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# Between Duty and Drive: Exploring the Role of Tradition in Successor Motivation Within Family Businesses

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**Abstract**

This paper investigates the role of tradition in shaping successor motivation within family businesses, with a particular focus on the tension between perceived duty and intrinsic personal drive. Succession in family businesses is a critical process that significantly influences the long-term continuity and success of these firms. While previous research has extensively examined structural and strategic aspects of succession, the motivational perspective of successors remains comparatively underexplored. Using a qualitative research approach, semi-structured interviews were conducted with current- and next-generation members from family-owned businesses to gain in-depth insights into their experiences and perceptions.

Through my findings, I identified that tradition can act both as a motivating force and as a source of pressure. While some participants perceived tradition as a meaningful foundation that fostered commitment and purpose, others experienced it as an obligation that constrained their autonomy. Through this research, I contribute to a deeper understanding of the emotional and motivational dynamics within succession processes and derive practical implications for family businesses navigating generational transitions.

*Keywords:* family business; succession; successor motivation; tradition; transgenerational entrepreneurship

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## 1 Introduction

### 1.1 Problem Definition and Objectives

Family businesses are the most widespread form of business organization worldwide and contribute considerably to the economy in many countries (Astrachan & Shanker, 2003; Klein, 2000). These companies can have a long history and go back as far as the 6th century.

Family organizations tend to be defined by enduring traditions that maintain principles and identity throughout generations, influencing the company's long-term performance. Multiple studies indicate that family enterprises often preserve historical traditions, consequently sustaining a consistent identity (Suddaby & Jaskiewicz, 2020). Traditions have become established as a fascinating construct in family business research, utilized to highlight the uniqueness of innovation inside family enterprises and the associated opportunities. In addition, traditions are preserved and utilized as a valuable legacy to capitalize on (De Massis et al., 2016). Nonfamily enterprises have also acknowledged the significance of managing historical interpretation, leading to the emergence of several consulting firms that highlight how organizations can leverage their history for competitive advantage (Lasewicz, 2015).

Yet traditions have purposes beyond profit generation. Traditions are defined by Dacin et al. (2019) and Shils (1981) as consciously passed down beliefs, customs, and symbolic practices from one generation to the next. Family organizations are often characterized by historical identity statements, combining corporate philosophy and familial customs, usually established by founders and passed down through generations. These values and traditions create a robust organizational identity and a sense of continuity that can act as both a catalyst and a constraint for strategic change (Sasaki et al., 2019). Family businesses, rooted in tradition, provide unique methods for innovation (De Massis et al., 2016), a strengthened brand identity that offers leaders stability during periods of transformation (Lee & Shin, 2015), and historical values that function as a moral compass (Sasaki et al., 2019).

Given the widespread recognition of early succession

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planning as crucial, further investigation into this last reason may be necessary (Neubauer, 2003). Different approaches are available to stimulate the interest of successors within the organization, such as involving them at an early age or incorporating them into the company immediately after graduation (J. Chrisman et al., 2009). Working in a family business is essential, however insufficient for success; relationships with managers and family mentors that provide enriching developmental experiences are also necessary (Daspit et al., 2016), as is the cultivation of skills and character (Salvato et al., 2012). The transfer of a company inside the family is not simply a transient issue; the quality of the relationship between the current owner and the successor is essential for a successful succession (Daspit et al., 2016). Additionally, Dacin et al. (2019) suggests that traditions should be actively managed within organizations.

This thesis contributes to the discussion on the role of traditions in generational transitions within family businesses, a topic at the intersection of family business studies and leadership succession literature. Exploring this link is particularly relevant as traditions often have a stronger influence on identity, continuity, and leadership transitions in family firms compared to non-family businesses (Jaskiewicz et al., 2015; Parada et al., 2019; Suddaby et al., 2023). The objective of this exploratory study is to identify critical factors for successful generational handovers, focusing on how traditions shape successor motivation, alignment, and the overall transition process. The examination of this subject should help to address the following research question: *"How do successors experience the influence of traditions on their decision to take over the family business?"* The answers to the question will derive from insights obtained through seven semi-structured interviews with successors of medium to large German familial businesses who have undergone succession recently.

### 1.2 Course of Investigation

At first, I will define the theoretical background by presenting a brief literature review on generational transition, the significance of traditions, and their impact on family enterprises. This will include an overview of generational transition and succession planning, the role of traditions in family businesses, and the integration of traditions within succession planning. Furthermore, I will analyze how traditions may function as both enablers and limitations in the succession process. Understanding established frameworks and theories is essential for positioning this study within its wider context and comparing findings with current literature.

Second, I will transparently summarize the methodology underlying this study to ensure trustworthiness and rigor, following Guba's (1981) trustworthy criteria for qualitative research. Using the Gioia method (Gioia et al., 2013), I will conduct an inductive analysis based on seven interviews with members of family businesses undergoing or preparing for generational transitions. This approach allows for an in-depth analysis of the influence of traditions on the motivations, identities, and strategies of successors.

Finally, I will present the findings, revealing correlations between theoretical ideas and practical experiences, including varying points of view among individuals surveyed. Based on these findings, theoretical and practical implications will be derived, and directions for future research will be proposed. The study concludes in a summary of key findings about the influence of traditions on generational transitions in business families and the limitations of this research.

## 2 Theoretical Background

Generational transition is a crucial phase in the lifecycle of family companies. It involves the transfer of leadership, knowledge, and values across generations to guarantee continuity and success. Traditions, deeply rooted in family-owned businesses, significantly influence their identity and operations. This section initially investigates generational transition and its significance, followed by an analysis of the role of traditions in familial companies. By providing a theoretical foundation, it sets the stage for understanding the interplay between these elements in the broader context of family business continuity.

### 2.1 Generational Transition & Succession Planning

#### 2.1.1 Importance of Generational Transition

A family business is defined as an enterprise governed and/or managed with the objective of realizing the corporate vision held by a dominating group overseen by one or more families, ultimately aiming for long-term sustainability and success (De Massis et al., 2016). The generational transition in familial businesses is a complex process that connects ownership and management to family members, prioritizing long-term objectives including intergenerational continuity to ensure the business's endurance across generations (Querbach et al., 2022).

Leadership succession, as a key aspect of generational transition, is recognized as one of the most significant events for family firms, since it dictates the organization's path for upcoming years or even decades (De Massis et al., 2008; Richards et al., 2019). This moment represents a merger of history and present, when successors are expected to act as reliable caretakers of the company's heritage, guaranteeing the preservation of its legacy (Radu-Lefebvre et al., 2024). Maintaining the essential resources, including wealth and leadership potential, within the family is crucial for securing the company's future (Jaskiewicz et al., 2015) and its legacy. Multigenerational family-owned companies use organizational practices, routines, and cultural mechanisms that enable the transmission of knowledge, values, and beliefs between generations, hence promoting innovation and flexibility to changing market circumstances (De Massis et al., 2016). Narrative strategies such as "founder foreshadowing", "emplacing the legacy in the community", and "weaving family and macro-history" promote the ongoing development of family values and company legacies, so reinforcing the firm's identity and mission for the future (Suddaby et al., 2023).

Despite its significance, the succession process is a fragile and difficult undertaking, with an elevated chance of failure. Inadequate preparation, disagreements, and generational misalignment often contribute to the unsuccessful leadership transfer in several family enterprises, resulting in substantial disruptions to the organization (De Massis et al., 2008; Jaskiewicz et al., 2015). Tensions often emerge when legacy senders try to maintain the past, while successors concentrate on developing their identity and influencing the future, resulting in a possible conflict of visions (Radu-Lefebvre et al., 2024).

Shared goals can help to mitigate these tensions (Tessema et al., 2024), because they are more traditional and communal in nature. Family firms prioritize non-financial goals, including socioemotional wealth, regional community integration, and transgenerational legacy. These objectives, essential for sustainability with long-term implications, commonly overpower corporate goals like profit maximization or expansion (Brinkerink & Bammens, 2018; Gómez-Mejía et al., 2007). As a result, families prioritize the continuation of legacy and values over purely economic aims (Richards et al., 2019). This can be associated to more dependable and established knowledge elements that require traditional rather than state-of-the-art knowledge (Gusenbauer et al., 2023).

This focus on maintaining legacy and values directly correlates with the necessity for strategic foresight, since effective early succession planning is essential for facilitating a seamless and sustainable transition. Leadership transfers in family businesses need extensive preparation, sometimes extending over many years, to adequately prepare both the current leader and the successor for this change (Daspit et al., 2016; Neubauer, 2003; Richards et al., 2019). The incumbent generally determines the management of the process, with practical learning via observation, inquiry, and action being important in equipping successors for their future responsibilities (Marshall et al., 2006; Querbach et al., 2022). But for a successful handover, both the successor and incumbent must be willing to engage in the process. The successor must be ready to take on leadership, while the incumbent should acknowledge the resources, effort, and time necessary for the transition, which can often be underestimated (J. Chrisman et al., 2009).

