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HOW TO PREPARE YOUNGER GENERATIONS IN FAMILY FIRMS? A DIDACTIC LABORATORY ON GENERATIONAL TRANSFER

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Abstract
Family firms are the most common business model in advanced economies and in developing countries. Succession is the main reason of failure for FFs. University business and management studies are not always effective in preparing new generations to deal with succession, to make them understand pitfalls and risks associated with an inadequate management of succession and to make them aware of the responsibilities associated with the entrepreneurial role. Even in economics and management faculties, courses specifically devoted to FF and succession are indeed rare. This is why in this paper we propose an educational initiative specifically focused on generational transfer in FFs. It aims to educate students enrolled in economics and management studies on the phenomenon of succession. In the near future, in fact, they may be personally involved in a succession process, acting as successors of a FF, or be indirectly involved, if in their future they will work as accountants, business consultants, managers, employees of FFs, banks, etc.

Keywords: Family business, Generational transfer, Education, University, Teaching methods.
JEL classification: I23; M21; M53.

1. Introduction

In this paper an educational initiative, named “Laboratory on generational transfer” (henceforth the “Lab”) is described and discussed. It is focused on the issue of succession in FFs (henceforth the “FFs”) and involves undergraduate and graduate students enrolled in economics and management studies. The idea of starting this teaching initiative arose some years ago by some authors’ considerations, professors of Entrepreneurship and Small Business in a Faculty of Economics and Management: 1) the high percentage of FFs in Italy and in many other countries; 2) risks associated with generational transfer and the large number of companies facing crisis or failure because of mistakes in managing succession; 3) the importance of successors’ education and training for a successful generational transfer and continuity of FFs; 4) the need to integrate traditional business courses in order to educate students to succession. In this perspective, the aim

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of the Lab is to analyze and study problems that FFs meet when they face a generational transfer and to create a teaching experience based on practical applications and students' active participation. In the Lab, this goal is achieved through various teaching methods, mainly characterized by the active participation of students and the involvement in the classroom of senior/junior entrepreneurs, who have experienced or are currently experiencing a generational transfer.

With these premises, this paper is organized as follows. In the next section we explain why the education and training of successors can affect the success of the succession process and discuss the potential contribution of universities. Then, the meaning of the term "laboratory" is explained and the program of the Lab is presented. In the fourth section, different teaching methods used in the Lab are described. Finally some conclusions and critical considerations about the usefulness of the Lab are presented.

2. The importance of higher education for younger generations in family firms

FFs are the most common business model in advanced economies and in developing countries. Providing accurate data and making international comparisons is not easy, given the many definitions used to identify FFs (Handler, 1989; Chrisman et al., 2003; Sharma, 2004). One of the most suitable definitions to identify distinctive features of a FF is provided by Chrisman et al. (1999): "A business governed and/or managed with the intention to shape and pursue the vision of the business held by a dominant coalition controlled by members of the same family or a small number of families in a manner that is potentially sustainable across generations of the family or families". A look at available data is useful to appreciate the widespread presence of FFs in Italy and Europe. According to data of FBN International (2008), in the main European countries, FFs account for a very high percentage, ranging from 61% in Holland, to 91% in Finland. Their contribution to total employment in Europe is high too – above 30% – with the lowest levels in the Netherlands (31%) and highest in Sweden (61%). In Italy, 73% of firms are family controlled and they contribute to 52% of employment.

Succession is the main reason of failure for FFs (Boldizzoni et al., 2000) and the first generational transfer, in particular, causes the closedown of 70% of FFs (Armal, 2003). Early as 1994 European Commission estimated that 2 out of 3 businesses disappear within 5 years from the succession, with a loss of 300,000 jobs per year in Europe, and that 10% of failures are due to a bad management of succession process. In 2002, EU statistics showed that about 5 million of European companies, 30% of the total, would have had to deal with a succession process in the next ten years, with 610,000 businesses and 2,400,000 jobs at risk each year. A number of failures of FFs in fact are caused by problems occurring during succession: if poorly managed, it may leave the company without a strong leadership and cause internal tensions and conflicts that make the company very vulnerable, even to the point of causing its failure.

