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IN SEARCH OF ENTREPRENEURIALLY-ORIENTATED STRATEGIES ADOPTED BY A SUCCESSFUL SOUTH AFRICAN FAMILY BUSINESS

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ABSTRACT

The importance of an entrepreneurial orientation (EO) to business success and long-term sustainability is well documented, and an entrepreneurial mindset in every generation is seen as key to the survival of family businesses across generations. The primary objective of this study was to identify the EO strategies adopted by a successful South African family business. A descriptive, single-case study research design was adopted and five key actors in a successful family business were interviewed. A directed content analysis was used to analyse the data. Overall, the findings of this study concur with the literature on EO among family businesses in terms of them undertaking proactive, innovative, autonomous and risk-taking activities. However, in contrast to the literature the family business investigated in this study showed ample evidence of activities where they directly and intensively challenge their competitors. Furthermore, given the financial success and reputation of this family business, it can be suggested that their EO strategies are paying off.

INTRODUCTION AND PROBLEM DEFINITION

Irrespective of their size, legal form or industry in which they operate, family businesses are described as "the backbone of corporate life across nations, remaining a cornerstone of socioeconomic development" (Kraus, Harms and Fink, 2011: 33). Family businesses account for the largest percentage of economic activities and dominate the economic landscape of most nations (Family Firm Institute, 2015a; Yu, Lumpkin, Sorenson and Brigham, 2012: 33; Sharma, 2004: 3). Although no universally accepted definition of a family business exists, most "revolve around the important role of family in terms of determining the vision and control mechanisms used in a business, as well as the creation of unique resources and capabilities" (Family Firm Institute, 2015b; Sharma, 2004: 3). Researchers believe that the "heart of the field is about understanding the reciprocal influence of family on business and vice-versa" (Chrisman, Chua and Sharma, 2003: 2). It is this reciprocal influence, as well as the "paradoxes caused by the involvement of family in business", that are recognised as the key features that make the field of family business unique and that distinguish it from other disciplines (Melin, Nordqvist and Sharma, 2014: 1; Yu *et al*., 2012: 33; Sharma, Chrisman and Gersick, 2012: 5).

A reason often given to explain why family businesses are studied is the high failure rate of succession from one generation to the next. Even though most owners want to see their family business continue after their departure from the business, statistics worldwide show that numerous versions of the gloomy British saying: "clogs to clogs in three generations" or "from shirtsleeves to shirtsleeves in three generations" are found in many cultures to describe the fragile nature of family business survival (Nicholson, 2008: 104). In recent times it has, however, been suggested that instead of focusing mainly on succession, researchers should pay more attention to investigating the entrepreneurial longevity of successful business families across generations in order to understand the

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factors drive their success (Zellweger, Nason and Nordqvist, 2012: 151). In line with this suggestion, researchers have begun to view "firm survival" as a different measure to the "longevity of a family enterprise". "The first focuses on continuity of a firm from year to year and generation to generation, whereas the latter focuses on enterprising families and the ventures they create and destroy over time, in their pursuit to create value and wealth over generations"(Sharma, 2014).

Studies on family business are increasingly focusing on business families, the entrepreneurial behaviour of these families, and how they preserve and transfer wealth, as well as resources and entrepreneurial mindsets across generations (Melin *et al*., 2014: 4). The concept of "transgenerational entrepreneurship" is used in these studies, referring to the "processes through which a family uses and develops entrepreneurial mind-sets and family influenced resources and capabilities to create new streams of entrepreneurial, financial and social value across generations" (Habbershon, Nordqvist and Zellweger, 2010 cited in Nordqvist and Zellweger, 2010). "Entrepreneurial mindsets" refer to the "attitudes, values and beliefs that orient a person or group towards the pursuit of entrepreneurial activities", whereas resources and capabilities refer to the "families' resources and capabilities that create competitive advantage for them" (Zellweger *et al.,* 2012: 137).

Understanding the total entrepreneurial activity of a family adds significantly to "our understanding of family business longevity and transgenerational value creation in families" (Zellweger *et al*., 2012: 151) and "great promise exists for understanding the change and renewal processes over generations of enterprising families" (Melin *et al*., 2014: 4). As a result, studies in family business are increasingly being directed towards understanding the "common themes and practices that prevail in family business that survive across generations as well as industrial and societal changes" (Sharma, 2014).

The Successful Transgenerational Entrepreneurship Project (STEP) project is one such study that "focuses on understanding common themes emerging from transgenerational entrepreneurial families from different parts of the world" (Sharma, 2014). Founded in 2005 (by Babson College and a group of European universities and business schools), the STEP project was envisaged to be a leading international collaborative research project that would bring together a large group of scholars interested in entrepreneurship in family business contexts (Babson, 2015). The project outlines a research framework which involves investigating aspects such as transgenerational potential, entrepreneurial performance, the external mediating factors, entrepreneurial orientation (EO) and the "familiness" resource pools within the context of family businesses (Babson, 2015). One of the key research questions (Melin *et al*., 2014: 4) that the STEP project attempts to answer is: How do long-lived dynastic families acquire and maintain their entrepreneurial spirit and resources over generations? It is with this question in mind that the purpose and primary objective of this study have been formulated.

