Engaging practitioners in qualitative family business research:
An engaged scholarship approach

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Abstract

In this chapter, we argue for more engagement with practitioners in qualitative family business research. We explain how and why an engaged scholarship is helpful to study complex social phenomena in the family business context and provide an overview of the engaged scholarship approach. We elaborate on the research activities involved, as well as the various levels of engagement between the stakeholders who participate in research projects and scholars. We discuss the relevance of the engaged scholarship approach to build relevant understandings of family business topics and we go through the dilemmas and challenges of using an engaged scholarship approach. The final section of the chapter provides some thoughts on how to practice an engaged scholarship approach in family business studies, dealing with some of these challenges.

Keywords: family business, qualitative research, engaged scholarship, rigor and relevance, stakeholder involvement

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Introduction

In this chapter we focus on the characteristics, possibilities and challenges associated with an engaged scholarship approach in qualitative family business research. We draw on the notion of engaged scholarship as described by Van de Ven (2007) and link it to the historically close connection that researchers in this field has had with family businesses. Family businesses can typically be characterized by how the family, ownership and business systems interact and produce specific organizational outcomes (Tagiuri & Davis, 1996; De Massis & Kotlar, 2014). The family business research field has grown over the last decades as the result of a steadily increasing number of activities by scholars devoted to understanding what the complexity of the interaction between these systems means for organizations and their owning families (Sharma, Melin & Nordqvist, 2014). These activities also aim to build an understanding of the causes and effects of variations of family and ownership involvement in businesses as well as the heterogeneity among this group of firms (Melin & Nordqvist, 2007). Today, family business research is a field where scholars from multiple disciplinary backgrounds, theoretical perspectives, and methodological orientations are engaged to develop deeper knowledge of a large variety of issues pertaining to family businesses and business families.

A very important historical root of today's family business research is a close interaction and collaboration with practice. The family business research field was founded to satisfy the educational needs of family business stakeholders and to create an understanding of the challenges faced by family business owners, managers and their advisors (Sharma, Hoy, Astrachan & Koiranen, 2007). The founding mothers and fathers of the field were active and reflective family business practitioners. Many with an academic background, yet a strong orientation towards providing advice and consultation to family businesses and their owners and managers (Sharma et al., 2007). The academically trained advisors to business families realized that the broader management discipline had not generated enough knowledge to address the unique challenges faced by owners and managers in family businesses, including issues such as succession, family governance, and conflict management. In close collaboration with both their clients and other family business stakeholders, they embarked on research projects with the aim to generate practically relevant and actionable knowledge for how to address specific business and family challenges. The pioneers of the family business field can thus be described as engaged scholars.

Engaged scholarship (ES) (Van de Ven, 2007) involves a research approach that is characterized by a close collaboration between scholars and practitioners throughout all phases in the research process. ES is well suited to embark on phenomenon-based research projects

(Von Krogh, Rossi-Lamastra & Haefliger, 2012), in which deep knowledge is required to tackle issues that are relevant to practitioners but that fall outside the scope of available theories. ES allows researchers to uncover the details involved in the phenomenon of interest by attending to the who, the where, and the how (Van de Ven, 2016). As such, it goes beyond a mere combination of academic and practitioner knowledge. ES involves what could be labelled as 'co-inquiry', "*where the research questions, problematizations and theory development are co-constructed with family business stakeholders (rather than respondents) in the fieldwork setting*" (Fletcher, De Massis & Nordqvist, 2016: 23). This definition by Fletcher et al. (2016) already indicates that ES, or co-inquiry, considers family business practitioners as important stakeholders in the research process, rather than merely respondents.

The purpose of this chapter is to explain the potential of engaging practitioners in doing qualitative research that qualifies simultaneously as rigorous and relevant to various groups of scholars and practitioners in the family business field. As evident in this edited volume, there is today an increasing interest in qualitative research methods in family business (see also Nordqvist, Hall & Melin, 2009; Fletcher et al., 2016; Leppäaho, Plakoyiannaki & Dimitratos, 2016). For instance, De Massis and Kotlar (2014) argue that scholars need to design studies that enable them to rigorously combine multiple perspectives and navigate multiple levels of analysis to generate an in-depth understanding of family business issues, as well as their antecedents and consequences. We concur with this argument and build further on De Massis and Kotlar's (2014) insights as we suggest that an engaged scholarship (ES) perspective deserves much more attention in family business research. Our modest claim is that ES is to be essential in addressing the complexity of family business and in producing research that offers both scientific rigor and practical relevance.

This chapter proceeds with explaining why an ES approach is needed, we then provide a review of the ES approach and elaborate on the activities involved, as well as the various levels of engagement between researchers and the stakeholders involved. The section that follows discusses the importance of ES in family business research. Subsequently, we discuss challenges and dilemmas regarding the use of an ES approach after which we present suggestions on how to engage with practitioners, dealing with some of these challenges. The chapter ends with some concluding remarks.

Why is there a need for an engaged scholarship approach?

