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The Well-Being of Managers in the Context of the Identity Brand of the Family Company

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Abstract

Theoretical background: The article delves into the domain of qualitative research applied to investigating the well-being of managers within family businesses. It situates its discussion within the broader context of brand identity in such enterprises. Theoretical underpinnings include insights into the formation of well-being in family-run companies, highlighting the interconnectedness between managerial well-being and the identity of the family business.
Purpose of the article: Primarily methodological in nature, the article aims to delineate a systematic approach to conducting qualitative research specifically tailored to exploring the well-being of managers within the context of family business brand identity. It seeks to elucidate the process of uncovering the intricate links between managerial well-being and the identity of family-owned businesses, thus contributing to the understanding of how well-being manifests in such organisational settings.
Research methods: The article outlines an algorithmic framework designed to guide qualitative research endeavours focused on manager well-being within family businesses. It underscores the importance of employing both inductive and deductive approaches in qualitative research, as evidenced by a pretest conducted to discern their differential applications in this context.
Main findings: The key findings of the article revolve around the proposed algorithm for conducting qualitative research on the well-being of managers with respect to the brand identity of the family business brand. The study underscores the importance of qualitative methods in unraveling the complexities of well-being in the unique context of family-run enterprises. By elucidating the interrelationships between managerial well-being and brand identity, the research contributes to a deeper understanding of the dynamics at play within family businesses and offers valuable insights for both scholars and practitioners in this field.

Introduction

One of the important issues in modern business management is the well-being of the employees employed by the company, as well as the managers who manage them. The scientific literature provides knowledge about the essence of well-being, as well as interest in well-being and managers' perceptions of it. However, the issue of managers' well-being in family firms, including issues concerning the relationship between the brand identity of the family firm and managers' well-being, has not yet been sufficiently studied. A more accurate recognition of how manager well-being is shaped in family firms and what the related problems are, as well as how the shaping of a family firm's brand identity can increase or decrease manager well-being, requires research to better understand these relationships. This article deals with describing the concept of qualitative research through which the above-mentioned issues can be better understood. Such research can be a valuable

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complement to quantitative studies that describe the phenomena under study in statistical terms.

The purpose of this article is to describe the algorithm for proceeding with qualitative research on the well-being of managers in the context of the brand identity of a family business. The basis for this description was the prepared study design and the conducted qualitative research pre-test. The article does not stop at the results of the study as it focuses on methodological issues. Using a real-world example, the dilemmas faced by those conducting qualitative research are shown, and the implications of different approaches to analysing qualitative data are presented.

Literature review

The essence of well-being

The issue of *well-being*, referring to various contexts of human functioning, has become extremely popular in the social sciences today. The precise definition of the term well-being has caused a number of difficulties over the years, due to the complexity of this theoretical construct.

Well-being initially appeared in the tradition of clinical psychology in contrast to "lack of health". These concepts were treated as opposite ends of the same continuum (Hills & Argyle, 2002; Hattie et al., 2004). However, over time, it was recognised that these constructs are independent of each other (Diener et al., 1995, after Ilska & Kołodziej-Zaleska, 2018; Russel & Caroll, 1999, after Ilska & Kołodziej-Zaleska, 2018).

A key role in both the growth of interest in the topic of well-being, as well as in deepening the understanding of this concept, was played by the achievements of researchers representing the current of psychology known as positive psychology. Initially, researchers of this current equated the concept of well-being with the term happiness (Czapiński, 1994; Kahneman, 1999; Diener, 1984, 2000; Seligman, 2002; Seligman et al., 2005). Martin Seligman (the founder of positive psychology) placed "happiness" as the primary object of positive psychology research, making "life satisfaction" its measure. Following this way of understanding well-being, Seligman, within the framework of the "theory of true happiness", pointed out that the happiest people (those living the so-called "full life") direct their pursuits to each of the following areas of happiness (Seligman et al., 2005):

– a life of pleasure (i.e. realised by achieving daily pleasures),

– an engaged life (i.e. pursued on the path of discovering one's own skills and abilities and engaging them to enrich one's own life),

– a meaningful life (i.e. one that provides a deep sense of fulfilment, resulting from engaging one's own resources and skills toward a higher good, while benefiting others).

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Over time, the subject of positive psychology evolved towards well-being, which was reflected in the "theory of well-being" developed by Seligman. Seligman made the measure of well-being within this framework the so-called "personal *flourishing*", while the goal of positive psychology was to support the individual in maximising well-being, understood as "living life to the fullest".

Today, however, the concept of well-being is still heterogeneously understood. The Cambridge Dictionary (2023) defines the concept of *well-being* as "the state of feeling healthy and happy". In this definitional view, therefore, happiness is a component of well-being, on a par with health. Additional difficulties in precisely defining the concept of well-being arise when one analyses, in accordance with the above approach, the formal definition of health as one of the components of well-being. Indeed, according to the World Health Organisation, "health is not only the absence of disease, but also a state of complete mental, social, and physical *well-being/self-esteem*" (WHO, 2023). It is not difficult to see that these definitions are, therefore, in logical conflict with each other.

In colloquial terms, well-being is sometimes equated with the concept of welfare. However, these concepts are not the same, for welfare refers only to the economic potential for consumption and is in fact a measure of the level of real income (or wealth), and is even synonymous with wealth (Machowska-Okrój, 2014). It is also sometimes colloquially referred to as affluence.