The significance of virtues is critical for ensuring successful transitions. Incorporating Aristotelian virtues, including prudence, bravery, temperance, and justice, into leadership practices increases the probability of a seamless and successful succession, since these values enable ethical and balanced decision-making (Parada et al., 2019).

Lastly, in some instances, the inclusion of non-family managers in the succession process is advantageous. Families could consider using external consultants to plan and support succession, offering an unbiased viewpoint and specialized knowledge. This approach requires cautious handling, since family members may see the succession as a matter to be addressed internally to maintain family autonomy and trust (J. Chrisman et al., 2009; J. Chua et al., 2003; Daspit et al., 2016).

#### 2.1.2 Challenges in Generational Transition

Transferring a family company from one generation to another is a complicated process frequently plagued with difficulties. This chapter indicates some challenges that may emerge during generational transitions, emphasizing elements that might obstruct effective succession and providing insights into the conditions needed for an easier leadership transfer. Before the analysis starts, it should be noted that research on determinants of successful successions has predominantly depended on post-hoc data, such as surveys conducted after the transfer, and has not incorporated comparisons with failure transitions (Gagné et al., 2021). This constraint highlights the necessity of comprehending the challenges associated with effective generational transitions.

Numerous authors mention that over fifty percent of family businesses fail to endure beyond the first generation or several generations (Daspit et al., 2016; Klein, 2000). Statistics (Fels et al., 2021) indicate that approximately 90% of German companies are family-run, with 190,000 potentially succeeding in the current period, starting from 2022 to 2026 (Fels et al., 2021). This represents a 26% rise in the number of firms able to transition to the next generation compared to the 2018-2022 period. The dominant reason for handover is the advancing age of the current family members, which rose as a percentage from 2023 to 2024 (Fels et al., 2021; Kay et al., 2018).

The primary issue, the lack of suitable successors, accounts for the current transfer of only one-third of family companies to family members. The report indicates that successors encounter challenges such as inadequate returns in relation to significant responsibilities, elevated taxes upon transfer, numerous constraints, and insufficient succession planning (DIHK, 2023, 2024). Numerous factors make it unappealing for successors unwilling to confront these obligations and limitations.

Unsuccessful transitions may arise from several causes, such as inadequate preparation and planning, lack of competent successors, business owners' resistance about giving up power, and challenges over the company's nature or profitability (Gagné et al., 2021). A significant obstacle to succession is the dissatisfaction or lack of motivation among potential successors. Dissatisfaction or reluctance of the successor might fully hinder succession, either due to the successor's rejection of the role or the dominant coalition's decision against their appointment (De Massis et al., 2008). Conflicts with non-family management pose considerable hurdles and may hinder effective succession (Bruce & Picard, 2006). Furthermore, if formal training is overlooked, successors may be inadequately prepared to assume top management roles, so threatening the transition process (De Massis et al., 2008).

Other structural challenges within the family enterprise could impede succession. Excessive dependence on a sole owner-manager generates obstacles in learning and innovation, hindering successors from acquiring the requisite knowledge and experience for competent leadership (Querbach et al., 2022). This centralized decision-making structure frequently ends in a bottleneck, where important knowledge, skills, and creative tactics are restricted to a single individual instead of being distributed across the firm. Resistance to the input of successors and rejection of ideas from family members can cause frustration and hinder progress, resulting in complicating the transition (Querbach et al., 2022).

In addition to these challenges, research indicates that while short-term evaluations of successors' competencies are essential, the enduring trust created via generalized exchange connections is crucial for the successful fulfillment of the process (Daspit et al., 2016). In the absence of this trust, the probability of a successful succession considerably declines. These findings underscore the necessity of prioritizing not just immediate succession preparedness but also fostering trust and long-term alignment among all stakeholders in the family enterprise.

#### 2.1.3 Incumbent and Successor in Succession Planning

Prior to exploring the separate roles of incumbents and successors in the generational transition process, it is necessary to first analyze the dynamic interplay between the two. This connection establishes the basis for a successful succession, affecting both the process and its results. Comprehending their connections, common objectives, and possible hurdles assists in clarifying the characteristics that facilitate successful leadership transitions in family companies.

Research frequently emphasizes the crucial role of a high-quality relationship in ensuring effective succession (Brockhaus, 2004; Daspit et al., 2016). However, maintaining exchange relations between the incumbent and successor might be difficult because of inherent misalignments in their organizational roles, perhaps causing friction in the process (Sharma et al., 2003). Simultaneously, cultivating harmony among family members by a robust communication fosters easier transitions and enhances overall success (Daspit et al., 2016). Key factors that contribute to a successful transition, in addition to a robust predecessor–successor relationship, consist of increased successor motivation, relevant education and work experience for the successor and familial harmony (Jaskiewicz et al., 2015). From a theoretical point of view, the agency theory argues that a fundamental discrepancy between principals (incumbents) and agents (successors), highlighting the need of monitoring and control to alleviate risks (Jensen & Meckling, 1976). The stewardship theory presents an alternate perspective, stating that alignment between principals and agents is attainable when there are shared goals and motivations (Davis et al., 2010). Therefore, the alignment of motivation between the incumbent and the successor is important. Both parties benefit from shared motivations based on belonging and identity creation, which are essential for transmitting and advancing the family business legacy (Radu-Lefebvre et al., 2024).

Understanding the incumbent's role is essential for explaining how leadership transitions unfold in family businesses, as their intentions, actions, and level of involvement significantly shape the successor's development. Incumbents often share their heritage to sustain their identity and to preserve the family company's heritage (J. H. Chua et al., 1999; Richards et al., 2019). The preference for familial continuity clarifies why incumbents predominantly choose to hand over leadership responsibilities to their descendants instead of non-familial managers (Radu-Lefebvre et al., 2024). Because successors exhibiting elevated levels of dedication and skill are preferable, it is certain impossible to anticipate excellence in both dimensions. This highlights the need for adaptability and support from the incumbent throughout the transition process (Richards et al., 2019). In order to ensure a smooth transition from the incumbent's perspective, it is crucial to prepare successors for leadership via education, mentoring, and early exposure to the family firm. Vicarious learning, in which younger family members witness and imitate the entrepreneurial behaviors shown by incumbents, serves as an effective mechanism for transmitting leadership abilities (Tessema et al., 2024). Early exposure to legacy senders, including founders and senior family members, strengthens the successor's identity inside the business (Radu-Lefebvre et al., 2024). The importance of family and parental role models in influencing entrepreneurial intentions and developing an entrepreneurial career path is further supported by social learning theory (Bandura, 1969) and career development theory (Super, 1980), which highlight the impact of these role models on potential successors (Radu-Lefebvre et al., 2024). Initiating the succession process early is necessary, as it fosters the successor's dedication and mitigates the possibility of misalignment (J. Chrisman et al., 2009). Hands-on mentoring, entrepreneurial education, and involvement in business activities provide successors further opportunity to develop the skills required for successful leadership (Tessema et al., 2024), highlighting the connection between the incumbent's responsibilities and the successor's growth.

The successor's commitment to the family business is an essential component for ensuring a seamless generational transmission. This dedication signifies the intent to manage the family enterprise and maintain its heritage for future generations (Richards et al., 2019). Shared visions and beneficial relationships between the incumbent and successor foster buy-in, emotional investment, as well as engagement in the organization's future, so improving the succession process further (Daspit et al., 2016; Dumas, 1998). Establishing an entrepreneurial legacy inside the family business might further motivate successors. While some multigenerational family enterprises have diminished entrepreneurial activity, others effectively preserve it throughout generations by fostering a legacy that inspires strategic activities (Jaskiewicz et al., 2015). Trust from the incumbent is essential, since it enables the successor to feel competent and independent (Gagné et al., 2021; Mayer et al., 1995). To enhance the successor's motivation and confidence, it is necessary to provide clear guidelines for the transfer of responsibility throughout the transition. Clearly defining the moment the successor takes full authority and the outgoing generation transfers responsibility mitigates misconceptions among the workforce and facilitates a more smoother transition of leadership (J. Chrisman et al., 2009).

Successor training not only includes skill development, but also meaningful exposure to the family company. Fostering social capital inside the family is essential — nevertheless, it must be complemented by building skills and character (Salvato et al., 2012). Simply working in the family business is insufficient; interactions with managers and familial mentors that provide developmental experiences are essential for adequate preparedness (Sardeshmukh & Corbett, 2011). Early exposure to the firm also allows successors to cultivate connections with essential stakeholders, including suppliers, customers, and lenders, enhance their reputation inside the organization, and get an extensive understanding of its culture and complexities (De Massis et al., 2008). Engaging successors in the reinterpretation of familial traditions may enhance their identity and promote continuity. This strategy helps the reconciliation of generational gaps within the family and company, thereby promoting a more effective succession planning (Suddaby & Jaskiewicz, 2020).

