or subjected to empirical testing (Holton, 2006). Although some propositions within a grounded theory may be amenable for quantification and verification, the theory's credibility is not ascertained through traditional verification methods. Therefore, Glaser (1978, pp. 4-6) advocated fitness, work, relevance, and modification as criteria for determining a grounded theory's credibility. First, the categories of the theory must fit the data—that is, how well the theory's concepts represent the behavior that is being conceptualized (Holton, 2010). Second, a theory is considered to work when explaining, predicting, and interpreting what is happening in the area studied. Third, the theory is relevant to the action of the area; in other words, its core category represents the main concern—or an important dependent variable—for the participants studied. Fourth, it is easily modi-

fiable in light of new ideas that may emerge as a result of new data. (Holton, 2007; Loy, 2010).

As a novice researcher, particularly in classic GT, the researcher should spend as much time learning the methodology. Everything has a first time. Nonetheless, the guidance the researcher received from visiting established GT researchers and consulting with fellows of the Grounded Theory Institute aided the researcher in adhering to the methodology as closely as possible—which meant staying close to the data and allowing emergent concepts to emerge through constant comparison, memoing, and theoretical sampling. Due to its close relationship to the data, the emergent theory appears to have a great deal of relevance for Indonesian large family businesses. As discussed in Chapter 4 (see subsection 4.5.11 Receiving Feedback on Theory and Methodology), the researcher's feedback from family business researchers, large family business advisors, the Chairman of a large family business, large family business scholars and executives, and people intimately connected to large family businesses established the theory's relevance.

Additionally, the Trustworthy Check that was conducted using the following acceptable practices: audit trails, peer debriefers, negative case analysis, triangulation of data sources, sustained engagement with informants, sharing individual interview transcripts and emerging concepts and

categories with participants, and having the process peer-reviewed.

In terms of modifiability, abstracted concepts—for example, founders-indoctrinated or Promethean ambitions—could theoretically be expanded to include additional concepts, dimensions, or properties as a result of the new data.

### **Contribution to the knowledge**

This research advances understanding in a variety of ways. The established theory bolsters the founders' approach to perpetuate the business and pass the torch to the subsequent generation. In this case, it is the third generation succeeding in a large-family business setting. Usually, family business research has tended to articulate the idea of passing down the business across generations simply as succession. Nevertheless, succession does not factor in the longevity and perpetuation motivation beyond the building and striving of a family business.

This research responds to the demand of Brockhaus (2004); Le Breton-Miller, Miller, & Steier (2004); Nordqvist, Hall, & Melin (2008) for using rigorous qualitative and grounded theory methodologies to create theories on family business outside of a Western context. Besides, this study also tries to respond to the call Meyer (2006) that the grounded theory-building research should play an essential role in the indigenous research agenda because many phenomena

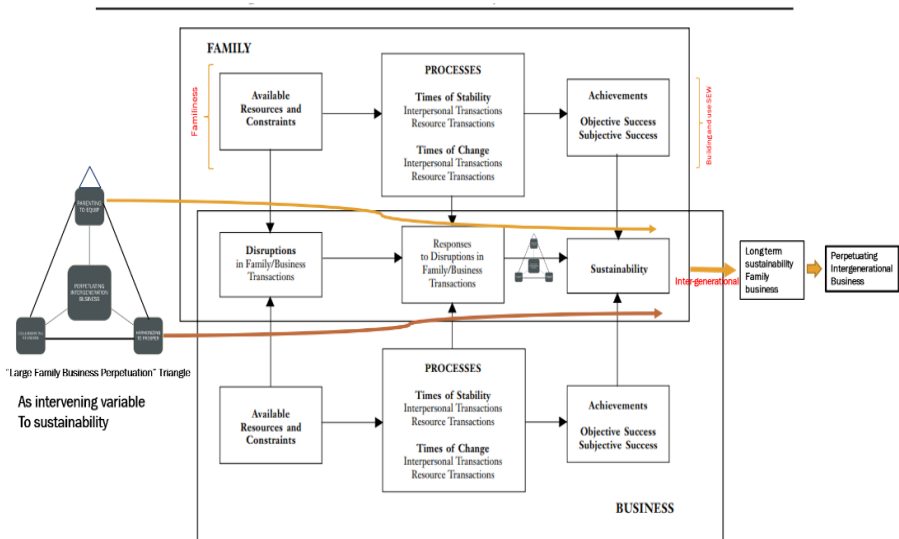


are substantially new or different in ways that are not clear from earlier research.