The lack of terminological precision, therefore, prompts us to go to the root of the term "well-being". The etymology points to one important characteristic of the term. It is not so much a momentary good mood (*wellness*), which an individual may experience at various points in life, but a long-term state relating to various areas of life and which the individual subjectively evaluates as "good". In the broadest sense, well-being can therefore be understood as a subjective, positive state resulting from a combined emotional and cognitive assessment of all dimensions of a person's life.

In the context of well-being, a number of concepts appear in the literature that may be semantically close in meaning. An interesting attempt to clarify the concepts appearing in the literature in the context of well-being and to organise the relationship between them was made by Simons and Baldwin (2021). Figure 1 synthesises the result of their work.

Well-being thus includes:

– health in the physical dimension (understood as the proper functioning of all human systems and organs),

– mental health (understood as a person's ability to think logically, to recognise and express feelings, to cope with stress),

– social health (understood as the proper functioning of the individual in the social environment),

– wellness (understood as a temporary good mood),

– wellfare (understood as a measure of an individual's prosperity in economic terms).

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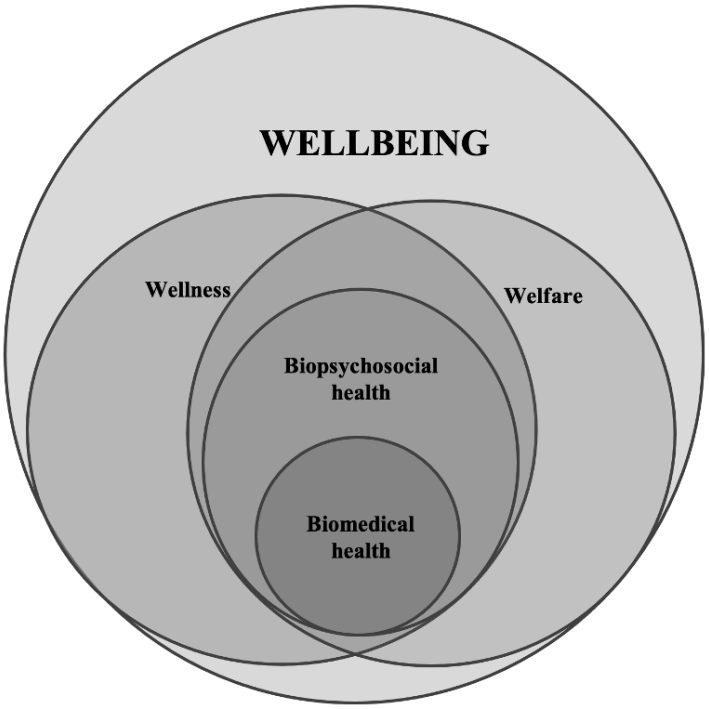

Figure 1. Well-being vs. other closely related terms

Source: Authors' own study based on (Simons & Baldwin, 2021).

The literature on positive psychology indicates that well-being is not so much a real phenomenon as a theoretical construct composed of several measurable (real) components (Seligman et al., 2005). Consistent with this assumption, various theoretical approaches have been developed in psychology over the years, focusing on describing the internal structure of well-being understood as psychological well-being, and therefore more narrowly than in the approach presented in Figure 1.

Within the existing psychology literature, two general theoretical traditions can be discerned: hedonistic and eudaimonistic. In the hedonistic tradition, well-being is associated with an individual's desire to experience pleasure and avoid unpleasant states. This approach is evident in Diener's subjective well-being theory (Diener, 1984, 2000), as well as Kahneman's objective happiness concept (Kahneman, 1999), among others. In the eudaimonist tradition, on the other hand, well-being is a construct describing a state in which an individual strives primarily to realise his or her potential, while satisfying the need for meaning and self-actualisation. An understanding of well-being according to the eudaimonist tradition is evident in Ryff's concept of psychological well-being (Ryff, 1989, after Trzebińska, 2008), as well as Waterman's concept of eudaimonistic well-being (Waterman et al., 2010), among others.

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According to Diener's subjective well-being theory (1994, 2010, after Wojciszke 2012, p. 250), well-being includes an affective component (understood as experiencing positive affect and rarely experiencing negative affect) and a cognitive component (understood as overall satisfaction with life and satisfaction in key areas of life, i.e. work, family, income).

With the development of research on the issue of well-being, approaches that represent a synthesis of the hedonist and eudaimonist traditions have also emerged over time. In the Polish literature, this type of synthetic approach to well-being was presented by Czapiński (2004) as part of the so-called "onion theory of happiness". However, the best-known concept, which integrates hedonistic and eudaimonistic approaches, was introduced by the aforementioned founder of positive psychology, Martin Seligman. According to his concept, well-being is the result of five elements (Seligman, 2011a, p. 33):

1) positive emotions – the foundation of well-being concept,

2) engagement – the ability to become completely absorbed in the task at hand,

3) meaning – a sense of belonging to something that the individual recognises as something greater than himself and at the same time is willing to serve it,

4) accomplishments – an individual's natural drive for success, or excellence in his or her field,

5) positive relationships – the presence in an individual's life of other people with whom he or she can build satisfying social relationships.

Other ways to capture the structure of well-being are also present in the psychological literature. For example, Keyes' three-dimensional concept of well-being (Keyes, 1998, 2002; Keyes & Waterman, 2003) views well-being as a construct that includes: psychological well-being, emotional well-being, and social well-being. Psychological well-being includes dimensions derived from Ryff's concept (Ryff, 1989; Ryff & Singer, 2008): self-acceptance, autonomy, purpose in life, and personal growth. Emotional well-being is associated (analogously, as in the hedonistic trend) with the individual's experience of positive emotions and the rare experience of unpleasant feelings. The third dimension of well-being in Keyes' three-dimensional concept is social well-being, which consists of social acceptance, social coherence, social integration, and social contribution.