### 2.2 Traditions in Family Business

#### 2.2.1 The Role and Meaning of Tradition in Family Business

The daily interactions within family companies are shaped by informality and customs. This influences both operational and leadership strategies within these companies (Querbach et al., 2022; Suddaby & Jaskiewicz, 2020). Business practices are impacted by the familial history, which over time cultivates and reinforces shared values, norms, and beliefs (Zellweger et al., 2012). In this context, historical identity statements, including corporate philosophy and familial traditions, are important as they reflect the cultural and ethical roots of the firm (Sasaki et al., 2019).

Traditions are considered as essential to the success of family businesses, providing continuity and stability across generations, while assisting firms in balancing the protection of legacy with the necessity for adaptation (Suddaby & Jaskiewicz, 2020). Families engaged in these rhetorical historical practices for a far longer duration than non-family enterprises, making them better suited for leveraging traditions (De Massis et al., 2016; Suddaby & Jaskiewicz, 2020). Nevertheless, the role of traditions is often misunderstood. The assumption that traditions embody the agency of past generations to the disadvantage of present and future generations represents a significant theoretical misrepresentation of traditions — both in general literature and specifically in family business research (Suddaby & Jaskiewicz, 2020). A widely recognized definition of traditions describes them as beliefs, customs, and symbolic practices passed down from one generation to the next (Calabrò et al., 2019; Dacin et al., 2019; De Massis et al., 2016; Shils, 1981; Suddaby & Jaskiewicz, 2020). Within the business context, and particularly in family-owned businesses, tradition can be observed as a unique and exceptional asset. The enduring and rooted characteristics of tradition make its replication more challenging, consequently enhancing its uniqueness and scarcity, which provides a competitive advantage (De Massis et al., 2016; Parada et al., 2019). Furthermore, companies cultivate their brand identity through traditions and their external image (Lee & Shin, 2015). Nonfamily enterprises are increasingly acknowledging the competitive advantage of using the interpretation of the past, resulting in the emergence of consulting businesses that specialize in this approach (Lasewicz, 2015), which underscores the competitive benefits of traditions.

Traditions derive significance from their historical and geographical origins, meaningful to both the business and the family (Dacin et al., 2019). The geographical context often provides a sense of rootedness and a connection to the firm's origin. As a result, family members tend to preserve and even strengthen the path established by the founder, as the founder's imprinted values and beliefs have a deep connection to these traditions. These ideals and beliefs guaranteeing an enduring impact even after the founder's passing (Kammerlander et al., 2015). It must be acknowledged that traditions are not static. Dacin et al. (2019) defines traditions as a dynamic resource that can change and evolve within organizations and should be proactively maintained by the family. Their continuous reinterpretation in the present to shape the future empowers future generations, challenging the misconception that traditions only exert influence from the past to the present. The hybrid nature of traditions, consisting of "traditium" ("what is passed down") and "tradere" ("how it is transmitted"), enables flexibility. This dual trait allows each generation to reinterpret traditions to meet modern requirements (Suddaby & Jaskiewicz, 2020). Established traditions, such as the exclusion of women from ownership, have been revised to promote equity and inclusivity (Parada et al., 2019). But this does not imply that traditions must be forsaken (Sasaki et al., 2019). A conventional philosophy and today's one can coexist and enhance the business by facilitating broad involvement in strategic decisions and aligning the corporate culture with current requirements. Core values, which are closely linked to traditions, are another essential aspect of corporations. These values influence the organizational culture and engagements with internal and external stakeholders (Parada et al., 2019). Values such as loyalty, long-term orientation, and humility are often central to the ethos of family businesses, fostering continuity and stability across generations (Tessema et al., 2024). Internally, traditions can establish a foundation for fostering a shared identity (Dacin et al., 2019).

Legacy emerges and can be transmitted only when individuals recognize themselves as co-protagonists, driven by identity-related, emotional, moral, and instrumental motivations (Radu-Lefebvre et al., 2024). The successors' motivation underscores the beneficial use of traditions. The following chapter will cover the benefits and drawbacks in detail.

#### 2.2.2 Benefits and Drawbacks of Utilizing Traditions

Traditions are deeply embedded in the DNA of family businesses, shaping their identity, culture, and long-term vision. While they provide continuity and a strong foundation for organizational stability, traditions can also act as a double-edged sword. Research indicates that traditions associated with family companies have both advantages and disadvantages regarding the same topics. This yield benefits and drawbacks for innovations, identity development and motivation for successors (Tessema et al., 2024).

It has been noticed that traditional, bureaucratic, conflict-ridden, and chaotic companies have problems across various dimensions (Miller et al., 2003). Factors that can be found in family businesses (Querbach et al., 2022). Recent research mostly indicated that family enterprises are generally less innovative than non-family corporations (Suddaby & Jaskiewicz, 2020). Family firms tend to have a cautious attitude towards innovation, emphasizing socioemotional wealth and long-term sustainability rather than engaging in high-risk innovations (Skorodziyevskiy et al., 2024). Moreover, one of the most significant reasons families hesitate is due to the excessive dependence on the firm's history (Zahra et al., 2008). Conventional thinking in innovation proposes that dependency on historical knowledge can lead to path dependence, inflexibility, and conservatism, therefore diminishing a firm's capacity to innovate effectively and address contemporary environmental demands and expectations (De Massis et al., 2016). Additionally, traditions may foster resistance to innovation when family members strictly hold on to established practices (Querbach et al., 2022), driven by their respect for tradition and a desire to maintain a consistent identity (Suddaby & Jaskiewicz, 2020). This commitment may hinder innovative ideas, lead to inflexible decision-making, and hinder adaptation (Leonard, 1992; Querbach et al., 2022). Besides negative effects of traditions on family-owned businesses, they also provide advantageous outcomes, which will be elaborated upon, since this thesis primarily emphasizes the advantages of utilizing traditions.

When incorporated into practical learning processes, family traditions serve as a strong framework that fosters creativity and maintains continuity during change (Querbach et al., 2022). In family firms, traditions have become a fundamental element in understanding their unique approach to innovation. Research underscores that traditions enhance the distinctiveness of innovation in family enterprises by influencing their capacity to adapt and progress while preserving a robust link to their historical foundations (De Massis et al., 2016). This balance is essential, especially in today's rapidly evolving marketplaces, where companies need to combine stability with expansion (Erdogan et al., 2020; Tessema et al., 2024). Family businesses have demonstrated how integrating traditional practices with modern technologies can lead to the creation of new product meanings and functionalities, thus ensuring their relevance in contemporary markets (De Massis et al., 2016). This methodology is embodied in the principle of "Innovation trough Tradition", which emphasizes the development of dynamic capabilities to preserve and reinterpret traditional knowledge. Traditions are preserved and shared by "interiorization", while "reinterpretation" involves modernizing and innovatively applying them (De Massis et al., 2016). The maintenance and modification of traditions in family enterprises are frequently accomplished through strategies including elaboration, recovery, and decoupling (Sasaki et al., 2019). Elaboration is converting past activities into contemporary formats to maintain their relevance in present circumstances. Recovery focuses the restoration of past traditions to tackle contemporary issues, whereas decoupling facilitates the coexistence of historical and modern values.

Interestingly, family firms, ranging from small and medium-sized enterprises to large corporations, tend to invest less in innovation compared to their nonfamily counterparts. However, their innovation efforts often result in superior performance, underscoring their capacity to innovate more efficiently rather than more often. This approach also extends to internationalization, where family businesses prioritize innovation and global outreach over diversification (Skorodziyevskiy et al., 2024).

Traditions are essential in forming a collective identity in family-owned companies, acting as an anchor and as a tool for navigation. Although traditions offer stability and continuity, they must adapt to maintain relevance, particularly with shifting market dynamics and leadership changes (Parada et al., 2019; Querbach et al., 2022). When properly incorporated, they serve as a source of unity and motivation, cultivating trust and shared purpose. By using historical values, family enterprises may address recent challenges with a sense of integrity and authenticity while keeping aware of current conditions (Sasaki et al., 2019). In times of crisis or leadership transitions, traditions function as an imprinting mechanism, establishing the basis for a collective identity and trust. By defining values at these critical periods, companies may cultivate togetherness and resilience among family members and employees (Tessema et al., 2024).

In conclusion, this chapter could be summarized as follows: Family-owned companies often face the "Theseus Paradox" (continuity versus change) and the "Oedipus Paradox" (founder versus successor vision). Effective tradition management enables family firms to confront these issues by honoring historical values while promoting innovation (De Massis et al., 2016). The forgetting and consequent substitution of historical statements were often linked to substantial organizational transformation. In contrast, the enterprises that preserved the historical motto in its original form maintained the same core business, family ownership, and around the same size (Sasaki et al., 2019).