The main purpose of generational transfer is to provide the company a new leadership, able to ensure its survival and its competitiveness in the long term (Rothwell, 2001). It follows that the choice of successor is absolutely crucial and it is essential that he meets the requirements – skills, knowledge, motivation, desire and determination – needed to effectively perform the entrepreneurial role (Kets de Vries, 1993). This explains why much attention should be given to the preparation of successors. A higher preparation could in fact favour the success of generational transfer and reduce risks for the survival of FFs. Indeed several scholars have focused on the path successors should follow to acquire needed skills and prepare themselves to successfully lead the company (McGivern, 1978; Danco, 1982; Barach et al., 1988; Piantoni, 1990; Ward, 1990; Corbetta, 1995; Morris et al., 1997; Cabrera-Suarez et al., 2001). The most shared view is the impossibility of defining a standard path, given the variety of situations to consider with respect to the firm (size, nature of business, stage of life cycle, ownership structure, etc.) and the characteristics of successors and predecessors (age, character, attitudes and personal interests, etc.).

At the same time, there is general agreement in identifying some key steps that should be met to ensure a gradual growth and skill enhancement of successors, both inside and outside the enterprise: school and eventually university studies; working periods in other firms; entrance in the FF, performing different functions and taking increasing levels of responsibility, up to the final assumption of the leadership in the FF.

There is general agreement that university is a very important, although not compulsory, step of this educational and training process. University studies are in fact viewed as very important to allow the future entrepreneur to acquire a solid basic training, to acquire a good cultural level and to achieve personal maturity, consistent with the responsibilities of a leader. Concerning the choice of university course, the general opinion is not to force younger generations to enrol in a faculty selected only on the basis of their future entrepreneurial role (business and management studies, or technical / scientific studies related to the activity of their FF) if it does not correspond to their interests and motivations. Instead it is better to let successor to choose studies according to his/her feelings and aptitudes. Choices imposed by families may in fact be counterproductive, as they may lead the successor to develop a sense of aversion to the FF and to the entrepreneurial role, perceived as a constraint and a burden (Corbetta, 2010).

With specific regard to business and management studies, it is believed that, although they are certainly useful to allow students to acquire specialized skills relevant to the future role of business leaders, they are not always effective in preparing new generations to deal with succession, to make them understand pitfalls and risks associated with an inadequate management of succession, to make them aware of the responsibilities associated with the entrepreneurial role, to make them understand the importance of a good preparation and the need to address the succession process without haste and without expecting to get right to the finish line. In fact we observe that, even in economics and management faculties, academic courses specifically devoted to FF and succession are indeed rare.

This is why, in this paper, we propose an educational initiative specifically focused on generational transfer in FFs. It aims to educate students enrolled in economics and management studies on the phenomenon of succession. In the near future, in fact, they may be personally involved in a succession process, acting as successors of a FF, or be indirectly involved, if, in their future, they will work as accountants, business consultants, managers, employees of FFs, banks, etc.

3. The “laboratory on generational transfer”: syllabus and learning objectives

Before describing the Lab’s program, learning objectives and expected results, it is important to focus on the importance of the term “laboratory”. Indeed, this word may have two different meanings in Italian language: 1) a laboratory is a place equipped for research and scientific purposes; 2) a laboratory is a place where artisanal activities are carried out. This double meaning explains why we used the term laboratory. In fact it emphasizes the concept of a “place of research” (research laboratory) and that of a “place of doing” (artisanal workshop). So a laboratory is a place where it’s possible to constructs an understanding that is not simply transmitted from teacher to students, but instead is created by teacher and student together. In a laboratory, in fact, students create experiences, among themselves and together with teachers; they learn together to use methods, concepts, interpretive schemes, analytical models, etc. This double meaning is the same characterising the learning processes in this didactic laboratory: theoretical knowledge is never separated from concrete applications and learning is always accompanied by doing. In fact the Lab has a double objective: i) to analyze and study problems that FFs meet when they are involved in a generational transfer; ii) to create a teaching experience based on practical applications and students’ active participation, so as to provide a more direct understanding of the subject. The Lab’s objective, therefore, is not only to allow students to acquire theoretical concepts, but also let them acquire conceptual tools necessary to analyze, understand and resolve situations involving generational transfer. It is important to emphasize that the main perspective adopted in the Lab comes from business management. However, one of the main objectives of the Lab is to make students understand the importance of integration with other disciplines (legal, fiscal, psychological, etc.) that address the same problems through diverse perspectives.