It is also worth mentioning the approach proposed by Czerw (2017). On the basis of the literature studies made, she distinguished three dimensions of overall well-being (Czerw, 2017, p. 20):

1) personal well-being (e.g. Ryff & Singer, 2008; Seligman, 2011b) – understood as a positive evaluation of one's personal life, which includes both general life satisfaction, a positive emotional balance (hedonistic view) and a positive self-image, feeling meaningful in various areas of private life (eudaimonistic view),

2) social well-being (e.g. Keyes, 1998) – referring to an individual's life in diverse social groups (i.e. family, friends, co-workers) in both hedonistic and eudaimonistic terms,

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3) professional well-being (e.g. Warr & Clapperton, 2010) – understood as an evaluation of one's work life in hedonistic (a positive emotional balance of the work context) and eudaimonistic (a sense of meaning and value of one's work) terms.

Well-being in a bibliometric study

The analysis of the relationship between well-being issues and the brand identity of family businesses began with a bibliometric study. In the bibliometric study carried out by the authors of the present study, 40 publications were identified, which, after content analysis, were limited to 33 thematically related publications and published between 2007 and 2023. Bibliographic analysis was carried out according to the following search parameters: Web of Science Index: SCI-E, SSCI, ESCI; NOT Web of Science Index: CPCI-SSH; NOT Languages: Russian; Document types: Article; NOT Document Types: Early access.

The keywords used in the search for publications were "brand identity", "well-being", "managers well-being", "family business AND brand identity", "family firm AND brand identity", "family enterprise AND brand identity", "family enterprises AND brand identity", "family businesses AND brand identity", "family firms AND brand identity", "well-being AND brand identity".

The analysis took into account the number of publications, the percentage of the total number of publications, and the number of citations of these articles. Between 2007 and 2010, only one publication was published. Starting in 2011, the number begins to increase, reaching its maximum in 2019 and 2020 with 7 and 6 publications, respectively. After these years, the number of publications gradually decreases. A significant increase in the number of citations can be observed starting in 2013, until it reaches 156 citations despite the decrease in the number of publications, with the number of citations continuing its growth rate until 2022. In other words, there is a clear increase in interest in the topic of managerial well-being and branding of family businesses studied from 2011 to 2020. The number of citations increases significantly throughout the analysed period. The decrease in the number of publications in 2021–2023 (which may be related to the global COVID-19 pandemic crisis) is not accompanied by a decrease in citations, which may suggest that despite the decrease in the number of new publications, older articles are still widely cited and analysed. It should be added that the low rate in 2023 is due to the inclusion of the first half of 2023 in the database. The analysis will change when data from the entire year 2023 are included (Figure 2).

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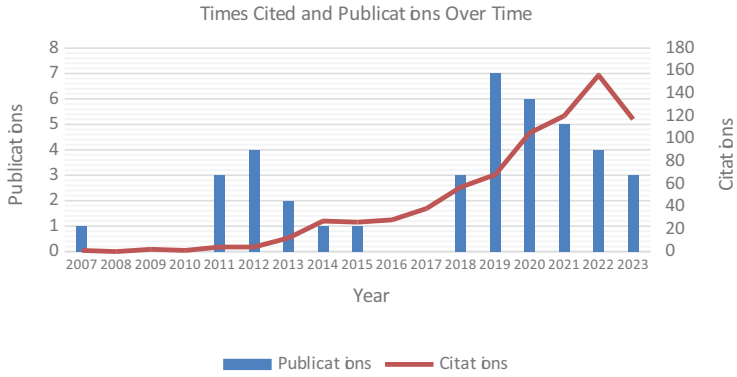

Figure 2. Number of publications and their level of citability from 2007 to 2023 (in 2023 – 1 semester)

Source: Authors' own study.

Due to the small number of publications and thus keywords, it was decided to perform the analysis for a minimum number of repetitions of 2. The bibliometric study revealed the existence of five clusters of related keywords and topics covered in the publications. Cluster 1 included studies whose main topic is well-being, a sense of happiness (these terms are sometimes used interchangeably), in addition to health and positive emotions. In clusters 2 and 3 we find publications referring to the functioning of family businesses, ownership, succession, and brand identity (*brand identity*). The brand identity of the family business and the perception of the brand and related topics have been assigned to cluster 4. Cluster 5 contains publications binding other groups. These include human resource management (*hrm*, or *human resource management*), job satisfaction, and performance.

The conclusions presented allow us to accept the premise of the importance of conducting research on the well-being of managers, especially in the context of shaping the brand of a family business and building its identity.

Brand identity

Explaining the essence of brand identity requires first answering how to understand the concept of "identity". The concept of identity is used in psychology, sociology, philosophy, and many other sciences, including management. In psychology, identity refers to the answer to the question of who one is (Vignoles, 2017). The answer to this question can include choices, goals, experiences, relationships, among others, that indicate who an individual is (Vignoles, 2017). In management, the term "identity" is often rounded off with a word indicating what it refers to. A distinction is made between brand identity and organisation identity, among others. Brand identity (*brand identity*) is understood somewhat differently from the identity

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of a particular person. When we deal with brand identity, we answer the question of what a specific brand is, what characteristics it has. Brand identity is defined as the concept of a brand from the perspective of its owner (Joachimsthaler & Aaker, 1997). As de Chernatony (1999) points out, brand identity is about the ethos, goals, and values that give a sense of individuality that differentiates a brand. David A. Aaker, in his 1996 book *Building Strong Brands,* defined brand identity as a unique set of brand associations that a brand strategist wishes to create or maintain (after Bravo et al., 2017). Other authors, such as Gylling and Lindberg-Repo (2006), follow Aaker in defining brand identity very similarly.