### 2.3 Tradition in Succession Planning

Traditions have endured throughout several generations in certain firms and hence provide an important component of the generational transition. Traditions ensure that generational transitions follow established values and ethical norms (Tessema et al., 2024). Internally, traditions can establish trust among family members while matching personal values with the family business values, and therefore aligning incumbent and successor goals (Tessema et al., 2024). This alignment, which includes both ownership and governance goals, is essential for an effective generational handover process (J. J. Chrisman et al., 2015).

The concept of "rhetorical history" helps families in understanding and preserving traditions (Suddaby & Jaskiewicz, 2020). Narratives play an important role in communicating values and traditions, functioning as instruments for building identities and generational continuation (Parada et al., 2019). The storytelling about ancestors' achievements help to reinforce family identity and traditions, aligning younger generations with the ideals and vision of the business and preceding generations. Families utilize symbolic gestures and tales during informal interactions, such as family dinners, to communicate core values and maintain traditions (Jaskiewicz et al., 2015). This historical knowledge enables family members identify cause-and-effect patterns over time, so assisting later generations in confronting future challenges (Radu-Lefebvre et al., 2024). The following methods can be employed for transmitting traditions: Training programs, symbolic communication, and shared cultural awareness enable the next generation's internalization and application of traditional knowledge within a modern framework (De Massis et al., 2016).

Depending on how they are perceived in present-day situations, traditions may limit successors and discourage them from taking over the family company (Radu-Lefebvre et al., 2024) and may serve as a behavioral constraint (Dacin et al., 2019). An important component of a smooth transition is the successor's motivation, which can have significant negative consequences in the opposite situation (Le Breton-Miller et al., 2004).

On the other hand, empowering future generations is an essential part of utilizing traditions to build identity. By engaging younger family members in the reinterpretation and modernization of traditions, family enterprises may guarantee continuity while cultivating a feeling of ownership and collective purpose among successors. This process not only strengthens the organizational identity but also facilitates smoother transitions and efficient successions (Suddaby & Jaskiewicz, 2020).

The commitment to continuing the family company history often arises from a deep sense of duty and pride in the traditions that characterize the family and its company. According to Richards et al. (2019), the successor's motivation to run the family business is fundamentally linked to their commitment to maintaining and enhancing this legacy. Traditions foster this sense of responsibility and loyalty by linking the subsequent generation to their heritage. This emotional bond reinforces their dedication to the family business and motivates them to preserve the traditions and practices established by previous generations (Querbach et al., 2022). Traditions significantly influence the identity and purposes of successors, potentially constraining or empowering them (Radu-Lefebvre et al., 2024). Narratives embedded within these traditions often highlight resilience through past crises, inspiring successors with stories to preserve and innovate. By providing a sense of continuity, traditions empower successors with a belief that they can overcome problems and enhance the family legacy (Jaskiewicz et al., 2015).

## 3 Methodology

### 3.1 Research Design

This thesis investigates how traditions can impact the succession planning in family-owned firms, specifically on the willingness of future successors. De Massis (2014) argues that a qualitative research design, such as case studies, is the most appropriate method for investigating "how" and "why" questions. The objective of the research is to get comprehensive insights on the traditional influences during family business transitions, with critical consideration of nuance, detail, and context. Given the absence of empirical investigation (Gagné et al., 2021; Jaskiewicz et al., 2015), an exploratory approach is best suited for uncovering the previously unrecognized characteristics of traditions. The objective is to construct theories that reveal the impact of traditions on the development and dynamics of succession planning in family-owned companies (De Massis & Kotlar, 2014). To get a broad spectrum of perspectives, I conducted interviews with several Now- and Next-Generations from different backgrounds and industries. Taking a social-constructivist viewpoint, I acknowledge my role as a reflecting observer in the research process. By engaging with the interview partners, I encourage the construction of a shared social reality that is both empirically grounded and subjectively meaningful (Berger & Luckmann, 2016). Therefore, I participate in identifying common patterns and applying them within a broader context. This inductive research will stick to the Gioia Methodology to maintain academic rigor (Gioia et al., 2013). The selected methodological strategy in this thesis is frequently used in family business literature and mainstream educational research.

### 3.2 Sampling

The data were gathered from seven interviews with leading families of German family-owned businesses and one interview with a consultant/lawyer who is specialized in family company succession (Table 1). The samples were selected carefully and purposefully to identify the most information-dense examples. Furthermore, snowball sampling was utilized to identify instances by requesting referrals for interview candidates from other interviewers. All participants were approached by phone or email, and each interview was performed individually by a single interviewer.

### 3.3 Data Collection Methods

For an understanding of the management of successions in family businesses and the impact of traditions on these transitions, it was important to fully understand the points of view and experiences of those engaged in these processes.

**Table 1:** Interviewee Sampling Information

| Interview | Company | Category | Interview Participant | Recent Succession | Generation | Industry | Employees | Founding Year |
|---|---|---|---|---|---|---|---|---|
| A | A | Consultant/Expert | 1 | / | / | Consultant/Lawyer | 30 | 2018 |
| B | B | Family Business | 4 | Succession rejected | ≈ 16 | Winery | 5 | 1674 |
| C | C | Family Business | 1 | 2012/2017 | 3 | Online Vehicle Registrations | 1.800 | 1957 |
| D | D | Family Business | 2 | 2023 | 7 | Winery | ≈ 15 | 1818 |
| E | D | Family Business | 1 | “ | “ | “ | “ | “ |
| F | E | Family Business | 1 | 2025 | 6 | Logistics/Car Sale | 12.200 | 1871 |
| G | F | Family Business | 1 | Succession rejected | 3 | Mineral Oil Trade | 15 | ≈ 1965 |

Consequently, an interview method was used to obtain specialized and insightful information. A semi-structured interview format was employed to maintain a conversational and flexible flow, enabling the interviewee to suggest new and unexpected topics. A hybrid approach of in-person and online interviews done using Microsoft Teams was employed to align with participants' availability and preferences. The interviews ranged in duration from 20 to 50 minutes. All interviews were conducted in German, as all interviewees were native speakers of the language. With the approval of each participant, the interviews were recorded and transcribed with the Trint software, yielding 77 pages of transcribed content. The transcripts guaranteed comprehensive coverage of all themes and allowed a more thorough study of the answers.

Two distinct interview guidelines were created, one for the families and another for the external consultant. These were not provided to the participants before the survey to encourage an unbiased and spontaneous opinion. The interview guidelines have been divided into four sections, addressing three primary areas: the present succession status within the firm, the succession process, and the influence of traditions on the organization. Typical questions include: “Was the handover planned? If so, how long in advance?”, “How do you define traditions?”, and “What values and traditions are present in your company?”. The complete interview instructions are included in the Appendix A and Appendix B. Data were gathered during a one-month period in January 2025, and upon completion of the study, the results will be shared to all participants.

### 3.4 Data Analysis

Subsequent to data collection, all data were coded utilizing the Gioia Methodology; the data were examined comprehensively to uncover patterns, which were clustered into concepts and ultimately categorized, resulting in the emergence of a theory (Gioia et al., 2013). The data were coded using continuous comparison, according to an inductive approach rather than employing pre-established categories.

Additionally, I utilized the MAXQDA program to systematically code all interview transcripts, thus improving data storage, coding, retrieval, and interlinking. Upon analyzing the transcripts, codes surfaced that were grouped into concepts, which were further clustered into dimensions. Initially, I formulated first-order concepts by using open coding to gather coded statements from all interviews (Gioia et al., 2013). Secondly, I developed second-order concepts by the continuous comparison and contrast of different first-order concepts. In the last phase, I unified the second-order concepts into dimensions. The data analysis is illustrated using a data coding tree (*Figure 1*).

All interviews were done in German; thus, I utilized the translation application DeepL, QuillBot and ChatGPT to convert the interview transcriptions into American English.

### 3.5 Trustworthiness of the Research

This thesis intended to satisfy Guba's (Guba, 1981) criteria for trustworthiness: credibility, transferability, dependability, and confirmability. Credibility was established by the voluntary involvement of participants. Similarly, I am assured that the results are reliable, as all respondents have positions of management in German family enterprises. The results show a degree of transferability to different contexts or situations.

The research setting was carefully identified, and the sample covers a variety of industries, enabling the findings relevant to familial businesses across diverse sectors. On the contrary, transferability may be limited by certain characteristics of the results, such the age or gender of the participants.

In considering reliability, I included an in-depth description of the method, covering data collection and analysis, for the purpose of repeatability. Reliability is similarly guaranteed by the recordings and transcriptions of all interviews. I tried to enhance the confirmability of my findings by conducting regular meetings with individuals uninvolved in the research to reveal my own biases and deliberate about my results with them. Furthermore, following conversations with the participants reinforce the confirmability of this study. Finally, I offered detailed insights into the data structure process, enabling objective evaluation of the data.