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PURPOSE AND PRIMARY OBJECTIVE

Within the context of the global STEP project, the purpose of this study was to provide insights into how a successful South African family business stimulates entrepreneurial thought and implements entrepreneurially orientated actions within their business. These insights will contribute to building knowledge on family businesses and ultimately improve the functioning of these businesses, the purpose of all family business research (Sharma, 2004: 23). Given the importance of an EO to business success in general (Zellweger and Sieger, 2012: 67) and the importance of an entrepreneurial mindset to the survival of the family business in particular (Cruz and Nordqvist, 2012: 33; Nordqvist and Zellweger, 2010), the primary objective of this study was to identify the EO strategies adopted by a successful South African family business. Through identifying these strategies, EO best practices can be established, shared and compared internationally.

LITERATURE OVERIVEW

Entrepreneurial orientation (EO)

In the entrepreneurship literature, the concept of EO has been used to describe businesses that pursue venture-creating activities, or businesses that have a strategic orientation or posture characterised by innovation, risk-taking, proactiveness, competitive aggressiveness and autonomy (Naldi, Nordqvist, Sjöberg and Wiklund, 2007: 33,35; Lumpkin and Dess, 1996: 140; Covin and Slevin, 1989: 79). As such, EO is seen as the actions of an organisation that make it entrepreneurially orientated (Covin and Slevin, 1991: 8), or as the "driving force behind the pursuit of entrepreneurial activities"(Covin and Wales, 2012: 677). The concept of EO originated from the work of Miller (1983: 771), who defines a firm that is entrepreneurial as one that "engages in product market innovation, undertakes somewhat risky ventures, and is first to come up with 'proactive' innovations beating competitors to the punch". Miller (1983: 780) conceptualises EO in terms of the three dimensions of innovativeness, risk-taking and proactiveness. Expanding on Miller's (1983) work, Lumpkin and Dess (1996: 139) describe EO as "processes, practices and decision-making styles that firms use to act entrepreneurially", and he introduces two additional dimensions of EO, namely competitive aggressiveness and autonomy. Covin and Wales (2012: 677), on the other hand, define EO as "an organisational decision-making proclivity favouring entrepreneurial activities". Despite these different perspectives, most authors define EO in terms of a firm's processes, methods and decision-making activities (Arzubiaga, Iturralde and Maseda, 2012: 438) and describe it in terms of five dimensions: innovation, risk-taking, proactiveness, competitive aggressiveness and autonomy.

Given the vast amount of literature written on defining and describing the five dimensions of EO, the purpose here was only to introduce the concepts and to identify key phrases or strategies associated with each dimension (See Table 1). Numerous definitions of the five dimensions were dissected to identify the various phrases or strategies. Table 1 also served as a coding framework for guiding the content analysis undertaken in this study.

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TABLE 1
PHRASES DESCRIBING THE DIMENSIONS OF EO

Phrases	**Sources**
Innovativeness	
• "Engaging in creativity and experimentation" • "Introducing new products and/or services" • "Technological leadership via Research and Development" • "Engaging in and supporting new ideas, novelty, experimentation and creative processes" • "A willingness to depart from existing technologies or practices" • "Venturing beyond the current state of art" • "Identifying new combinations of current products and services" • "Pursuing new opportunities"	Rauch, Wiklund, Lumpkin and Frese (2009) (based on Miller, 1983); Certo, Mos and Short (2009); Short, Payne, Brigham, Lumpkin and Broberg (2009); Wiklund and Shepherd (2005); Lumpkin and Dess (1996).
Risk-taking	
• "Taking bold actions" • "Venturing into the unknown" • "Borrowing heavily and/or committing significant resources to ventures in uncertain environments" • "Taking bold action in the face of uncertainty" • "Incurring debt or taking risks in order to seize an opportunity" • "Committing resources to projects with unknown outcomes" • "Willingness to break away from what is tried-and-true"	Rauch *et al*. (2009) (based on Miller, 1983); Certo *et al*. (2009); Short *et al*. (2009); Wiklund and Shepherd (2005); Lumpkin and Dess (1996).
Proactiveness	
• "Opportunity-seeking" • "Forward-looking" • "Introducing new products and services ahead of the competition" • "Acting in anticipation of future demand and/or needs" • "Creating a first-mover advantage vis-à-vis competitors" • "Anticipating opportunities to develop and introduce new products" • "Continuous environmental scanning" • "Acting in advance of change, recognising change" • "Eliminating operations in the mature or declining stages" • "Fast follower in new or existing markets" • "Willing to act on insights ahead of competition" • "Pioneering" • "Acting as leader rather than follower"	Certo *et al*. (2009); Rauch *et al*. (2009) (based on Miller, 1983); Hughes and Morgan (2007) (based on Lumpkin and Dess, 1996); Wiklund and Shepherd (2005) (based on Lumpkin and Dess, 1996); Dess and Lumpkin (2005); Lumpkin and Dess (2001); Venkatraman (1989).