However, this does not mean that there are no differences in understanding the identity of the brand by different authors. They are expressed not only in the way the concept is defined, but also in the definition of the elements that make up brand identity. Various models have emerged to explain what makes up brand identity. For example, Kapferer (1995, after Kall, 2001, pp. 27–28; Azoulay & Kapferer, 2003) detailed the following components of brand identity: physical facet, personality, relationship, culture/values, reflected consumer and consumer mentalisation. In turn, de Chernatony (1999) points out that brand identity includes the following components: the brand's vision, the brand's culture, the brand's positioning, the brand's personality, the brand's relationship and the brand's presentation. In this view, corporate brand management is presented as a process that involves narrowing the gaps between identity elements to create a cohesive identity and, on the other hand, narrowing the gap between the brand's identity and its reputation among stakeholders (de Chernatony & Harris, 2000).

Today, research on brand identity focusses on several issues. Among other things, it examines the relationship between brand identity and brand image. While brand identity refers to how company strategists want the brand to be perceived, brand image refers to how the brand is currently perceived (Srivastava, 2011). Brand image includes the set of beliefs consumers have about a brand (Nandan, 2005). In the context of building strong brands, it is important to take care of both brand identity and brand image, and ensuring alignment between brand identity and brand image can foster increased brand loyalty (Nandan, 2005). In this context, it is important to identify and measure the gap between the communicated brand identity and the actual brand image (Roy & Banerjee, 2014).

The impact of brand identity on the effects that can be obtained from a brand is also an important issue addressed in the literature (see, e.g. Coleman et al., 2015; Casidy et al., 2019). The impact of brand identity on brand value is being studied (Alvarado-Karste & Guzmán, 2020). The issue of co-creation of brand identity by stakeholders, including consumers, can also be included among interesting research subjects (Kennedy & Guzmán, 2016). Furthermore, one of the contemporary issues under study is the development of brand identity in the context of achieving sustainable development goals (Caldana et al., 2022).

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In conclusion, brand identity is being studied today in various contexts. New and interesting connections are being found between brand identity and other concepts in business management.

Family business brand identity

The concept of brand identity acquires a specific character when the entity to which we relate it is a family business. This is for two reasons. First, because the mechanism of brand identity formation in a family-owned entity is different from the mechanism of brand identity formation in a nonfamily business (Craig et al., 2008), and second, a family-owned entity may have two coexisting brands, an independently shaped corporate brand and a corporate brand, i.e. the brand of the family business sector, which it merely co-creates (Blombäck, 2009).

The nature and distinctiveness of the family business are due to the strong influence of the family (i.e. the basic social group based on ties of kinship, affinity, or marriage) on the organisation and management of the business formed by one or more of its members. According to the theoretical model, a family business is an economic organisation made up of three coupled subsystems: business, ownership, and family (Gersick et al., 1997, p. 6). The latter subsystem generates an important contribution to the operation of the organisation in the form of entrepreneurial concepts, knowledge, skills, and financial resources to make them a reality, and also contributes to the creation of certain specific management styles, ways of building relationships, and cultural patterns of doing business (Leszczewska, 2012).

Since both a business organisation and a social organisation can have their own identities, the identity of a family business should be associated with the result of the overlap between the identity of a social group, such as a family running a business, and the identity of a business entity (Mahto et al., 2019). Some authors also point out that in the "family" subsystem, the collective identity of all family members is strongly influenced by the individual identity of the founder (Boers, 2013, pp. 57–58).

The two types of organisational identity indicated (i.e. family and business) combine and form a hybrid construct called family *firm identity* (Wielsma & Brunninge, 2019). As Zellweger et al. aptly put it, it reflects the importance of the business in the lives of those in the founder's family (Zellweger et al., 2010). Then, on the foundation of the family company's identity, a brand identity is created, that is, a package of unique characteristics, values that allow the brand to be identified and distinguished from other competing brands. Its essence will be determined by answers to three questions: Who are we? What do we offer? How do we do it? (Sierpiński, 2022). Given the purpose of this article, the answer to the latter question seems particularly relevant.

The involvement of family members in the making, and often the implementation, of management decisions contributes to the formation of a specific set of factors that identify a family business, which is referred to in the literature by the term "familiness"

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(Frank et al., 2010; Baños Monroy et al., 2015). The intensity of this characteristic in a company depends on the level of trust family members have in each other, their loyalty, and the degree of identification with the family business (Wielsma & Brunninge, 2019). One of the consequences of a company's familiness is that it is people-orientated (Leszczewska, 2012), which means that people who perform work in a family business are assigned more value, and long-term relationships are built with them.

The familiness of an enterprise displayed as a distinguishing feature of a business entity determines the so-called family identity of its brand. This attribute is considered a major tool for building competitive advantage (Chrisman et al., 2005). The degree to which it is used in competition with nonfamily entities varies and depends on the type of market. In the case of B2B market activity, family identity is definitely communicated more often and attributed more importance than in the case of B2C market activity (Schwass & Glemser, 2015).