## 4 Findings

The data collected from the interviews reveal that the tradition of a family and their business can have an impact on the successor's motivation. Three factors are significant in this context. The first factor is the practice of familial and corporate traditions; the second is the intergenerational contact within the family; and the third is the planning for the handover procedure. The three components, as identified in the coding tree, provide the framework of the findings chapter.

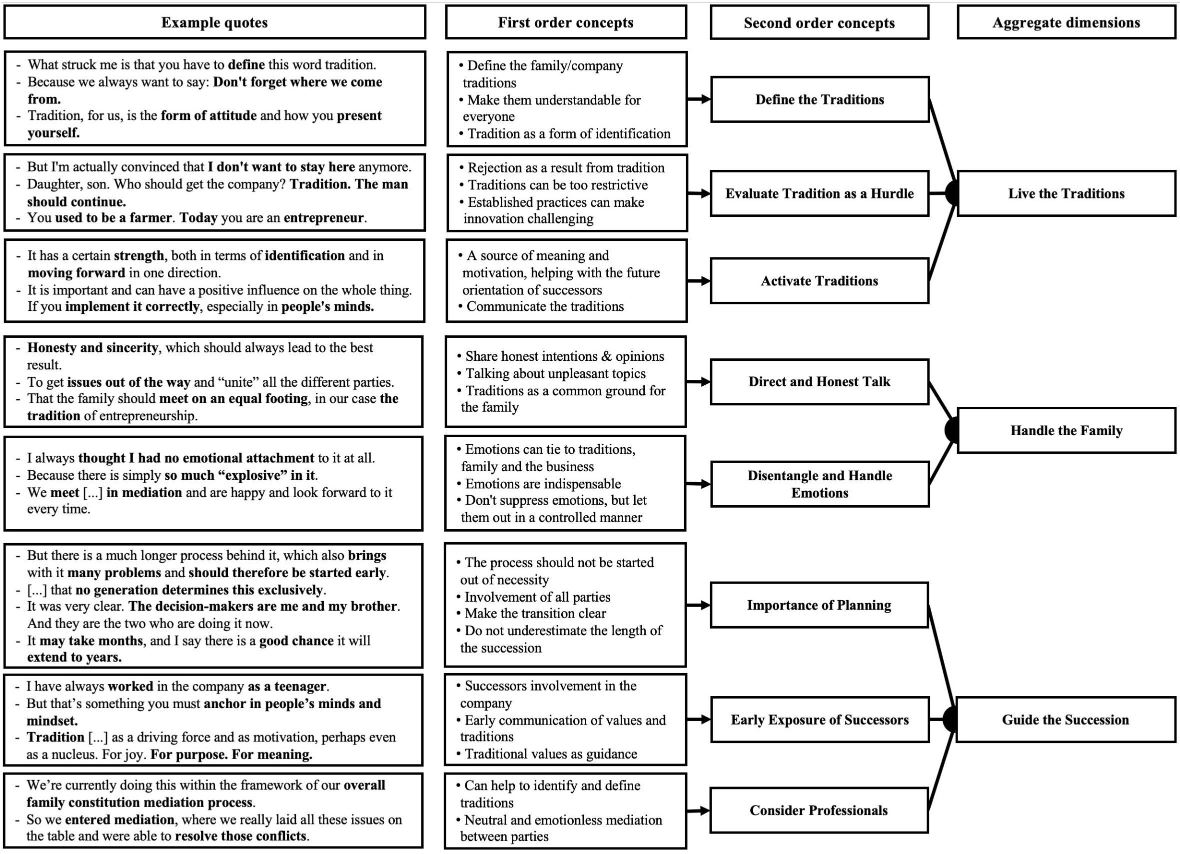


**Figure 1:** Data Coding Tree

## 4.1 Live the Traditions

The first chapter addresses the subject of tradition and is segmented into the following sections: Define the Tradition, Evaluate Tradition as a Hurdle, Activate Traditions. To effectively use tradition as a determining factor for the successor, it must first be identified and acknowledged in its present state, and possible difficulties must be addressed.

### 4.1.1 Define the Traditions

Traditions can appear in numerous forms and methods of operation, each manifested uniquely within individual families and organizations. Nonetheless, their role becomes particularly significant when considering succession processes, as traditions can serve as essential reference points for forming successor identity and motivation. When asked about their definition of traditions, several interviewees hesitated before providing a response, since they initially lacked a conclusive answer.

Contrary to this, interviewee F provided a clear response, as his family had already addressed the matter in depth. Expert A characterizes traditions as "unwritten rules" that influence family dynamics and provide guidelines for successor behavior. These unwritten rules should be embraced and acted upon. However, this is exactly where it may fall apart, since the interviewees were required to think about the fundamental issue of how their tradition is defined.

> *"Perhaps you will realize over the coming weeks and months of work that this word tradition needs to be defined." (Interview A)*

Traditions were defined as recurrent elements, such as events and rituals, and are primarily characterized as internal values that impact individual behaviors. The values are manifested in the rituals and events, indicating that the value element serves as the fundamental definition of traditions. Interviewees highlighted that these internal values shape the behavior of family members, including how they perceive their role as successors. For instance, the family of interviewee F explicitly connects their entrepreneurial identity, deeply embedded as a tradition, with the motivation of family members, especially for successors. Similarly, families in other interviews identified specific traditions, such as their family crest or longstanding name, as central pillars providing continuity and fostering a sense of pride among successors. Both families communicated a feeling of pride by showing off their tradition:

> *"We have now printed the [Name] everywhere, as well as our crest. These symbols truly reflect our tradition. It is very important to us that others recognize us as a traditional family business. We consistently emphasize that members of the fifth, sixth, or seventh generation are active within our*

> *company, as this is something quite rare and special." (Interview D)*

Additionally, values were described by interviewee F as "relatively unchangeable," further underscoring their critical role during the succession process. Such stable, value-based traditions offer successors a consistent point of orientation amidst potentially uncertain generational transitions. Therefore, explicitly identifying these values through targeted reflection — such as asking:

> *"What is our unique selling proposition? What is our nucleus? Why are we doing this, and what drives our actions?" (Interview A)*

These questions help successors consciously adopt the family's entrepreneurial mindset and better understand their future role within the family firm. Consequently, traditions are not merely abstract historical concepts; rather, they actively facilitate the succession process by providing successors with a clear, purpose-driven framework to guide their motivations, attitudes, and behaviors in alignment with family expectations and identity.

#### 4.1.2 Evaluate Tradition as a Hurdle

Before examining the advantageous aspects of traditions, the interviews also revealed certain challenges associated with traditions. While these hurdles did not lead to them rejecting the opportunity to take over the family firm, they nevertheless represented issues that occupied the interviewees. The interviews highlighted traditional hurdles characterized by conservative mindsets, compulsive holding on to existing practices, and the hindering of successors' innovation.

> *"The handover of a company can also be seen as a tradition and can lead to reluctance on the part of the successor due to pressure." (Interview G)*

> *"I mean, tradition can also be a burden, without question. [. . . ] You can say that there are some people who don't want it for that very reason." (Interview A)*

The statements of the two respondents indicate that the previously mentioned traditional rules additionally include a duty. Within the framework of the family business, accountability signifies the need to sustain the firm. However, tradition may be restricting and hinder the adaptability of subsequent generations. This may result in descendants' resistance regarding taking control over the company's future.

"And strangers always go to my husband because they think: The husband is the winemaker." (Interview E). This implies that traditional sectors hinder the capacity of women to fulfill leadership roles in the company. Expert A supports this bias and adds that this methodology seems to be common in traditional organizations. However, he emphasizes that this should not occur using the conventional method, but rather that different factors must be taken into account, such as: "Who shows a greater willingness to contribute to the company, and who shows less? Who is more stress-resistant and brings the right skill set?". A further limitation, as noted by respondents B and G, is that the family business is traditionally tied to the local region. This association prompted them to distance themselves—both physically and psychologically — from the company in order to pursue opportunities elsewhere.

Alongside these limitations, generational disagreements arise concerning how the family business should adapt to current developments. "Back then, you were a farmer; today, you're an entrepreneur — and that requires an entirely different way of thinking." (Interview E). The interviews confirmed that the succession process usually starts a long time before the official handover. This way, the next generation is involved early on and can contribute their ideas to the growth of the family business.

Nonetheless, there were instances where concepts were discarded, leading to anger among some descendants.

> *"If I then said, yes, I would like to hire someone new, for marketing, for example. My parents don't understand that at all. Because in their mind that's not necessary; it's just more costs." (Interview B).*

The interviews with several families indicate a similar pattern, describing how the industry is grappling with a transformation in consumer behavior and therefore must take action. In addition to the refusal of successors to take over the company, resistance to adaptation and the rigid adherence to traditional processes can lead to further disadvantages. In the scenario of interview G, the prior generation failed to adapt to market demands, leading to a lack of future potential, which further reinforced the successors' disinterest in the industry of the family firm. The conventional business practices and lack of innovation, often seen in traditional family companies, have resulted in decreased passion among heirs. This encourages an investigation into whether traditions serve as a motivating hindrance or supports the choices about the family company.