Professor Andrew Van de Ven at the University of Minnesota in the USA has become a leading voice in the ES debate in the organizational and social sciences. This is particularly attributed to his book in which he explains his understanding of ES as follows "*ES is a participative form of research for obtaining the different perspectives of key stakeholders (researchers, users, clients, sponsors and practitioners) in studying complex problems*" (Van de Ven, 2007: 9). The central value of an ES approach is the possibility to better understand social phenomena that have a high level of complexity, which often far exceed our individual capabilities to understand them (Van de Ven, 2007). Because of individuals' unique experiences, history, culture, training, and the limits to our cognitive abilities, topics or issues are inevitably studied from a limited perspective. The complexity of these topics can be studied much better if scholars engage with relevant stakeholders in the research process. Banks et al. (2016) have suggested that 'grand challenges', defined as "*ambitious but achievable objectives that energize, direct attention, and facilitate arousal and discovery of new strategies and knowledge*" (pp: 2209), can promote large-scale collaboration among various groups of stakeholders which stimulates ES in the management domain. Wiklund, Wright and Zahra (2018) suggest similar opportunities for entrepreneurship scholars.

ES is needed to understand the complexity of phenomena, but also because the impact of 'traditional' research output remains limited. The limited impact and the resulting widening gap between theory and practice, which is seen in many research areas (Adams, Smart & Huff, 2017; Banks et al., 2016; Starkey & Madan, 2001; Wiklund et al., 2018; Bowen & Graham, 2013), has several causes, which are not mutually exclusive. First, there is a lack of translating and diffusing research knowledge into practice. This issue is also referred to as the knowledge transfer problem or the 'lost in translation' problem. It implies that the knowledge created is not ready for use and hardly enough to inform the decisions of practitioners. Second, there is little to no collaboration between academics and practitioners. This means that academics tend to miss out on the opportunity to draw on the distinct and complementary knowledge that practitioners can offer and vice versa. Lastly, research generally suffers from a knowledge production problem, which means that academics do not always pose the most relevant research questions from a practice perspective, because the research questions are often driven by researchers' own interests rather than practitioners' needs. As such, knowledge is already 'lost before translation' (Shapiro, Kirkman & Courtney, 2007; Banks et al., 2016; Van de Ven & Johnson, 2006). Although it is often argued that the gap between theory and practice should be bridged by attending to an ongoing knowledge transfer (the knowledge transfer problem as referred to above) (e.g., Hodgkinson & Rousseau, 2009), we argue in line with Van de Ven (2007) and Pettigrew (2001), that scholars and practitioners need to engage with each other throughout the entire research process instead of only at the end of the journey. There is a risk that knowledge transfer is inhibited if research questions with little relevance for practice are posed at the start of a research project. Thus, the argument is that more engagement is needed throughout the entire knowledge production process to address the dual challenge of relevance and rigor (Van de Ven & Johnson, 2006; Van de Ven, 2007; Hodgkinson & Rousseau, 2009).

Today we observe an intensified debate around rigor and relevance. Vocal scholars in the field argue for relevant studies that have real impact to practice (Alvesson & Sandberg, 2013; Pettigrew & Starkey, 2016; Hodgkinson & Rousseau, 2009; Huff, 2000). Governments seem to increasingly and explicitly put greater demand on universities to conduct research that can stimulate economic growth and social development by having a stronger impact on a wider group of stakeholders outside academia (Nutley, Walter & Davies, 2007; Starkey & Madan, 2001; Whitehurst & Richter, 2018). Some scholars suggest that the academic profession of doing research embodies a form of narcissism, as scholars mostly speak to and write for each other and reflect on each other's work while caring little about other stakeholders' needs and opinions (Pettigrew & Starkey, 2016). There is an increasing concern that the studies we perform may not matter much to anyone but to scholars themselves (Pettigrew & Starkey, 2016). It is common that researchers in the family business field, like in most other management fields, tend to focus most of their research time writing for academic journals that may not be read by people outside academia. Studies show that a significant proportion of articles published, also in top journals, garner zero or very few citations even from other scholars (Pfeffer, 2007). Bartunek (2007) showed that only 64% of the refereed articles published in the *Academy of Management Journal* in one year (2006) included a discussion on the implications of the study for practice. And those studies that did provided recommendations for action based on the findings, mainly emphasizing the importance of increasing managers' awareness of the studied phenomena. In the same vein, Wiklund et al. (2018:15) recently concluded that much research in the field of entrepreneurship "…*goes unused perhaps because it focuses more on what researchers want to study, rather than what our different stakeholders care about*."

For scholars it is of course important to acknowledge that rigor is a necessary condition for developing theory that provides scientific insight into reality. But this is not enough. As Vermeulen (2007: 2) argues *"…only if theory is developed with reality in mind will it reveal true insight. Without a deep understanding of organizations and the problems they face, academics may study the wrong things, interpret results incorrectly, and generate findings that may be rigorous but too detached from reality to be relevant*". Vermeulen (2007) suggests that individual scholars should add relevance to their work by 'smelling the beast' through regularly leaving the desk to directly interact with practitioners to enrich their understanding of the research subject, while upholding our standards of rigor. Following this line of thought, Edwards (2018) goes one step further and suggests that engaging with management practice benefits from a critical performativity approach. A critical performativity approach implies that management research seeks to 'improve' practice in some way, where the terms of the engaging should be specified to ensure clarity regarding whose interests are served, and what 'improve' means in a specific situation and context.

What is engaged scholarship?