The literature emphasises that when the level of family identification with the company is formed at a high level, i.e. the family and the company share almost the same values, the level of family identity is also high (Dorda & Shtëmbari, 2020). In such a situation, family identity takes on the character of an intangible asset (Zellweger et al., 2010), which can be used as a tool for attracting and retaining customers (Binz Astrachan et al., 2018).

The brand identity of a family business, according to the literature review, is built in two ways (Dorda & Shtëmbari, 2020). The first is by leveraging the attributes of a family business organisation, such as tradition and longevity, and associated with them: heritage (i.e. values passed down), credibility, work culture, customer relations, stability, and social responsibility. The aforementioned factors are the result of the specific approach to business management that we face in the case of family-owned entities. The second way, on the other hand, is based on improving the qualities that external stakeholders believe are the hallmarks of family businesses. This group mainly includes the characteristics of the marketing offer and the approach to the customer, which are the source of values such as quality, ethics, patriotism, and trust (Baryń, 2018).

Previous research on family brand identity has focused attention on the influence of family on brand identity (Bettinelli et al., 2022), the instrumental use of family firm brand identity in the context of business development and market competition (Craig et al., 2008; Zellweger et al., 2010; Motoc, 2019), and the marketing potential of family firm brand identity (Canziani et al., 2020; Spielmann et al., 2022). However, a coherent concept of a family firm's brand identity has not been formed, and so far neither has its relationship to the well-being of the managers who manage it been studied.

Based on the analysis of research results on the values recognised and communicated by family businesses and the distinguishing features of the family business identity, it can be assumed that the so-called culture of well-being, i.e. care for the safety and intellectual, physical, emotional and spiritual condition of people in the organisation, is reflected in the brand identity of the family business (Dacko-Pikiewicz, 2019). However, the question of the impact of well-being of people in managerial

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roles in family firms on the way they perceive and define the company they manage, as well as the question of awareness of the importance of well-being as a constitutive element of the family firm brand, requires thorough recognition.

Qualitative research methodology of managers' well-being in the context of family business brand identity

Conceptual algorithm for proceeding

For the purposes of the project in progress, an algorithm was adopted in accordance with the traditional process of implementing a qualitative study, which consists of the following stages: setting research objectives, choosing an appropriate qualitative technique, defining a research sample, creating a research tool (scenario), fieldwork, and data analysis.

This classic approach to the qualitative research process is worth enriching with the use of Computer Assisted Qualitative Data Analysis Softwares (CAQDAS). Although these tools were originally created primarily to support the process of analysing the collected qualitative data, it is worth noting that the implementation of the project using CAQDAS changes the general style of the researcher's work, requiring him to have a different perspective on a number of methodological issues (i.e. the way of perceiving the research objectives, the process of implementing the fieldwork and the analysis of the collected data).

The process of implementing a qualitative study begins with the stage of formulating specific research objectives. While in quantitative research the research objectives are usually conclusive in nature, in qualitative research the objectives are usually aimed at discovering the issues, experiences, needs, preferences, and behaviours of the respondents (i.e. they concern the search for answers to the questions: What? How? Where? When? Under what circumstances?), their in-depth exploration and explanation (i.e. they concern the search for answers to the question: Why?). In the case of the issue of well-being of family business managers and its relationship to the brand identity of the family business, the following three main modules could be among the specific research objectives:

MODULE 1: FAMILY BUSINESS BRAND IDENTITY (FBBI):

– identifying managers' knowledge of FBBI items:

a) the characteristics that distinguish a family business brand from other brands on the market, the foundation of the family business brand identity (e.g. history and tradition), the unique values represented by the family business brand, forming the so-called "family heritage" and creating their typology,

– identifying of turning points in the FBBI formation process (to determine the degree of development of brand identity of the family business),

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– identifying of FBBI elements typical of each stage/stage of brand identity development,

– identifying of rational and emotional attitudes toward the brand of the family business among managers,

– identifying the characteristics of the "ideal family business brand",

– identifying typical dilemmas related to the FBBI building process and identifying ways to solve them.

MODULE 2: WELL-BEING OF FAMILY BUSINESS MANAGERS:

– identifying of rational and emotional associations with the term "well-being" and "well-being of a family business manager",

– identifying and classifying of elements that build well-being of family business managers, in particular: physical well-being, psychological well-being, eudaimonic well-being, social well-being,

– identifying of dilemmas accompanying the formation of family business managers well-being,

– identifying and typology of measures taken in family businesses to take care of managers' well-being and identifying of initiators of such measures,

– identifying of activities that are lacking in family businesses in the context of taking care of managers' well-being.

MODULE 3: FAMILY BUSINESS BRAND IDENTITY AND MANAGERS' WELL-BEING:

– identifying and categorisation of FBBI elements related to managers' well-being, such as:

a) the quality of family relationships,

b) the presence and acceptance of managers in the family,

c) the role of unique business challenges (e.g. succession, family-business relationship management),

d) access to resources and support for managers in the family business,

e) the organisational culture of a family business,

f) family business development strategy (e.g. long-term plans vs. uncertainty and work stress),

– identifying of FBBI elements that build a manager's affiliation with a family business,

– identifying the types of managers' well-being (i.e. physical, psychological, eudaimonic, social) determined by FBBI,

– identifying ways to strengthen FBBI taking into account managers' well-being,

– identifying threats to managers' well-being associated with strengthening FBBI.

Once the specific objectives have been established, the next step in the algorithm to proceed with a qualitative project is to define the criteria for selecting the research sample and designing its structure.