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TABLE 1
PHRASES DESCRIBING THE DIMENSIONS OF EO (continued)

Competitive aggressiveness	
• "The intensity of a firm's efforts to outperform /undermine rivals" • "Strong offensive posture" • "Aggressive (forceful) response to competitive threats/actions" • "Bias toward out-manoeuvring and outdoing rivals" • "Is offensive as opposed to defensive in its approach to competition" • "Can be deliberate action or reactive actions" • "Unconventional tactics rather than head-to-head competition" • "A response to threats" • "Is reactive" • "An aggressive 'head-to-head' confrontation"	Nordqvist and Zellweger (2010); Certo *et al.* (2009); Rauch *et al.* (2009) (based on Lumpkin and Dess, 1996, 2001); Hughes and Morgan (2007) (based on Lumpkin and Dess, 1996, 2001).
Autonomy	
• "Independent action by leaders or teams" • "Aimed at bringing forth a business model, idea or vision and carrying it through to completion" • "Giving authority to individuals or teams" • "Creating processes and systems that develop independent thinking" • "Granting freedom to be creative, to push for ideas and to change current ways of doing things" • "Flexibility"	Arzubiaga *et al.* (2012); Soininen, Martikainen, Puumalainen and Kyläheiko (2012); Zellweger and Sieger (2012); Nordqvist and Zellweger (2010); Rauch *et al.* (2009) (based on Lumpkin and Dess, 1996, 2001); Certo *et al.* (2009); Hughes and Morgan (2007) (based on Lumpkin and Dess, 1996).

Entrepreneurial orientation in family businesses

According to Miller (2011: 882), the nature of ownership influences EO in that "family nurturing" may suppress entrepreneurial behaviour in family businesses. However, contradictions appear to exist in literature concerning family businesses and EO (Casillas, Moreno and Barbero, 2010: 29). For example, Landström, Crijns, Laveren and Smallbone (2008:108) report that family businesses are more likely to show signs of proactive, innovative and autonomous activities than they are to show signs of risk-taking and competitive aggressive activities. This suggests that the latter are less important to family businesses, whereas the former are more important and more meaningful when it comes to transgenerational value creation (Zellweger *et al*., 2012: 145; Landström *et al*., 2008: 108).

According to Short *et al*. (2009: 10), family businesses exhibit less innovative behaviour than nonfamily businesses do because the family dominance inhibits innovativeness. However, Lumpkin, Brigham and Moss (2010: 248) propose that family businesses may be more tolerant of the experimentation that accompanies innovativeness. Family businesses are more likely to resist change and are generally conservative and risk-averse in their orientation (Casillas *et al*., 2010: 27; Short *et al*., 2009: 18). Naldi *et al*. (2007: 41) found that although risk-taking is an important dimension of entrepreneurial behaviour in family businesses, these businesses tend to take less risk than do nonfamily businesses because large portions of the family's wealth are often tied up in the family business (Naldi *et al*., 2007: 38) and because they have a long-term orientation to the business. According to Zellweger and Sieger (2012: 78), the level of proactiveness in a family business may be hampered by family ownership. Similar, Martin and Lumpkin (2004) assert that the level of proactiveness evident in a family business varies depending on the owning generation. However, Casillas *et al*. (2010: 27) contend that proactive behaviour is enhanced when organisational structures are such that they combine ownership and management. Wiklund and Shepherd (2005: 75) conclude that family businesses need to be constantly proactive if they want to achieve growth and overall business success, because proactiveness can help the business sustain a first-mover advantage.

According to Landström *et al*. (2008: 108), competitive aggressiveness is generally less important in family businesses compared to the other dimensions of EO. It is suggested that family businesses tend to avoid very offensively aggressive behaviours because of concerns for their reputation among stakeholders (Arzubiaga *et al*., 2012: 448; Zellweger and Sieger, 2012: 79). Landström *et al.* (2008: 98) and Martin and Lumpkin (2004) note that few of their respondents chose to take competitors head-on, and that most respondents paid little attention to their competitors in the market. According to Arzubiaga *et al*. (2012: 444), family businesses makes less use of formal monitoring and other control measures than do nonfamily businesses, thus indicating more autonomy within their businesses. Furthermore, Martin and Lumpkin (2004) contend that family businesses “limits their own autonomy by involving more people in decision-making and installing strong boards of directors”.

RESEARCH METHODOLOGY

Research design and sampling

An interpretivism research paradigm – and more specifically a descriptive, single-case study research design – was adopted for this study. The case under investigation was selected based on the strict criteria for transgenerational family businesses to participate in the STEP project (Chrisman, Chua and Sharma, 2005: 560), namely that the family themselves must see their business as a family business, the family ownership in the main operating business should be above 50 per cent (voting share) and the family must have at least one active operating business (not only being a passive shareholder or investor). Furthermore, there should be at least two generations involved in the ownership and/or management of the business and the business should employ at least 50 employees. Lastly, the family must have a transgenerational intention, that is, “an ambition to pass on the business to the next generation of family members” (Nordqvist and Zellweger, 2010). As such, criterion sampling was adopted. Adhering to the aforementioned criteria for a family business in the South African context, the Thomas Motor Group (TMG)*, a prominent motorcar dealership situated in the Eastern Cape, was selected as the case for this study.

Data collection

Semi-structured interviews based on the interview schedule of the STEP project were employed to generate the primary data required for this study. The aim of the interviews was to gather a comprehensive outline from each of the participants to create a story about the family business from several perspectives. The STEP interview schedule provided the interviewer with a set of semi-structured questions relating to the dimensions of EO. Permission was granted by the chief executive officer (CEO) and the other participants to conduct the interviews. The interviewees were contacted via telephone and the interview dates and times were scheduled. In line with the requirements of the STEP project (Nordqvist and Zellweger, 2010), five interviews with key actors in the family business investigated were conducted. The interviews, conducted in English, each lasted between 60 and 120 minutes, were audiotaped and then transcribed word-for-word (verbatim) into Microsoft Office Word documents (interview transcripts). The profiles of the participants interviewed are summarised in Table 2.

