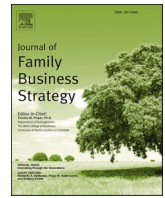


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# Untangling the yarn: A contextualization of human resource management to the family firm setting

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## ABSTRACT

Despite the efforts to contextualize human resource management to family firms, scientific literature addressing this study domain suffers from limited systematization. The article arranges an integrative framework to make sense of the challenges faced by family firms in designing and implementing human resource management practices. Bibliographic coupling was run on an intellectual core of 69 papers to illuminate dominant research streams. Besides, co-citation was executed to determine the conceptual roots nurturing recent scholarly advancements. A dance between formality and informality of human resource management practices characterizes extant research, calling for developments to understand how family firms can deal with it.

## 1. Introduction

Human resource management focuses on how to deal with people at work (Klikauer, 2022). This mandate entails heterogeneous aims, including the achievement of efficiency and effectiveness in making people able to accomplish their jobs, the enhancement of individual knowledge, skills, and attitudes, the understanding and representation of the workforce's needs and expectations, the establishment of a supportive work climate, and the unleashing of individual and collective contribution to organizational success (Ulrich, 1998). Human resource management finds distinguishing challenges when contextualized to family firms (e.g., Combs et al., 2018; Hoon et al., 2019), i.e., organizations that are owned, governed, and/or managed with the purpose of accomplishing the vision or the mission of a dominant coalition that is the expression of a family, whose primary interest is to make organizational activities sustainable across generations (Chua et al., 1999). The deep involvement of the family in framing the functioning of the firm enacts a distinctive bundle of resources (i.e., familiness), which thoroughly permeates management processes and practices (Habbershon and Williams, 1999). Embedding familiness in human resource

management practices distinguishes family firms from their nonfamily counterparts (Deng, 2018). This leads to ambiguous implications at the individual and collective levels (Marler et al., 2021). On the one hand, since family firms resemble a family-like environment at work, they may establish an attractive, cohesive, and empowering workplace, where people are solicited to contribute to organizational performance energetically (Tabor et al., 2018). On the other hand, the dichotomy between family and nonfamily employees may give birth to work-related discrimination (Manna et al., 2021), whose different shapes (Jennings et al., 2018) range from bifurcated compensation (Samara et al., 2021) to unfair promotions (Dailey and Reuschling, 1979). The difficulty in escaping from such ambiguity has contributed to making human resource management a neglected factor in explaining the dynamics and performances of family firms (Astrachan and Kolenko, 1994), spotting an enduring knowledge gap (Hoon et al., 2019).

Even though scholars and practitioners are increasingly interested in highlighting what makes family firms capable of effectively managing people, empowering them to thrive and flourish at work (Lambrechts and Gnan, 2022), prior research stressed the need for further advancements intended to disentangle the attributes of human resource

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management and its specific contribution to family firms' effectiveness (Bettinelli et al., 2022; Peláez-León and Sánchez-Marín 2022). Disparate theoretical insights have been embraced to push forward what we currently know about how to steer family firms (Bammens et al. 2011), such as the principal-agent theory, stewardship theory, and the resource-based view (Siebels and Zu Knyphausen-Aufseß 2012). These perspectives have specific implications when applied to human resource management. Drawing on agency theory, previous research highlighted that family firms are exposed to problems related to favoritism and predilection for family members over nonfamily ones, allocating to the former overly generous treatments that are not necessarily justified by better competences or higher performance (Eddleston et al., 2018). Stewardship theory relies on the assumption that managers operating in a family firm are likely to overcome issues related to agency by behaving as stewards of the organization (Tsao et al., 2019). This involves showing a strong commitment to enhancing organizational performance, which might extend to employees, encouraging them to reciprocate managers' behaviors and display work engagement (Vallejo, 2009). Based on the Resource-Based View, familiness can be depicted as a glue holding together family and nonfamily members in the design and implementation of human resource management, nurturing the development of a distinctive bundle of resources that adds to the competitive advantage of the firm (O'Shea and Duarte Alonso, 2022). Against this background, the mutuality perspective has been used to point out the family firms' ability to set up a unique workplace, which relies on loyalty and solidarity (Rondi et al., 2022). Conversely, the bifurcation theory and the imprinting theory have been exploited to acknowledge the emergence and reiteration of discriminatory practices in family-owned organizations (Kidwell et al., 2018; Madison et al., 2018), pointing out the determinants of organizational inclusiveness (Maseda et al., 2022).

While such heterogeneity of conceptual and practical approaches enriched the scholarly debate, it triggered a fragmentation of knowledge, preventing us from getting a unified and systematic account of human resource management in the family firm setting. This is reflected in the limited attention paid to the formalization of human resource management practices (Steijvers et al., 2017) and in the dilemmas affecting the professionalization of people management in the family business (Sinha et al., 2021). The article attempts to fill this knowledge gap, reviewing the current literature that contextualizes human resource management to family firms. An effort has been accomplished to elicit the primary conceptual roots inspiring recent advancements. Besides, an integrative overview of the research streams characterizing the current scholarly debate is delivered. More specifically, the article addresses the following research questions:

**RQ 1:** What are the theoretical roots on which the scholarly debate about human resource management in family firms is established?

**RQ 2:** What are the research branches through which the literature about human resource management in family firms unfolds?

A hybrid literature review consisting of bibliometric analysis and an interpretive systematization of retrieved scholarly contributions has been undertaken to answer these research questions. Our study adds to extant literature reviews focusing on human resource management in the family firm setting. First, it delivers an updated overview of what is known about how to manage people in family firms, extending previous systematizations (Flamini et al., 2021; Machado and Melo, 2014). Second, rather than focusing on specific practices, such as employee relations (Ferraro and Marrone, 2016), or particular issues related to people management, such as silence behaviors at work (Lu and Xie, 2013), our research provides an integrative and comprehensive review of human resource management in family firms. Last but not least, this article combines the strengths of bibliographic analysis with interpretive systematization, enabling us to arrange a thicker and more dependable representation of the state of the art of human resource management in the family firm setting (Marler et al., 2021).

The article proceeds as follows. The next section describes the

research protocol for collecting, analyzing, and selecting relevant contributions. Then, the study results are reported. The findings section is twofold: firstly, it underpins the conceptual roots on which the current literature is settled; secondly, it presents the research streams articulating the scholarly debate about human resource management in family firms. The discussion develops an integrative framework to systematize the reviewed contributions and advance some avenues for further research. Finally, the conclusion emphasizes the implications of this literature review, stressing its contribution to theory and practice.

## 2. Methods

### 2.1. The review protocol

Coherently with the study's aim, the research methodology consisted of a domain-based literature review (Palmatier et al., 2018). More specifically, human resource management represented the study domain targeted by our review. It was framed in the family business setting, acknowledging that family-owned organizations disclose peculiarities in designing and implementing people management practices (Reid and Adams, 2001; Villani et al., 2023). A structured protocol was followed to conduct this literature review. Drawing on Paul et al., (2021), we used the Scientific Procedures and Rationales for Systematic Literature Reviews (SPAR-4-SLR). This protocol has been preferred to alternatives available, such as the Preferred Reporting Items for Systematic Reviews and Meta-Analyses (PRISMA), for two reasons. On the one hand, SPAR-4-SLR has been distinctively conceived for the social science field, providing scholars with clear recommendations to ensure the integrity and robustness of literature reviews (Sreenivasan and Suresh, 2022). On the other hand, it enables a holistic and replicable systematization of the scholarly debate, enhancing the review's consistency and dependability (Tsiotsou and Boukis, 2022).

The SPAR-4-SLR protocol evolves through three steps. Each step is further articulated in two phases. The assembling stage sets the ground for collecting contributions. It entails selecting the data source and configuring the search string to elicit relevant records. Next, the arranging stage involves defining the exclusion and inclusion criteria and purifying the dataset by removing records that do not meet the study aims or do not fit the review's scope. Finally, the assessing stage entails a final evaluation of the purified dataset. Selected items are carefully analyzed and systematized to extract meaningful evidence. A thorough description of the study protocol is reported below.

### 2.2. Assembling

The assembling stage was conducted through tailored queries on different citation databases. The authors met to identify the databases to be queried to collect relevant contributions. In line with our desire to include only studies whose quality was certified by the peer review rule, two databases were interrogated, which currently represent the most widely used resources to conduct literature reviews: Clarivate Analytics' Web of Science (WoS™) and Elsevier's Scopus® (Archambault et al., 2009). Other sources, such as Dimensions.ai and Google Scholar, were not considered, since they rely on machine learning rather than journals' classification, thus falling short of ensuring the records' reliability and consistency (Bornmann, 2018). To confront the two databases, we executed a generic query focusing on the study domain (human resource management) and the research context (family business). Echoing the evidence reported in previous studies (Singh et al., 2021), Scopus® yielded more contributions than WoS™. Moreover, all records indexed in WoS™ were included in Scopus®. Hence, we elected Scopus® as the source for conducting this literature review.

Next, the authors defined the search strategy for assembling the literature contributions. Sticking to the study purpose, the research string consisted of two components. The primary part focused on the study domain. We attempted to contemplate different nuances of human

resource management, acknowledging the various perspectives and approaches taken to define this construct (Brewster, 2004). In addition to human resource management, we referred to alternative ways of interpreting this construct, contemplating variations such as manpower, personnel, and people management. Such terms were related through the Boolean operator 'OR'. The secondary part of the search string was related to the research context. Recognizing the heterogeneity of concepts used to refer to family-owned organizations (Sharma et al., 1996), we included different terms in our research string (e.g., family business and family enterprise), enhancing the comprehensiveness of our review. The Boolean operator 'OR' was used to connect the terms which were part of the secondary keywords. The operator 'AND' connected the primary and secondary components of the search string. We used the asterisk (\*) to account for potential variations of the terms. We accomplished the research on 'Title, Abstract, and Keywords.' The search string follows:

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((TITLE-ABS-KEY("human resource manage*" OR "HRM" OR "manpower manage*" OR "talent manage*" OR "personnel manage*" OR "workforce manage*" OR "people manage*") AND TITLE-ABS-KEY ("family firm*" OR "Family bus*" OR "family own*" OR "family ent*" OR "family compan*" OR "family-based*")))
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We ran the search on January 19th, 2023. To maintain the consistency of our data collection and advance the review's replicability, we decided to set a time limitation to assemble contributions. We admitted in our study all records published within 2022. Moreover, we introduced a language limitation: only items published in English were included in our literature review. Lastly, all items whose quality was certified by the double-blind peer review rule were considered. We focused on original articles published in academic and/or professional journals, conference proceedings, and book chapters, provided they underwent double-blind peer review. Items that did not respect this requisite, such as letters, notes to the editors, and editorials, were omitted. As a result, we collected 179 contributions, which were passed to the arranging stage.

### 2.3. Arranging

Collected items were reported in an electronic worksheet. For a preliminary analysis, they were coded by authors' name, source type, source name, publication year, title, abstract, and keywords. This permitted us to spot four duplicates, which were removed from the dataset. Additional codes were included to identify the key topics, study designs, conceptual perspectives, and main implications. Next, the authors met to determine the exclusion criteria. Three rules were agreed upon to skim the dataset and focus on impactful papers. First, the items that did not comprehensively address arguments related to human resource management were retracted as off-topic. Second, the contributions that did not contextualize human resource management practices to the peculiar traits of family firms were removed as off-scope. Third, the items that did not target human resource management as the main topic of the analysis and did not emphasize the unique challenges related to people management in the family business were discarded as off-focus.

Two authors independently screened the dataset to sort out the items that met the exclusion criteria. Once the individual analysis was completed, the authors discussed their results to purify the dataset. The contributions on whose retraction the authors agreed upon were removed from the dataset. A discussion was launched when the authors were inconsistent on the inclusion or the exclusion of relevant items. Where the authors could not achieve a consensus, a third independent expert was involved in setting disagreements. As a result of the first round of analysis, 83 contributions were discarded. A second screening was realized, which focused on the full text of collected items. This further analysis led us to discard 25 records. Altogether, 41 articles were removed because they were off-topic (i.e., they addressed topics other than human resource management), 46 were retracted because off-scope

(i.e., they did not contextualize human resource management to family firms), and 21 were dismissed because off-focus (i.e., they did not target people management in the family firm setting). Therefore, we arrived at a dataset consisting of 67 items, which were passed to the assessing stage. Fig. 1 graphically depicts the process that led us to identify the items included in our literature review.

### 2.4. Assessing

Consistent with the research questions, the arranging stage was twofold. First, we implemented a co-citation analysis to identify the theoretical roots of our intellectual core and map its conceptual backbone (Boyack et al., 2005). Second, we used bibliographic coupling to sort the articles in groups reflecting the usage of conceptual perspectives and the main topics of interest: this allowed us to unveil the research streams populating the scholarly debate about human resource management in the family business (Kessler, 1963). The conjoint use of co-citation and bibliographic coupling was instrumental in taking advantage of both techniques and overcoming their shortcomings. In fact, "...bibliographic coupling is able to cluster very recent papers but clusters fewer of the very old papers, while co-citation clustering does the opposite" (Boyack and Klavans, 2010: p. 2391).

VOSviewer (vers. 1.6.10) was used to accomplish the analysis. Co-citation and bibliographic coupling were used as the aggregation mechanisms. The visualization of similarity technique was exploited to systematize articles into clusters depicting homogeneous research streams (van Eck and Waltman, 2010). The software generates a two-dimensional map based on the aggregation analysis results. It locates items based on their similarity measures. Since we were interested in obtaining large enough clusters embedding consistent research streams, we set 10 as the minimum cluster size. Besides, we maintained the resolution parameter at one (van Eck and Waltman, 2017). The minimum link strength was set at five to ensure the clusters' thickness (Waltman and van Eck, 2012).

