Process tracing: a methodological proposal for a practice approach to family entrepreneurship

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Abstract

Purpose – Following the lead of neighboring fields such as strategy and organization studies, entrepreneurship is gradually joining in the adoption of a practice perspective. Entrepreneurship as practice (EaP) is thus a nascent domain of investigation where the methodological debate is still unsettled and very fluid. In this paper, the authors contribute to this debate with a focus on family entrepreneurship.

Design/methodology/approach – The authors develop a conceptual paper to discuss what it entails to look at family entrepreneurship through a practice lens and why it is fruitful. Moreover, the authors propose a research strategy novel to the field through which such investigation can be pursued, namely process tracing, and examine its inferential logic.

Findings – Process tracing is a strategy of data analysis underpinned by an ontology of causal mechanisms. The authors argue that it complements other practice methods by inferring social mechanisms from empirical evidence and thereby establishing a connection between praxis, practices and practitioners.

Practical implications – Process tracing helps the articulation of an "integrated model" of practice that relates praxis, practices and practitioners to the outcome they jointly produce. By enabling the assessment of impact, process tracing helps providing prima facie evidentiary grounds for policy action and intervention.

Originality/value – Process tracing affinity with the practice perspective has been so far acknowledged only to a limited extent in the social sciences, and it is, in fact, a novel research strategy for the family entrepreneurship field.

Keywords Family entrepreneurship, Practice perspective, Praxis, Practices, Process tracing

Paper type Conceptual paper

1. Introduction

Family entrepreneurship is a research domain of growing interest that focuses on the entrepreneurial attitudes and behaviors emerging at the interface of individual family members, the entrepreneurial family and the family firm (Bettinelli *et al.*, 2017; Minola *et al.*, 2021). Recently, and following the broader *practice turn* in the social sciences (Schatzki *et al.*, 2001), family entrepreneurship scholars have acknowledged the relevance of further investigating the actual processes and practices through which family members, entrepreneurial families and family firms do entrepreneurship, that is family entrepreneuring.

The shift from family entrepreneurship to family entrepreneuring entails the adoption of a practice lens (Champenois *et al.*, 2020; Johannisson, 2011). Central to this perspective is

the notion of social practices conceived as arrays of activity centrally organized around "shared practical understanding" (Schatzki, 2001, p. 11). As such, social practices are embedded in the situated and collective knowledge that actors acquire and use in the social and organizational context which they inhabit (Rouleau and Cloutier, 2022). The practice perspective finds its roots in the praxeology developed by social theorists of the caliber of Bourdieu (1977, 1990), Giddens (1979, 1984), Foucault (1977) and Schatzki (1996, 2003). More recently, it has reached out to fields such as organization studies and strategic management where it is by now quite firmly rooted (Feldman and Orlikowski, 2011; Vaara and Whittington, 2012; Whittington, 1996). Entrepreneurship studies, however, are latecomer to the practice turn and still timid in the adoption of a practice lens even though the payoff of such a perspective is arguably high for the field (Johannisson, 2011; Thompson *et al.*, 2020).

Such reluctancy might be due to the fact that the adoption of the practice perspective carries with it ontological as well as methodological implications. On the one hand, a practice lens implies an "ontological commitment to the primacy of social practices" (Vaara and Whittington, 2012, p. 289); consequently, it requires a reconceptualization of phenomena central to the field. On the other hand, to pursue a practice agenda, there is a need for research strategies that are coherent with the underlying ontological commitment. As a matter of fact, the methodological debate in entrepreneurship as practice (EaP) is gradually developing, and methodological innovation is warmly encouraged (Champenois *et al.*, 2020). Hence, how to study family entrepreneuring still remains to some extent an open question.

In this article, we contribute to this debate, and after recalling the origin of the practice perspective to entrepreneurship, we first discuss what it entails to look at family entrepreneurship through the practice lens. We argue that the shift toward family entrepreneuring entails focusing on the actual doings and sayings of agents within the entrepreneurial family and reconstructing the nexus of practices in which entrepreneurial activity is embedded. Second, we elaborate on the reasons why such a shift is worthwhile in family entrepreneurship, namely expanding the range of empirical dimensions under investigation, generating knowledge of use for practitioners and overcoming the agency–structure dualism. Third, we offer a preliminary answer to the question of "how to study family entrepreneuring?", by proposing process tracing as a fruitful research strategy in this respect. Specifically, we argue that, by reconstructing social mechanisms operating in particular contexts, process tracing guides the inference from the actual doings and sayings of entrepreneurial agents to the nexus of practice in which their activities are embedded. In so doing, it helps advancing a practice perspective to family entrepreneurship.