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TABLE 2
PROFILE OF PARTICIPANTS INTERVIEWED IN THE STUDY

Participant*	Family/Non-family member	Kinship relation and generation	Position the in business	Shareholder	Length of employment
Arthur Thomas	Family member	Son of founder, 2nd generation	CEO	Yes (60 per cent)	41 years
Clint Thomas	Family member	Son of founder, 2nd generation	Director of Operations and Sales	Yes (40 per cent)	43 years
Gavin Bowden	Nonfamily member	n/a	Dealer Principal and Financial Director	No	10 years
Martha Store	Family member	Granddaughter of founder, 3rd generation	Human Resources Director	No	10 years
Michael Thomas	Family member	Grandson of founder, 3rd generation	Customer Service Manager	No	2 years

* Please note that all names have been changed to protect the identify of participants

Data analysis

To identify the EO strategies adopted by the family business from the transcribed interviews, a directed content analysis was undertaken. This study is based on the STEP theoretical framework and focused on theory testing (deductive content analysis). The STEP theoretical framework provided the broad themes under investigation, namely the five dimensions of EO, and Table 1 served as a coding framework to guide the content analysis undertaken to identify the various strategies associated with each of the dimensions of EO. As such a deductive approach of theory testing was adopted.

Trustworthiness

Sin (2010: 307) outlines five criteria for judging the trustworthiness of qualitative research data, namely: credibility, transferability, dependability, confirmability and authenticity. *Credibility* was achieved by the researchers becoming involved in the study for an extended period of time and through thorough observation of the subject to gain an in-depth understanding. In terms of *transferability*, the findings of this study were assessed against similar global studies conducted in the context of the STEP project. *Dependability* was initially achieved by following a thorough and well-documented methodology, and additionally by adhering to the methodological guidelines of the STEP project. Moreover, the researchers ensured that all important information pertaining to the study, including the interview schedule, interview transcripts and other secondary data were well documented and accessible for future reference. In this study, the research process was accurately described and subsequently followed in order to enhance *confirmability*. To further strengthen confirmability, the audiotaped interviews, from which the interviews were transcribed, were stored for future accessibility and reference. To achieve *authenticity* the participants were informed of the need for them to provide consent to participate and were reminded of their right to refuse to be a part of the study or withdraw at any time.

EMPIRICAL RESULTS

Entrepreneurial mindset

An entrepreneurial mindset is evident in the TMG. This spirit can be traced back to the founder, Rory Thomas. At the age of 16, he lied about his age and joined the army to go and fight in the Second

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World War. He was captured and spent nearly four years in a prisoner-of-war camp. It was during this time that he developed his ambitions, his plans and his entrepreneurial side. He was freed by General George Paton and was awarded the military cross for bravery, one of the few South Africans who were awarded a military cross in the field. After the war he joined a company called Mobil Exxon and was a sales representative going around the Transvaal. On one of his trips he came across a business and bought a share in it. This was the start of his many entrepreneurial endeavours. As Arthur comments on his father, "*… he was very entrepreneurial, using everything he had, he started growing, he did some crazy things, he started growing rice in the Eastern Transvaal, he had a furniture manufacturing company, he ran a car rental company through the Kruger Park. He was farmer, he grew tobacco, he planted one of the first forests in the Eastern Transvaal. So he was an incredibly entrepreneurial man*". It is this entrepreneurial mindset or spirit that has been passed on to the founder's oldest son and to other family members, as well as from the founder's oldest son to the next generation. According to Arthur, *"… I think it* [entrepreneurial spirit] *could be in the genes"*.

This entrepreneurial mind-set evident among the members of the business owning family permeates the business and manifests in the entrepreneurially orientated manner the business operates. As Martha suggests, *"… our entrepreneurial spirit is probably entrenched in our culture …"*. This entrepreneurial mindset or culture that permeates the TMG is described in terms of the dimensions of entrepreneurial orientation, namely autonomy, innovativeness, risk-taking, proactiveness, and competitive aggression.

Innovativeness

As previously mentioned, the automotive industry in which the TMG operates is dynamic and highly innovative. As Arthur comments: *"The motor cars you drive today, versus the motor cars we drove then, are just worlds apart and that innovation will continue to happen. The pace of innovation is getting quicker …"*. The group's years of experience in the industry have enabled them to identify opportunities. According to Clint, *"There is like a sixth sense that you know what is good and bad and you know where there is an opportunity; you can smell the bloody thing coming"*.

Although the TMG is not involved in product innovation as such (vehicle innovation occurs in motor vehicle factories), they have realised that to compete in a dynamic and innovative industry requires encouraging creativity at all levels and a constant search for new ideas in terms of retailing, service delivery and interactions with clients. A willingness to create newness and novelty is clearly evident. Over the years, the group has started several new businesses, innovations and creative initiatives, and continue to do so. As Arthur comments, *"Too many, too many, we've started new businesses, we've started so many new businesses and so many new initiatives"*. These initiatives include selling vehicles outside Port Elizabeth by opening up a national team to handle national sales, using technology to appraise cars, the introduction of express servicing by appointment, making motor rental available to clients. Many of their initiatives have received national recognition. According to Michael, *"the mother company came to us for a pilot, they saw what we did and said right, now snapshot, so a lot of the things that we do are cutting edge and very ahead of everyone else"*.