Finally, yet importantly, we used an interpretive approach to report the study findings. We stored all relevant items in an electronic worksheet. We carefully investigated them, trying to collect evidence on the perspective and approach taken to contextualize human resource management to the family firm setting. A tailored coding technique was applied (Charmaz and Bryant, 2010; Glaser, 1978). Open coding was implemented to get insights into the conceptual and empirical foundations on which our literature review relied. It was accompanied by axial coding, which enabled us to highlight mutual connections across the reviewed contributions. A rich and comprehensive report of the state of the art emerged from this methodological approach, which permitted us to emphasize the conceptual foundations on which our intellectual core is settled and to map the main research streams investigating human resource management in the family firm setting.

## 3. Research findings

### 3.1. An overview of the intellectual core

The literature review's intellectual core consisted of 67 contributions. Most were articles published in peer-reviewed journals (87%), with the remaining part including book chapters (13%). We retrieved no contributions issued by publishers considered predatory or criticized for unethical publishing. About 50 different sources were contemplated in this literature review. However, six journals (i.e., Family Business Review, the German Journal of Human Resource Management, the International Journal of Human Resource Management, the Journal of Family Business Management, the Journal of Family Business Strategy, and the Journal of Small Business and Enterprise Development) accounted for about a third of reviewed items (31%).

As depicted in Fig. 2, publication years ranged between 1993 and 2022. More than half of the contributions were published from 2015

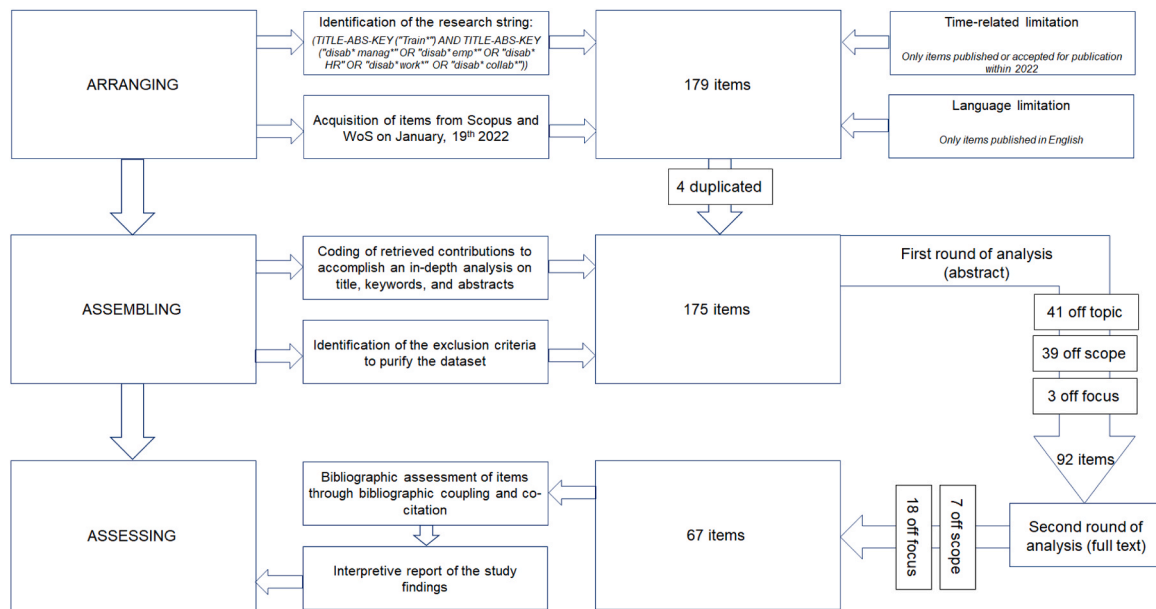


Fig. 1. A graphical representation of items' collection and screening. (Source: Authors' own elaboration).

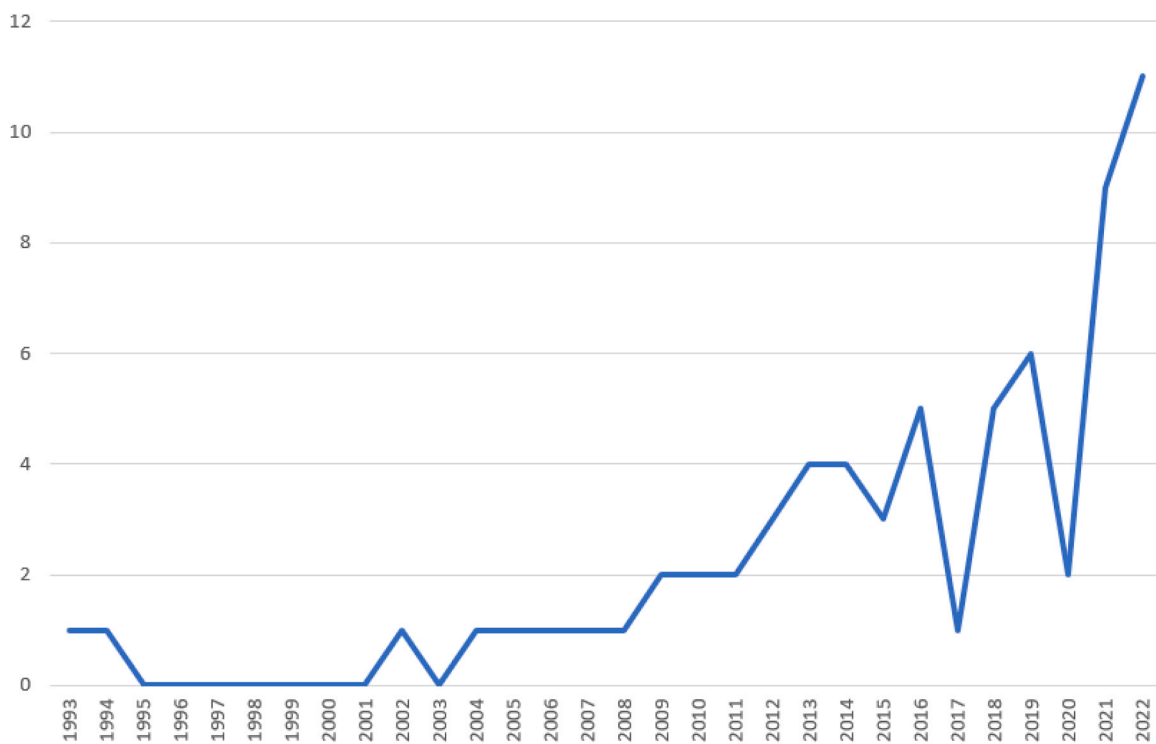


Fig. 2. The distribution of reviewed items per publication year. (Source: Authors' own elaboration).

onwards (63%) when research on human resource management in the family business reported a spiraling growth. At the time of this report, the reviewed items were cited 27 times ( $\sigma = 56$ ), ranging from a minimum of 0 to a maximum of 302 citations. Only 1 in 6 items were authored by a single author (16%), with the remaining part being co-authored by a minimum of 2 and a maximum of 8 scholars ( $\mu = 2.8$ ;  $\sigma = 1.4$ ). European countries were the primary research contexts in 1 in 3 contributions (37%), followed by Asia (19%) and North America (12%).

Table 1 includes an overview of the reviewed items, summarizing their study aims, methodology, and key findings. About half of the contributions adopted an empirical and quantitative study design. Qualitative research (28%) and conceptual papers (21%) followed. Only one experimental study was taken into consideration. The journal ranking issued by certified academic bodies (e.g., the Australian Business Dean Council and the Chartered Association of Business Schools) was reported when available. Most contributions were published in sources listed in the ABDC Journal Quality List or the Academic Journal

**Table 1**

List of reviewed items. (source: Authors' own elaboration).

Authors	Title	Year	Source Title	Cited by	ABDC list	AJG list	Cluster	Study aims	Main findings	Study Design	Methodology	Country
Astrachan J.H., Kolenko T.A.	A Neglected Factor Explaining Family Business Success: Human Resource Practices	1994	Family Business Review	296	A	3	1	The article examines the impact of Human Resource Management and professional governance practices on the success and survival of family firms	Human Resource Management practices are empirically linked to family firms' survival and success; effective use of Human Resource Management practices has been found to be positively related to gross firm revenues, nurturing the organizational competitive advantage	Empirical - Quantitative	Structured telephone survey delivered to 614 family firms operating in the United States; descriptive statistics and Pearson product-movement correlations	United States
Bannò M., Sgobbi F.	Family Business Characteristics and the Approach to HRM in Overseas Ventures	2016	Journal of Small Business Management	18	A	3	1	The article investigates the relationship between Family Business and Human Resource Management abroad and attempts to conceptualize the role of human resources in internationalization processes	Family firms are likely to focus on internal staffing to control operations abroad; this might determine a replication of the parent company's organizational culture abroad, generating barriers to the exploitation of the opportunities provided internalization	Empirical - Quantitative	Short telephone and e-mail questionnaires to 123 companies that went overseas via 258 FDIs in 25 different countries; econometric modeling based on ordered regressions	Italy
Benito-Hernández S., López-Cózar-Navarro C., Priede-Bergamini T.	Examining the relationship between firm size and external advice on legal matters and human resources by family businesses	2015	Journal of Business Economics and Management	10	B	2	1	The study sheds light on the relationship between the use of external advice for arranging human resource management practices and the family firms' size	Family firms have been found to use more Human Resource Management external advice than nonfamily firms; neither organizational size nor experience in the market affects the family firms' propensity to use Human Resource Management external advice	Empirical - Quantitative	Secondary data collected from the Survey on Business Strategies (ESEE) on 2.013 manufacturing firms; ANOVA analysis, "U" Mann-Whitney test, and Chi-Square test	Spain
Casimiro M., José Chambel M.	Culture in small-sized Portuguese family businesses: Do first and second generations make a difference?	2014	Management Research	4	N/A	1	1	The study examines cultural patterns in the family business, providing evidence of the factors that influence the modification of such patterns	Family firms that employ a Human Resource specialist tend to develop a more formal and professionalized approach to Human Resource Management, reshaping the family business culture and promoting changes in the authority relationships, legitimacy norms, and incentives rooted in family firms	Empirical - Qualitative	Multiple case studies concerning six small-sized family businesses; data collected from in-depth and semi-structured interviews	Portugal
Cruz C., Firfiray S., Gomez-Mejia L.R.	Socioemotional wealth and human resource management (HRM)	2011	Research in Personnel and Human Resources Management	67	N/A	1	1	Embracing a Socioemotional Wealth perspective, the article attempts to explain the adoption of Human	The family-business owners' desire to preserve the socioemotional wealth endowment is reflected in the adoption	Conceptual	Unsystematic review of extant empirical evidence	N/A

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Table 1 (continued)

Authors	Title	Year	Source Title	Cited by	ABDC list	AJG list	Cluster	Study aims	Main findings	Study Design	Methodology	Country
	in family-controlled firms							Resource Management practices in family-controlled firms	of Human Resource Management practices; more specifically, family firms are expected to be more willing to promote employee participation, place greater emphasis on informal communication channels, prefer qualitative measures for evaluating performance, centralize selection process, invest more in (long-term) career development activities, and use social networks in the recruiting process			
Danes S.M., Stafford K., Loy J.T.-C.	Family business performance: The effects of gender and management	2007	Journal of Business Research	103	A	3	1	The study examines the relationship between management practices and gross revenues of family firms, contemplating the mediating role of gender	Personnel management has been found to affect gross revenues significantly; its effects were more prominent for family firms owned by women	Empirical - Quantitative	Secondary data collected from the National Family Business Panel about 708 family firms; semi-logarithmic regressions using data weighted for generalizability	United States
De Souza Freitas W.R., Jabbour C.J.C., Mangili L.L., Filho W. L., De Oliveira J.H.C.	Building sustainable values in organizations with the support of human resource management: Evidence from one firm considered as the 'best place to work' in Brazil	2012	Journal of Human Values	17	N/A	1	1	The study investigates the support offered by Human Resource Management to organizational sustainability	Human Resource Management practices play a crucial role in sustaining environmental and social management initiatives; the alignment between Human Resource Management and sustainability is accomplished through tailored communication systems bridging the gap between practices and sustainable values and employee empowerment and participation	Empirical – Qualitative	A single case study conducted on a leading Brazilian company; data were collected from interviews with four employees from the areas of product and process development, production, and human resources, as well as the CEO of the company	Brazil
Del Baldo M.	Corporate social responsibility, human resource management and corporate family responsibility. When a company is "the best place to work": Elica group, the hi-life company	2013	Economic Research-	8	N/A	N/A	1	The study focuses on Corporate Family Responsibility and examines the relationship between Corporate Social Responsibility policies and Human Resource Management	Effective Human Resource Management results from robust ethical values of the family firm's owner and managers; the commitment to share moral values is conducive to increased organizational success	Empirical – Qualitative	Single case study focusing on a large, multinational Italian family company that has been listed as one of the "best places to work" in the national and European contexts	Italy
Deng X.	Embedding 'familiness' in HRM	2018	Asia Pacific Business Review	12	B	2	1	The article investigates the implications of	Family firms can enhance employees' commitment	Empirical - Qualitative	Single case study focusing on a Chinese	China

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Table 1 (continued)