#### 4.1.3 Activate Traditions

The prior two chapters highlighted the need of defining traditions and recognizing their barriers. The strategy is to actively use traditions. This requires intentionally transmitting traditions to descendants, therefore ideally fostering a favorable influence on their motivation to continue the family business. The interviews showed that tradition, whether as values embodied inside the organization, or as a norm of how to behave towards employees, may provide meaning, motivation, strength, and clarity to future generations.

> *"These are our values, because then you understand certain actions better and can use them as a guide, [. . . ] coming with a strength, both in terms of identification and in moving forward in one direction." (Interview F).*

Successors gained a greater understanding of the decisions and actions of their prior generations. Expert A explains that traditions can serve as a source of importance for successors, functioning as both a motivating factor and a source for meaning. Similar to other respondents, Interviewee C also expresses that tradition serves as a key motivational factor: "[...], this family feeling, this sense of responsibility, that is also part of our tradition for me. That's what we've always practiced and that's what I want to continue". In the case of interviewee C, the traditional values were so tightly connected to the business that the passion outweighed the occasional pain experienced.

Having shown the beneficial impact of traditions on successors when consciously acknowledged, a question emerges about how these traditions might be actively used and the amount of their utility. The key terms in this context are "communicate" and "live".

> *"Why is your name [Name]?" And then my daughter can tell at some point: "That was my great-grandmother. I never knew her, but my dad always told me about her, that she co-founded the company" (Interview C).*

The comment from interview C effectively captures the combination of both key terms by using a figurative narrative. On the one hand, the ancestors and the memory of them lives on within the family. The daughter is aware of her roots, the role her great-grandmother played in the company, and the broader significance of the family within the business context. In interviews B and D, the honoring of ancestors was expressed through the transmission and use of their names, symbolizing a connection to familial tradition. This was exemplified by incorporating their names and the family crest into the future wine label. Notably, the final agreement on this decision was reached only once all family members were in consensus, reflecting how the traditions are maintained not only within the family but also at the organizational level. This underscores the earlier claims on the importance of continuing, experiencing, and communicating traditions.

> *"The traditions were "actively" developed, so that they do not exist like unwritten rules and are used as a common identifying feature for the family." (Interview F).*

### 4.2 Handle the Family

This chapter presents a look into familial communication and the integration of emotions. In order to function as a family, open and honest communication is essential, with emotions playing a significant part.

#### 4.2.1 Direct and Honest Talk

Unfortunately, familial arguments are unavoidable in the family. Numerous interviews have shown that communication is often challenging and may not be conveyed in a way that ensures mutual understanding. Quotes like "We never talked about it so openly" (Interview C) and "I try to make this clear to him in a rather charming way." (Interview E) describes the problems in intra-family communication. A lack of unanimous agreement within the family is often the result of inadequate communication or misunderstandings. In Interview F, communication challenges are attributed to a misalignment between sender and receiver, pointing out the necessity of aligning communication within the family. In response to the ongoing communication challenges, Interviewee F's family sought external assistance through mediation. The subject of goal setting in the framework of the succession process, for instance, necessitates collaboration between the current holder and their potential successor. The mediation fostered mutual understanding and resolved potentially unpleasant topics, which in turn supports alignment in goal setting and strengthens family harmony. According to Expert A's experience, transparent, honest, and sincere communication provides the most favorable results in such cases.

> *"When the company runs, the family runs and vice versa. In this case, this means that the family should meet on an equal footing (the lowest common denominator) before communicating openly and honestly." (Interview F)*

As previously mentioned, traditions should be defined with the most understandability. This is much easier to achieve via open communication. However, traditions may also provide a solid foundation for the open communication thanks to the common identity. Afterwards, traditions can serve as the "lowest common denominator" for future disputes within the family, due to the collective identity. Although the family might not always come to an agreement, honest responses require overcoming while helping to better understand the mental processes, hence enhancing mutual understanding within the family.

#### 4.2.2 Disentangle and Handle Emotions

Emotions are essential within the family and, while positively linked to the family, the business, and traditions, their dual nature means they can equally serve as a source of conflict.

Interview G reveals an emotional attachment to the organization, despite initial assumptions to the contrary. The connection to the firm becomes evident shortly before its intended sale — triggered by the awareness of long-standing traditions and enduring values within the organization. In this case, the family enterprise will not be passed on to the next generation. This emotional connection, however, is not always too late or ineffective. Expert A describes the personal and familial bond with the organization as a positive outcome of emotional commitment. The positive feelings that arise from working within the family business can foster a stronger identification with the company and increase the likelihood that successors will remain involved in the long term.

While these examples reflect the positive potential of emotional ties, the interviews also reveal their more challenging side. Feelings toward the family and the family business can just as easily become a source of tension. According to Interviewee B, emotional dynamics frequently served as a significant source of conflict within the family context. This is further supported by Interviews C and E, which mentioned that the emotional journey within the family has not always been smooth.

> *"Those 20 years were far from a bed of roses. They were marked by deep personal despair — despair over myself, over my relationship with my father — at times wishing him, or even myself, into the deepest circles of hell. There were moments when the conflicts with my brother and father were so intense that I would have gladly given up my share in the company, just to find peace and avoid the pain we sometimes inflicted on one another." (Interview C)*

Based on prior experience, Expert A emphasizes that the transfer of a family business tends to be more effective when emotions are set aside. Therefore, families should address emotional matters in advance of the handover process. Certainly, emotions have a beneficial impact, which may be intentionally utilized, similarly to traditions or in conjunction with them. In contrast to negative aspects, people prefer to discuss good matters and tend to minimize conversations on the bad. This is exactly why the adverse impacts of emotions must be proactively addressed, such as via deliberate discussions of uncomfortable subjects.

> *"Well, we meet every six to eight weeks in mediation, and we're genuinely happy and look forward to seeing each other each time. But still, someone ends up crying at every session. Not out of joy, but because there's just so much unresolved emotion beneath the surface. At the same time, it's good to have this space where these issues can be addressed, because afterwards, you can leave the room and simply be a family again." (Interview F)*

Interview C reveals that the process should not be considered complete with the legal handover of the company, as this act alone does not signify the end of the transition. Even after the formal transfer, various issues remain to be addressed, and emotional dynamics, both positive and negative, continue to play a role. These emotions not only persist beyond the handover but also influence future succession processes and family-related matters. However, this process should be approached with caution to avoid placing an emotional burden on potential successors too early on.

### 4.3 Guide the Succession

In addition to living the traditions and dealing with the family, planning may facilitate a smoother generational transfer and enhance the motivation of the descendants. The three main sections of this chapter examine the significance of planning, the early engagement of descendants, and the rationale of engaging external consultants.

#### 4.3.1 Importance of Planning

Across all interviews, successors emphasized that they were never pressured to take control of the family business and were always encouraged to pursue what they genuinely enjoyed. However, this mindset suggests that the current generation cannot fully rely on the next to voluntarily take on responsibility for the company. While a successor's commitment can never be guaranteed with absolute certainty, a lack of structured planning may reduce both the clarity of the succession process and the motivation of potential successors to take on future responsibility. This is exemplified in Interview B, where the family only recently realized that a descendant was unwilling to assume this responsibility, prompting them to make a sudden decision regarding the next steps. Beyond addressing the absence of a successor, a well-developed plan can also serve to inspire potential successors by providing them with a clearer sense of direction. Interviewee C explains how the development of specific skills and structured procedures has enhanced his effectiveness as a business leader. However, this progression was not always evident, as no concrete plan of action had been established for the succession process in the past:

> *"And that was also a mistake. Much of what we're doing now is actually what I had envisioned back then. The direction and focus we have today — I already had that in mind at the time. But back then, there was simply no one there to support it. [. . . ] No, there wasn't a concrete plan. [. . . ] It was more of a gradual, creeping process." (Interview C)*

Interviewee C's reflections highlight the importance of proactive and structured succession planning. Similarly, several families within the agricultural industry reported facing unexpected financial challenges, particularly inheritance taxes of up to 30% upon transfers. As the experience of Interviewee C demonstrates, early preparation and clearly defined strategies not only foster successor motivation but can also significantly mitigate financial and organizational burdens.

However, structured planning alone is not sufficient. Interviewee C illustrates another challenging aspect: "The most detrimental occurrence for us is when six children are running around the premises." This aligns with Expert A's observation that integrating multiple generations and diverse individuals into a single setting can be particularly challenging. Effective communication is essential, as it allows stakeholders to openly share their opinions and objectives. Given that a handover process should not occur merely out of duty or necessity, collaboratively creating a roadmap from the current situation to the desired future state can significantly enhance family unity and collective decision-making.

In the case of two interviews, the timing of the handover was not entirely clear. The handover was prolonged due to the transferring generation's unwillingness to give up authority. This relates to both the management and traditional working practices, which have to stay unchanged.