In his 2007 book, Andrew Van de Ven forcefully stimulated the debate on ES. But the need for a closer relation between theory and practice, and the applied nature of management research had been addressed earlier by other academicians (e.g. Boyer, 1996; Pettigrew, 2005; Tranfield & Sharkey, 1998). For instance, the engagement of stakeholders in academic studies has been referred to as action research (Lewin, 1946/1948), 'mode 2' research (Tranfield & Sharkey, 1998), interactive research (Svensson, Ellström & Brulin, 2007; Astleithner, & Hamedinger, 2003), design research (Van Aken, 2004), CIMO approach (Denyer, Tranfield & Van Aken, 2008), participatory research (Cornwall & Jewkes, 1995), experiential research (Grant et al., 2001), scholarship of engagement (Boyer, 1996), and practice-relevant research (Antonacopoulou, 2010). The relevance of the approach stretches beyond the social sciences and the management discipline. Also, in the natural sciences the added value of co-production and close engagement between scientists, communities, policy makers, and other members of the public is acknowledged as an important way to conduct more useful research (Nature, 2018).

ES entails a shift in the perception of our roles as researchers, as it denotes a form of inquiry where researchers involve the advice and perspectives of other individuals who are also interested in or even own this problem. Accordingly, these different perspectives are leveraged to learn more about a specific problem domain (Van de Ven, 2007; Van de Ven & Johnson, 2006). To do that, scholars need to redefine their relationships with the topics being studied and the stakeholders that are relevant and needed to do the study. These stakeholders in management research include employees, supervisors/managers, entrepreneurs, executives, advisors, and government policy makers (Banks et al., 2016; Wiklund et al., 2018). Just like these stakeholders, scholars become participants in the research process where they engage in relationships with individuals with various backgrounds (Pfeffer, 2007). The organization is no longer considered merely as a data collection site or a source for funding (Van de Ven & Johnson, 2006). This implies that ES is about respecting various kinds of knowledge producers and acknowledging that scholars are just one of those. Academic researchers do not have a monopoly on knowledge creation (Van de Ven, 2007; Van de Ven & Johnson, 2006). Instead, scholarly and managerial work differ in terms of the context, processes and purposes of their practice. Van de Ven (2007) argues that a pluralistic view of science and practice as representing distinct kinds of knowledge is needed to provide complementary insights for developing a better understanding of reality.

Following the ES view, the co-creation of knowledge by members of scholarly and practitioner communities is essential. This is realized through relationships that are characterized by negotiation, mutual respect, reflexivity and collaborative learning. Practitioners partner up with scholars and together they produce knowledge on relevant questions and issues by bringing in multiple perspectives and testing alternative ideas and views. As such, the stakeholders involved in studying a specific phenomenon can be viewed as a learning community. It is important to note that the diversity of perspectives that theorists and practitioners bring to making sense of a problem or phenomenon and their unique knowledge and valid expertise also involves a challenge of creative conflict management (Barge & Shockley-Zalabak, 2008). This implicates that potential conflicts over power and knowledge must be worked out. Through this collaborative approach of creating knowledge, ES enhances the likelihood of developing knowledge that advances both theory and practice.

Van de Ven (2007) proposes four research activities that should be performed to generate knowledge regarding the phenomenon of interest: (1) problem formulation; (2) theory building; (3) research design; and (4) problem solving tasks. The order in which these activities are performed can depend on what fits the research project best.

Problem formulation

What distinguishes ES from other research approaches is primarily the problem formulation activity. It consists of situating, grounding, and diagnosing the research phenomenon by determining who, what, where, when, why, and how the problem exists, both generally and in the specific situation at hand. It requires both an engagement with stakeholders who are involved in the problem and situating the phenomenon in the available literature. The formulation of good research questions is at the heart of research that has the potential to be both interesting and influential (Alvesson & Sandberg, 2011; Vermeulen, 2007). Alvesson and Sandberg (2011) have suggested to use problematization as a methodology for assumption-challenging studies, to perform higher impact research. They argue that novel research questions can be generated through a dialectical interrogation of one’s own familiar position, other stances, and the domain of literature targeted. Following an ES approach, problematization should however not only lead to identifying and challenging assumptions underlying existing theories. It should also include the viewpoints of practitioners. The relevance of research to management practice can be actively addressed by making sure that research questions are grounded in practice and informed by practitioners.

Theory building

The second activity, theory building, implies engaging with various knowledge experts on the research problem in a specific context to develop and adjust theoretical propositions based on joint learning processes and reflection over a prolonged period of time. More specifically, Van de Ven (2007) does not argue for joint theorizing with the stakeholders with whom the scholars engage. Instead, he suggests engaging with key stakeholders in order to better understand their perspectives and assumptions. As such, being better able to select, frame, and embed them in the literature, using appropriate concepts that fit these stakeholders' experiences (Whitehurst & Richter, 2018).

This activity of theory building does however not differ much from other more traditional research approaches. Even when performing a literature review, scholars seek for examples of such reviews and ask colleagues who are experienced in performing a literature review for advice. We suggest that testing for a 'theory fit' should be part of this theory building activity of ES. This means to test with practitioners whether potential theories for the research project make sense to them given the phenomenon or problem in focus in the study. Potentially, practitioners and stakeholders may help to identify the weaknesses in current theories and provide input to further develop the theories.