Authors	Title	Year	Source Title	Cited by	ABDC list	AJG list	Cluster	Study aims	Main findings	Study Design	Methodology	Country
	practices to retain a new generation of migrant workers in China							familiness on employees' organizational commitment, adopting the perspectives of Social Capital Theory, Social Exchange Theory, and Organizational Support Theory	by embedding familiness in their Human Resource Management practices; decent work conditions, career opportunities, and a corporate culture based on socialization reinforce the effectiveness of Human Resource Management practices		firm; data were collected through a combination of interviews and focus groups, supplemented with a review of the company's documents	
EliceGUI-Reyes J. I., Barrena-Martínez J., Romero-Fernández P. M.	Emotional capital and sustainability in family businesses: Human resource management perspective and sustainability	2016	CSR 2.0 and the New Era of Corporate Citizenship	4	N/A	N/A	1	The contribution investigates how human resource choices can be affected to preserve positive emotional capital for family firms	A typical socially responsible pattern characterizes family firms' human resource management practices, consistent with their interest in promoting emotional capital. Family firms have been found to pay significant attention to employees' training and continuous development, diversity management and equal employment, and occupational health and safety at work	Empirical – Qualitative	Multiple case studies focusing on ten successful family firms in Spain; data were primarily collected through document analysis	Spain
Fahd-Sreih J., El-Kassar A.-N.	HRM and Innovative Capabilities of Family Businesses	2018	Journal of Promotion Management	6	B	N/A	1	The study examines the implications of Human Resource Management on the performance of family businesses, with a focus on the innovative capabilities of nonfamily members	The performance of family firms is boosted by nonfamily members' selection based on innovative capabilities and their continuous training; nonfamily members enhance the diversity of knowledge resources available in the company	Empirical - Quantitative	Data were collected through a self-administered questionnaire distributed by mail to 269 family businesses; empirical analysis was based on Partial Least Squares Structural Equation Modeling	Lebanon
Ferraro H., Marrone J.	Examining employment relationship activities in family business research	2016	Journal of Family Business Management	12	N/A	1	1	The article reviews the state of the art of Human Resource Management in family-owned practices, with a focus on the formation, adaptation, and termination of employment relationships	Family firms typically embrace informal approaches in arranging human resource management practices; training is identified as the most developed practice in the domain of Human Resource Management applied to family firms	Conceptual	Unsystematic review of contributions focusing on Human Resource Management in the family firm setting	N/A
Gutiérrez-Broncano S., Rubio-Andrés M., Estévez P. J.	Managing human resources in family businesses: A review on the current state of research and new	2013	Effective Human Resources Management in Small and Medium	3	N/A	N/A	1	The article reviews scholarly knowledge about Human Resource Management in family firms, focusing on both	High-Performance Work Practices are conceived of as the best way to manage people in the family business; they enable	Conceptual	Unsystematic review of most relevant studies contextualizing Human Resource	N/A

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Table 1 (continued)

Authors	Title	Year	Source Title	Cited by	ABDC list	AJG list	Cluster	Study aims	Main findings	Study Design	Methodology	Country
	proposals for the future		Enterprises: Global Perspectives					negative and positive issues	organizational commitment of both family and nonfamily employees		Management to family firms	
Ibrahim A.B., Soufani K., Poutziouris P., Lam J.	Qualities of an effective successor: The role of education and training	2004	Education + Training	36	N/A	N/A	1	The article explores the factors that are conducive to an influential family business successor and discusses the crucial role that education and training could have in enhancing the qualities and skills of a successor	The capacity to lead, managerial skills and competencies, and commitment to take over the family business are crucial for an effective human resource strategy concerning the selection of a successor	Empirical - Quantitative	Data were collected through questionnaires delivered to 42 CEOs of small and medium-sized Canadian family firms attending a family business seminar; a factor analysis was conducted	Canada
Kansikas J., Nemilentsev M.	Understanding family dynasty: Nurturing the corporate identity across generations	2010	International Journal of Business Science and Applied Management	11	N/A	N/A	1	The article investigates corporate identity in the context of a multigenerational family dynasty	The corporate identity of family firms is reflected in Human Resource Management Practices; employees are critical to pinpoint organizational identity: in fact, the organizational identity is enacted by the joint experiences of an organization and further formulated by employees	Empirical – Qualitative	Single case study; data were collected from annual reports and elaborated through qualitative content analysis	Finland
Kuźniarska A.	Sustainable human resources as the future of HRM systems in family firms	2021	Designing and Implementing HR Management Systems in Family Businesses	0	N/A	N/A	1	The study examines how the adoption of the principles of sustainable management with the participation of the employees and the owners contributes to building a sustainable future for family firms	Sustainable activities undertaken in the area of Human Resource Management spreading rapidly, building a positive organizational image and improving the identity of the company; clear principles of sustainable management of human resources pave the way for increased levels of trust and participation among employees	Conceptual	Unsystematic review of contributions analyzing the contribution of Human Resource Management to the sustainable growth of family firms	N/A
McMullen J.S., Warnick B.J.	To Nurture or Groom? The Parent-Founder Succession Dilemma	2015	Entrepreneurship: Theory and Practice	55	A*	4	1	The article proposes a multi-level model of family firm succession built upon the assumption that family business founders who intend to pass the business on to the next generation wear both the hat of the parent and the hat of the founder	Founders promote successors' affective commitment by supporting their psychological needs for competence, autonomy, and relatedness; successors who feel affective commitment are expected to invest more resources in the firm, enjoy greater reciprocity	Conceptual	Development of a multi-level model of family firm succession built on Self-Determination Theory	N/A

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Table 1 (continued)

Authors	Title	Year	Source Title	Cited by	ABDC list	AJG list	Cluster	Study aims	Main findings	Study Design	Methodology	Country
Miller D., Lee J., Chang S., Le Breton-Miller I.	Filling the institutional void: The social behavior and performance of family VS nonfamily technology firms in emerging markets	2009	Journal of International Business Studies	302	A*	4 *	1	The article investigates the implications on organizational performance of family firms' ability to establish closer relationships with employees and external stakeholders in emerging markets	of effort, and be more likely to continue the family firm's commitment to its nonfinancial goals Organizational commitment to employees has been found to be conducive to improved performance both among family and nonfamily firms: companies that form tighter emotional bonds with their employees by being more solicitous of their well-being are likely to achieve better results than their counterparts	Empirical - Quantitative	Data were collected through telephone interviews with top managers of 170 South Korean companies included in the 2003 Daegu High Tech Venture Guide List; means comparison tests, correlation analyses, and regressions were used to analyze data	South Korea
Mura L., Hajduová Z., Smorada M., Jakubova Z.	Employee motivation and job satisfaction in family-owned businesses	2021	Problems and Perspectives in Management	2	N/A	1	1	The article investigates the differences in motivational focus and sources of satisfaction between family and nonfamily employees in family businesses	While nonfamily employees are more oriented towards economic benefits, family ones tend to balance an economic orientation and moral satisfaction; moreover, nonfamily employees tend to focus on activities' content, while family ones focus on success	Empirical - Quantitative	A questionnaire survey was delivered to 56 nonfamily employees and 148 family employees from family businesses; two-sample Fisher's F-test, two-sample Student's t-test with inequality of variances, and Pearson correlations were used	Slovak Republic
Otten D.	Daughters in charge: Issues and pathways of female leadership succession in German family businesses	2016	The Modern Family Business: Relationships, Succession and Transition	3	N/A	N/A	1	The paper takes insight from the accounts of people who have decided to lead their family business to provide female successors with guidelines about the issues and challenges they will face	Daughters' succession unfolds in three stages: 1) learning the business from the outside; 2) learning the family business; and 3) learning to lead the family business; Daughters should establish a team to which delegate managerial tasks to achieve flexibility and work-life balance	Empirical - Qualitative	In-depth qualitative study based on information collected from a real-life context through open questions	Germany
Reid R., Morrow T., Kelly B., McCartan P.	People management in SMEs: An analysis of human resource strategies in family and nonfamily businesses	2002	Journal of Small Business and Enterprise Development	59	C	2	1	The study investigates Human Resource Management practices in the setting of Small and Medium-sized Enterprises, confronting family and nonfamily companies	Family firms lag in implementing Human Resource Management policies and practices; despite the push for formalization, the modus operandi of the family business is characterized by informality	Empirical - Quantitative	Large-scale postal survey based on an adaptation of the CRANET Survey delivered to 219 Small and Medium-sized companies; basic descriptive statistics and Chi-square tests of	Northern Ireland

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Authors	Title	Year	Source Title	Cited by	ABDC list	AJG list	Cluster	Study aims	Main findings	Study Design	Methodology	Country
Sambrook S.	Exploring succession planning in small, growing firms	2005	Journal of Small Business and Enterprise Development	49	C	2	1	The article explores the issues in voluntary succession associated with finding and successfully developing principal successors to ensure the survival and growth of small-sized companies	The need to transfer the incumbent's knowledge characterizes the succession process; three types of knowledge are required for a successful successor: 1) technical knowledge (specialist and formal); 2) knowledge about the company (indoctrinated and informal); and 3) embedded knowledge about leadership and decision making (tacit)	Empirical - Qualitative	independence were used The paper reports the qualitative findings of a workshop; data collection was implemented through hand-written notes during the discussions/breakout session; the collected information was integrated into "case studies" of the three organizations	Wales
Solomon A., Breunlin D., Panattoni K., Gustafson M., Ransburg D., Ryan C., Hammerman T., Terrien J.	"Don't lock me out": Life-story interviews of family business owners facing succession	2011	Family Process	20	N/A	N/A	1	The article intends to enhance our understanding of the complexities of family business succession	High differentiation from the business and high levels of trust are expected to facilitate the succession; conversely, low differentiation from the business and low levels of trust constrain the succession; low trust and low differentiation narratives might have negative implications on the family firm	Empirical - Qualitative	Ten semi-structured interviews were accomplished; the transcripts were analyzed using a grounded theory methodology	United States
Welsch J.H.M.	The Impact of Family Ownership and Involvement on the Process of Management Succession	1993	Family Business Review	44	A	3	1	The article seeks to link the family business field with topics related to Human Resource Management, investigating if family firms are less rational and bureaucratic in managing people, with a focus on the succession process	In general, family firms are less rational in people management: they use less formalization and do not usually involve human resource experts in personnel management; they tend to value academic education, and they assign the responsibility of Human Resource Management to the immediate superior	Empirical - Quantitative	Questionnaires were delivered to 183 companies, including both family and nonfamily firms; inter-item correlations tests and Mann-Whitney U tests were conducted	Germany
Arasli H., Arici H.E., Çakmakoğlu Arici N.	Workplace favouritism, psychological contract violation and turnover intention: Moderating roles of authentic leadership and job insecurity climate	2019	German Journal of Human Resource Management	18	B	N/A	2	The article investigates how favoritism affects non-beneficiaries' turnover intention in family firms, contemplating the mediating role of psychological contract violation and the moderating roles of job	Unfair and discriminatory practices of favoritism involve a psychological contract violation and undermine employee relationships and motivation: as a response, non-beneficiaries' intention to quit increases; family firm managers should adopt a	Empirical - Quantitative	A survey was delivered to 576 employees of 48 family firms; a one-month time lag was utilized between data-gathering periods; Confirmatory Factor Analysis, Pearson correlation tests, and	Turkey

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Authors	Title	Year	Source Title	Cited by	ABDC list	AJG list	Cluster	Study aims	Main findings	Study Design	Methodology	Country
								insecurity climate and authentic leadership	meritocratic and professional Human Resource Management system based on fairness and equity to curb the occurrence of favoritism		hierarchical linear modeling were used	
Basco R., Bassetti T., Dal Maso L., Lattanzi N.	Why and when do family firms invest less in talent management? The suppressor effect of risk aversion	2023	Journal of Management and Governance	2	C	1	2	The article explores the issues and challenges of talent management practice in family firms, considering the industry competition and the level of risk aversion	Family-owned companies exhibit a higher degree of risk aversion; this translates into underinvestment in talent management practices within a non-competitive market; in general, family businesses invest more in retaining talented workers than recruiting them	Empirical - Quantitative	Secondary data from the World Management Survey on a sample of 640 medium-sized manufacturing firms; Structural Equation Modeling was used To estimate the mediation effect of risk aversion on the relationship between family ownership and talent management	France, Germany, the United Kingdom, and the United States
Christensen-Salem A., Mesquita L.F., Hashimoto M., Hom P.W., Gomez-Mejia L.R.	Family firms are indeed better places to work than nonfamily firms! Socioemotional wealth and employees' perceived organizational caring	2021	Journal of Family Business Strategy	21	B	2	2	The article intends to shed light on whether family firms are better or worse places to work than nonfamily firms; coupling socioemotional wealth theory and behavioral agency model, it is assumed that family owners strive to protect and enhance their socioemotional endowments by fostering stronger perceptions of organizational caring among their employees compared to those working for a nonfamily firm	People in family firms generate higher productivity due to caring behaviors, and practices exhibited toward them, even though family-owned companies offer fewer formal HRM programs and benefits	Empirical - Quantitative	Four-steps study design involving the validation and refinement of a scale to assess the work conditions of employees and an empirical analysis based on Structural Equation Modeling on a sample of about 50,000 people from 180 companies	Brazil
Dhaenens A.J., Marler L.E., Vardaman J. M., Chrisman J.J.	Mentoring in family businesses: Toward an understanding of commitment outcomes	2018	Human Resource Management Review	25	A	3	2	The article examines the relationship between mentoring and organizational commitment within the family business context, acknowledging the latter complexity and peculiarity	Family businesses should encourage a combination of mentoring from family and nonfamily managers to foster organizational commitment among employees	Conceptual	The authors develop a theoretical advancement that leads us to propose seven propositions about mentoring in family firms	N/A
Flamini G., Pittino D., Visintin F.	Family leadership, family involvement and mutuality HRM practices in family SMEs	2022	Journal of Family Business Strategy	4	B	2	2	The study investigates family firms as employers, taking into account different situations of family members' involvement and the	Long-term orientation and stewardship culture make family CEOs likely to outperform nonfamily CEOs when it comes to managing people; family	Empirical - Quantitative	Mixed data collection was implemented, using questionnaires to obtain primary data and querying secondary data from	Italy