In qualitative research, selection is most often purposeful (Patton, 2002), based on the specifics of the selected characteristics of the individuals or groups of individ-

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uals, crucial to achieving the defined research objectives. It is worth emphasising that the essence of this type of selection is not to reflect in the sample the real structure of the population under study (as in the case of representative sampling methods used in quantitative research), but to invite to the study respondents who bring new information, useful from the point of view of a deeper understanding of the problem under study, included in the research objectives agreed. Therefore, it is usual to look for selection criteria in a set of behavioural and psychographic variables, and not only in sociodemographic criteria, useful more in quantitative research.

To implement a qualitative study to achieve the aforementioned objectives, a two-stage selection was proposed. The selection criteria for the purposive selection within the framework of first-level selection were made:

1) the type of enterprise (i.e. family business),
2) the size of the company (i.e. SME companies),
3) length of operation in the market (i.e. at least 15 years).

The adoption of the last criterion was based on the assumption that retrospective thinking about both the ways in which a family company's brand identity is built and the well-being of the managers employed emerges only over time, with the accumulation of business experience.

In defining a simple sample unit (i.e. a direct source of primary data), one selection criterion was proposed, which was the influence of the managers on strategic decision-making processes in the family business. This variable was identified based on the position held (i.e.: owner, president, board member, or manager). In contrast, two variables were used as differentiating criteria:

1) relationship to the founding family (family person vs. nonfamily person),
2) type of position (founder/owner/nestor of a family business vs. executive/manager).

On the basis of the selection and differentiation criteria adopted, a selection matrix was developed to build the initial proposed sample structure, as well as to decide on the recommended number of interviews (Table 1).

Table 1. Characteristics of the research sample

Company size	Small business		Medium-sized company	
Relationship with the family of the company's owners	Family member	Outside of the family	Family member	Outside of the family
Owner/manager	3–4 interviews	2–3 interviews	3–4 interviews	2–3 interviews
Manager	2–3 interviews	2–3 interviews	2–3 interviews	2–3 interviews
Recommended number of interviews n = 18–26				

Source: Authors' own study.

It is worth noting, however, that the developed matrix is intended only as a starting point for the designed research, indicating the direction from which it is worth starting the data collection process. This is because, as a rule, in qualitative research, subsequent interviews should be conducted in accordance with the principle of

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theoretical saturation (more: Guest et al., 2006; Charmaz, 2009; Pasikowski, 2015). Thus, it may turn out during the conducting of the initial interviews that the nature of the research requires an ongoing remodelling of both the selection criteria and the number of recommended interviews.

The next step in the research procedure algorithm is the selection of the interviewing technique. In particular, it is crucial to decide whether an individual or group technique would be a better way to create conditions for free conversation with the subjects (who meet the selection criteria adopted in the previous step) around the adopted research objectives.

Both, the characteristics of the respondents and the specifics of the research objectives proposed above, indicated recommending one of the individual techniques: individual in-depth interviews (IDIs) or semi-structured interviews.

In the next step, an interview scenario is developed. In a case when more researchers are engaged into running the interviews, it is worth preparing instead of a classic IDI interview guide (i.e. which is more a road map for the researchers to help them stay focus on their research topic and should be continuously developed during the interview), rather a more structured version of that research tool. It may include:

– information on specific research objectives (indicating to the interviewer what to ask the interviewee and why exactly),

– precise wording of the questions (showing interviewers how to properly construct questions in line with a qualitative approach, in a real time),

– additional research implementation tips (suggesting how to conduct the interview and resolve specific issues appearing during the data collection stage).

A typical qualitative interview guide consists of three typical parts. The first is the introduction, where the participant should be informed about the general purpose and rules of the interview, as well as the ethical issues (i.e. anonymity, freedom to answer, anonymisation of the acquired content). This is also the moment to obtain formal consent of the interviewee if the interview is planned to be recorded. The second part of the scenario is the so-called warm-up, which includes questions that introduce the interviewee to the main topic, while fostering the respondent's engagement in further in-depth conversation. The third part of the scenario includes core questions relating to the specific research topics, along with brief instructions for the interviewer, including, among other things, guidance on the projective and supporting techniques used.

Verification of the Treatment Algorithm

After conducting the interviews and organising the primary data, there is a phase of preparing the data set for qualitative analysis. In the case of our pretest, this stage consisted of preparing the anonymised interview transcript and formatting it according to the general transcription rules (for more on transcription rules, e.g., see Miles

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& Huberman, 2000) as well as requirements of qualitative data analysis software. In qualitative projects, however, the qualitative data collected may be much more extensive and diverse. In such situations, as part of the preparation phase, the data might be organised by source (e.g. in-depth interviews, focus group interviews, photographs, literature sources, interviewers' notes). When working with qualitative data analysis software the data sources should be well described within the programme. In the case of working with IDI transcripts, it is worthwhile to additionally include within the memos detailed characteristics of interviewees (e.g. behavioural variables or a description of the situational context of the interview), as well as their demographic attributes important from the sampling point of view. This way of preparing the data set makes it possible to perform further comparative analyses.

The next step in data analysis is to code the gathered data. The coding process is a step in working with qualitative data that generally is aimed at reducing and organising the unstructured (or semi-structured) data into themes and patterns. The codes developed in this process are understood as the building blocks of analysis that help the researcher make sense of the collected data in light of the research questions posed (Braun & Clarke, 2012, p. 61). Codes identify and provide a label for a specific feature of the data that is potentially relevant to the research topic. Coding is carried out according to the requirements of the chosen coding strategy (Figure 3). In the broadest terms, the researcher can choose between two general research strategies, and therefore also two approaches to the coding process: the deductive approach (top-down) or the inductive approach (ground-up).