The perpetuating concept opens up the potential for theorizing the family business through the lens of family, with individuals within, and the business. The theory on Perpetuating Intergenerational of Large Family Business advocates that Family business research must always be conducted through the family's lenses. Thus, the success of the family business tends to be focused on both family processes and the family's response to disruptions (Olson et al., 2003) that the process of parenting overcomes by equipping the next generation with a specific ability, character, and value set necessary for them to become the next leader. Moreover, in equipping the skill, the founder forging their character and molding them strategically. They also encourage to harmonize among the family members and work toward the business's sustainability by collaborating with non-family members, thus helping the firm attain healthy performance.

This study adds to the body of knowledge about the Sustainability of Family Businesses of Stafford *et al.* (1999). In addition, this model has the potential to serve as a foundation for understanding sustainability: The model suggests that both business success and family functionality are critical factors in determining the survival or viability of family businesses. The "Triangle Model" of Large Family Business Perpetuation System (PHC Model ), as described in Figure

4.3, is the intervening/ mediating variable to Sustainability. The Triangle Model contains the process of parenting to equip the next generation with a particular skill, character, and value for them to be the next leader. In equipping the skill, the founder forging their character and molding them strategically. They also encourage harmonizing among the family members and working toward the business's sustainability by collaborating with non-family members, thus helping the firm attain healthy performance. Therefore, the PHC is an intervening/mediating variable to Sustainability, as described in Figure 13.



**Figure 13** Enhancement of Sustainable Family Business Model (Stafford et al.,1999).

The model of PHC helps families identify the family and business tools and constraints, processes, and transactions that are most likely to result in business and family success and sustainable family businesses. Additionally, the concept of sustainability is determined by how the family and company react to normative and nonnormative disruptions. The study discovered that disruptions must be confronted and addressed. We believe in the notion that the success of a family business tends to be relying on both family processes and the family's ability to cope with disruptions. The study discovered that incorporating time variables into the equation results in long-term family business sustainability and intergenerational business perpetuation. Our findings serve as a foundation for conceptualizing how to address long-term family business sustainability over intergenerational lines, in a realistic manner, through the use of process parenting to equip the next generation with the necessary skills, characteristics, and values to succeed as a leader. By equipping the abilities, the founder forges their character and strategically molds them. Additionally, they inspire family members to harmonize and work for the business's sustainability through collaboration with non-family members, thus assisting the firm in achieving healthy results.

This study also contributes to understanding how the theory agency theory and stewardship theory interlaced to influence family business, especially the large family busi-

ness. It supports Le Breton-Miller and Miller, (2009) study to show stronger confirmation for the agency and behavioral agency views of a family business than for the stewardship view. However, it demonstrates even more decisively how important is the notion of business embeddedness in the family as a factor that determines which of these views prevails. It may well be that profound embeddedness—strong ties of actors to the family—can encourage parochial service to the family rather than value enhancement for the business. Inside the family, the actors keep their harmony by having DAS's structure, which is conflict control, to prevent the agency problem. Or, they need to set up their right and obligation and governance using Family Constitutions to avoid the conflict of interest. My study supports that stewardship theory is a better alternative to agency theory explaining a family interaction with non-family members. Still, the agency theory is better to be underpinning the interaction among family members.