Innovativeness in the TMG is mainly driven by Arthur. According to Clint, "*Arthur is the wide thinker and he is always very creative and thinking about new opportunities …*". Gavin comments: *"Arthur will challenge each operating head to be as entrepreneurial as they can, look for ideas, if you're not coming up with ideas, I'm sure Arthur would be prompting"*. Gavin does, however, believe that *"… everyone is encouraged to think differently, put their ideas forward …"* and that *"not all entrepreneurial ideas are Arthur's, they are some of ours …"*. The findings relating to innovativeness are summarised in Figure 1.

FIGURE 1
DRIVERS, STRATEGIES AND OUTCOMES ASSOCIATED WITH INNOVATIVENESS

Drivers:
- CEO (Arthur)
- Financial director (Dealer principal, Gavin)
- Senior managers/directors (Martha, Michael, Paul)

↓

Evidence:
- *"… innovation will continue to happen. The pace of innovation is getting quicker … innovation from everyone is a big issue and they have the enthusiasm …" (Arthur)*
- *"Arthur will challenge each operating head to be as entrepreneurial as they can, look for ideas, if you're not coming up with ideas, I'm sure Arthur would be prompting" (Gavin)*
- *"Managers are told to be one step ahead, come with ideas …" (Michael)*
- *"… there are really good analytical thinkers within the group, there are very creative, strategic people within the group …" (Martha)*
- *"… everyone is encouraged to think differently, put their ideas forward and we value any contribution from anyone, be it the sweeper" (Gavin)*
- *"… there is new thinking every day" (Arthur)*
- *"… we're opening up a national team to handle national business" (Michael)*
- *"… there is Car Point, there's … Buy A Car … we are using technology to change the ways that we are appraising cars" (Arthur)*
- *"Our express service …" (Martha)*
- *"… we have motor rent … They've* [the mother company] *taken some of the policies that we've implemented here … and that's been rolled out by the warranty department nationally" (Michael)*

↓

Strategies adopted:
- Need for innovation recognised
- Creativity is encouraged at all levels
- New ideas are expected at managerial levels
- Employ the right people
- New ideas implemented

→

Outcomes:
- Enthusiasm for idea generation
- New ideas are forthcoming
- National recognition for business

Risk-taking

A moderate risk-taking profile in terms of resource commitments has prevailed in the group over the tenure of the second generation. The findings relating to risk-taking are summarised in Figure 2. According to Arthur, *"My attitude was, certainly up until 1994, was one of great uncertainty as to how things were going to work out in South Africa and I wasn't going to stick my head out and I didn't. So I played it very cautiously"*. Clint agrees, saying: *"We are definitely conservative, many opportunities have come flying past us that we have refused or not taken the bait"*.

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FIGURE 2
DRIVERS, STRATEGIES AND OUTCOMES ASSOCIATED WITH RISK-TAKING

Driver: CEO (Arthur)

Evidence:

- *"… it has always been extremely carefully considered …" (Arthur)*
- *"We are definitely conservative … Arthur, although he is very creative, he has a conservative side to him so he will think about all these things …" (Clint)*
- *"… we're looking for about an eight out of ten on green lights before we will actually press into something so …" (Clint)*
- *"I mean they did quite a lot of research and market surveys and things to ascertain if there is a need for something like that" (Clint)*
- *"Arthur looks at something, analyses it carefully first … he will carefully calculate … Arthur never shoots from the hip, never ever" (Gavin)*
- *"Arthur's not a fast mover, Arthur will look at something from every single side from a strategic point of view before just jumping, he doesn't rush in" (Gavin)*
- *"… because we have got some huge successes but we have also been caught sleeping" (Clint)*
- *"I have turned down business opportunities more than I have taken …" (Arthur)*
- *"I said to Arthur, well why don't we do the same and he said no, we don't do what they're doing. Let them burn themselves and they burnt themselves in the end" (Gavin)*

Strategies adopted:
- Careful consideration of new opportunities
- Conservative business decisions
- Research and analysis of new business opportunities

Outcomes:
- Losses have been avoided
- Lost opportunities

According to Arthur, decisions relating to resource commitments are made "… *where we believe there is the best possible outcome for us and that's it*". Similarly, Clint comments that "*… we're looking for about an eight out of ten on green lights before we will actually press into something so no, we are definitely not a high risk-taking business, we look at it properly and make an educated decision before going forward*".

Arthur has the greatest influence on the approach to taking risks by the group and opportunities are researched and analysed carefully before decisions to invest are made. According to Gavin, *"If Arthur doesn't like the risk, he won't go into it. Arthur will look at something from every single side from a strategic point of view before just jumping, he doesn't rush in. Arthur never shoots from the hip, never ever"*.

Although it appears that a more conservative approach to risk-taking exists, there are examples where major risks with little certainty have been taken. As Martha points out: *"I think that there are plenty of examples where they've taken major risks, with little certainty and I think this building is a great example of that … so I think there's lots of examples where they've taken a leap of faith"*.

Proactiveness

Athur drives proactiveness in the group. He is well-read, a visionary and a good strategist. According to Gavin, *"Arthur is a strategist through and through, so he's visionary, so he's, at any stage,*

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he's thinking where is the business going to be in three years' time and he's strategizing where it's got to be and he's leading like that". The group's forward-looking perspective is evident through the many initiatives undertaken in terms of environmental and human development issues. These initiative include:

- The first motor dealership in South Africa to receive the International Organisation for Standards (ISO) accreditation 9001;
- The use of rain harvesting tanks to wash cars;
- The use of green products in the group;
- The recycling of all waste materials with funds raised going to social projects;
- Replacement of light bulbs with light-emitting diode (LED) downlighters;
- HR development projects: apprentice programme, disabled learner programme, sales cadet programme;
- Various centres of excellence in the group: sales forum, service forum, a management forum; and
- A centralised fleet of cars for use by all divisions.