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Authors	Title	Year	Source Title	Cited by	ABDC list	AJG list	Cluster	Study aims	Main findings	Study Design	Methodology	Country
Harsch K., Festing M.	Managing nonfamily talent: Evidence from German-speaking regions	2019	German Journal of Human Resource Management	6	B	N/A	2	implementation of Human Resource Management policies and practices  The article investigates how family firms manage nonfamily talents to achieve organizational success	members' involvement in Human Resource Management roles entails greater adoption of mutuality-promoting policies and practices  Family firms and nonfamily talents appreciate a good relationship with each other, which results from cultural and emotional fit; nonfamily talents act as stewards of the family firm, and they value autonomy, empowerment, influence, and development opportunities for self-actualizing	Empirical - Qualitative	the AIDA database; Structural Equation Modeling was applied to a sample of 485 family-owned companies  Data were collected from 30 semi-structured interviews with 12 family business owners and 18 nonfamily talents from 18 companies; the grounded theory was used to analyze collected data	Germany, Switzerland, and Austria
Hernández-Linares R., López-Fernández M. C., Memili E., Mullins F., Patel P.C.	High-performance work practices, socioemotional wealth preservation, and family firm labor productivity*	2023	Business Research Quarterly	3	B	2	2	The study examines the implications of socioemotional wealth on the relationship between high-performance work practices and family firm performance	Implementation of High-Performance Work Practices coupled with high commitment to socioemotional wealth preservation decreases productivity; a substitution effect relates the two phenomena, according to which limited implementation of High-Performance Work Practices together with socioemotional wealth preservation enhances productivity	Empirical - Quantitative	Survey data were collected on a sample of 124 family-owned companies; primary data were integrated with secondary data obtained from the SABI database; Ordinary Least Squares regressions were used	Spain
Hoon C., Hack A., Kellermanns F.W.	Advancing knowledge on human resource management in family firms: An introduction and integrative framework	2019	German Journal of Human Resource Management	18	B	N/A	2	The editorial discusses facets of how family firms configure human resource management and set human resource practice	The search for family harmony, perceptions of fairness, ethical climate, and the pursuit of socioemotional wealth affect human resource management policies and practices; attention should be paid to building and maintaining the motivation of nonfamily members; this calls for investigating the psychological foundations of Human Resource Management in family firms	Conceptual	The article is based on an overview of the conceptual and empirical research related to human resource management within family firms, resulting in a human resource system framework	N/A

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Authors	Title	Year	Source Title	Cited by	ABDC list	AJG list	Cluster	Study aims	Main findings	Study Design	Methodology	Country
Hu Q., Zhang Y., Yao J.	Family involvement in middle management and its impact on the labor productivity of family firms	2018	Management and Organization Review	10	A	3	2	The article investigates how family involvement in middle management impact on the labor productivity of family firms	Family involvement in middle management negatively impacts productivity when the CEO is a family member, or the firm's size is significant. In these circumstances, there is a greater risk of nepotism, which damages organizational performance	Empirical - Quantitative	Secondary data were collected from the ninth survey of Chinese privately-owned enterprises conducted by the Privately Owned Enterprises Research Project Team; the sample involved 1284 privately-owned family firms; descriptive statistics and Ordinary Least Square regressions were used	China
Kidwell R.E., Hoy F., Ibarreche S.	" Ethnic" family business or just family business? Human resource practices in the ethnic family firm	2012	Journal of Family Business Strategy	24	B	2	2	The article conceptually explores the development of formal Human Resource Management practices in ethnic versus non-ethnic family firms	Human resource management in ethnic family firms tends to be less formally developed as compared with what happens in other family firms; although human resource management is considered to be conducive to increased organizational performance, formalization is not assumed to be effective by ethnic family firms	Conceptual	Based on a review of extant research, the authors develop five research propositions focusing on the effect of ethnicity on the formalization of Human Resource Management practices	N/A
Kim T., Marler L.	Are non-blood related "family" members treated differently? Determinants of bifurcation bias among family members in the family firm	2022	Journal of Family Business Management	7	N/A	1	2	The article analyses the heterogeneity of treatment of family members in family firms, identifying factors that influence the likelihood of bifurcation bias	Family members are not assumed to be a homogenous entity, but a rather heterogeneous entity, which is contingent on their status and/or position in the family; family members consider blood relatedness when determining the type of treatment; collectivism mitigates the impact of non-blood relatedness on the likelihood of bifurcation bias	Conceptual	The authors advance a theorization focusing on the bifurcation approach, which paves the way for four propositions	N/A
Marett K., Marett E.G., Litchfield S.R.	The role of relational familiarity when interpreting family business communication	2015	IEEE Transactions on Professional Communication	6	B	N/A	2	The article assesses the difference in perceptions within the family-owned businesses of messages received from family members and outsiders,	The relational familiarity between communicators enhanced message effectiveness and message appropriateness; information about complex problems and	Empirical - Experimental	A quasi-experimental design involving a control group was implemented; participants were recruited from students enrolled in	United States

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Authors	Title	Year	Source Title	Cited by	ABDC list	AJG list	Cluster	Study aims	Main findings	Study Design	Methodology	Country
								shedding light on the role of relational familiarity	tasks is perceived as most effective when described by familiar others		undergraduate business communication and operations-management courses and currently employed in a business; analysis of covariance was implemented	
Marler L.E., Vardaman J. M., Allen D.G.	Human resource management in family firms: Review, integration, and opportunities for future research	2021	Research in Personnel and Human Resources Management	2	N/A	1	2	The article reviews existing literature on human resource management in family businesses and offers pathways for future research	Agency theory and socioemotional wealth are identified as the most commonly employed theoretical frameworks to apply Human Resource Management to family firms; five predominant topics characterize the scholarly debate, which is focused on five issues: 1) compensation, 2) recruitment and selection, 3) training, 4) performance, and 5) turnover; literature addressing these topics is still nascent	Conceptual	Unsystematic literature review about contributions applying Human Resource Management to the family firm setting in the last two decades	N/A
Michiels A., Arijs D., Uhlaner L.	Formal HRM in family SMEs: the role of family-centered goals and family governance	2022	Review of Managerial Science	2	N/A	2	2	The article intends to illuminate the antecedents of formal Human Resource Management in private family firms	The pursuit of family-centered noneconomic goals leads to less formal Human Resource Management practice; family governance policies have been found to assist in preventing the detrimental effects of Human Resource Management practices aimed at preserving or enhancing the family coalition's socioemotional wealth, such as favoring an unskilled family member	Empirical - Quantitative	Survey data were collected from a sample of 293 privately-held family small and medium enterprises; descriptive statistics and hierarchical regressions were used	Belgium
O'Shea M., Duarte Alonso A.	Human resource management adaptation among family firms operating in Western Australia: an exploratory study	2022	Journal of Family Business Management	0	N/A	1	2	The study investigates how contemporary Human Resource Management and allied developments shape family firms' business practices	The formalization of Human Resource Management practices through the appointment of specialist staff that purposefully values and enables participative decision-making can strengthen, rather than	Empirical - Qualitative	The owners/co-owners of seven family firms and the manager of one family-owned organization were involved in the analysis; semi-structured, face-to-	Australia

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Peláez-León J. D., Sánchez-Marín G.	Socioemotional wealth and human resource policies: effects on family firm performance	2022	International Journal of Entrepreneurial Behaviour and Research	3	B	3	2	The article examines whether the use of High-Performance Work Practices mediates the relationship between socioemotional wealth and firm financial performance	reduce, familiness; limited formalization and professionalization of Human Resource Management can endanger organizational performances through staff loss The importance given to preserving socioemotional wealth stimulates the use of High-Performance Work Practice when a financial decline confronts family firms; however, only training and motivation are effective in avoiding the loss of socioemotional wealth	Empirical - Quantitative	face interviews and telephone interviews were undertaken; data were examined through qualitative content analysis Cross-sectional data were obtained from 196 medium-sized and private family firms in a high-risk context; primary data were integrated with secondary data obtained from the SABI dataset; Structural Equation Modeling was used	Spain
Rondi E., Überbacher R., von Schlenk-Barnsdorf L., De Massis A., Hülsbeck M.	One for all, all for one: A mutual gains perspective on HRM and innovation management practices in family firms	2022	Journal of Family Business Strategy	14	B	2	2	The article investigates how a long-term oriented family firm can empower its employees while pursuing innovation	The interrelation between trust and loyalty with the complementary features of credibility and solidarity that the family firm can accumulate over time explains long-run success; complementarity among these factors enact a unique virtuous cycle of reciprocal reinforcement between Human Resource Management and innovation practices	Empirical - Qualitative	A longitudinal case study combined with grounded theory building was implemented; 26 interviews were realized, complemented by access to past interviews from the corporate archives	Germany
Samara G., Arenas D.	Practicing fairness in the family business workplace	2017	Business Horizons	44	B	2	2	The article investigates how family firms can achieve fairness between family and nonfamily employees	Since family and nonfamily members have different characteristics and expectations, privileging family or nonfamily employees does not necessarily indicate a lack of fairness; to ensure fairness, family firms should follow a process model involving: 1) commitment to fairness; 2) explaining expectations for entitlement; 3) giving voice; 4) considering the correctness of unfair decisions; and 5) achieving consistency over time	Conceptual	A theoretical advancement involving a process model of fairness is elaborated starting from an unsystematic review of previous research	N/A

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Authors	Title	Year	Source Title	Cited by	ABDC list	AJG list	Cluster	Study aims	Main findings	Study Design	Methodology	Country
Schell S., de Groot J.K., Richard S., Hack A., Kellermanns F.W.	The role of affect in the selection of nonfamily top management team members in family businesses	2022	Long Range Planning	0	A	3	2	The article intends to illuminate the role of affect in selecting nonfamily top managers in family firms	Formal evaluation hinders affect infusion in the selection process; moreover, utilizing family-fit criteria rather than job-fit criteria in the selection of nonfamily Top Management Team members is associated with affect infusion	Empirical - Qualitative	A multiple-case study design was arranged, involving 53 interviews with 19 family businesses, supplemented by 14 expert interviews	Switzerland
Schmid A., Sender A.	How social capital influences performance in family firms: the moderating role of nepotism	2021	International Journal of Human Resource Management	5	A	3	2	The study investigates how organizational social capital benefits organizational performance, contemplating the role of nepotism	Nepotism has been found to strengthen the relationship between organizational social capital and organizational performance in companies giving power to family members. In such cases, family firms with more pronounced nepotism can better use their social capital for the benefit of the company	Empirical - Quantitative	Survey data were collected from 77 family-owned companies; a moderated regression model was implemented	Switzerland
Stavrou E.	Human resource management in the family business context	2021	The Oxford Handbook of Contextual Approaches to Human Resource Management	0	N/A	N/A	2	The article attempts to advance our understanding of Human Resource Management in family-owned organizations drawing on the resource-based view of the firm, the institutional perspective, and stakeholder analysis	Family firms are considered to be intrinsically oriented towards people, with employees being conceived of as intrinsic stakeholders; in family firms, the gross revenue increases much more than that of nonfamily companies when the proportion of younger employees is high	Empirical - Quantitative	Secondary data were collected from the Cranet survey; different European countries were involved, and the sample was split into family (781), and nonfamily (1355) companies; hierarchical linear model analysis was used	16 European countries
Su Y., Xia J., Zahra S.A., Ding J.	Family CEO successor and firm performance: The moderating role of sustainable HRM practices and corporate philanthropy	2023	Human Resource Management	0	A*	4	2	The article investigates how family CEO successors affect post-succession firm performance under conditions of sustainable Human Resource Management practices toward employees and top managers	Family CEO successors have been found to benefit more from a well-paid workforce and a reasonably paid Top Management Team; alternatively, nonfamily CEO successors focus more on short-run efficiency; generous treatment of employees leads the public to believe in the altruistic motives of corporate philanthropy: hence, internal and external stakeholders should be treated equally	Empirical - Quantitative	Panel data were collected in the period 2008/2016, focusing on 414 CEO successions, including 161 intrafamily CEO successions; the Heckman two-stage estimation procedure was followed for data analysis	China

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Authors	Title	Year	Source Title	Cited by	ABDC list	AJG list	Cluster	Study aims	Main findings	Study Design	Methodology	Country
Yarram S.R., Adapa S.	Does family ownership matter in executive pay design?	2021	Personnel Review	3	A	2	2	The study examines the level and structure of executive compensation of family and nonfamily businesses, assessing if minority shareholders are expropriated by family businesses using excessive pay	sticking to a reinforcing cycle perspective Family firms were found to pay lower levels of fixed salary as well as short- and long-term incentives than nonfamily companies; family firms are primarily motivated by nonmonetary considerations: their interest in nonfinancial objectives leads to less emphasis on linking performance with compensation	Empirical - Quantitative	Panel data over the period 2004/2014 were collected on a sample of 107 nonfinancial family businesses, which were matched with a selection of 220 nonfamily firms; panel random effects models were run	Australia
Aksoy E., Bayazit M.	The relationships between MBO system strength and goal-climate quality and strength	2014	Human Resource Management	15	A*	4	3	The study was aimed at collecting insights into the distinctiveness, consistency, and consensus dimensions of management by objectives in family firms	The system strength of human resource management is positively related to goal-climate quality and goal-climate strength; fostering perceptions of the distinctiveness of Human Resource Management practices is conducive to enhanced goal-climate quality	Empirical - Quantitative	Data were obtained from six large independent firms of a family-owned group; overall, 297 managers were involved in the analysis; Structural Equation Modeling was used to investigate data	Turkey
Almadana-Abon S., Molina-Gomez J., Mercade-Mele P., Delgado-Centeno J.	The total compensation model in family business as a key tool for success	2020	European Journal of Family Business	0	N/A	N/A	3	The article investigates the total compensation model as a critical element for Human Resources Management in family firms to optimize behaviors	Although a total compensation model fits family firms, they tend to prefer fixed rewards; owners/managers are likely to arrange special compensation packages for family members	Empirical - Qualitative	Exploratory data were collected from 40 Human Resources professionals operating in a family firm; a descriptive approach was used to examine the data	Spain
Bello-Pintado A., Garcés-Galdeano L.	Bundles of HRM practices in family and nonfamily firms: the impact on enhancing performance	2019	International Journal of Human Resource Management	11	A	3	3	The paper examines how ability, motivation, and opportunity bundles of Human Resource Management practices improve organizational performance in family firms and nonfamily firms	Organizational performances of family-owned companies greatly benefit from a bundle of Human Resource Management practices aimed at enhancing abilities and opportunities; employees' participation should be promoted to achieve increased organizational performances	Empirical - Quantitative	Data about a unique sample of 301 manufacturing plants were collected; Ordinary Least Squares linear regressions on two subsamples of family and nonfamily firms were elaborated	Argentina and Uruguay
Botero I.C., Litchfield S.R.	Exploring human resource management in family firms: A summary of what	2013	Handbook of Research on Family Business, Second Edition	16	N/A	N/A	3	The article provides a review of the literature to explore the unique attributes of Human Resource Management-	Family firms get a unique source of competitive advantage when they develop and motivate family and nonfamily	Conceptual	Unsystematic review of articles published in peer-reviewed journals	N/A