While collaborative planning can significantly enhance family unity and decision-making, the interviews also revealed challenges related to the timing of the handover. In two cases, uncertainties arose primarily because the transferring generation was unwillingness to give up authority. This unwillingness impacted not only the management of the business but also the maintenance of traditional working practices, which they insisted on maintaining. This resulted in dissatisfaction among the adherents and prompted skepticism over the succession. Once the authority was granted to them, the situation shifted, despite the incumbents' desire to retain their influence. Consequently, it is essential to clearly schedule the transition period and grant the next generation sufficient autonomy to operate independently. This demonstrates trust from the incumbent towards the successor and thereby enhances successor motivation. Additionally, it requires critically evaluating traditions and being prepared to let go of those that no longer align with the future direction of the business.

Another subject that surfaced from the interviews was that early preparation is crucial for addressing issues as early as possible:

> *"Outsiders only ever see the point at which the company is officially handed over. But there is a much longer process behind it, which also brings with it many problems and should therefore be started early." (Interview F)*

The handover is not a procedure that concludes with preparation and execution. The process extends beyond the company's transfer and resurfaces as an issue of concern in the subsequent generation at the latest. Expert A characterizes the planning process as iterative, since unforeseen issues consistently emerge that were not expected or anticipated in advance. In the instance of interview C, the transfer occurred only a few years before, however considerations have begun to arise about the potential distribution of the firm among the children in the future. This is due to the fact that he and his brother are now the managing directors and together have over three children. This shows that not only the siblings are involved, but also the cousins too. To address such issues effectively, they must be addressed in a timely manner and the future generations should be engaged as soon as they reach the appropriate age.

#### 4.3.2 Early Exposure of Successors

The subject of early engagement of descendants has been previously addressed in relation to traditions, family management, and the timely planning of succession. The interviews proved that the early engagement of successors is unavoidable, irrespective of their eventual takeover.

> *"That's just how it is on a farm — everyone's involved, whether they like it or not. It's the same with my kids." (Interview E)*

Within the scope of this thesis, interviews were carried out with families who have recently completed the succession process, as well as with families where succession is not planned to occur. Respondents from families that recently underwent a successful handover showed greater enthusiasm when reflecting on their prior involvement with the firm. In the context of this thesis, it is difficult to ascertain whether the successors' favorable perspective is primarily influenced by their current managerial role, which may lead them to adopt a more optimistic viewpoint, or whether their positive attitude stems from a long-standing association with the firm, fostering stronger emotional ties. Nevertheless, it can be concluded that early exposure of the descendants to the organization has played a role in cultivating their values and connection to the family business.

> *"My interest in the company became evident quite early, which pleased my father. Therefore, I officially joined the company in 2005, although I had already been involved in the business from a young age." (Interview C)*
>
> *"I would say that I have played a considerable role in shaping the development of the business over the past 25 years." (Interview E)*

In addition, several interviewees expressed that, at an early age, they saw their connection with traditions, be it ideals or rituals, as favorable. By engaging with the family's firm and contributing to the development of that firm throughout their developmental phase, successors cultivate an emotional connection with the family business, resulting in a strong identification with it. A family member from interview B said that he completed other internships within the same sector but ultimately chose to join the family firm due to favorable memories associated with it. Consequently, a beneficial correlation often existed between early experience and participation in the family company.

#### 4.3.3 Consider Professionals

The interviews conducted revealed the complex nature of family dynamics and their implications for the family enterprise. These complexities were evident across multiple dimensions and expressed differently by each family interviewed. For instance, the family from Interview D highlighted frequent difficulties in communication among family members. In contrast, the family from Interview F specifically pointed to emotional communication as problematic, noting that excessive emotions often hinder agreement. Furthermore, the family in Interview C indicated the absence of a clearly defined succession strategy as a significant complication.

Expert A is an external specialist and lawyer focusing on family-owned businesses, particularly in the field of succession planning. Several challenges expressed throughout the family interviews align closely with Expert A's professional experiences. Consequently, these issues are not isolated to individual families, indicating that an impartial external advisor can effectively support families in addressing and resolving the previously discussed challenges. As a consultant, Expert A has had the opportunity to collaborate with diverse families, varying business sizes, and a multitude of personalities. His expertise has provided him with extensive knowledge that he can use to assist families in various circumstances to prepare for the future. Interviewee F describes that his family's traditions were first defined, formulated, and activated by an external third party. The subsequent phase was mediation, which enhanced familial communication and established a shared consensus. An external consultant assists the family from interview G in selling the firm and offers assistance via his experience. The interviews indicate that specialists in many subjects may be approached, therefore generating a beneficial impact.

Nevertheless, the family members of the transferring generation from interview B had quite unfavorable attitude towards external consultants for their own company. Consequently, there is no definitive consensus about the effectiveness of consultants in achieving optimal outcomes, since several variables influence the acceptance of external consultants. Besides the financial expenditure, obstacles may arise from the family's resistance to let outsiders gain access onto its inner dynamics; in such instances, it is important that a previous generation supports and initiates this process. Furthermore, the generations that follow, having previously chosen against succession as indicated in interview B, are likewise unwilling to reconsider their decision and seek to cut themselves off from the family enterprise for the moment.

### 4.4 The Interplay of the Three Dimensions

Up to this point, the three dimensions identified from the interview analysis have been described individually and in detail. This chapter will now examine the interrelationship between these dimensions, recognizing that tradition alone cannot fully determine the transfer of ownership or the successor's readiness.

The figure illustrates that traditions (*Live the Tradition*) build the foundation of this model. Traditions, by their own nature, cannot realize their whole impact and must therefore be adeptly integrated into familial structures and the planning process.

Concerning the familial dimension (*Handle the Family*), traditions serve as a unifying factor for self-identification inside the family. This clarifies the behavior and opinions of predecessors to their descendants, fostering enhanced understanding. In addition, a family that understands one another facilitates an easier way to communicate, so enhancing the transmission of traditions. As a result, the identification of traditions proved easier for families when multiple family members and generations participated.

The handover dimension (*Guide the Succession*) can be supported by traditions, as they assist successors in confronting and managing issues both before and during the company's transfer. Furthermore, they provide the family with a basis for decision-making, such as determining if a successor would like to take over, particularly if he or she cannot identify with the traditions. A planned handover on the other hand provides a framework for the family to stick to, enabling early identification of issues, as such facilitating involvement and coordination between all family members.

There is a relationship between the familial dimension (*Handle the Family*) and the handover process dimension (*Guide the Succession*). A family that engages in open communication may more effectively organize the transition process and express mutual worries. A mutually accepted strategy within the family provides a degree of certainty about the future and reduces speculative thinking.

## 5 Discussion

### 5.1 Theoretical Implications

The role of traditions in shaping successor motivation plays a significant part in the generational transitions of family firms. Nonetheless, the particular impact of traditions on the decision-making processes of successors has received limited attention in existing academic literature. By integrating research on organizational traditions (Dacin et al., 2019; Suddaby & Jaskiewicz, 2020) within the empirical context of family businesses, this thesis addresses this research gap and provides novel insights into how traditions are perceived, interpreted, and utilized by successors. In doing so, the study answers the following research question: *"How do successors experience the influence of traditions on their decision to take over the family business?"* Thus, this thesis contributes to the literature by examining how traditions are not merely inherited constraints but actively shape successor identity and motivation through relational, emotional, and strategic mechanisms. Moreover, I apply theories of tradition as a dynamic organizational resource to the succession context, offering empirical evidence that traditions can serve as both enabling and limiting factors. Investigating how successors engage with traditions reveals that traditions are redefined through intergenerational dialogue, emotional reflection, and strategic reinterpretation — thereby allowing successors to derive meaning and legitimacy from the past while aligning it with future ambitions. By drawing on this perspective, the thesis demonstrates how traditions in family businesses function as evolving narratives that connect legacy with leadership intention.