In the case of the conducted pre-test, for authodidactic purposes, the semi-structured data were independently coded in line with both theoretical approaches mentioned above.

In the case of deductive coding, the first step was to create an initial set of codes (a hierarchical code system or code book), based on the research topics, as well as the questions included in the interview guide. It is worth noting that when applying the deductive approach (a top-down reasoning; from general ideas to specific conclusions; from theory to observation), the hierarchical code system should reflect an existing research framework or theory in the area under study (e.g. on well-being, brand identity and family businesses). On the basis of the data gathered in the pretest, a code system developed for deductive coding was developed, including codes grouped into the following general categories: "well-being", "family company values", "family company brand identity (FBBI)", "family company brand (FCB) vs. well-being".

In the process of deductive coding, it is extremely important to precisely define the codes contained in the code system, including anchor examples that illustrate the meaning of the category. However, it is not a matter of creating theoretical definitions, but definitions based on everyday language (since formal definitions are sometimes understood in a heterogeneous way). Thus, the point is to define the code (using a word or phrase) in such a way that it is understood in the same way by coders,

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regardless of whether they come from the world of science or from outside it. It is important to make sure that the definition of each code is free of formal definitional errors (e.g. the error of vagueness, excessive narrowness, or breadth, or the error of crossing definitional scopes). It is especially worth clarifying those codes that have a range of meanings in everyday language.

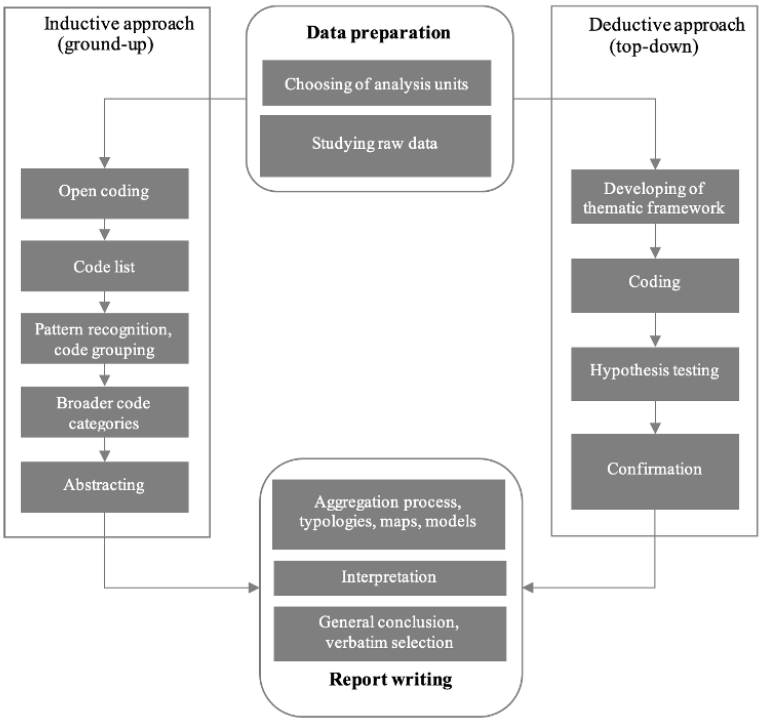

Figure 3. The process of analysing qualitative data in inductive and deductive terms

Source: Authors' own study based on (Elo & Kyngäs, 2008).

Coding is the foundation of qualitative data analysis, and the quality of the next steps of analysis and the conclusions drawn depend on it. When defining codes, it is therefore necessary to strive for linguistic precision, while keeping in mind the utilitarian dimension of the definitions created in a code memos. Research practice has developed a valuable experience in this area, which is the training of coders held before the coding process begins, on how to understand the various codes included in the code system. This is the right time to make sure that the way all coders understand the codes is the same.

The next step to be taken in a situation where coding work on the same data set is proceeded parallel by different coders is to check whether the coding procedure

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carried out was in accordance with the accepted objective criteria. A good practice to be taken in qualitative analysis is the assessment of the quality of coding work by comparing the intercoder matches or reliability. A discrepancy between the results obtained by different coders can be a clear signal which definitions were not properly prepared and need to be reformulated. The evaluation of the consistency of the coding process can be carried out using an intercoder agreement procedure in MAXQDA.

The coding consistency assessment analysis is extremely useful in a qualitative study. It highlights how important it is in the process of deductive coding to establish a uniform understanding of each of the terms used to label individual codes. This requires that coders have a strong understanding of research methodology and be attentive to words and the meanings given to them. This is because the same words can have different meanings to different people. Therefore, the coding, as a key step in the data analysis process, must not be approached in an unreflective or mechanical manner.

Here, a methodological remark is worth making. In quantitative research, it is crucial to algorithmize the researcher's work, which is reflected in acting on the ground of a universal, repeatable (fully or at least partially automated) sequence of steps, developed on the ground of accepted standards for performing a given activity, within a specific analytical framework. In other words, in quantitative research, it is easier to create a universal algorithm which will be a description of the strictly defined steps that the researcher should follow to complete a specific analytical task. However, applying such an approach to qualitative analysis would be very difficult. This is because algorithmization could lead to "detachment the researcher from the data", particularly from its source and context. While in quantitative research this approach is natural, expected, and even necessary, in qualitative research it involves an increased risk of overinterpretation of the results. A qualitative researcher should therefore be grounded in the data he or she analyses, knowing and understanding them well.