During the Lab, different teaching methods are used, especially those entailing the active involvement of students. In fact, the Lab’s methods are inclusive, as students have not simply to receive information from teachers, but they have to actively participate. This implicates not only the logic of reproducing, replicating or repeating what they studied, but also builds the capacities of invention and intuition. Student must apply the acquired conceptual tools – of analysis, evaluation, research, etc. – to identify critical situations, to define problems and to find their solutions.

Outcomes expected from the learning process are not only theoretical concept about generational transfer, but also analytical instruments, interpretive models, work methods, which help students analyze and confront real situations. For example, during the Lab a case is proposed in which a problem of succession has to be solved by the students, who were expected to propose a solution and describe the reasoning behind their decision. To achieve this result, memorizing theoretical concepts is not sufficient, but it’s fundamental that they know how to actively elaborate on, and effectively utilize, the knowledge they has gained, so as to know how to behave in real situations, to collect critical information and then to utilize such knowledge as a map orienting themselves in finding a solution.

The Lab’s program consists of 15 meetings, which are briefly outlined below: 1st meeting: laboratory presentation, introduction and brainstorming about the concept of FF and succession; 2nd meeting: illustration of a theoretical framework about succession processes; 3rd meeting:

analysis of a case study by groups of students; 4th meeting: discussion of solutions identified by each group; 5th meeting: screening of a movie followed by a guided discussion; 6th meeting: description of legal instruments that can be used to face succession; 7th meeting: analysis of tax aspects of succession; 8th meeting: analysis of corporate operations that can be adopted to deal with a succession; 9th meeting: analysis of the relationship between senior-junior and between family members, in order to understand how they can affect a succession process; 10th meeting: participation of two/three entrepreneurs, who have lived or are living the experience of succession, as predecessors or successors; 11th meeting: follow-up and drawing up of a report; 12th meeting: completion of reports, under the supervision of the teacher; last three meetings: presentation of reports by students (a lesson for each students' group) and discussion.

4. Teaching methods used in the "Laboratory"

During the Lab different teaching methods are used: frontal lesson; case method; movie screening; testimonies; group work. The characteristics of such teaching methods and the reasons for their adoption are analyzed in the following sections.

4.1. Frontal lessons

Although the Lab gives preference to active teaching methodologies, some frontal lessons with classic didactic approach are necessary for the following reasons: 1) the first two lessons are dedicated to the introduction of basic theoretical concepts about FFs and generational transfer. They are needed to provide participants with a clear and complete theoretical frame about how to manage a succession process. These lessons are preparatory to the following lessons, based on more involving teaching methods; 2) in the following frontal lessons specific aspects of generational transfer are discussed: in particular legal, fiscal and psychological issues.

In accordance with the Lab's underlying logic, in these frontal lessons professors try to actively engage students and to foster participation. Indeed, it is noted that frontal lesson is a teaching method that is characterized by: maximum dependency of the student on the instructor; a passive position taken by a student, to which attention and listening is required to replicate notions transmitted by the teacher; low control by the teacher on student's level of learning.

During the Lab, students are indeed constantly solicited to actively participate. This result is obtained thanks to guided discussions, which are helpful: i) to verify the meaning that students attribute to the primary concepts (e.g. FF and succession), so as to then construct a common conceptual basis. This is created in the first teaching unit, through a brief brainstorming exercise around specific concepts (Agosti, 2006); ii) to let students elaborate some concepts (e.g. qualities of a good successor), which are not simply transmitted from teacher to student, but are "constructed together"; iii) to allow the professor to acquire feedback and verify that information transmitted has been correctly understood by students.