This book induces founders to ensure perpetuation by using parenting to forge their vigilant character, self-control, self-efficacy, conscientiousness, business zeal, and ability to delay gratification, as well as accepting the founders' compelling motives. Their mindset must be evolved from being enterprising to be more nurturing, using the family as a base. As the family has grown in size, they are encouraged to harmonize with one another. The family role is also prominent,

especially the grandmother and mother's role in maintaining a sense of unity and watching over the shared family vision. A family constitution is essential to safeguard the family's interest in the business while also regulating their rights and obligations. Additionally, the family must trust non-family members to help with the vision, embrace them as family members, and give them merit-based professionalism. When the family is operating in this direction, the business should realize its sustainability to attain healthy performance.

Henceforth, the theory of "Perpetuating intergenerational business," in the large family business, especially between founders and their later generations or successors or parent-child, in the family and the context of the family business, take the fundamental stage in the theoretical findings of this study: (i) casting the Family Constitutions as an initial step, (ii) forging character of the later generation since their early childhood, (iii) molding their ability and attitude strategically so that they can become the next leader, (iv) providing the best formal education to follow their passion and develop the talent, (v) allowing them to gain apprenticeship or start a start-up, to gain confidence and build entrepreneurship in practice (vi) entrusting the successors to join the family business, (vii) preserving harmony among family members and ensuring to collaborate to synergize, especially with non-family professionals.

## Implications

This research contributes significantly to the study of large family businesses and family businesses in general. There are two contrasting perspectives on family businesses: those that are fragile and temporary, barely surviving to the third generation. Another assertion is that family businesses are robust and outperform other types of businesses. This research demonstrates that the more stable option of family business survival over multiple generations is conceivable with A Theory on Perpetuating Intergenerational of Large Family Business – The Importance of Parenting, Harmonizing, and Collaborating.

Perpetuating as a concept is not merely a new concept. Ward is one prominent family business expert, and he (Ward, 2008) published the book regarding perpetuating. However, no further research was conducted. Nonetheless, the idea of perpetuating is revolutionary in the literature. Family business research has tended to define succession as the act of passing the business down through generations. However, succession is not a problem in a large family business. The majority of them have made some preparations, but they remain concerned. Their actual main concern is Perpetuating the business, including family members' involvement and sustainability. Although succession is a concern for some members of the family, it ignores the more fundamental, more intrinsic concern of establishing, develop-

ing, sustaining, and passing on the business legacy to the next generation.

### **Theory and Future Research Implications**

This thesis has many implications for future research and practice. The perpetuating concept is a subset of succession theory, or any revolutionary theory of succession in the family business, such as the concept of Dynasting (Loy, 2010). The idea of perpetuating enables theorizing about the reason for the family business's longevity. Rather than focusing exclusively on what longevity is or why certain family businesses prosper and others do not, the "Theory on Perpetuating Intergenerational of Large Family Businesses" explains how to perpetuate intergenerational business. This research contributes to the study of Loy (2010).

Out of curiosity, the researcher wonders if scholars from other disciplines, such as psychology or anthropology, could collaborate further in the future, interpreting actual incidents and coding using commercial software. Perhaps in the future, various emerging ideas will emerge.

The majority of research on Chinese-related businesses has concentrated on performance rather than failure (Kiong, 2005). This study uses convenience sampling to collect data from a successful family business that has survived at least two crises. It is beneficial for family business theory to sam-

ple from a large family business that fails or diminishes in order to understand the context of family business failure.

Additionally, it would be worthwhile for subsequent researchers to extend the study to include all Large Family Businesses of diverse cultures, religious backgrounds, and financial performance. Different cultural and religious backgrounds and contexts will be critical to determining how family involvement patterns differ from those studied here. Family-owned businesses in a variety of cultural settings, including Javanese and non-Javanese communities such as Sundanese, Tapanuli, Bugis-Makassar, Gorontalo, Minahasa, and Borneo, may indeed give rise to a variety of distinct themes that are deemed to be more significant within their cultural background and environment. Additional research on multi-cultural ethnic Chinese clusters such as Hokkien, Teochew, and Hakka can provide invaluable insights for stakeholders in Chinese-Indonesian family businesses.