2. The origin of the practice perspective to entrepreneurship

The practice perspective investigates human activity as embedded in social *practices*. Practices are "accepted ways of doing things, embodied and materially mediated, that are shared between actors and routinized over time" (Vaara and Whittington, 2012, p. 287). This definition includes three main features of a practice. First, "embodied" refers to the intertwinement between the form of human activity and the character of the human body, i.e. "bodies and activities are constituted within practices" (Schatzki, 2001, p. 11). Second, practices always involve nonhuman entities, such as the material layout in which a certain activity occurs, or the discursive resources that make them possible. Finally, practices depend on shared skills and understanding (i.e. a practical understanding); in other words, they are the result of "the successful inculcation of shared embodied know-how" (Schatzki, 2001, p. 12).

According to this perspective, social action emerges within a macro-institutional context, a "field" (Bourdieu, 1990), it relies on it, it is shaped by it while at the same time it contributes to recursively defining the field itself. In this respect, the practice perspective clearly

distinguishes itself from the methodological individualism or the reductionist tendency that explains social behavior by exclusively focusing on the actions of one individual or group of individuals (Ylikoski, 2016; Zahle, 2016).

While sharing these features, it must be acknowledged that the practice perspective is a broad and fragmented intellectual landscape which translates into three ways of studying practice (Feldman and Orlikowski, 2011): an empirical focus on how people act (the "what" of a practice lens); a theoretical focus on practice which is concerned with explaining everyday activity (the "how" of a practice lens) and finally, a philosophical focus (the "why" of a practice lens), a distinct social ontology according to which the social field is conceived as "a field of embodied, materially interwoven practices centrally organized around shared practical understandings" (Schatzki, 2001, p. 12).

Despite its remote origins (Wittgenstein, 1951; Heidegger, 1962), it is only in the last decades that the practice perspective has proliferated across various field so that we can speak of a "practice turn" in the social sciences (Schatzki *et al.*, 2001). Entrepreneurship is not an exception to this pattern. In fact, EaP has been recently acknowledged as an emerging research field (Champenois *et al.*, 2020; Thompson *et al.*, 2020), and the term "entrepreneuring" has been coined to conceptualize "entrepreneurship as a practice, a creative and social/ collective organizing process that materializes in a venture" (Johannisson, 2011, p. 137). According to EaP, the unit of analysis should be what entrepreneurs actually think and do, that is "all the meetings, the talking, the selling, the form filling and the number-crunching by which opportunities actually get formulated and implemented" (Thompson *et al.*, 2020, p. 247). Narratives, discursive practices, resources acquisition/use, gendered practices and networking are the most studied entrepreneurial practices so far, and studies within such a perspective look at women and social entrepreneurs as examples of relevant actors (Champenois *et al.*, 2020).

3. Towards a practice perspective to family entrepreneurship: the entrepreneuring family

Family entrepreneurship represents a domain of recent and growing interest that finds its roots in early 2000s works resulting from the intense dialogue of management, entrepreneurship and sociology scholars (Rogoff and Heck, 2003; Aldrich and Cliff, 2003; Heck and Mishra, 2008; Heck *et al.*, 2008). A comprehensive overview of the research field has been recently offered in Minola *et al.* (2021). The concept of family entrepreneurship can be, in general terms, ascribed to all entrepreneurial behaviors, such as corporate and transgenerational entrepreneurship [1], occurring at the interface between two or more of these elements: the individual, the family and the family firm (Bettinelli *et al.*, 2014). For example, studies have looked at how the family influences its members' entrepreneurial behavior by focusing on socialization and imprinting of values (Jaskiewicz *et al.*, 2015) or on role modeling (Mungai and Velamuri, 2011). The influence of individuals on family firms has leveraged on studies on personality (Zhao *et al.*, 2010) and leadership styles (Ensley, 2006). Furthermore, family characteristics, such as its developmental dynamics, have been examined to understand a family firm's entrepreneurial behavior (Minola *et al.*, 2016). We suggest that the adoption of a practice perspective might further deepen the understanding of how these different elements (i.e. the individual, the family and the firm) interplay.