4.2. Case method teaching

Case method teaching consists of providing students with a written description of a problematic situation. Realistic but simulated, the situation is usually invented for didactic purposes. The description must contain all of the necessary information for understanding the problem presented in the case, for conceptualizing the reasons for its complexity, and to elaborate a proposal for its solution (Dooley and Skinner, 1977; Jennings, 1996; Osigweh, 1989; Romm and Mahler, 1991). Case method contributes to the student's learning process in two ways: 1) the case portrays an exemplary and recurrent situation concerning the object of the study (i.e., the decision between possible candidates to the succession); 2) the case favours the development of a method to analyze problems and develop decision-making. This method is particularly effective when considering the complexity of every succession process, in which very different variables are involved – patrimonial, financial, legal, fiscal, strategic, but also psychological, affective, and familial. Every one of these must be adequately considered, as they may deeply affect succession process and its results. In this context, in fact, the case method becomes particularly useful in getting students accustomed to confronting complex situations and to making decisions in uncertain situations. In fact such a method stimulates the development of students' capacities for identifying problems, evaluating critical situations, recognizing the most relevant factors, as well as for proposing solutions. So case method acts as a "gymnasium" – a protected environment in which students can put themselves to the test, confronting situations very similar to those they will encounter in their future professional work.

Cases dealing with succession, furthermore, generally describe "open" situations, as problems presented cannot be resolved by a single, unequivocally identifiable "right answer". For this reason case method is highly efficacious, as it stimulates discussion and active comparisons among students, and incentivizes them to work at defending their own choices and argue them convincingly.

It is important to specify that, in the context of the Lab, the work accomplished by the case method is most similar to the so-called "deductive" approach (Booth et al., 2000). The case method is used after some theoretical lessons, in order to transmit basic concepts about succession process. Thus the case is employed within a wider didactic process using diverse methods, each one providing an important contribution to student's learning process. The case has diverse functions: 1) demonstrative/exemplary: as it presents students a concrete example of succession; 2) of execution: making students confront a real succession situation, which requires theoretical-conceptual instruments to be analyzed and solved; 3) to verify students' abilities to transfer in the reality theoretical concepts. The use of the case method therefore differs from an "inductive" approach – Harvard style (Andrews, 1953; Barnes et al., 1994) – in which it is exclusively employed and not to support traditional didactic. In the inductive approach, in fact, the educational process involves a sequence of cases, whose main aim scope is soliciting student's ability to confront complex and unusual situations.

In the context of this Lab, there is not enough time to adopt this latter approach, which requires the presentation of different cases. Since our class is composed of university students, we feel that the deductive approach better responds to their formational needs, since they must also acquire a solid theoretical base of reference rather than simply developing a capacity for analysis and problem solving. In the context of the diverse types of cases that can be utilized, the Lab adopts "case focused on the study of problems" (Goguelin, 1995) in which the case establishes an invented problem, provides the necessary and relevant information but also secondary or completely irrelevant details (students have to choose), and some information are sometimes incomplete or completely left out (to create uncertainty or indetermination which, in fact, can characterize many real situations).

4.3. Movie screening

Actually, the use of cinema as an educational tool, especially in managerial contexts, has grown in recent years and it is widely agreed that it is a particularly effective educational method (Shaw and Locke, 1993; Rappaport and Cawelti, 1998; Carley, 1999; Clemens, 1999; Champoux, 2001; Quaglino, 2005). One of the reasons of its success is that cinema "amuses, moves, entertains, excites, raises new thoughts" (Di Giorgi et al., 2005). As such, it possesses a high educational power, thanks to its ability to pull the spectator into a fictitious reality, which is external to him, living an absorbing, high impact experience. This ability to "transport" the spectator into the scene highlights communicative and therefore educational skills which are more effective than other educational strategies. When watching a movie, the spectator doesn't just watch, but is drawn to identify with represented situations and characters, living their experiences indirectly and developing a particularly powerful learning process as a result (D'Incerti et al., 2000; Agosti, 2006).

From a methodological point of view, watching and discussing a movie in a didactic process has some similarities with case method. The main difference between the two methods concern the way adopted to present the "case": in place of a written description, in the latter situation to be analysed is presented in a movie. Apart from this difference, certain similarities with the case method are found in the aims and methods of use of this educational tool. Cinematographic material can be employed in three main ways (Cortese, 2006): 1) as a "warm up": it is shown at the beginning of a lesson to introduce a subject, to get the students' interest and help them to understand themes later analyzed; 2) as an example: it is presented at the end of one or more lessons to show an event with problems and situations that have already been discussed. It allows viewers to understand the complexity of situations, the role of people involved, interactions between variables determining the final outcome; 3) as a case study, chosen for its exemplarity and complexity. The movie should urge students to identify critical elements to be analyzed during the lesson.