Furthermore, considering Meyer's (2006) claim that grounded theory ought to be used in emerging economies, this study has demonstrated that classic grounded theory has worked well to develop a potentially culturally specific theory. The Theory on Perpetuating Intergenerational of Large Family Business may be more relevant to Indonesia or Southeast Asia at large than any of other developed countries. Therefore, future research may employ classic grounded theory methodology to produce family businesses theo-



ries in different cultures, such as the Middle East, South Asian, South American families, and African families.

Moreover, in line with the research of familiness and socio-emotional wealth in the family business, this study expands that successful transmission of familiness and preservation of socio-emotional wealth affects the family business's longevity (Habbershon, 2006; Venter, 2007; Berrone, Cruz, and Gomez-Mejia, 2012; Hasenzagl, Hatak and Frank, 2018). Future study should involve longitudinal studies of large family businesses spanning several generations and examining the significance of each generation's degree of familiness and socio-emotional wealth.

Additionally, the current research's main implications are its recognition of the Theory on Perpetuating Intergenerational of Large Family Business. The emergent-patterned core dimension is "Parenting to Perpetuate" and the sub-core "Harmonizing to Perpetuate and Collaborating to Perpetuate" (as displayed in Figure 5.2). Besides, the guidance of "Stepping-stone into an inter-generation perpetuation" directs the family business with distinguished seven stepping-stones to the transfer of the family business intergeneration into perpetuation. It has been identified in Figure 5.1 as follows: Early child forging Character, Strategic Molding to become the next leader, Obtain the best formal education to follow their passion and develop the talent, Forgo apprentice or start a start-up, Join the family business, Ensure

to collaborate to synergize especially with non-family professionals, and Preserve harmony among family members. This analysis of the concept of "perpetuating" introduces and educates researchers to a new field of research on family businesses that examines family businesses' performance, family member engagement, and multigenerational family business development.

Finally, the emergent pattern of sub-core "Harmonizing to Perpetuate" and "Collaborating to Perpetuate" might expand future research on the influence of Agency Theory or Stewardship Theory on Harmonizing family members and Collaborating between the family and non-family managers.

### **Managerial Implications/ Implications for Family Business Practice**

In many respects, the principle established in this study applies to large family businesses, business-owning families, family business education, and consulting. For large family business owners, this principle provides a framework for navigating the business's survival and perpetuation, including the transmission of authority along family lines. In severe cases, the theory can help a family avoid a "third-generation curse." This theory allows the family to explain how the family business is passed down from one generation to the next. According to the family studies, transferring the family business from the founders to succeeding generations

is a lifelong and ongoing one. The family must resolve and promote the transition process's elements—entrepreneurship, ideals, outside knowledge, childhood, and education. Thus, the handover process is not fixed in time; it begins sooner and never finishes. Parents must foster and shape the next generation's character, then strategically mold the upbringing environment to prepare the next leader. We should provide them with the opportunity to receive the best formal education possible to pursue their passion and cultivate their talent. Subsequently, after graduation, we will encourage them to apprentice. After developing the ability to explore an idea, take a risk, and learn from others, they can decide to enter the family business. They must collaborate and maintain familial harmony, particularly with professionals outside the family. To preserve the value, this process must be emulated again and again.

The use of the proposed “The seven stepping-stones to the transfer of the family business intergeneration into perpetuation”, as identified by Figure 5.1, serves as a tool to guide to enhance the long-term sustainability of family business inter generation. “Perpetuating Intergenerational Model” of Low Theory of Perpetuating Intergenerational of Large Family Business is the model that can help founder address their main concern on the perpetuation of the business. The founders require planning cautiously using “Par-

enting to Perpetuate” and “Harmonizing to Perpetuate and Collaborating to Perpetuate.”

This theory aids family business consultants in comprehending the critical nature of early planning advisory. The majority of large family businesses have a family constitution in place, but it is either improperly enforced or urgently needs to be changed. The family consultant needs to advise the family to modify the constitution and enforce it consciously. Finally, since most families expect their family business to thrive and last several generations, this proposed hypothesis makes sense.