The intercoder agreement procedure in MAXQDA therefore provides practical indications of which of the codes specifically may provide difficulties in their unambiguous understanding and which of them should be clarified precisely before the actual coding phase. Since, as indicated, the mentioned project was pretest in nature, the authors decided to code the same data set (IDI transcript) in an inductive approach as well. The methodical question posed was whether these two distinct way of coding the same primary data set will result in receiving an additional body of knowledge, enriching the conclusions within the research topic.

In general, inductive coding is great for small data sets, as well as for exploratory research or grounded theory-based approach. In general, inductive coding starts from the primary data (e.g. interview transcript), moving through the operationalisation of the data to its conceptualisation in the process of analysis (Bryda, 2014). Thus, it is a "bottom-up" approach (i.e. from observation to theory). Individual data segments are therefore labeled with codes that emerge naturally as the coder goes through the primary data set sentence by sentence. As a result of this stage, a list of numerous and varied codes is being developed, some of which can be *in vivo* codes (based on

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the data itself, on words or phrases used by the interviewees). Once the first round of coding is completed, the next task is to organize the codes in a hierarchical code system containing categories that group the codes originally extracted. In summary, therefore, while in the deductive approach the code system is formed before the data coding stage begins, with the inductive approach the code system is the end result of the coding process. In our pretest, the inductive code system contained codes grouped into the following categories:

– family business value (interpersonal/social values; personal values; competence/intellectual values; ethical/moral values),

– associations with the "family business" (successors; founder's own satisfaction; position in the social environment; area of operation; independence; values; ownership; profit),

– the company's distinguishing characteristics (cost advantage; quality of service; recognition among suppliers; speed/flexibility; atmosphere; efficiency),

– associations with "well-being" (physical/health well-being; financial/wealth well-being (welfare); social well-being; psychological well-being),

– shaping the family brand (developing the core business area; developing additional business areas; handing over the company to successors),

– shaping successors (sensitising successors to the social role of the family business; imparting substantive knowledge about the family business; creating conditions for self-discovery).

The result of the activities undertaken under the two coding approaches described above was therefore the development of two independent sets of coded data, which were then analysed independently.

In general, the coded material helps the researcher better understand the data and the analytical categories that emerge from it (e.g. the main themes taken up in the interview, key categories, or tentatively identified relationships between them). It is worth remembering, however, that qualitative data analysis is a process of constantly sifting through and rereading (e.g. in different contexts) the coded segments, in order to verify the hypotheses that emerge during the work.

The coding process in the inductive approach is followed by a stage of aggregating the codes into more capacious categories, which are then analysed in terms of the relationships existing between them. In this way, general themes central to the phenomenon under study are identified – by way of abstraction – and then models, typologies, and other forms of visualisation of the relationships perceived between the emerged themes are built.

Naturally, an reliable content analysis cannot be performed on the basis of one pre-test interview. Therefore, the analysis of the results is not presented in the article. However, it is worth noting that the subject of the process of forming a family business was not addressed in the pretest (i.e. there were no questions from the researcher initiating a direct conversation on this topic), and yet, these threads emerged "spontaneously" from the raw data themselves. This is worth noting, because the fact that

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these threads emerged from the raw data in the pretest (which, as a rule, was only intended to test the created research procedure and not to achieve the main research objectives), indicates the unique value of qualitative methods. If the qualitative researcher has a good understanding of the general purpose of the project being carried out, invites a person to the study who precisely meets the sampling criteria, talks to the interviewee long enough, and adheres strictly to the methodological guidelines associated with conducting qualitative interviews, then the key themes for the main topic "emerge on their own". Careful coding using an inductive approach makes it possible to grasp them and "bring them to the surface of the data", which would not be possible using a deductive approach within qualitative data analysis.

Discussion and conclusions

The article describes an algorithm for conducting qualitative research on the well-being of managers in the context of the brand identity of a family business. It can be helpful in the design and implementation of further qualitative research on the issue of managers' well-being in family firms, and it can also be useful in the preparation of other qualitative research.

The differences between inductive and deductive approaches to analysing qualitative data are also noted. The decision to choose an analytical strategy is crucial in qualitative projects. It is worth being aware that these two different approaches to the way the collected research material is coded (deductive vs. inductive) provide the researcher with a picture of the same data, but seen quite differently. Metaphorically speaking, these approaches are like looking at the same object (the object of study and specific research objectives) from two different perspectives, or like showing the same object from two different projections (cross sections). Each of them provides valuable and useful information and can lead to enriching conclusions for the researcher about the topic. Undoubtedly, the deductive approach (as geared toward testing hypotheses derived from theory, the *top-down approach*) is more strongly linked to the body of existing literature knowledge, as well as the researcher's individual knowledge in the area under study. It helps to situate the newly acquired content of the researcher in the ongoing project within the existing body of established knowledge. In contrast, the inductive approach (as an exploratory, data-grounded, *bottom-up approach*) is aimed at extracting new knowledge and exploring topics or connections not yet analysed in the literature in a specific context. It allows one to take a "fresh" look at a topic, i.e. without the burden of the researcher's existing knowledge.

Both approaches are extremely useful. Each can also be applied in completely different implementation conditions. This is worth keeping in mind when making decisions related to the design and implementation of a qualitative study.

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