There are several movies dealing with business subjects that can be used as a teaching tool. Moreover movies with other subjects can also be used, as long as their plot can be used metaphorically in a business-managerial key. Within the Lab, a movie belonging to the first category has been selected. This is The Inheritage (original title Arven), directed by Dane per Fly in 2003. The main character is Christoffer, the young son of the owners of the Danish steelworks Borch-Moeller. Following his father's suicide, he's convinced by his mother to take on the leadership of the firm, even though his life choices were totally different. The movie presents several themes that are particularly well-suited to discussion in the Lab: reasons for the choice of the successor; typical features of FFs (overlapping between family and business; coincidence of ownership and control; limited presence of external management; informal decision making;

recruitment of employees often depends on family issues); attitude of the candidate for succession towards the family and the FF; role of third persons in the succession process.

Choosing to show The Inheritage was based on the following criteria: the ability to present students with a generational transfer characterized by very realistic situations; the possibility of identifying key parts in a generational transfer – main and supporting characters, critical variables, crucial moments, etc. – and understanding how they take part in the succession process and influence its final outcome; the possibility of involving students in a succession process, allowing them to share the protagonist's experiences, moods and feelings of anguish. The movie may, therefore, be seen as an effective simplification of reality. The complexity of the story, the interweaving of family and business affairs, psychological and individual variables mean that the movie is particularly suited to "training" students, who can discover in the story theoretical concepts to confront them with complex real-life situations. After viewing the movie, a guided discussion is performed in the classroom, in order to highlight key issues, with the help of a guide prepared by the professor and containing a number of insights.

4.4. Testimonies

Direct testimonies by businessmen make up a central part of the Lab, an occasion – for students – to meet actors direct involved in a succession process. Even testimonies from firms can, in some ways, fit in with the case method with a deductive approach. Nevertheless, it differs from the above-mentioned case method in many ways. With a testimony, in fact, the Lab's students deal with a real situation that is told orally (not written) by people directly involved in it. In this way, students are able to comprehend the complexities of a succession process; these are hard to "invent" and represent with all their characteristics in a simulated case.

Furthermore, a testimony is not seen as a "case study of problems", as the entrepreneur has not been asked to present a "generational transfer problem that has to be solved", but simply to tell his/her story. Student's task allotted is not to "find a solution for the problem", but to globally analyse the situation, applying theoretical knowledge they have already acquired. The biggest effort for students is to critically analyze the case, to identify problems and to find possible solutions for them. Testimonies are structured as follows. Some entrepreneurs (2-5) involved in different FFs are invited to talk about their experiences. The testimony is seen as an "informal chat" in which each entrepreneur is able to choose how he/she wants to present data and use supports such as slides, movies, information on the company, etc. The testimonies are registered and then transcribed word by word. The aim is to gather necessary information to analyze a real case of succession and prepare a report in the form of a case history.

Over the course of the years, we have found that the choice of "type" of entrepreneur (founder / successor, son / daughter, successors of different generations, etc.) inevitably "steers" the meeting, in which some aspects of the succession – linked to characteristics exhibited by the entrepreneur and his/her personal experience – emerge instead of others. For example: the presence of both senior and junior entrepreneurs usually means that generational cohabitation is approached from two points of view; the presence of only junior entrepreneurs focuses attention on motivation, training, professional experience, joining the firm, difficult relationship with the senior, etc.; the presence of both male and female entrepreneurs raises inevitable role issues and promotes useful reflections on the role of the woman in FFs; and so on.

Testimonies are followed by a meeting for professors and students in which they follow up and set out the final report. The aim of this teaching unit is to compare testimonies, share the structure and methods of presentation of the final report, and organise group. Each group is entrusted with a case. Group work is carried out autonomously and groups are free to contact the entrepreneur in order to check information and meet him/her in the company for a further interview. All information must merge in the final report that will show the analysis of the case, and will be organized as follows: history and characteristics of the firm; characteristics of FF (ownership, governance, etc.); succession approach; siblings' pathways outside/inside the FF; opportunities of the succession process and innovations carried out by successors; conclusions: strengths/weakness, best practices/proposals for improvement, and lessons learned. The report is written under the supervision of the professor and discussed in the plenary session which concludes the formative process, in which each group presents their report and receives feedback from the professor and other students. Afterwards the report is further perfected and finally sent to the entrepreneur.