Although Arthur drives proactiveness in the group, other members of the family have also acted proactively. Martha, for example, recounts that *"… the auditors said to me that of all the companies that he audits, we have the highest skills development spend out of any other company"*. Similarly, Michael comments: *"I put together something called a KPI list, which is what do I do every day to make sure that the job is done … and we rolled it out with the group …"*. The findings relating to proactiveness are summarised in Figure 3.

FIGURE 3
DRIVERS, STRATEGIES AND OUTCOMES ASSOCIATED WITH PROACTIVENESS

Driver: CEO (Arthur)

Evidence:
- *"Arthur is a very good strategist, he is thinking forward all the time … and he is very connected in the industry so he will pick up a sniff and he will pick up an opportunity quite quickly" (Clint)*
- *"We are the first motor dealership in South Africa to be ISO accredited … we have got huge rain harvesting water tanks …" (Clint)*
- *"We use green products to wash our cars … We redid the lighting in the workshop … you have them all centralised and use them as you need them to improve utilisation of all the vehicles by having less" (Michael)*
- *"… so we recycle our old oil, our old metal, or our old plastics, papers … Rather develop your own people than bring in from outside. So we got an apprentice programme, we got a disabled learner programme, we got a sales cadet programme, there's a strong push to develop individuals … but in our industry we have been ahead of our, ahead of the game from an HR perspective" (Martha)*
- *"… the auditors said to me that of all the companies that he audits, we have the highest skills development spend out of any other company" (Martha)*
- *"I put together something called a KPI list … we rolled it out with the group …" (Michael)*

Strategies adopted:
- Environmentally conscious
- Develop employees internally
- Improve productivity

Outcomes:
- Cost savings
- Industry recognition
- ISO accreditation
- "Green" business practices

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Competitive aggressiveness

Over the years the TMG has directly and intensively challenged their competitors by buying them out, closing them down or incorporating them into the group's activities. In this way they have improved their market position and expanded their influence. The findings relating to competitive aggressiveness are summarised in Figure 4.

The TMG has adopted a clear differentiation strategy when competing. In striving to be different and ahead of competitors, their strategy has been to position themselves as being the *best* at everything and being *first* to do something. According to Arthur, "*we chose a long time ago, at my direction, that we would work on being different. So on differentiation we said right from the start we will differentiate in three ways: one is our people, two is our buildings and three is the equipment we use. We will run the business with the best computers, the best systems, the best equipment, the best buildings and employ the best people that we can possibly do in this area and that was the differentiation, that started the differentiation"*. The implementation of their strategy is also clearly described by Gavin who says, *"You come and visit me in this dealership, I want you to feel like a king and a queen. You must always feel different … people, hopefully, must greet you differently, must give you a warmer feel. My willingness to engage, my willingness to try and sort your problems out, my willingness to listen, all which must be different …"* Furthermore, they are *"known in the* [mother company] *world as the people who always tried things first …"*.

The group's differentiation strategy has paid off. As Gavin remarks, *"We are three years ahead of most dealers in the country … and offer a service better than any of their competitors"*. As Michael comments: *"… what we are doing here is benchmark compared to other dealers because no one has got a service reception or a process like we have"*. His comments are support by Gavin who says, *"… what we've tried to do is add on value items, so anyone can sell a car, but no one can offer the value that TMG can offer you"*. As such, although the actions of competitors are monitored, they do not focus on them but focus on their own strategy, on being different, being ahead of competitors and outperforming them. According to Arthur, *"I actually try not to look at my competitors, I watch … I'll go and see what's happening, but no, generally speaking I think we are more focused on doing our thing"*. Furthermore, Michael explains: *"… they strive themselves as always being one step ahead of everyone and they make a point of it"*.

The TMG has also continuously sought to embrace new non-traditional ways of competing in the industry. According to Arthur, *"we tried various means of selling cars, oh gracious me. From putting them in containers and encapsulating them with the story of the car to, oh, the selling methods we chose were different and we tried just about everything"*. Gavin gives another example: *"… it's going to be Polos, it's going to be selling them with a flower on top or something, so all those ideas of giving the boot away for free …"*.

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FIGURE 4
DRIVERS, STRATEGIES AND OUTCOMES ASSOCIATED WITH COMPETITIVE AGGRESSIVENESS

Driver: CEO (Arthur)

Evidence:
- *"I think the purchase of XX and then closing it, the purchase of YY and then moving it into our premises and the opening of the ZZ dealership … so we took them over and pulled them into the AA building …" (Michael)*
- *"Now we chose a long time ago, at my direction, that we would work on being different. So on differentiation we said right from the start we will differentiate in three ways: one is our people, two is our buildings and three is the equipment we use …" (Arthur)*
- *"Arthur's brief has always been, we want the best equipment, we want it to be cutting edge from a technology point of view … always adopted an approach to be different …" (Gavin)*
- *"… in your performance appraisal, he* [Arthur] *says, what have you done outside your normal job to do something different and take this company further and you actually have to give a written document … managers are told to be one step ahead, come with ideas, what have you done differently" (Michael)*
- *"We were known in the* [mother company] *world as the people who always tried things first …" (Arthur)*
- *"… they strive themselves as always being one step ahead of everyone and they make a point of it" (Michael)*
- *"He's always tracking them, what's going on and then staying one step ahead" (Michael)*
- *"Be ahead of the competition … We don't actually worry about our competitor … I won't just change my strategy because of their strategy … I believe we spend more money than most companies on research, we spend a lot of money on advertising research" (Gavin)*