Research design

The purpose of the third activity, research design, is to gather empirical evidence on the research problem by engaging with method experts and the practitioners who provide access to the phenomenon of interest. The way in which the research with the practitioners is done, depends on the different forms of ES. Van de Ven (2007) proposes that ES can be performed in many different forms: doing basic science in which only advice from practitioners are taken into consideration, co-producing knowledge with practitioners, doing evaluation research for professional practice, and action/intervention research for a client. The use of any of these forms depends on the research question and purpose of the study (is the study meant to describe, explain, predict, apply, or evaluate an intervention) and the degree to which the researcher engages with the field (does (s)he remain detached and stick to the role of an external observer or does (s)he act as an internal participant). Intervention research, in which the effect of a specific intervention is evaluated, as well as action research, in which a change process takes place that is studied simultaneously, are the forms of research that are most often acknowledged as ES studies (e.g. Nielsen & Miraglia, 2017).

The intensity and importance of engaging with practitioners and what engaging involves is rather different for these forms of ES. Merely using practitioners' advices does not deviate much from traditional research approaches where the researcher is open to the advice of other stakeholders but remains fully in control of the research project. This approach provides the advantage of safeguarding academic standards but may lead to research findings that are not utilized. This form of ES may be interesting for doctoral studies on topics that are close to practice, because it enables students to incorporate the advice of practitioners without risking their academic output. On the other extreme, if one chooses to perform an intervention, do action research, and deal with a specific problem of a family business, then the researcher is dependent on the interaction and consultation with practitioners in the client's setting. The researcher doing action or intervention research has good chances to create high-impact studies but also risks that the study will be politicized because of the importance to the client (Martin, 2010), or that the study is performed at the expense of an independent and objective stance (Svensson et al., 2007).

Of course, there are also possibilities to perform ES using an in-between approach of the ones described above, in which the research activities and the control over the project are shared concerns of the researchers and practitioners involved. One of the possibilities is to do research with practitioners, trying to describe or explain a phenomenon together by answering a research question that is of mutual interest to the parties involved. If the purpose of the project is to develop a policy or design a plan, then the project is generally designed to address a normative question relating to the evaluation or design of a policy or plan. This approach, which closely relates to design or evaluation research, seeks to obtain evidence-based knowledge of various solutions to an applied problem by taking a distanced and outside perspective that is necessary for evaluation findings to be considered impartial and legitimate (Van de Ven, 2011).

The various forms of research design have engagement as a common denominator, and as such the research design activities must also include tasks like the initiation of research cooperation, setting the project boundaries, securing funding, and deciding on sample sizes, data and methodologies (Martin, 2010). These tasks are often not easy to perform because the interests of the researchers and practitioners may not perfectly align or because of different ways of working. Also, researchers are generally not used to perform such tasks together with practitioners,. Martin (2010) explains that these design tasks can be difficult because researchers and practitioners are active in different professional spheres. Researchers and practitioners often have different priorities, assumptions and concerns; and they are subject to different sorts of expectations (Martin, 2010).

Also, relationship-specific factors may affect the level of success of the collaboration between scholars and practitioners, including the strength and quality of relationships, the commitment of practitioners, and the reliance on capable boundary spanners (Rosli et al., 2018). Boundary spanning is about breaking down boundaries between disciplines and between scientific and professional fields by facilitating interaction and interdependence between team members (Antonacopoulou, 2010). Bansal et al. (2012) have argued that intermediary organizations are needed for these boundary spanning activities to better align management research and practice. Intermediary organizations are organizations like practitioner journals, consultants and think tanks that connect research and practice.

Problem solving tasks

The last research activity of problem solving consists of processing, interpreting and applying the empirical findings, and engaging with the intended audiences (communicating and negotiating) to create impact (Korte, 2009). These audiences can help to interpret the meanings and possible use of the new knowledge that research has generated (Hunt, 2008). The empirical material should be considered as a source of inspiration and a partner for critical dialogue to generate novel and innovative insights (Alvesson & Sandberg, 2013). The engagements with the audiences should be adjusted based on their unique customs, assumptions, and speaking patterns. Thus, communicating new research knowledge to practitioners is also about to whom the knowledge is communicated; partners in the research process versus other stakeholders, how it is communicated; including the choice of language/discourse and where it is communicated; including choice on media channel (non-academic journals, social media, seminars, etc.). It is important to note that the research project has not ended after this final stage. Instead, the knowledge developed through engaging with stakeholders should be processed further before it can be considered as research output for peer-reviewed journals (Whitehurst & Richter, 2018; Kieser & Leiner, 2009).

Aguinis et al. (2014) have offered a measurement framework that includes various forms of output for different groups of stakeholders. This is important because it can help scholars to strategically assess which practitioners they are trying to affect and why, what kind of training is needed for future scholars, but also to communicate the relevance of the scholars' work to a broad audience. Their so-called pluralist conceptualization of scholarly impact acknowledges the value and relevance of applications of knowledge beyond academic publications (Aguinis et al., 2014).