My findings confirm and expand the conceptualization of tradition as a rhetorical and organizational resource (Dacin et al., 2019). Although previous theories have highlighted the role of traditions in maintaining organizational identity and continuity, I discovered that such continuity is not automatic. Rather, it results from proactive meaning-making, influenced by familial communication and contextualized by collective interpretations of the meaning of traditions. Successors did not simply adopt traditions as fixed legacies; rather, they reflected on, questioned, and, when possible, reinterpreted them to align with their individual and professional identities. Thus, this thesis supports the concept

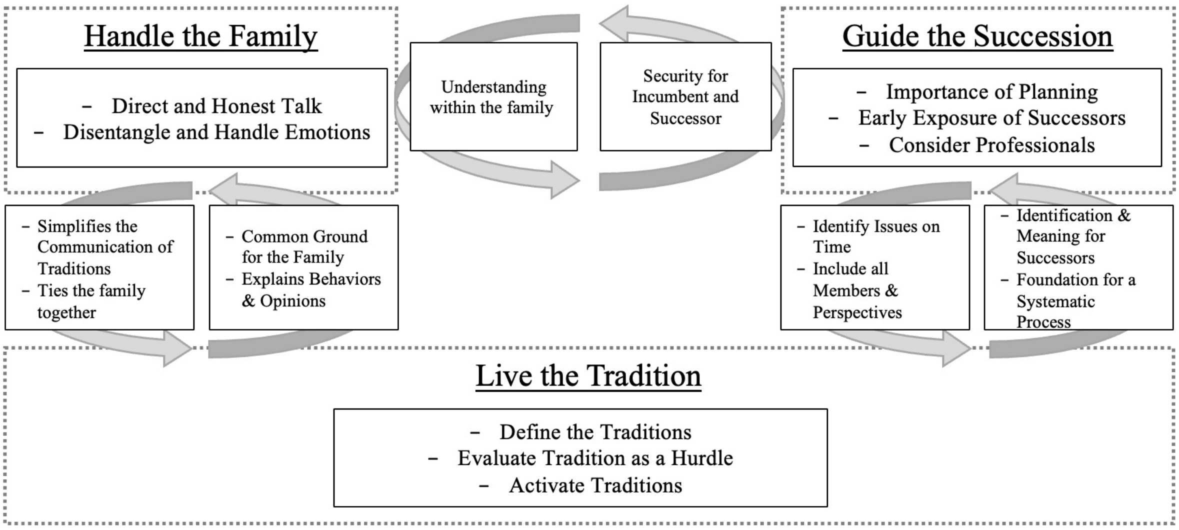


**Figure 2:** Model of Tradition-Driven Dynamics in the Pre-Succession Phase

of tradition as a dynamic resource, while also emphasizing the significant interpretative and emotional effort necessary to implement tradition effectively in modern succession settings.

In several instances, successors utilized traditions as identity anchors, like a source of pride and continuity that reinforced their motivation to take on leadership. This supports the theory that traditions function as a narrative bond linking the past, present, and future (Suddaby & Jaskiewicz, 2020). Simultaneously, several interviewees characterized traditions as burdensome or constraining, particularly when they promoted outdated gender roles or enforced implicit expectations. This ambivalence challenges the too harmonious representation in the literature, which frequently characterizes tradition as inherently beneficial or unifying. I discovered that the significance and influence of traditions differ dramatically based on the successor's own circumstances, ideals, and autonomy. In this context, traditions can be both emotionally empowering and burdensome, requiring families to address the emotional inheritance embedded in their history. My findings add to the socioemotional wealth framework (Gómez-Mejía et al., 2007), especially its focus on continuity and legacy preservation as fundamental objectives of family firms. Although successors frequently had a deep emotional connection to their family's traditions, this attachment did not always serve as a source of motivation. When traditions were perceived as inflexible or misaligned with contemporary norms, the desire to preserve continuity resulted in skepticism, emotional strain, or even refusal of taking responsibility. This highlights the necessity for a deeper take on socioemotional wealth. One that considers emotional ambivalence and recognizes that heritage may also act as a source of pressure or misalignment.

Likewise, while the stewardship theory highlights the significance of similar values and a long-term orientation for advancing succession (Davis et al., 2010), my findings indicate that the alignment between the incumbent and successor should not be assumed, even in organizations with established traditions. Several interview cases demonstrated notable discrepancies, particularly when traditions were inadequately defined or when they conflicted with the successor's own identity. In many cases, stewardship was not a natural product of tradition but rather a result of intentional and often painful conversation, mediation, and reinterpretation. Therefore, I question the concept that tradition inherently promotes stewardship and emphasize the importance for critical reflection and collaborative meaning-making.

An important contribution to my study is the incorporation of tradition into the succession process as a symbolic and emotional element, rather than only a strategic or procedural aspect. Rituals, names, and visual symbols like family crests occasionally served as tools for aligning successors with the firm's tradition. These findings indicate that succession refers also to identity and legitimacy as it does to operational readiness. A viewpoint that might enhance future research focused on succession processes. Furthermore, I promote the understanding of early exposure. While operational training and initial job experience have been highlighted in the literature as vital for preparing successors (J. Chrisman et al., 2009; Tessema et al., 2024), my findings underscore the significance of emotional and symbolic exposure. Successors who actively participated in family narratives, informal traditions, and symbolic practices had enhanced emotional bonds and a more defined understanding of the business's identity. This points out that early exposure should not be limited to skills training but also the opportunity for successors to interact with tradition in ways that promote identification and thinking.

Another significant component relates to the assumption of intra-family homogeneity. My data shows that traditions are not universally experienced within the same family. Gender, sibling order, generational context, and individual biography influenced successors' interpretation and valuation of traditions. This variety complicates the concept of family values and necessitates a more detailed investigation of the interpretation of tradition within family systems. According to Dacin et al. (2019), family enterprises should be seen as internally diverse organizations, containing numerous and occasionally conflicting narratives on the meaning and future of tradition.

Finally, I suggest that external actors, such as consultants or mediators, can play a valuable role in facilitating the reflection on and transmission of traditions during succession. This observation contrasts with the traditional assumption that succession processes should be handled exclusively within the family. My findings show that external professionals can provide structure, encourage open communication, and assist families in articulating and reinterpreting traditions in a way that supports a smooth generational transition. This observation aligns with J. Chrisman et al. (2009), who emphasize the importance of systematic and formalized succession planning practices in family firms. Professional facilitation can assist in navigating the relational and emotional complexities often inherent in family successions. Therefore, future succession models should acknowledge external facilitation as an important and, in some cases, necessary element of successful tradition work and intergenerational transfer.

### 5.2 Practical Implications

The findings of this thesis offer several practical implications for family firms preparing for or currently undergoing generational succession. Central to the results is the recognition that traditions do not operate automatically as motivational drivers. They must be consciously identified, interpreted, and actively shaped to unfold their full potential in the succession process.

My first practical implication is the importance of making traditions explicit. In many cases, successors experienced traditions as vague or undefined, leading to uncertainty or emotional distance. Families are encouraged to reflect together on the core traditions that define their business identity and to communicate these clearly across generations, for example through storytelling, written value frameworks, or symbolic acts. Explicit traditions create orientation and foster emotional connection, particularly when successors are involved early in the process of defining and interpreting them. Closely related is the need to treat tradition as a dynamic and co-creative element rather than a rigid structure to be preserved unchanged. Successors are more likely to embrace leadership roles when they feel they can help shape tradition in line with their values and future vision. Practices such as revisiting symbols, adapting rituals, or integrating innovation into traditional practices can help make tradition relevant and motivating for younger generations.

The findings also underscore the value of structured and transparent succession planning, developed in dialogue between incumbent and successor. Ambiguity or implicit expectations can create frustration and delay commitment. A jointly developed roadmap clarifies roles, responsibilities, and timelines and creates space for open discussion of expectations and concerns.

Another core implication is the significance of early emotional and symbolic exposure. Beyond operational involvement, it is crucial to give successors opportunities to emotionally engage with the business by learning its history, participating in meaningful rituals, and understanding its founding values. This supports identity formation and strengthens long-term motivation.

My final reccomandation is the use of external facilitation, whether through consultants, coaches, or mediators. An external expert be considered as a supportive measure rather than a last resort. External actors can provide valuable perspectives, foster constructive dialogue, and help families articulate and realign their understanding of tradition and succession. Engaging external support can strengthen trust within the family and ensure that tradition becomes an enabler rather than a barrier during the generational transition.

## 6 Conclusion

In this thesis, I investigated how traditions influence the motivation of successors to take over a family business. By conducting seven interviews with successors in family firms, I gained valuable insights into how traditions are perceived, interpreted, and utilized in the context of succession. I discovered that traditions function as emotional and symbolic anchors that can either strengthen identification with the family firm or create distance. When traditions are consciously identified, actively communicated, and embedded into the family's awareness, they can serve as meaningful resources that provide successors with a sense of purpose, orientation, and continuity. However, the pure existence of traditions is not sufficient. In family firms, the intersection of rational business practices and emotional family dynamics creates a highly complex environment. Emotional factors can either enhance or disrupt the succession process. My findings suggest that traditions need to be actively reflected upon and clearly communicated to unfold their full potential. Rather than remaining unspoken or existing as implicit rules, traditions should be intentionally embedded into the family's collective consciousness. Early engagement with the family business and open conversations about future plans can contribute to clearer expectations and more successful succession planning.

Nevertheless, this study has limitations that provide avenues for future research. Firstly, only seven interviews were conducted, and in several cases, not all relevant family members involved in the succession process could be interviewed. This may limit the generalizability of the findings. Secondly, while this thesis offers initial insights into the relationship between tradition and successor motivation, it does not establish a direct causal correlation. Future studies could build upon this foundation by employing broader samples and more diverse family firm constellations to deepen the understanding of how traditions concretely affect succession outcomes.

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