Strategies adopted:
- Buy out competition
- Differentiation
- First movers
- Position as best (superior)
- Focus on own strategy
- Strong customer orientation
- Invest in marketing communication
- Invest in market research
- Creative marketing approaches

Outcomes:
- Industry leader (set the benchmark)
- Eliminated competition
- Culture of superiority (being the best)

Furthermore, all employees are expected to contribute towards the TMG being different. As Michael describes it, "*What Arthur does do at the end of the year, in your performance appraisal, he says, what have you done outside your normal job to do something different and take this company further and you actually have to give a written document, of which he returned ninety per cent of them and said, don't waste my time, think again …*". In addition, "*… managers are told to be one step ahead, come with ideas, what have you done differently*".

Their ability to compete aggressively is attributed to family ownership where decision-making does not need to go up the chain of command as in a corporate venture. This is

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described by Clint who says, *"… our ability to put something onto the ground fast, besides saving us a lot of time, it doesn't give our competitors too much breathing space"*.

Autonomy

At all levels, family and non-family employees working in the TMG are not only given the freedom to be creative, to push for ideas and to change current ways of doing things, but are also encouraged to do so. Individuals thus often show independence of actions in bringing forth ideas and carrying them through to completion. Employees are empowered to do their jobs and are able to make their own decisions within their scope of responsibility. Autonomy in terms of innovation is encouraged and rewarded.

Senior managers are particularly encouraged to act autonomously, to push for ideas and to change current ways of thinking. As Michael comments, *"Managers are given that leeway, not necessarily all the staff, but managers are told to be one step ahead, come with ideas, what have you done differently"*. Gavin goes so far as to say: *"I've got freedom as if I was a shareholder"*. For senior managers, reporting structures are flexible, debate is encouraged and failure is tolerated. As Gavin explains, *"… to get into Arthur's office if you're an operating manager or like myself, it's very easy … "* and *"… there's an element of allowing us to learn and cut our teeth and make the errors"*. The findings relating to autonomy are summarised in Figure 5.

FIGURE 5
DRIVERS, STRATEGIES AND OUTCOMES ASSOCIATED WITH AUTONOMY

Drivers:
- Current owners (Arthur and Clint)
- Financial director (Dealer principal, Gavin)
- Senior managers

↓

Evidence:
- *"So the resources would be made available and you would make it happen …" (Martha)*
- *"… there is a lot of faith given to employees when ideas are offered and authorised" (Martha)*
- *"Managers are given that leeway, not necessarily all the staff …" (Michael)*
- *"I've got freedom as if I was a shareholder" (Gavin)*
- *"… so at times we are quite vigorous in terms of the way we debate things, so nothing is sacrosanct" (Clint)*
- *"… but to get into Arthur's office if you're an operating manager or like myself, it's very easy …" (Gavin)*
- *"Absolutely, I won't come down hard on people who fail. In fact, just the opposite" (Arthur)*
- *"… so there's an element of allowing us to learn and cut our teeth and make the error" (Gavin)*

↓

Strategies adopted:
- Openness to ideas
- Failure is tolerated
- Autonomous thinking and debate are encouraged
- Open-door policy for senior managers
- Access to resources provided

→

Outcomes:
- Open communication
- Idea generation
- Independent thought
- Culture of learning

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DISCUSSION

From the findings of this study it is evident that an entrepreneurial mindset exists among the members of the business family investigated. The attitudes, values and beliefs that orientate the family members towards pursuing entrepreneurial activities stem from the founder, and have been passed down to successive generations. As suggested in the literature, an entrepreneurial mindset in every generation is key to the success of a family business and its survival across generations (Cruz and Nordqvist, 2012: 33; Nordqvist and Zellweger, 2010). This entrepreneurial mindset is evident in the entrepreneurially orientated manner in which both family and non-family members work in the family business, and in the operation and existence of the TMG.

According to Lumpkin and Dess (1996: 142), innovativeness is defined as the “tendency to engage in and support new ideas, novelty, experimentation and creative processes that may result in new products, services or technological processes”. Given this definition, the findings show that the TMG encourages and implements innovation. Innovativeness is mainly driven by Arthur, but also by the financial director and the senior managers. Specific strategies include recognising the need for innovation and encouraging creativity at all levels in the organisation. Creativity is specifically expected at managerial level; employing the right people who are capable of creative thinking is seen as vital. Once established as feasible, new ideas are implemented. These strategies have led to an enthusiasm for new ideas and as a result, new ideas are constantly forthcoming from all levels of the organisation. The findings of this study appear to contradict the views of Short *et al*. (2009:10) who contend that family dominance often inhibits innovativeness in a family business, but support the position of Lumpkin *et al*. (2010:248) who propose that family businesses may be more tolerant of the experimentation that accompanies innovativeness.

It is evident that a moderate to conservative risk-taking profile in terms of resource commitments has prevailed in the group over the tenure of the second generation. Arthur has the greatest influence on the approach to taking risks by the group. Although the business is not described as risk-averse as such, its strategies when taking risks include researching and analysing decisions carefully and adopting a more cautious or conservative approach. The consequence of this approach is that losses have been avoided, but opportunities have also been lost. The findings of this study tend to support the literature which contents that family businesses are generally conservative and risk-averse in their orientation (Casillas *et al*., 2010: 27; Short *et al*., 2009: 18).