Importance of engaged scholarship for family business research

Next to university-based scholars, professional associations have emerged and play an integral role in building the family business field and to push for the importance of engagement with practice in family business research. For instance, the Family Firm Institute (FFI) was founded in 1986 and has been an important stakeholder. This association initiated the *Family Business Review* and organizes an annual conference in which academicians and practitioners closely interact and exchange ideas (Sharma et al., 2007). Also, the Family Business Network (FBN) has been stimulating research that can be used by family businesses. In 1997, the European Family Businesses (EFB) was created as a European federation of national associations representing family firms. The issues highlighted by EFB show the family business research community different research topics of high practical relevance. The European Commission also acknowledges relevant research topics, importantly business transfer and succession within family business as one of the urgent questions in the coming decade (European Commission, 2013). Reflecting on the extent to which the growth of family business research has impacted the relationship between theory and practice, Sharma et al. (2014) argue that the pluralism of contributions continues and that research, education and advising have become more and more focused, moving from general to more specific themes.

Against this backdrop, we argue that ES is especially important for qualitative family business research because of the practical relevance of the additional layer of complexity that family involvement in the firm offers. For instance, many scholars in the family business field have used systems theory to understand the systemic interactions that characterize family businesses as a result of the subsystems family, business and ownership (e.g. Pieper & Klein, 2007; Tagiuri & Davis, 1996; Sharma & Nordqvist, 2008). Systems theory is attractive for researchers adopting an ES approach because it promises a comprehensive understanding of the complexity and specificities of family businesses as well as the dynamics resulting from the interactions between the subsystems and between the system of the family business and its environment. Moreover, family business scholars argue for the use of a paradox perspective to capture the conflicting perspectives, values and goals posed by family and business (e.g.

Schuman, Stutz & Ward, 2010; Ingram et al., 2016). Basco and Perez-Rodriguez (2009) have suggested that the paradoxical nature of family business stems from the competing yet complementary systems of family and business. Typical dilemmas in family firms include for example unconditional acceptance (born) versus conditional acceptance (hired), socialistic versus capitalistic regimes, cooperative versus competitive behavior, emotionality versus rationality, and equality versus merit (Zellweger, 2014).

Drawing on systems theory and paradox theory are relevant ways to address the complexity of family businesses. As indicated earlier in this chapter, an ES approach is particularly suited to understand complex organizational phenomena; such as family business issues. For example, the study of the succession of ownership and management in family businesses is one of the topics that involves a high level of complexity (Salvato & Aldrich, 2012) and it has been suggested that additional tensions emerge as generational transitions occur and family firms evolve from an owner-managed firm to a cousin consortium (Ingram et al., 2016). For example, a cousin consortium family firm is often owned by multiple family members. Research has shown that teams of owners with healthy interpersonal relationships and with a shared vision on the future of the firm have a positive effect on mobilizing the team's resources (for example knowledge via social networks) as a strategic asset for the firm (Uhlaner et al., 2015). However, family owners would benefit a lot from studies that provide a deeper understanding of how teams of owners can build and maintain healthy relationships and how they can arrive at a shared vision on the future. Baron and Lachenauer (2016) describe the issue as follows: "*the lack of awareness that family business ownership requires a set of choices is perhaps the greatest – and most harmful – misconception in the field of family business. Indeed, a failure to understand your ownership options can ultimately cripple your business, causing it to lose its competitive advantage, even resulting in buy-outs or sales that nobody really wants.*" To build an understanding of such complex phenomena and how families deal with them, one would ideally involve multiple stakeholders through inclusive qualitative research methods (Nordqvist et al., 2009).

It seems reasonable to view family business owners and managers as the primary group of practitioners to include in research approaches with the purpose to engage practitioners. However, in line with Aguinis et al. (2014), also other stakeholders can be considered in the family business field such as students, non-family executives, policy makers, family members not actively involved in the business, family business advisors, media, project sponsors, and so on.

Dilemmas and challenges in engaged scholarship

The advantages that an ES approach offers to researchers, e.g. providing insight in complex phenomena, bridging the gap between practice and theory and doing research that is relevant and has impact, come at a cost. Engaging with various stakeholders in research projects can be challenging. Whitehurst and Richter (2018) indicate that ES fits the management research domain well, but scholars should be prepared to deal with various tensions when they embark upon ES projects. These authors indicate that scholars are likely to face tensions regarding personal motivations and identities, gaining and maintaining stakeholder engagement, and balancing and managing the relationships among the research team members. In this section, we will elaborate on various dilemmas and challenges that scholars must take into consideration when taking an ES approach.

First, an important challenge in ES is the resource need in terms of time and money, for both scholars and practitioners (Shapiro et al., 2007). The costs of engaging with practitioners may serve as a main cause for the slow pace in bridging the gap between research and practice in the management discipline (Pettigrew, 2001; Martin, 2010). Banks et al. (2016) have introduced the concept of ‘collaboration costs’ to characterize the challenges preventing partnerships among academics and practitioners in the creation of knowledge. Two mechanisms that make these partnerships especially difficult are information asymmetries and goal incongruence. First, information asymmetries naturally arise in situations with specialized knowledge (Banks et al., 2016; Shapiro et al., 2007). Whereas information asymmetry is generally associated with imbalance of power in relationships, Banks et al. (2016) understand information asymmetry as a potential win-win relationship where researchers can get access to practitioners knowledge and information and vice versa. While scholars have been trained to do rigorous research, practitioners have practice-oriented knowledge, experience in their specific industry, and insider information about their own situation that scholars want to know more about. The second mechanism, goal incongruence, occurs because of self-interest behavior or the inability of stakeholders to act with consensus. It is likely that the primary goals of the different stakeholders differ in this process of creating knowledge together (Banks et al., 2016). The desire to collaborate will diminish when the overall collaboration costs become too high (Banks et al., 2016).