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Authors	Title	Year	Source Title	Cited by	ABDC list	AJG list	Cluster	Study aims	Main findings	Study Design	Methodology	Country
	we know and ideas for future development							related research in family firms	employees using tailored practices; size, development stage, and family influence represent relevant factors influencing the use of Human Resource Management practices, which primarily involve staffing, training, and employee relations			
Burhan M., Hamdan O.A., Tariq H., Hameed Z., Naeem R.M.	The role of contextual factors in shaping HRM formality in SMEs	2022	Employee Relations	0	B	2	3	The paper investigates how contextual factors influence the formality of Human Resource Management practices in small and medium-sized enterprises	Family firms were less likely to offer structured training and development opportunities to their employees; family ownership was not found to affect the formality of Human Resource Management practices	Empirical - Quantitative	Data were collected from a survey delivered to 300 respondents; multiple regression analysis was used to extract evidence	Pakistan
Çalışkan B.O.O.	HRM practices and problems in family-owned SMEs	2013	Effective Human Resources Management in Small and Medium Enterprises: Global Perspectives	1	N/A	N/A	3	The article intends to provide helpful suggestions about Human Resource Management practices for small and medium-sized family firms	The unpreparedness of family members to deal with the specific challenges associated with people management might prevent the viability of family firms, impairing their sources of competitive advantage	Conceptual	Unsystematic review of the literature to identify the main challenges and problems affecting Human Resource Management in family firms	N/A
Cater J., James K., Kidwell R., Camp K., Young M.	HRM practices and effectiveness: a comparison of US Hispanic and non-Hispanic family firms	2019	Journal of Small Business and Enterprise Development	10	C	2	3	The article discusses the implications of agency and stewardship governance on Human Resource Management practices of family firms	A combination of agency and stewardship governance approaches increases the effectiveness and efficiency of Human Resource Management practices and contributes to organizational performance	Empirical - Quantitative	Survey data were collected from 169 family business owners, 70 of whom were Hispanic; linear regressions and Spearman's correlations were used to obtain evidence from the data	United States
Cater J.J., III, James K., Kidwell R.E., Camp K.M., Young M.	The impact of Mexican culture on the human resource management practices of Mexican-American family firms	2022	International Journal of Entrepreneurship and Small Business	0	N/A	2	3	The article intends to examine if cultural influences from the country of origin influence the use of Human Resources Management practices	The design and implementation of Human Resource Management practices are affected by the leaders' country of origin; acknowledging the cultural factors influencing the strategies and decisions of family owners is essential to understand how people are managed in family firms	Empirical - Qualitative	Family firm leaders from 20 companies were involved in the analysis; in-depth interviews were performed to collect relevant data	United States

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Authors	Title	Year	Source Title	Cited by	ABDC list	AJG list	Cluster	Study aims	Main findings	Study Design	Methodology	Country
Chang S.-I.	Study on human resource management in Korea's chaebol enterprise: A case study of Samsung Electronics	2012	International Journal of Human Resource Management	16	A	3	3	The study sheds light on the distinctive characteristics of Human Resources Management systems in the context of Korean chaebol	A shift from seniority-based to ability-based Human Resource Management systems is identified, with role and position being reflected in wages	Empirical - Qualitative	A single case study approach was taken based on qualitative interview data and simple questionnaire survey data	Republic of Korea
Colot O., Dupont C., Volral M.	Effects of human resource practices on family firms social performance	2009	Corporate Ownership and Control	2	B	N/A	3	The article analyses how Human Resource Management practices affect the social performance of large family-owned companies, which is reflected in the turnover rate	Although family-owned companies have lower labor costs, give fewer bonuses, and train fewer their employees than their nonfamily counterparts, they report lower turnover; in general, training is negatively associated with turnover, while part-time employment determines higher turnover	Empirical - Quantitative	Data were collected from a sample of 74 large family and nonfamily firms; multiple regressions were used to conduct the analysis	Belgium
De Kok J.M.P., Uhlaner L.M., Thurik A.R.	Professional HRM practices in family owned-managed enterprises	2006	Journal of Small Business Management	180	A	3	3	The study intends to identify the determinants of professional Human Resource Management practices across small and medium-sized firms	Family-owned firms were less likely to use professional Human Resource Management practices; drawing on agency theory, the social interactions among family members enable informal and cultural mechanisms that substitute or complement the formal administrative systems; drawing on a resource-based view, limited organizational size and complexity explain the lower formalization of Human Resource Management practices in family firms	Empirical - Quantitative	A written questionnaire was used to collect data from 736 small and medium-sized companies; mediation analysis was used to collect evidence	Netherlands
DiPietro R., Martin D., Pratt T.	Understanding employee longevity in independent fine dining restaurants: A grounded theory approach	2019	International Journal of Contemporary Hospitality Management	5	A	3	3	The article investigates talent management and attempts to provide evidence of factors affecting the talents retention rate	A shared value system between employees and managers creates a stable workforce and longer tenure; family firms can develop a positive culture, which lets people flourish at work; in such an atmosphere, employees take pride in working and perceive higher levels of self-esteem	Empirical - Qualitative	In-depth interviews were delivered to fourteen informants employees in two family-owned fine dining restaurants; thematic analysis was accomplished to extract evidence	United States
Hassan A.	Revising the "five-fold framework" in	2014	Tourism Analysis	5	A	2	3	The article investigates the process of recruitment	In small-sized family firms, family influences	Empirical - Qualitative	A single case study was accomplished;	United Kingdom

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Authors	Title	Year	Source Title	Cited by	ABDC list	AJG list	Cluster	Study aims	Main findings	Study Design	Methodology	Country
	human resource management practices: Insights from a small-scale travel agent							and selection in small-scale family firms, following the five-fold framework	are more relevant than qualifications, experience, and working capacities; employees who are outside the family network are more likely to be affected by poor motivation and emotional deprivation		both primary and secondary sources of data were used to obtain relevant information	
Kidwell R.E., Eddleston K. A., Kellermanns F.W.	Learning bad habits across generations: How negative imprints affect human resource management in the family firm	2018	Human Resource Management Review	47	A	3	3	The study examines the impact that lessons learned and transmitted can have on the development of human resources in the family firm	When families are imprinted with a sense of entitlement, Human Resource Management will be less formalized for family rather than nonfamily employees; when imprinting is based on injustice, Human Resource Management will be distorted; manipulated people management aimed at favoring family members appears in contexts where imprinting is based on parental altruism; further generations are more likely to enact a reimprinting process	Conceptual	Drawing on imprinting theory, the authors develop six propositions emphasizing the dark side of imprinting within family firms, highlighting how it endangers human resource efforts and threatens company performance	N/A
Kim Y., Gao F.Y.	An empirical study of human resource management practices in family firms in China	2010	International Journal of Human Resource Management	63	A	3	3	The study intends to identify factors affecting the formalization of Human Resource Management practices in family firms	Large firms adopt more formal and sophisticated HRM practices that enable them to gain increased institutional legitimacy and social acceptance and to cope with their expanding workforce and complexity; conversely, informality embraced by small-sized companies enacts flexibility which is helpful to deal with high levels of environmental uncertainty	Empirical - Quantitative	Survey data were collected from 205 family-owned firms; logistic and OLS regressions analysis were accomplished	China
Newman A., Sheikh A.Z.	Determinants of best HR practices in Chinese SMEs	2014	Journal of Small Business and Enterprise Development	19	C	2	3	The article examines the factors which determine the adoption of best Human Resource Management practices in small and medium-sized enterprises	There was no evidence of the influence of family ownership on the use of Human Resource Management practices; conversely, size, international relationships, and collaboration with other companies determined	Empirical - Quantitative	Survey data were collected from 345 companies; regression analysis was accomplished	China

(continued on next page)

Table 1 (continued)

Authors	Title	Year	Source Title	Cited by	ABDC list	AJG list	Cluster	Study aims	Main findings	Study Design	Methodology	Country
Saini D.S., Budhwar P.S.	Managing the human resource in Indian SMEs: The role of indigenous realities	2008	Journal of World Business	85	A*	4	3	The article investigates how Human Resource Management issues are dealt with in small and medium-sized enterprises	greater use of formal Human Resource Management practices Bounded rationality constrains the family firms' capability to innovate and formalize Human Resource Management practices; owners assume that they are already doing whatever is possible to achieve success; insights into how to innovate people management are retrieved from indigenous approaches spontaneously implemented by employees	Empirical - Qualitative	Two case studies were conducted; interviews and informal discussions served as the main approaches to data collection	India
Tsao C.-W., Chen S.-J., Wang Y.-H.	Family governance oversight, performance, and high-performance work systems	2016	Journal of Business Research	17	A	3	3	The study examines the relationship among family governance oversight, High-Performance Work Practices, and the performance of public family firms	Independent nonfamily directors generate advantages for public family firms since they pave the way for governance oversight through professionalization; professional advice guides personnel decisions, and companies are more likely to adopt High-Performance Work Practices to enhance organizational performance	Empirical - Quantitative	Data about 158 public firms were collected; correlation and regression analysis and a Sobel test were implemented	Taiwan
Wu N.	Small Is Beautiful or Big Is Better: How Much Do Industry and Family Ownership Matter in Firms of Different Sizes?	2020	European Management Review	1	C	3	3	The study investigates whether organizational size affects the relationship between industry sectors, family ownership, and calculative human resource management	Family-owned companies were less likely to adopt calculative Human Resource Management practices than their nonfamily counterparts; however, the negative relationship between these two dimensions primarily characterizes large-sized firms	Empirical - Quantitative	Secondary data were collected from the 2011 British Workplace Employment Relations Study; correlation analysis and hierarchical regressions have been implemented	United Kingdom
Zaim H., Ramadani V., Dinibutun S. R., Gërguri-Rashiti S., Said D.S.	Knowledge management and human resources performance: evidence from Turkish family businesses	2022	Journal of Family Business Management	3	N/A	1	3	The article assesses the effects of knowledge management on Human Resource Management's performance in family-owned organizations	The effectiveness of People Management was positively affected by the implementation of knowledge management initiatives; the informal climate typical of family	Empirical - Quantitative	Survey data were collected from 397 employees and managers working in family-owned companies; Ordinary	Turkey

(continued on next page)

Table 1 (continued)

Authors	Title	Year	Source Title	Cited by	ABDC list	AJG list	Cluster	Study aims	Main findings	Study Design	Methodology	Country
									firms facilitates knowledge sharing		Least Square regressions were run	

Guide (AJG), certifying the quality of reviewed items.

### 3.2. The results of the co-citation analysis

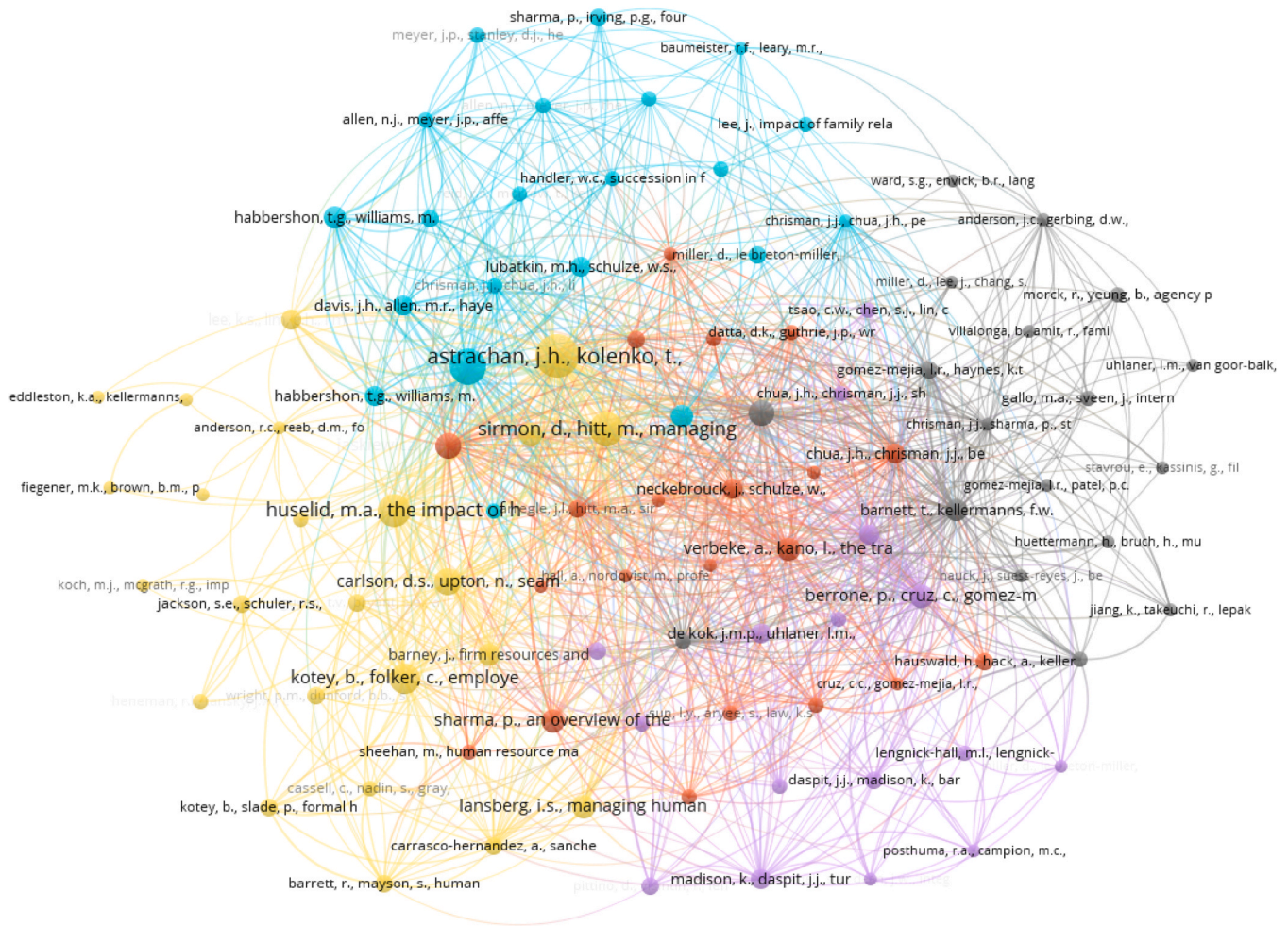
Fig. 3 graphically displays the results of the co-citation analysis, systematically reported in Table 2. Although we did not set any limitations for the inclusion of the items, we focused on the 100 cited references with the greatest total link strength. This approach enabled us to pay attention to the most relevant and compelling theoretical roots in which the scholarly debate has been established. All records were published in peer-reviewed journals adhering to the double-blind rule. More than 30 different sources hosted the articles contemplated in the co-citation analysis. Family Business Review (19%), Entrepreneurship: Theory and Practice (18%), the Academy of Management Journal (8%), the Journal of Small Business Management (6%), and the Journal of Management (5%) published more than half items. Publication years ranged between 1983 and 2019. About 1 in 5 contributions were published during the past Century (18%), while more than half were issued between 2000 and 2009 (55%). Altogether, the co-citation analysis led us to identify 5 clusters, which are briefly depicted below.