The adoption of such a perspective to family entrepreneurship first and foremost entails the study of entrepreneurial phenomena as they unfold *on the ground*. This brings the researcher's attention to how actual individuals act, speak and relate within actual families when doing entrepreneurship and to the practices constituted through their daily interactions. The shift to practices as the fundamental constituents of family entrepreneurship has vast repercussions on the conceptual building blocks of this area of

study. Consider for instance the entrepreneurial family, which is arguably a central construct in the inquiry on family entrepreneurship and, more in general, family business (Aldrich and Cliff, 2003; Aldrich *et al.*, 2021). The entrepreneurial family is typically defined as a "family that runs one or more businesses and that has an intent to grow these businesses with the family as the foundation" (Nordqvist and Melin, 2010, p. 221; Habbershon and Pistrui, 2002). The centrality of such a construct in this area of study depends on the fact that the family is seen as the engine of entrepreneurial initiatives that have the potential to ensure the survival and success of the business over time and across generations.

The adoption of a practice perspective entails abandoning the view of the entrepreneurial family as an entity provided with certain, more or less fixed, characteristics such as cognitive predispositions, affective inclinations or behavioral tendencies. Rather, it entails defining the entrepreneurial family through the *very* activities in which the family engages daily and ordinarily. It is what it does that makes the family an entrepreneurial one. And it remains so insofar as it keeps on doing and saying certain things in certain ways. Through this shift in perspective, the entrepreneurial family becomes an *entrepreneuring* family, [2] a family constituted by the very practices that it enacts. Hence, studying family entrepreneurship through a practice lens means focusing on the actual doings and sayings of entrepreneurial agents for reconstructing the nexus of practices in which the entrepreneurial activity is embedded.

4. Motivation for a practice approach in the study of family entrepreneurship

Scholars highlight several reasons why a practice perspective might be welcome in fields such as organization studies, strategic management and entrepreneurship (Feldman and Orlikowski, 2011; Thompson *et al.*, 2020). Some of these reasons are particularly salient for family entrepreneurship.

First, the adoption of the practice perspective significantly expands the range of empirical dimensions brought under the scientific lens. Such expansion is reached by the relational ontology lying at the core of the practice approach. The basic unit of analysis for a relational ontology is neither individual entities nor structural whole but the dynamic space where interplay, interrelations and interactions unfold (Tatli *et al.*, 2014). As noticed by Kyriakidou and Ozbilgin (2006), relationality in social settings can be encompassed in a scientific study to different degrees. Relationality can be treated as a contingency factor having an impact on the processes and outcomes; alternatively, it can inform methodological choices leading to the adoption of methods that explore dyadic and group relationships amongst individuals in given settings. At maximum, relationality orients the whole research design and leads to conceptual revision and the formulation of new concepts that are explicitly informed by a relational ontology (e.g. Bourdieu's notion of *field* or *habitus*). The most direct implication of a "novel" ontology is that the domain of a scientific field accordingly expands from an empirical, theoretical and methodological point of view. Thompson *et al.* (2020), for instance, argue that entrepreneurship has typically focused either on individual or organizational level phenomena thus marginalizing other, potentially relevant, units of analysis. The adoption of such a relational ontology brings practices to the forefront, that is the "actual work of entrepreneurship" (Thompson *et al.*, 2020, p. 250), especially in context such as the family business where the relational dimension is indisputably central.

Second, the practice perspective is fruitful for an inquiry into actionable knowledge, that is knowledge of use for practitioners (Jarzabkowski and Wilson, 2006). Generally speaking, because it pays attention to the minute details of how things get done on the ground, practice research can formulate principles that explain and guide action and thus provides insights for envisaging and, eventually implementing, levers for change (Feldman and Orlikowski, 2011). In particular, EaP closely attends to the world of practitioners by studying decision-making

processes as well as the way in which such decisions are informed by practices of knowledge formation and use (Vaara and Whittington, 2012). In this regard, practice research has significantly contributed to the inquiry into the relationship between (academic) theory and practice (Jarzabkowski and Wilson, 2006; Tsoukas and Knudsen, 2002). Jarzabkowski and Wilson (2006) suggest that questions about whether strategy theory is in fact actionable, as typically addressed, stem from a view on the relationship between theory and practice that is way too simplistic. A closer look to the practice shows that theory is hardly, if ever, directly applied. On its way to the world of practice, theory is first translated into "knowledge artefacts" (p. 355), that is principles, models and frameworks. Second, knowledge artefacts are appropriated by practitioners and adapted for responding to specific situations in a way that is independent from the theory bases from which they first originated. These findings have profound implications not only for how to assess the relevance of theory but also for how to steer theory in a direction that increases its relevance. The richness of insights the practice approach can provide in this regard is potentially utmost beneficial for an area such as family entrepreneurship where the need for actionable knowledge is a prominent concern (Poza *et al.*, 1998; Sharma *et al.*, 2012; Vought *et al.*, 2008).