A second challenge is discussed by Martin (2010), who warns for the politicization of the research process when we engage with practitioners who commission studies for tactical reasons such as ducking difficult decisions, defending existing positions, or building support among other stakeholders for a predetermined course of action. Striving for relevance can narrow research agendas, time pressure may result in rushed work lacking in academic rigor, and the request for clear recommendations for practice may conflict with the nuanced tone of research findings (Martin, 2010).

Alternatively, practitioners who are really open to new ideas, such as how to address specific problem with a scientific approach, might encounter the problem that others view them as being too disruptive in suggesting how to implement research findings (King & Learmonth, 2015). Related to these political challenges are the different pressures that researchers and the practitioners are exposed to, coming from their own institutions (Astleithner & Hamedinger, 2003). For the researcher the pressures are related to expectations on rigor and academic output. For collaborating partners, the pressure could be related to the successful output of the change process that is studied, or for policy makers findings that can be translated to new policies. These pressures shape the expectations and interests of all persons involved in the research project, often leading to conflicts between them. In these collaborative processes, the researchers may be given the role of (objective) experts whose knowledge is held in higher esteem than that of the other participants in the research process (Astleithner & Hamedinger, 2003). Such perceived inequalities may create further problems and challenges in the realization of ES.

Third, considering the most interactive forms of ES, involving action and intervention research, several potential challenges and dilemmas are associated with the researcher's strong engagement and collaboration within the field. For instance, in action research, the researcher may take a strong role in the change process that is studied. Such proximity and involvement will make it more difficult to conduct a critical analysis of the resulting data (Svensson et al., 2007). In other words, a strong focus on the local understanding in collaboration with organizational members in the partner organization may happen at the expense of research productivity and output of academic knowledge, which in turn may create legitimacy problems in the traditional research community (Svensson et al., 2007).

To overcome these challenges, the joint learning process with organizational participants need to explicitly aim for a theoretical outcome that contributes to theoretical development that is simultaneously clearly relevant for practice. This may be possible through collaboration between partners during the whole research process, from the first activities of problem formulation to the resulting activities of problem solving that aims to advance both theory and practice, a joint process of producing high quality research that demands high levels of mutual trust to handle emerging conflicts of interests (Svensson et al., 2007; Van de Ven 2007). Here the capacity for reflection is critical for both the researcher and the other stakeholders, meaning that all involved participants should be able to critically examine their own understanding of the ongoing process. For the researcher, it is central to be able to handle dilemmas of creating closeness and still being able to keep a distance yet creating trust but still being critical when required towards coproducers (Svensson et al., 2007). It can be challenging to maintain a good balance between being an insider (to obtain access to the data) and an outsider (to be sufficiently objective and independent to perform the study) at the same time (Brewer, 2000 in Waddington, 2004).

On a perhaps more fundamental level, Kieser and Leiner (2009) argue that ES (in the meaning of producing research that is rigorous as well as relevant) is impossible because the system of practice and system of science accord to different institutional logics, which makes close engagement problematic and unhelpful. Scholars and practitioners can inspire each other through dialogue and even provocations, but they cannot collaboratively produce research that is both rigorous and relevant (Kieser & Leiner, 2009). Although scholars and management practitioners may indeed represent distinct systems, leading to issues (it may take time to understand each other's point of view, interests, and train of thoughts), when the need to address a shared problem is significant enough, individuals may want to invest time and energy to overcome these boundaries between the systems.

The challenges described above closely relate to the dialectics that scholars ought to acknowledge and embrace in practicing ES (Cheney, 2008). Cheney (2008) argues that the following five dialectics are important to take into consideration. The first concerns the tension between the openness needed for knowledge development versus a natural inclination of practitioners to protect their business or organization and therefore an unwillingness to share all kinds of information. Cheney (2008) argues from an ethical point of view that researchers have a responsibility to challenge situations of unwarranted secrecy when pieces of information are beneficial for the welfare of others.

The second dialectic is privilege (the difference between experts and non-experts) versus equality among research project members. This implies the role of the researcher as a participant in the research project, just like other participants involved. The third dialectic involves the concern of distance versus empathy regarding the role of the researcher, as discussed above. The fourth one involves genuine other-centered listening to identify the multiple voices involved in the research project versus advising. The last dialectic involves representation versus intervention and attends to following through on specific promises for feedback, results, and deliverables while also considering how the initial purpose(s) of the project seem in the light of retrospection.

The dilemmas and challenges discussed show that following an ES approach may have the potential to challenge the status quo in academic research and that scholars should be willing to invest time and money to engage with stakeholders to make it work. A scholar needs to be willing to face the consequences of taking this risk to push boundaries. With the basis and continued dominance of research designs inspired by a positivist methodology in the management discipline, the criteria that are deployed to assess the quality of research still center on validity and reliability to ensure scientific rigor (Johnson, 2015). Scholars and reviewers of journals have become more open to other than positivism-inspired philosophical orientations, allowing for more variety in research approaches to various forms of research. But this does not mean that it is still not challenging to publish ES-based research, in which subjectivity plays a significant role. Here it should be noted that the ES approach suggested by Van de Ven (2007) is based on the philosophical orientations of critical realism and pragmatism, while it remains for more interpretivism oriented researchers to show additional conditions and meanings of ES implemented in actual research practice.