The yellow cluster included 24 items published between 1983 and 2007. It identifies people as the primary sources of competitive advantage. Hence, the role played by human resource management practices in advancing the success of family firms is highlighted. The cyan cluster consisted of 21 items issued between 1990 and 2012. It delves into familiness, emphasizing that it underpins the identification of family and nonfamily members with the firm, generating organizational commitment. The brown cluster was composed of 21 contributions published between 1989 and 2018. It investigates the factors that make family firms good places to work, arguing that bifurcation biases trigger unfairness at work. The grey cluster hosted 18 items published between 1988 and 2019. It stresses that family firms' socioemotional wealth orientation affects how people management is designed and implemented. Lastly, 16 articles published between 1992 and 2018 were part of the purple cluster. It illuminates the need for equality in treating family and nonfamily employees to enhance the positive implications of human resource management on organizational performance.

#### 3.2.1. Yellow cluster: a resource-based view of human resource management

The yellow cluster is rooted in the resource-based view. It assumes that the firm's competitive advantage derives from the availability of heterogeneous, distinctive, and entrenched resources, which possess the attributes of rarity, imperfect imitability, and limited substitutability (Barney, 1991). With their specific endowment of knowledge, skills, and attitudes, people are unique repositories of distinctive resources for the firm (Sirmon and Hitt, 2003). Therefore, arranging sound human resource management practices contributes significantly to family firms' performance and viability (Carlson et al., 2006; Huselid, 1995). Human resource management practices should be crafted in light of the overlapping family and business norms to achieve uniqueness. However, this paves the way for institutional ambiguity (Lansberg, 1983). These arguments support the tenet that there is no best recipe for managing people in family firms. Instead, the design of human resource management practices depends on the firm's peculiar organizational characteristics (Jackson et al., 1989).

The uniqueness of human resource management in the family firm setting relies on the managers' ability to orchestrate tailored practices, which align the formality of management decisions and the informality of organizational dynamics (Nguyen and Bryant, 2004). Such alignment is conducive to strengthening the firm's core resources and augmenting its dynamic capabilities, thus enabling the competitive advantage's continuous renewal (Wright et al., 2001). The larger the firm's size and the faster its growth rate, the greater the propensity to embrace formal human resource management practices (Kotey and Slade, 2005), which are expected to corroborate the sources of competitive advance (Barrett



- Yellow cluster** - A resource-based view of Human Resource Management
- Cyan cluster** - Leveraging familiness as a distinctive bundle of resources
- Brown cluster** - Making family firms good places to work
- Grey cluster** - A stakeholder-based view of employees rooted in socioemotional wealth
- Purple cluster** - Enhancing performance through Human Resource Management

Fig. 3. The graphical representation of the clusters obtained from co-citation analysis. (Source: Authors' own elaboration).

and Mayson, 2007).

3.2.2. Cyan cluster: leveraging familiness as a distinctive bundle of resources

The cyan cluster expands the resource-based view and contextualizes it to the family business, giving birth to the familiness construct. It acknowledges that the family firms' functioning is deeply affected by the interaction of the family unit, the business sphere, and the family members. The distinctiveness of family firms results from the idiosyncratic interactions among these three elements (Habbershon et al., 2003). More specifically, the essence of the family firm is lodged in familiness, which imbues management decisions with the family intention to maintain control over the organization, enact transgenerational value creation, and pursue the family-oriented vision in the long term (Chrisman et al., 2003).

Research focusing on family firms is inherently based on the assumption that "...the family component shapes the business in a way that

the family members of executives in non-family firms do not and cannot" (Chua et al., 1999). From this point of view, familiness enacts a unique work setting, facilitating the strengthening of social capital (Pearson et al., 2008) and nurturing the trust and commitment of family and nonfamily employees, who are encouraged to behave as stewards of the firm (Davis et al., 2010). Familiness makes family firms less willing to shift towards professionalization since it might impoverish the organization's essence and identity (Stewart and Hitt, 2012). Notwithstanding, the formalization of people management might unleash the value of familiness embedded in the firm, energizing its sources of competitive advantage (Zahra et al., 2004).

3.2.3. Brown cluster: making family firms good places to work

Relying on agency and stewardship theories, the brown cluster revolves around what makes family firms attractive employers (Neckebrouck et al., 2018). On the one hand, it is maintained that the socioemotional orientation of family firms makes it more challenging to

**Table 2**

A descriptive overview of the clusters retrieved from co-citation analysis. (source: Authors' own elaboration).

Cluster	Label	No of items	Range of publication year	Main theme (s) addressed	Key references
Yellow cluster	A resource-based view of Human Resource Management	24	1983/2007	People represent the most relevant source of competitive advantage for family firms; human resource management practices serve the purpose of increasing the uniqueness of the bundle of distinctive resources available to family firms	Barney, 1991; Carlson et al., 2006; Huselid, 1995
Cyan cluster	Leveraging familiness as a distinctive bundle of resources	21	1990/2012	The distinctiveness of family firms is rooted in familiness, that is, the idiosyncratic interaction of the family unit, the business sphere, and family members. Human resource management is imbued with familiness, which reduces the family firms' propensity to professionalize and formalize management decisions	Chua et al., 1999; Stewart & Hitt, 2012; Zahra et al., 2004
Brown cluster	Making family firms good places to work	21	1989/2018	Family firms face special challenges in building an excellent workplace for employees. The propensity to understand family members as long-term stewards and nonfamily members as short-term agents paves the way for bifurcation biases and risks of organizational injustice, which impoverish the quality of the work climate	Miller et al., 2008; Neckebrouck et al., 2018; Verbeke & Kano, 2012
Grey cluster	A stakeholder-based view of employees rooted in socioemotional wealth	18	1988/2019	Human resource management is deeply affected by the intrinsic orientation of family firms towards socioemotional wealth. Consistently with a socioemotional wealth perspective, employees are identified as the most salient stakeholders of family firms, which should strive to advance individual work conditions	Barnett & Kellermanns, 2006; Debicki et al., 2016; Stavrou et al., 2007
Purple cluster	Enhancing performances through Human Resource Management	16	1992/2018	Embracing an extended interpretation of socioemotional wealth, the importance of equally treating family and nonfamily members is emphasized. Family firms that are more willing to implement formal human resource management practices achieve better performance, empowering people and meeting their desire for autonomy, competence, and relatedness	Madison et al., 2018; Miller & Le Breton-Miller, 2014; Tsao et al., 2009

professionalize human resource management (Chua et al., 2009). It curbs the organizational ability to attract and retain talents motivated by self-enhancing opportunities and extrinsic rewards (Hauswald et al., 2016). On the other hand, the family firms' propensity to treat family members as long-term stewards and nonfamily members as short-term agents creates bifurcation biases in managing people (Tabor et al., 2018). In most cases, recruitment and selection are based on familial proximity, without references to the candidates' formal qualifications and work-related abilities, with major drawbacks on corporate performance (Jaskiewicz et al., 2013).

Alongside making family firms less attractive, bifurcation biases and unfair treatment of nonfamily members have been argued to put organizational prosperity and survival at stake (Verbeke and Kano, 2012). In fact, they are inconsistent with the owners and managers' long-term concerns for the prospects of the business, which are endangered by the shortage of nonfamily talents triggered by nepotism (Miller et al., 2008). Besides, organizational viability is undermined by disrupting employee relationships based on benevolence and mutual trustworthiness between family and nonfamily members (Cruz et al., 2010).

### 3.2.4. Grey cluster: a stakeholder-based view of employees rooted in socioemotional wealth

The grey cluster accounts for the role of socioemotional wealth – i.e., the nonfinancial value established in the “...affective endowment that family members derive from the business” (Debicki et al., 2016) – in shaping human resource management practices and enabling the achievement of mutual gains (Huettermann and Bruch, 2019). It is assumed that management decisions within the family firm setting are primarily affected by the desire to avoid loss in socioemotional wealth. This represents the key parameter against which the effectiveness of organizational actions is assessed (Gómez-Mejía et al., 2007).

The design and the implementation of people management strategies and initiatives are affected by the psychological contract between the organization and employees, which involves common beliefs that every effort will be made to ensure both parties' well-being (Ward et al., 2007). Employees are considered salient stakeholders of family firms,

which show an “...intrinsic employee commitment orientation” and disclose “...a sincere interest to employee well-being” (Stavrou et al., 2007). Based on such psychological contracts with employees, family firms are compelled to balance the preservation of socioemotional wealth and people-centeredness, avoiding that an excess of family-related concerns in management decisions might generate unfairness and injustice at work (Barnett and Kellermanns, 2006).

### 3.2.5. Purple cluster: enhancing performance through human resource management

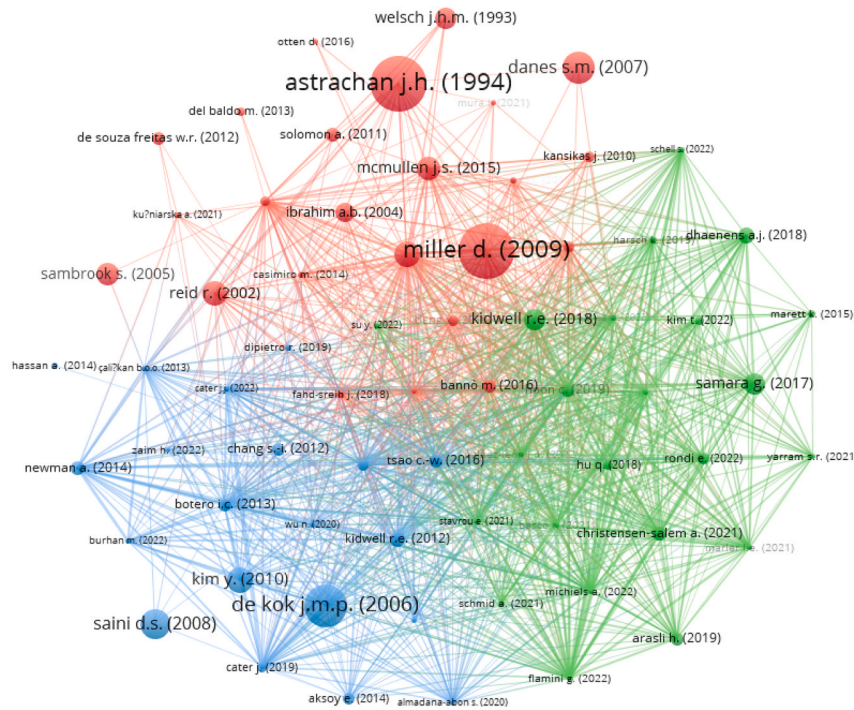
The purple cluster applies an extended interpretation of socioemotional wealth to people management. It emphasizes the importance of balancing how family and nonfamily members are managed to accomplish organizational success and long-term viability (Miller and Le Breton-Miller, 2014). From this standpoint, family firms that are more ready and capable of arranging formal and professionalized human resource management practices are more effective and achieve better results than their counterparts that do not pay adequate attention to people management (Tsao et al., 2009).

Formalizing human resource management practices has manifold positive effects for family firms. First, it multiplies the family effect on employee retention, enacting a more attractive and empowering workplace (Pittino et al., 2016). Second, it sets the conditions for dependable organizational justice, minimizing perceptions of unfairness at work and adding to the individual and collective desire to contribute to organizational success (Madison et al., 2018). Third, it facilitates the delegation of autonomy and self-determination in the workplace, improving the quality of the work environment by complying with the employees' need for autonomy, competence, and relatedness at work (Dekker et al., 2015).