From the findings of this study it is evident that the TMG adopts a forward-looking approach in that it introduces new products and services ahead of competition. Strategies of the TMG which are associated with being proactive include being environmentally conscious and adopting numerous “green” initiatives, developing human resources from within the business and improving productivity at all levels of the organisation. These strategies have led to both costs saving for the group and recognition in the industry. As a visionary and strategist, Arthur drives proactiveness in the group but proactive initiatives are also forthcoming from third generation family members. The findings of this study support Casillas *et al*. (2010: 27) who contend that proactive behaviour is enhanced when organisational structures are such that they combine ownership and management.

Lumpkin and Dess (1996) as cited in Rauch *et al*. (2009: 764) define competitive aggressiveness as “the intensity of a firm’s efforts to outperform rivals and is characterised by a strong offensive posture or aggressive (forceful) responses to competitive threats/actions”. Certo *et al*. (2009: 322) define competitive aggressiveness as “establishing a culture of unconventional tactics rather than head-to-head competition with incumbents”. Given these definitions, several strategies of the TMG can be identified as being competitively aggressive. In addition to directly and intensively challenging their competitors by buying them out, closing them down or incorporating them into the group’s activities, other competitive aggressive strategies include striving to be different (differentiation), being the first mover and being ahead of competitors, positioning oneself as being the *best* at everything and being *first* to do something. Even though the TMG observes what its competitors do, it is more focused on implementing its own strategies. TMG employees treat their customers as “kings”, and large sums of money are spent on advertising. Furthermore, creative advertising and new non-traditional ways of competing in the industry are implemented. Although driven by Arthur, all employees are expected to contribute towards the TMG being the best, being ahead of competitors and being different. Their ability to compete aggressively has been attributed to family ownership and has resulted in the TMG being recognised as an industry leader, eliminating competition and developing a culture of superior service. The findings relating to the TMG concur with Landström *et al.* (2008: 98) and Martin and Lumpkin (2004) who found that among family businesses, competitors are not often confronted head-on and little attention is given to competitors within the market. However, the findings appear to contradict the view of Landström *et al.* (2008:108) who contend that competitive aggressiveness is generally less important in family businesses than are the other dimensions of EO. The various competitive aggressiveness strategies implemented by the group attest to this.

Autonomy in the TMG is driven by both Arthur and Clint (the current owners), the dealer principals and the senior managers. Several strategies are adopted to encourage autonomy among both family and non-family employees at all levels of the organisation. Examples of these strategies are openness to new ideas and a tolerance for failure, the encouraging of autonomous thinking and debate, flexibility and an open-door policy for senior managers, as well as the provision of support and resources for the implementation of new ideas. These strategies have led to effective communication and a culture of learning, independent thought and idea generation existing in the family business. Like most family businesses (Landström *et al.*, 2008: 108), the TMG shows numerous signs of allowing and encouraging autonomous actions in its business.

In summary it can be concluded that all dimensions of EO are evident in the activities and strategies of the TMG. Landström *et al.* (2008: 108) report that family businesses are more likely to show signs of proactive, innovative and autonomous activities, than they are to show signs of risk-taking and competitive aggressive activities. The findings of this study concur with those of with Landström *et al.* (2008: 108) in terms of proactive, innovative, autonomous and risk-taking activities, but not in terms of competitive aggressive activities. By contrast, the TMG shows ample evidence of activities where competitors are directly and intensively challenged. The importance of EO to business success and long-term sustainability is well documented (Zellweger and Sieger, 2012: 67) and given the growth and financial performance TMG has experienced over the last few years as well as its financial security and reputation among all stakeholders, it is evident that the EO strategies implemented by the TMG are paying off.

LIMITATIONS

A limitation of this study is that it focused on a single case study, the TMG, and on the EO components of the STEP research framework only. “To fully understand the common themes and practices that prevail in family business that survive across generations as well as industrial and societal changes” (Sharma, 2014), in addition to EO practices, the context in which the family business operates, the various external mediating factors and the ‘familiness’ resource pools should also be investigated. These other aspects of the STEP framework may provide insights and context into the EO strategies adopted.

CONTRIBUTIONS AND MANAGERIAL IMPLICATIONS

Despite these limitations, the study makes a contribution to both theory and practice. In terms of theory the study has responded to several calls (Melin *et al.,* 2014; Mahler, 2008) for more qualitative studies in the field of family business and has also added to the ever-increasing global body of case study material available to STEP project members around the world. To date, very few cases from Africa exist in the global STEP project database, limiting the ability of researchers to undertake cross-cultural comparisons and identify best practices for family businesses in emerging markets. From the perspective of practice, the findings of this study provide insights for consultants to family businesses, as well as for family business owners themselves, into successful EO strategies.

Although one could argue that findings based on a single case study from one specific industry (motor industry) are not representative of or applicable to all family businesses, the findings of this study do have implications for all family business owners. Firstly, the dimensions of EO can be seen by some, especially those in business, as vague theoretical concepts. This study describes these dimensions in terms of evidenced based strategies that provide all family business owners with examples of how to practically be entrepreneurially orientated in the management of their family businesses. Secondly, family business owners should take cognisance of the potential outcomes associated with the EO strategies employed, as it is these outcomes that could contribute to enhancing their business's success.

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