As family business research focuses on the nature, characteristics, dynamics, and behavior of families and the firms that they manage and own, the research field is somehow engaged by nature. To understand family firms, scholars must inquire about the family members' thoughts, intentions, and their activities. Through inquiring, one could argue that the scholars engage with the practitioners involved in the study. However, for ES to be true to its merits, as indicated before, scholars should be willing to take distance from their traditional role, to operate on an equal level with the various groups of stakeholders involved and together create a learning community. In the following and last section of this chapter, we will provide suggestions on how to practice an ES research approach.

Thoughts on how to engage with practitioners in family business research

In this section we provide suggestions on how to deal with the challenges discussed before. We will illustrate our suggestions by sharing some of our own experiences. We build on and extend the suggested four research activities required for ES as suggested by Van de Ven (2007) by adding a preparation phase in which parties are introduced to each other, ideas are exchanged, interests are expressed, relationships evolve and potential plans for collaboration can be developed. During this preparation phase, several of the challenges discussed before should be dealt with aiming to prevent them from emerging while carrying out the research project. Whereas Van de Ven (2007) assumes some of these activities to be part of the research design activities, we posit that there should be a clear prioritization of these activities in terms of timing, as it would be a waste of time and other resources if only later during the collaborations the partners find out that they do not agree on the research question, or on the resulting output.

The preparation phase is essential to develop connections between the practitioners and scholars. They need to find and get to know each other and discover whether there is a phenomenon, dilemma, challenge or problem that is of interest to practitioners as well as scholars. We therefore argue that it is important for scholars to participate in events for practitioners, to share research findings in practitioners' outlets, social media and newspapers, build a network and to position themselves as experts on a specific topic. Vice versa, for practitioners it is important to reach out to universities and develop connections with scholars, for example via student projects. When practitioners find their way into the universities, they can share the issues that they run into and would like to know more about. When practitioners and scholars learn ways to connect to each other, then it becomes easier to discuss potential research ideas. For example, in a project on advisory boards in family firms we started off by organizing a meeting for family business owners, advisors, accountants, board members and scholars to discuss the topic and the relevance of a research project investigating the functioning and potential value of an advisory board in SME family firms (Van Helvert-Beugels, 2018).

Consequently, if parties agree on the relevance of a joint research project, a project leader should be appointed, each party's commitment to the project should be specified and the conditions need to be set. If scholars and practitioners have little or no experience in collaborating with each other, it might be wise to involve a boundary spanning organization that can help. One facet of ES that may need more explicit attention and which has also been discussed as a challenge, are the collaboration costs and the commitment needed of the parties involved in terms of time and money to do the research. Moreover, the risk of politicization of the research and expectations regarding timeframes and outcomes aimed for should be discussed at this stage to prevent conflict from occurring as much as possible. If a problem or challenge has been identified and agreed upon, which is aimed at improving professional practice, then there might be potential to apply for grants provided by national or international governmental institutions. Still, in most of the grants co-funding is required, by which the commitment of the different parties involved is ensured. A grant application oftentimes requires a section in which the problem formulation and research design is discussed. This implies that at this stage, far before the research starts, the parties involved should already deliberate on this and the scholars should make sure to embed the chosen grand challenge in the relevant literature.

In a project on advisory boards, the researchers applied for a grant of the Dutch Taskforce for Applied Research, which is part of Netherlands Organization for Scientific Research (NWO) (Van Helvert-Beugels, 2018). We received the maximum grant sum of Euro 300.000,- over a project duration of 24 months. The participants were requested to co-finance the project with a contribution of 50% of the total project cost. This implied that the family businesses involved in the project invested 20 days each during these two years and they had to sign a contract to show their commitment. Because these grants were made available to the university, we performed the role of project leader. In the grant application, we had to specify the problem formulation and the research design including sample sizes and methodology, which we had discussed in advance with the parties involved. Next to the family businesses, we involved advisors, family business experts, policy makers, other scholars, and our university board members. In similar projects, sector organizations and other professional organizations were involved.

Only after these initial steps have been taken, the research really starts. During this phase, the potential dilemmas regarding the researcher's engagement and collaboration within the field become apparent. As discussed, a strong engagement with practitioners may happen at the expense of an independent and objective stance, research productivity and output of academic knowledge. One possibility to deal with these challenges is to separate the task of researching from the task of performing the intervention, as is commonly done in action research. This allows the researcher to take on the role of observer while another person performs the intervention. Moreover, dividing these tasks strengthens the possibility to share reflections, thoughts and perspectives regarding the phenomenon studied.