## 3.3. The results of bibliographic coupling

Fig. 4 displays the results of bibliographic coupling. As detailed in Table 3, three clusters were identified, embedding different research streams contextualizing human resource management practices to





**Blue cluster** - Unveiling the peculiarity of human resource management in family firms  
**Green cluster** - The bright and dark side of human resource management in family firms  
**Red cluster** - A people-centered view of human resource management in family firms

Fig. 4. The graphical representation of the clusters obtained from bibliographic coupling. (Source: Authors' own elaboration).

Table 3  
 A descriptive overview of the clusters retrieved from bibliographic coupling. (source: Authors' own elaboration).

Cluster	Label	No of items	Range of publication year	Main theme (s) addressed	Key references
Blue cluster	Unveiling the peculiarity of human resource management in family firms	20	2006/2022	The cluster sheds light on the specific challenges that affect the design and implementation of human resource management practices within family firms. The research stream embedded in this cluster acknowledges the distinct role of organizational size in shaping people management. The socio-cultural specificities of family firms influence how human resource management practices are arranged and implemented. Despite the variety of approaches taken, people management is expected to contribute to organizational performance significantly	De Kok et al., 2006; Kidwell et al., 2018; Saini and Budhwar, 2008
Green cluster	The bright and dark side of human resource management in family firms	23	2012/2022	Nepotism and favoritism are the major issues influencing the quality of human resource management in family firms. Effective people management is imbued with loyalty, credibility, and mutuality, which overcome the problems generated by nepotism and favoritism. The formalization of human resource management practices should be carefully handled to address the side effects of nepotism and favoritism, avoiding drawbacks on the preservation of socioemotional wealth	Dhaenens et al., 2018; Rondi et al., 2022; Samara and Arenas, 2017
Red cluster	A people-centered view of human resource management in family firms	24	1993/2021	Human resource management practices in family firms are primarily intended to create a family-like environment, which permits owners and managers to preserve and corroborate the socio-emotional wealth of the firm. Designing and implementing people-centered human resource management practices entails achieving a fit between human resource management practices and the organizational culture. People management establishes a bridge between the past and the future of family firms, playing a fundamental role in maintaining the family business values and invigorating their salience, thus strengthening the organizational identity	Astrachan and Kolenko, 1994; Cruz et al., 2011; Miller et al., 2009

family firms. The blue cluster consisted of 20 items published between 2006 and 2022. They primarily included empirical studies (85%), with quantitative research covering more than half of the contributions. Such research addressed the peculiarities of human resource management in the family business, delivering insights about the specific challenges that affect people management in this setting. Alongside arguing the attributes of human resource management across family firms, it provides some evidence about the role of organizational size in shaping how people are managed.

The records of the green cluster were published between 2012 and 2022. Altogether, 23 items fell into this cluster. About 1 in 4 contributions adopted a conceptual perspective to advance what we know about human resource management in the family firm setting (26%). The remaining part consisted of quantitative empirical studies (52%). The green cluster acknowledged the bright side and illuminated the dark side of human resource management in the family business. It focuses on the fairness-related issues that might affect human resource management's quality and effectiveness. Moreover, it maintains the need for tailored organizational and management initiatives to achieve integrity in dealing with family and nonfamily members.

Finally, 24 items whose publication years ranged between 1993 and 2021 were in the red cluster. It is rooted in empirical studies, with quantitative and qualitative research characterizing about 4 in 5 items (79%). The remaining part consists of conceptual advancements (21%). The red cluster offered a longitudinal, people-centered interpretation of human resource management practices in family firms, investigating issues related to long-term viability and succession management. The social and emotional orientation of family firms is acknowledged as a distinctive trait affecting decisions about people management.

An in-depth account of the research streams identified through bibliographic coupling is depicted below. As previously anticipated, we embraced an interpretative approach to report the study findings. It enabled us to offer a detailed and nuanced narration of the main topics and themes addressed within and across the research streams.

### 3.3.1. Blue cluster: unveiling the peculiarity of human resource management in family firms

The debate about human resource management in family firms revolves around a paradox. Family firms get unique sources of competitive advantage from managing people through appropriate staffing, tailored training, and timely performance management (Botero and Litchfield, 2013). However, family firms' owners and managers are not necessarily prepared to deal with issues and challenges associated with human resource management, falling short in fully reaping its advantages (Çalışkan 2014). Unpreparedness is related to little formalization and inadequate professionalization of people management, which are triggered by two factors: 1) the intimacy of social exchanges in a workplace imbued with familiness, and 2) the resource constraints dictated by limited organizational size (de Kok et al., 2006). Notwithstanding, previous research emphasized that arranging integrated bundles of human resource management practices contributes to family firms' viability, especially when they are oriented towards enhancing employees' competencies and encouraging their involvement in management decisions (Bello-Pintado and Garcés-Galdeano, 2019).

Drawing on the reviewed literature, two approaches are used to build a valuable bundle of human resource management practices (Cater et al., 2019). An agency-based perspective brings managers to embrace a short-term view to maximizing the organizational capability to extract value from people. This implies a focus on calculative performance management to determine consistent compensation strategies (Wu, 2020). Conversely, a stewardship perspective embodies a long-term view and stresses the importance of recruitment, selection, and training to preserve the social and emotional endowments of the firm. It holds the need for nurturing and maintaining people's normative and affective commitment to the firm through familiness (Hassan, 2014). It is difficult to understand the factors that lead family firms to undertake

an agency orientation or a stewardship approach. On the one hand, the professionalization and formalization that are typical of an agency orientation express the corporate desire to attain institutional legitimacy and social acceptability in the external environment. On the other hand, the informal way of managing people rooted in stewardship enables flexibility, which answers to the family firms' need to develop resilience and thrive in a complex and increasingly competitive domain (Kim and Gao, 2010).

Greater availability of resources and enhanced inter-organizational relationships positively impact the family firms' willingness to formalize and professionalize human resource management (Newman and Sheikh, 2014). These findings are consistent with previous research maintaining that family governance oversight enacted by the contamination between the perspectives taken by family members and the insights of independent directors paves the way for the arrangement of formal human resource management practices (Tsao et al., 2016). This adds to corporate performances by instilling a merit-based approach and human-capital enhancing view in the family firms' strategic outlook (Chang, 2012). Moreover, a concern for knowledge management in addressing organizational dynamics fosters the implementation of formalized and professionalized approaches to people management (Zaim et al., 2022).

The informal approach embodied in stewardship is primarily targeted at building social cohesiveness in the workplace, facilitating the establishment of a shared value system inspiring individual and collective actions (DiPietro et al., 2019). Little formalization of training and compensation policies is consistent with the desire to preserve the adaptability of management decisions, which are framed in light of the employees' emotions and feelings at work (Almadana-Abon et al., 2020). Although it might undermine the clarity and quality of the work climate (Aksoy and Bayazit, 2014), informality sustains the socio-emotional wealth of the firm (Colot et al., 2009). Moreover, it is imprinted in the family's mindset, enabling the continuous alignment of human resource management practices to the owners and managers' perspectives and priorities (Kidwell et al., 2018).

Contingent factors should be considered to fully understand the family firms' orientation toward embracing an agency orientation or a stewardship perspective (Burhan et al., 2023). Among others, organizational culture's critical role in affecting human resource management practices has been emphasized, with paternalistic cultures being more oriented toward informality (Cater et al., 2022). Besides, corporate size has been found to influence the shape of people management practices: small family-owned organizations are more likely to opt for informality and stewardship than large family firms (Saini and Budhwar, 2008).

### 3.3.2. Green cluster: the bright and dark side of human resource management in family firms

Family-owned institutions are complex social collectivities, whose viability heavily relies on the managers' capability to align the needs and expectations of family and nonfamily members, overcoming biases and prejudicial treatments (Marler et al., 2021). The coexistence of family and nonfamily members generates opportunities and challenges. An organizational climate permeated by familiness creates special incentives for nonfamily employees: it enacts a supportive atmosphere at work, which enables people to thrive when challenging job demands are faced (Hoon et al., 2019). Previous research highlighted that familiness facilitates the cultural and emotional fit between family and nonfamily members, encouraging both to be committed stewards of family values (Harsch and Festing, 2019). These arguments are echoed by contributions stressing that family firms are unique work settings infused with loyalty, credibility, trustworthiness, and solidarity (Rondi et al., 2022). Besides, they are intrinsically oriented toward people (Stavrou, 2021). These features make family firms an ideal work setting, unparalleled by nonfamily-owned organizations (Christensen-Salem et al., 2021). From this standpoint, family and nonfamily members are not antithetic but complementary. The former express affective commitment toward the

firm, while the latter perceive normative commitment (Dhaenens et al., 2018). Human resource management practices should be carefully designed and implemented, achieving mutuality and altruism between family and nonfamily members (Su et al., 2023). Three interventions fit this purpose. First, human resource management practices should be shaped according to a socioemotional perspective, acknowledging how people concur in generating emotional and social value for the firm (Yarram and Adapa, 2021). Second, a commitment to fairness should be undertaken, giving equal opportunities to employees and introducing correctives to cope with organizational injustice (Samara and Arenas, 2017). Third, a focus should be put on training and motivation, nurturing the family and nonfamily members' identification with the organization, and sustaining their growth within the firm (Pelález-León and Sánchez-Marín, 2022).

However, the explicit or implicit desire to protect and advance the family's priorities generates contradictions and ambiguities, making it hard to accomplish fairness (Hernández-Linares et al., 2023). A dark side of human resource management arises, which should be acknowledged and addressed through tailored policies to harmonize the family's socioemotional targets with the firm's long-term viability (Michiels et al., 2022). Workplace favoritism is the most common dark side of human resource management in family firms. Among other things, nepotism is a typical trait of family firms, which is rooted in the organization's social capital and embeds the family's attempt to preserve its socioemotional wealth (Schmid and Sender, 2021). Although nonfamily members intrinsically accept it, nepotism entails a breach of the psychological contract between the organization and the employees, generating alienation and detachment (Araslı et al., 2019). Favoritism is especially dangerous when enacted by family members operating in middle management, where the risks of generating perceptions of organizational injustice and unfairness are high (Hu et al., 2018). It is worth noting that favoritism does not indistinctively apply to family members. Instead, family members' capability to attract favors depends on blood-relatedness, familial proximity, and familial tenure. Therefore, discrimination can also appear across different family members who benefit from favoritism based on their closeness to influential representatives of the firm (Kim and Marler, 2022).

Discriminatory practices can go unnoticed, being sedimented in management processes and organizational dynamics. Emphasizing the difference between family and nonfamily members, scholars claimed that relational familiarity boosts convergence in information exchange, making family members more capable of making their voices heard by owners and managers (Marett et al., 2015). Inadequate professionalization of human resource management inherited by the consolidated organizational culture of family firms exacerbates this situation (Kidwell et al., 2012). When coupled with risk aversion, it leads to a lesser willingness to invest in people management, corroborating informality and preventing formalization (Basco et al., 2023). Moreover, family firms' owners and managers might miss the knowledge, expertise, and skills to enhance human resource management practices, falling short in revising extant people management practices in a perspective of increased organizational fairness and justice (O'Shea and Duarte Alonso, 2022). This is associated with defensive practices embraced by family members, who might sabotage the selection of nonfamily managers, since they might impoverish the socioemotional wealth of the firm (Schell et al., 2022).

### 3.3.3. Red cluster: a people-centered view of human resource management in family firms

Sticking to their socioemotional endowment, family firms are not primarily interested in enhancing productivity or increasing financial performance through people management. Alternatively, they intend to create a family-like work environment based on informal communication, employee involvement, and organizational excellence (Cruz et al., 2011). This approach sets the ground for embedding familiness in human resource management practices according to a people-centered

perspective, enacting decent work conditions and continuous opportunities for personal and professional growth (Deng, 2018).

The effectiveness of people-centeredness depends on the fit between human resource management practices and an organizational culture emphasizing autonomy, delegation, and responsibility (Del Baldo, 2013). Fitness unleashes the employees' emotional capital, supporting their commitment to the firm (Elicegui-Reyes et al., 2017). From this point of view, human resource management is conceived of as a strategic tool for family firms: appropriate people management engages family and nonfamily members in initiatives aimed at nurturing organizational sustainability from a social, financial, and environmental perspective (de Souza Freitas et al., 2012), adding to the long-term viability of the firm (Kuzniarska, 2021).

In line with these arguments, human resource management has been claimed to represent a critical yet neglected factor explaining organizational success, providing people with the skills and motivation to cope with the particular challenges that characterize the family business setting (Astrachan and Kolenko, 1994). However, due to their introverted nature (Reid et al., 2002) and the difficulty in accommodating the diverging expectations of family and nonfamily members, family-owned organizations are usually unprepared to arrange formal human resource management practices (Welsch, 1993). Family members are primarily interested in self-actualization, while nonfamily members are predominantly motivated by extrinsic rewards (Mura et al., 2021). Limited capability to handle the diverging demands and expectations of family and nonfamily employees induces family firms to rely on external advice and consultancy to manage people (Benito-Hernández et al., 2014). Coupling informality with more professional approaches recommended by external consultants is conducive to a twofold gain. First, it permits nurturing and consolidating the employees' emotional ties to the firm, advancing the collective commitment to the values embedded in the family and permeating the organizational culture (Miller et al., 2009). This is especially important when family firms undergo a process of internationalization. In this circumstance, the exploitation of internal resources facilitates the preservation of the firm's socioemotional capital, preventing its contamination with values inconsistent with the organizational culture (Bannò and Sgobbi, 2016). Second, formalizing people management and emphasizing the role played by nonfamily members enhance the quality of the work climate (Casimiro and José Chambel, 2014), overcoming discriminatory practices (Gutiérrez-Broncano et al., 2014), fostering innovation (Fahd-Sreih and El-Kassar, 2018), and increasing organizational resilience when unforeseen disruptions are faced (Danes et al., 2007).