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## APPENDIX

### A. TRUSTWORTHINESS CHECK

The following are the acceptable practices: use of audit trails, peer debriefers, negative case analysis, triangulation of data sources, prolonged engagement with informants, sharing with participants individual interview transcripts and emerging concepts and categories, and having a peer review the process.

Table Trustworthiness in Grounded Theory  
Methodology Research

Trustworthiness dimension	Steps to improve the trustworthiness
Credibility (Internal validity)	<ul style="list-style-type: none"><li>• Prolonged engagement with participants (Brown et al. 2002; Jacelon and O'Dell 2005; Morrow 2005): Most of the 27 interviews, plus two interview videos was handled more than one-hour length.</li><li>• Triangulation of data, such as data from interviews, observations, documents, and others (Bowen 2009; Brown et al. 2002; Jacelon and O'Dell 2005): Discussing back the scripted interview the most of in-</li></ul>

	<p>formants and present the result to some of the informants to get the feedbacks.</p> <ul style="list-style-type: none"> <li>• Thick descriptions of data and sufficiency of data assessment or saturation (Morrow 2005): Under mentoring Dr. Helen Scott of Grounded Theory Institute, we conducted coding word meticulously by word and line by line, constant comparisons, and memoing.</li> <li>• Respondent validation of interview transcripts and emerging concepts and categories (participant checks) (Brown et al. 2002; Jaelon and O'Dell 2005; Morrow 2005): We have done most of the validation transcript and present the emerging concept and categories and present in to some of Informants.</li> <li>• Participant guidance of inquiry (theoretical sampling) by Cooney (2010): I follow close adherence to theoretical sampling and constant comparison to having a result in an</li> </ul>
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	<p>emergent theory of relevance to the participants studied.</p> <ul style="list-style-type: none"> <li>• Use of participants' words in the emerging theory (Cooney 2010): I stick with participants' words in the coding process.</li> <li>• Negative case analysis (Brown et al. 2002; Morrow 2005): I discussed with one of the prominent bankers in Indonesia Mr Donald Sianipar of Standard Chartered and famous artists whose family used to have a prominent general insurance company. The company went bankrupt several years ago, partly not doing what stated in the emerging theory.</li> <li>• Peer debriefers (Brown et al. 2002; Jacelon and O'Dell 2005; Morrow 2005): Reviewed by Dr. Jacob Tan.</li> </ul>
Transferability (External validity)	<ul style="list-style-type: none"> <li>• "Thick descriptions" of the research, the participants, methodology, interpretation of results, and emerging theory. (Bowen 2009; Brown et al. 2002; Cooney 2010; Morrow 2005): Diverse from 4</li> </ul>

	<p>LFBs and 27 informants (Combination G1, G2. and G3s); Execute methodology meticulously under mentoring Dr. Helen Scott; and Trusted relationship with all Informants create openness.</p>
Dependability (Reliability)	<ul style="list-style-type: none"> <li>• Examination of a detailed audit trail by an observer (Brown et al. 2002; Morrow 2005): Mentored by Dr Helen Scott and detailed audit trail/peer researcher by Dr Jacob Tan.</li> </ul>
Confirmability	<ul style="list-style-type: none"> <li>• Examination of a detailed audit trail by an observer (Brown et al. 2002; Morrow 2005): Mentored by Dr Helen Scott and detailed audit trail by Dr Jacob Tan.</li> <li>• Confirmability tests the 'objectivity' of research to:</li> <li>• Dr. Antonius Tanan, Senior Director of Ciputra Group and the President of UCEC (Universitas Ciputra Entrepreneurship Center), Lecturer at Universitas Ciputra.</li> <li>• Prof Dr. Leo Suryadinata, Visiting senior fellow at the ISEAS–Yusof</li> </ul>

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Source: Sikollia et al. (2013).

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