The advisory board study (conducted by the first author of this chapter) consisted empirically of four real-time case studies, with observations during the advisory board meetings as the main source of data, along with interviews and secondary documents. During the advisory board meetings, the researcher took detailed notes that were used as the main data source and turned into meeting reports for the participants. Thereby, creating a win-win situation: there was great access to the data and the practitioners were relieved of the task of writing meeting reports themselves. One additional advantage of this approach was that the observations were instantly checked for accuracy and correctness by the practitioners involved. However, by creating the meeting reports we became one of the participants in the advisory board meetings. Our presence was visible, and not only accepted but over time also developed into a given. The researcher's position was still independent in the sense that she drew her own conclusions, regardless of whether the participants agreed with those conclusions. Being involved in four different family firms, comparing the cases over the entire research period, helped in maintaining a distance to the participants. An important advantage of the close involvement was that the observations were very informative; being present during the meetings allowed us to create a clear overall picture of the different roles of each of the advisory boards and their main tasks performed. It is likely that the interpretations of the data would not have been similar to the current ones without the observations. Most likely, we would have missed the magnitude of the differences among the cases.

It is interesting to note that an ES research project provides a lot of opportunities for scholars to establish themselves as an expert on a specific topic, which is a necessary condition to start a new ES research project. In this project, the research findings were simultaneously communicated to and negotiated with the academic audience via a dissertation project (Van Helvert-Beugels, 2018) as well as with the family firms and advisors via practice-based activities, where the knowledge developed was first given back to the family firms involved in the study. In addition, other family firms have been informed about the various roles of advisory boards and their outcomes via various communication channels: newspaper and magazine articles, a radio broadcast, short films, informative meetings, and an easy to read booklet, in which the findings of the study were illustrated with short portraits of the cases studied.

Conclusion and outlook

We argue that more studies based on an ES approach are needed in the family business research field. In order to make a difference to various family business stakeholders such as students, owners, managers, policy-makers, and advisors, research should not only be rigorous but also address relevant challenges. ES is about engaging stakeholders and creating impact – in academia – but also beyond. Stakeholders should be engaged throughout the entire research process, and different stakeholders can be engaged in the different steps. For instance, stakeholders facing a problem or a challenge, such as how to design a succession process, how to hire a non-family CEO, or, in the case of policy makers, how to formulate a new policy for supporting internationalization of family businesses, should be invited to the problem formulation phase. In qualitative family business research, an ES approach thus means to engage owners/managers, students, advisors, policymakers and/or other stakeholders in all four phases of ES research.

The idea of actively involving different stakeholders in various steps also illustrates the important point that ES is a collective and collegial process of creating and communicating knowledge. To build strong ES research projects, we need to build teams that consist of different stakeholders, competences and interests. Through engaging relevant (academic) expertise and stakeholders' different practical perspectives, the interaction between people is more likely to result in deep insights and understandings of the complex social and organizational world of family businesses. This realization is based on the careful grounding of research in real-life organizational and social problems, creating more relevant research questions and eventually more meaningful problem solutions (Korte, 2009).

Transparency is increasingly mentioned as an important quality criterion for various forms of engaged research (Bansal & Corley, 2011; Bluhm et al., 2011). It is important that researchers are transparent about how they engage with the phenomenon that they are studying, provide rich descriptions of the findings, and show how those findings have led to conclusions. Bluhm et al. (2011) stress the importance of transparency not as an end but rather to convey the logic of the argument explaining why the researcher did what s/he did. It is fair to conclude that subjectivity plays a significant role in ES studies, and even more so when engaging becomes more intense. Instead of treating this subjectivity as a variable to be controlled for or attempting to reduce it to zero, we suggest regarding it as a component of researchers' processes of understanding, one that has both good and bad consequences (Maxwell, 2012). Only through engaging closely and focusing on a particular context is it possible to identify the mechanisms and details involved that explain the phenomenon of interest. We recommend researchers to be aware of the subjectivity involved in the research process and the effects of their own involvement on the research findings, be reflexive, and be creative in dealing with this subjectivity. However, related to the aim of publishing studies using an ES approach in a transparent and reflective way, it may be a good idea to consider changing the current dominant assessment format of tenure and promotion applications and go beyond the traditional focus on top academic journals (Wiklund et al., 2018; Vermeulen, 2007). Next to traditional academic output also practice-oriented output would have to count much more.

Family business research has developed enormously over the past decades. A main challenge we have today is to ensure that our research is relevant not only to ourselves as academics and scholars but to the broader family business community. An important first step that we can take is to realize that we need to connect better to different audiences (Wiklund et al., 2018). As researchers we need to understand who our audiences are, how we can motivate stakeholders to work with us, and meet the expectations of each audience we engage with. This can be done by inviting stakeholders, discussing potential research topics, and including their perspective next to the more conventional academic perspective, or to let stakeholders present their problems and challenges to an audience of researchers. Together, they explore which theoretical perspectives and qualitative research design would fit to deal with those challenges.

The time for a stronger integration of ES in qualitative family business research is ripe. Many business schools around the world are changing their priorities towards supporting research that has a wider impact and is relevant for practice. The importance of research with impact is also subscribed by accreditation agencies such as AACSB and EQUIS that also increase their expectations on business schools to develop strategic plans for how their research combines rigor and relevance. In many countries, governments, funding agencies and other grant-giving entities increasingly expect scholars and institutions receiving their support to explicitly describe how research they support has impact outside the narrow academic discussions. The origin of the family business research started by researchers that also engaged in advising, and the continued close connection between research and practice make our field very well positioned to be a pioneer in delivering scholarly work through engaged scholarship that combines rigor and relevance in a genuine way.

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