Since human resource management plays a fundamental role in maintaining family business values and invigorating their salience, it contributes to establishing a bridge between the past and the future of family firms and preserving organizational identity (Kansikas and Nemilentev, 2010). Attention should be paid to the initiatives to develop family and nonfamily members' work engagement, enhancing their sense of belongingness to the firm and advancing their desire to contribute to organizational success (Ferraro and Marrone, 2016). Emphasis is attached to successors' training, improving the managerial skills, psychological commitment, and leadership capabilities needed to enable the family firm to navigate an increasingly competitive environment (Ibrahim et al., 2004).

An effective successor establishes his or her ability to take-over on three forms of knowledge: 1) technical expertise upholds expert power, 2) situated knowledge establishes referent power, and 3) decision-making skills enact positional power. Their combination empowers the successor to lead the family firm (Sambrook, 2005). Furthermore, improving these three types of knowledge accommodates the need for autonomy, competence, and relatedness, which foster the succession process (McMullen and Warnick, 2015). This is especially true where the transition is hampered by the low differentiation between the owner's life and business activities and by limited interpersonal trust, which creates a hostile organizational climate (Solomon et al., 2011). In such

cases, a step-by-step succession is required, facilitating the take-over and reducing the owner's resistance. In fact, it avoids an abrupt replacement of the owner and prepares the successor to handle the firm, preserving the organizational identity rooted in familiness (Otten, 2012).

#### 4. Discussion

##### 4.1. An integrative framework contextualizing human resource management to family firms

Fig. 5 delivers an integrative framework systematizing the evidence collected from this literature review. The state of the art of scholarly debate about human resource management in family firms is metaphorically portrayed as a tree. The co-citation analysis enabled us to identify the tree's roots. They nourish the underpinning theoretical perspectives reported in the trunk and nurture the three most relevant branches that emerged from bibliographic coupling, which symbolize the research streams populating the scholarly debate in our study domain.

The resource-based view can be envisaged as the tree's most profound and vital root. It assumes that firms establish their competitive advantage on a bundle of resources that is valuable, rare, inimitable, and not substitutable. Being the repository of human capital, people are crucial contributors to the firm's competitive advantage. Employees' knowledge, skills, and attitudes are unique ingredients of the recipe for organizational success. Hence, appropriate human resource management practices should be designed and implemented to amalgamate such ingredients with the structural and relational assets of the firm, unleashing their distinctive impact on individual and collective performance. Blending knowledge, skills, and attitudes in a bundle of resources does not happen in the void. Instead, it is contextualized in a specific setting that, in the case of family firms, is imbued with familiness.

Representing the second conceptual root of the integrative framework, familiness accounts for the inextricable interactions intertwining the family unit, the business sphere, and the individual lives of family

members, giving birth to an idiosyncratic, inimitable, and nontransferable asset. Familiness energizes the firm's social capital and inherently shapes the arrangement of human resource management practices, whose informality mirrors the intimacy, loyalty, trustworthiness, and cohesiveness typical of the family setting. While it does not lead to a professionalization of management activities, familiness prompts people-centeredness, which, in turn, inspires the formalization of people management practices. Formalization has two positive implications. First, it enables organizational excellence, facilitating the design and implementation of high-performance work systems to fully exploit individual and collective capabilities. Second, it reduces bifurcation biases, aligning the treatment of family and nonfamily members. This is consistent with an extended interpretation of socioemotional wealth (Gómez-Mejía et al., 2023). It appreciates the stock of affective value invested in the family firm in assessing the *pros* and *cons* of management decisions.

Socioemotional wealth constitutes the third and last conceptual root on which the scholarly debate on human resource management in family firms is built. The need to protect and preserve the family's values and reputation induces owners and managers to formalize people management, promoting equality and organizational justice to foster a normative and affective commitment to the firm. Alongside strengthening the psychological contract between the workforce and the organization, which relies on mutuality and reciprocity, this enhances the work climate, making people more willing to use their abilities, express their motivations, and exploit available opportunities in the workplace.

As depicted in the tree's trunk, the three conceptual roots give birth to two alternative approaches inspiring the design and implementation of human resource management practices, which find their background in the agency and stewardship theories. Even though these two theories have been attached to how family firms deal with nonfamily and family members, with the former being conceived of as short-term agents and the latter as long-term stewards of the family firm, they underlay two different philosophies of people management. Agency theory frames people management as a specialistic function that accompanies the growth of family firms. In this context, professionalization and

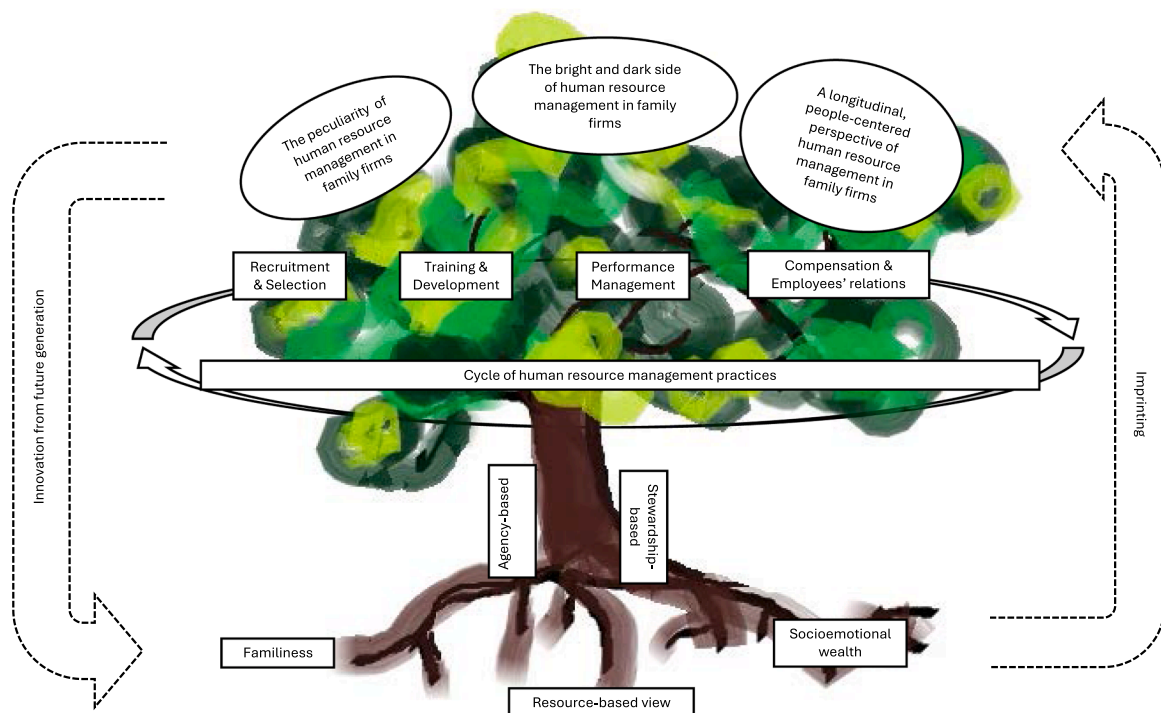


Fig. 5. An integrative overview of the study results. (Source: Authors' own elaboration).

formalization of human resource management are primarily intended to satisfy the owners' desire for control. Conversely, stewardship theory acknowledges human resource management as a strategic function aiming to empower the workforce and enable it to express its potential fully. Both informality and professionalization are exploited for this purpose. On the one hand, informality enacts flexibility and agility, which advance the family firms' resilience when crises and unforeseen challenges are faced. On the other hand, professionalization adds to the institutional legitimacy of the organization, increasing its attractiveness towards talents and its capability to retain the best employees.

Regardless of the approach taken, the family firm's growth in size and age anticipates the formalization of human resource management practices. Formalizing people management sets the conditions for a better alignment of human resource management practices with the specific challenges and issues faced by family firms, enabling owners and managers to enact an attractive and empowering workplace that meets the family members' self-actualization needs and the nonfamily members' demand for autonomy, competence, and relatedness. Moreover, formalization tackles the dark sides of human resource management. Rather than disrupting the firms' familiness and socioemotional wealth, formalization leverages these two assets to advance the employees' abilities, motivations, and opportunities, fostering fairness and nurturing affective, normative, and continuance commitment to the organization. Finally, formalization facilitates the continuous improvement of human resource management. It prevents the risks of stagnation generated by the imprinting of informal approaches inherited from the founders. Furthermore, it assists new generations in getting legitimization in the firm without disrupting socioemotional wealth and preserving familiness.

#### 4.2. Implications, limitations, and avenues for further developments

Conceptual and practical implications can be collected from the results of this literature review. From a theoretical perspective, human resource management is understood as a field where the resource-based view, familiness, and socioemotional wealth conjoin to generate a distinctive and valuable source of competitive advantage. People management intends to attract, develop, and retain talented employees, boosting their normative, affective, and continuance commitment to the firm, regardless of their blood relationships. Familiness and socioemotional wealth should be handled as idiosyncratic and specific attributes of family firms. Far from generating bifurcation biases and unfair treatment, they inspire people-centered human resource management practices aimed to empower people and foster their active participation in organizational dynamics. This enacts a family-like corporate setting, making family firms attractive workplaces. Consistent with these arguments, the polarization between an agency and a stewardship-based approach in managing people is not related to the diverging treatment of nonfamily and family members. Instead, such polarization entails two alternative conceptualizations of human resource management. Where it is handled as an ancillary and specialized function of the organization with limited influence on management decisions, agency theory prevails. Conversely, where human resource management is embedded in the organization as a core component of the strategic apex participating in shaping the agenda for the future of the family firm, a stewardship approach is taken.

From a practical perspective, three main guidelines can be recommended to managers based on the research streams that populate the extant scholarly domain. First, attention should be paid to the formalization of human resource management. It facilitates acknowledging the specific challenges that affect people management in family firms. Moreover, it enables the assessment of the distinctive contribution of employees to the enhancement of organizational performance, guiding owners and managers in their management decisions aimed at tapping value from people and putting it at the service of business excellence. Second, precautions should be taken to avoid that formalization is

affected by legacies from the past, which legitimize the primacy of family members. Unjustified discrimination of human resources, which is not based on transparent rules and does not reflect their actual contributions to value generation, creates a hostile work atmosphere, impairing the individual sense of belongingness to the firm and jeopardizing organizational commitment. Third, a longitudinal, people-centered perspective should be adopted in designing and implementing human resource management. Effective people management adds to organizational resilience and encourages people to commit to achieving long-term viability. Besides, it underpins the corporate concern for environmental and social sustainability, in line with an extended socioemotional wealth view of family firms.

Several limitations affected the dependability of this literature review. Although we made every effort to ensure the comprehensiveness of our dataset, the findings were based on records extracted from a single source. However, we are confident that this limitation did not undermine the integrity of our literature review since we cross-checked the outputs from different databases and did not retrieve any flaws in our data source. In addition, we used an interpretive approach to report the study findings (e.g., King et al., 2022). While this might have generated some subjective biases in the representation of the state of the art about the study domain, the replicability of our research protocol maintains the objectivity and consistency of our review. Lastly, we did not delve into specific human resource management practices since we were concerned with how people management as a study domain has been contextualized to the family firm setting. Therefore, it is impossible to extract specific guidelines about how to handle human resource management practices to advance family firms' performance.

Further research is needed to push forward what we know about human resource management in family firms. From a conceptual perspective, further efforts are required in order to harmonize the resource-based view, familiness, and socio-emotional wealth in a cohesive and integrated theoretical framework inspiring the contents and the dynamics of people management in the family firm setting. Also, further theoretical advances are necessitated to make sense of how combining these three conceptual perspectives can pave the way for implementing a people-centered approach to human resource management, which avoids bifurcation biases and adds to the long-term viability of family firms.

Longitudinal empirical research is needed to shed some light on the factors nurturing the formalization of human resource management practices and gauge its implications on organizational performance. The antecedents and consequences of formalization should be investigated, illuminating the distinguishing features that characterize human resource management in the family business. Attention should be paid to the management decisions and approaches implemented in family firms to curb discriminatory practices and foster an empowering work climate that engages nonfamily members and supports normative, affective, and continuance commitment. Future studies could also be intended to investigate the impact of human resource management practices directed at organizational fairness on family and nonfamily members' job satisfaction, checking how they shape the atmosphere in the workplace. Finally, yet importantly, research is required to unveil how succession affects human resource management practices in family firms. A better understanding of how the inertia generated by imprinting can be overcome by the vital energies brought by new generations should be achieved, emphasizing the newcomers' ability to facilitate the formalization and professionalization of people management.

## 5. Conclusion

This literature review contributed to the scholarly debate in two ways. First, it identified the conceptual roots nurturing intellectual contributions about human resource management in the family firm setting, envisioning the resource-based view, familiness, and socioemotional wealth as the cornerstones of this study domain. Secondly, it

delivered an integrative overview of the state of the art of the literature, shedding some light on the three most relevant research streams. Beyond emphasizing the distinctiveness of human resource management, the literature highlights its dark side. It maintains the need for a people-centered approach in human resource management to boost the viability of family firms. Although human resource management in the family firm setting attracts increasing contributions, little is known about the secret sauce for extracting competitive advantage from it.

### Author's statement

All authors contributed equally to the manuscript.

### Declaration of Generative AI and AI-assisted technologies in the writing process

Last but not least, the Authors confirm that they did not use generative artificial intelligence technologies in the writing process.

### CRediT authorship contribution statement

**Elena Casprini:** Conceptualization, Formal analysis, Methodology, Validation, Writing – original draft, Writing – review & editing. **Rocco Palumbo:** Formal analysis, Methodology, Validation, Writing – original draft, Writing – review & editing. **Alfredo De Massis:** Conceptualization, Formal analysis, Methodology, Validation, Writing – original draft, Writing – review & editing.

### Declaration of Competing Interest

We do not declare any competing interests.

### Data availability

Data will be made available on request.

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