In conclusion, the use of testimonies allows highlighting some essential issues of succession process: its complexity, the importance of personality traits of people involved the need to adopt different solutions depending on different situations. Furthermore, this method is useful not only because of the interaction between entrepreneurs and the class, but also thanks to discussions between entrepreneurs, which represent an opportunity to interact and compare notes; something that is much appreciated by the businessmen.

4.5. Group work

Group work is a method widely used in the Lab. By group work we mean the "division of participants into groups of reduced dimensions, working autonomously, to which a task is assigned. This task must be carried out within a set time and conclusions must then be presented during a plenary discussion" (Bellamio, 1995). This teaching method is associated with the case method used as a "pretext" in order to develop individual and group skills relating to the analysis of complex situations, find possible alternatives for problem solution, choose the best one (Goguelin, 1995) and consolidate acquired theoretical bases.

The choice of enriching individual learning process is due to at least three factors: 1) the reduced size of the group facilitates interaction, the exchange of ideas and experience allowing for more active participation, an in-depth examination of themes and the sharing of different types of knowledge; 2) ideas, work, solutions and proposals belonging to each group are confronted with and judged by the other groups (not just by the professor). This ensures all participants feel responsible and increases the efficiency of evaluation since it comes from colleagues and not from the professor; 3) it is considered as useful to make students aware of the importance of developing skills to aid in group work (such as communication, interaction, organization, negotiation, etc.) which are increasingly more important in work environment.

With these aims – during the first exercise, with the written case – the classroom is divided into subgroups. Each group chooses a name and a representative, whose job it will be to represent the group in all its communications with the professor and, successively, the entrepreneur. Once formed, the group will remain unchanged for the duration of the Lab. Once the task has been assigned to the groups, they will alternate working sessions in the classroom, supervised by the professors, with sessions, carried out autonomously. The group is free to organize its activities and meetings autonomously, as long as it meets its goals on time. Finally, all members are invited to present the results of the group project. At the presentation of the final report, the professors will evaluate single participants as well as the group in its entirety. Individual evaluation is carried out on the following aspects: use of language, clarity of presentation, the understanding and application of concepts and theoretical models and capacity for synthesis. Group evaluation takes into consideration the work as a whole and its presentation in the classroom.

5. Conclusions and critical considerations

The aim of the Lab on generational transfer is to respond to the specific need to create and strengthen awareness and preparedness not only in the potential successors, but also in all those who – for various reasons – should know more about this topic (future accountants, consultants, managers, entrepreneurs, employees of FFs, banks' officers, and so on). In this context, the Lab aims to raise awareness, educate and inform the participating students on the phenomenon of generational transfer. The course is mainly focused on business management issues, but is also offers an overview of the main legal and fiscal aspects of a succession process.

The program described in the previous pages can be used in a flexible way. It may, in fact, be enriched or reduced in accordance with the specific requirements arising from the characteristics of the class. This is particularly true for the theoretical part proposed at the beginning of the Lab, which is a prerequisite of the subsequent lessons, characterized by a more participatory approach. The Lab is suitable for versatile use as well: it can in fact be seen as a stand-alone course or as part within a broader course. In the first case it will probably be necessary to enrich the introductory part, especially if the class does not have some necessary preliminary knowledge of management and does not know the characteristics of FFs. In the second case, instead, the Lab may constitute the second part of a broader course devoted to the management of family businesses.

One of the main problems raised in carrying out the Lab as part of university courses has been the difficulty in assessing students. The report provided at the end of the course is in fact a collective output, as well as the presentation of the work done by each group. However, if an individual assessment is required, there is the problem of how to identify the contribution of each student in the group in which he/she has been involved. One solution might be to follow a dual criterion, combining the assessment of the group with a moment of individual evaluation at the end of the Lab. Such a system would have the advantage of encouraging team work, since the good evaluation of the group would benefit all its components. At the same time, this solution would avoid unequal treatment and make it possible to take into account the individual contributions and the level of preparedness of each student, avoiding rewarding those who have worked less and, conversely, to penalize those who have worked more. On the contrary, assessing the participants only through an individual traditional test or examination is considered inconsistent with the approach characterizing the entire course. In this way, group work would be discouraged and the ability of the Lab to teach students how to work within a team would be weakened.

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