Finally, the relational ontology discussed above enables overcoming dualisms that have been pervasive in the social sciences such as subjective versus objective, determination versus free will and, particularly, agency versus structure (Vaara and Whittington, 2012). In particular, transcending the opposition between the individual, on the one hand, and the social structure, on the other hand, is particularly attractive, we argue, for family entrepreneurship. Indeed, from a theoretical point of view, the family embeddedness perspective from within the field of family entrepreneurship tries to steer research in a similar direction (Aldrich and Cliff, 2003; Zellweger *et al.*, 2019). This approach acknowledges that, when considered in a family context, entrepreneurial action is embedded in a field of social and, particularly, familial ties which needs to be considered for explaining entrepreneurial behaviors and outcomes. In this view, agency is not denied but is somehow complexified by acknowledging, on the one hand, the plurality of actors that partake in the entrepreneurial endeavor, and, on the other hand, the variety of roles and relationships in which their acting are embedded. In terms of structure, the double affiliation, to the family business and to the entrepreneuring family, shapes the modality of relating and acting in which entrepreneurial agents engage and concur to the formation of practices that are idiosyncratic to the family context. The practice perspective exhorts researchers to bring the family embeddedness view to the extreme consequences by establishing a dialectic between the agents and the social structure in which they are embedded. How this can be done in family entrepreneurship, however, remains to be seen.

5. Process tracing as a research strategy for a practice approach
Reviews of the practice literature in fields such as strategic management (Vaara and Whittington, 2012) and entrepreneurship (Champenois *et al.*, 2020) display a plethora of techniques that, while attuned to a practice ontology, respond to the needs of an approach that, first and foremost, requires the observation and recording of real-time experience and action. They primarily include participant observation, ethnographic and quasiethnographic research, video and audio recording, semi-structured and open-ended interviews, and so on. From a practice perspective, these techniques have a comparative advantage qua data collection procedures that enable investigators to stay close to "what happens" in the field (Champenois *et al.*, 2020, p. 291). As such, they are particularly useful for an "empirical" approach to practice that is mainly concerned with documenting everyday activity in both its "routine and improvised form" (Feldman and Orlikowski, 2011, p. 1240). The practice perspective, however, also aspires to develop a "theoretical approach" by explaining the

dynamics of everyday activity and the "logic according to which practices are produced, reinforced and changed" (2011, p. 1241).

The issue can be framed slightly differently by appealing to the distinction between *praxis, practices* and *practitioners*, the three pillars of the practice perspective (Reckwitz, 2002; Whittington, 2006). While closely connected conceptually, from an epistemic point of view, *praxis*, *practices* and *practitioners* are set apart by an inferential leap. By referring to "actual activity, what people do in practice", *praxis* is the most concrete and directly observable construct in the triad. *Practice* and *practitioners* lie instead at a higher level of abstraction. To qualify as *practice*, actions need not only to exhibit patterns but also must be carriers of social meaning. Establishing the existence of a practice thus involves both empirical analysis as well as an interpretive act. The concept of *practitioners* is logically subordinate; hence dependent on that of *practice*, *practitioners* are in fact those members of the social group "who do the work of making, shaping and executing" practices (Whittington, 2006, p. 619). Since they enable proximity to action in real time, and hence direct or quasidirect observation, methods such as participant-observation, ethnography or yet audio–visual recordings are more aptly seen as techniques for documenting *praxis*. How to analyze these data and inferring *practices* and *practitioners* from *praxis*, however, remains often implicit in these methodologies. We argue below that process tracing, qua strategy of data analysis underpinned by an ontology of causal mechanisms, helps guide and formalize this inferential leap.

Process tracing started being theorized as a method on its own in the 70s when it was conceptualized as a strategy for tracking causal processes (Bennett and Checkel, 2015; Trampusch and Palier, 2016) [3]. Specifically, it was initially meant to trace decision-making processes in domains such as cognitive psychology and international politics by following up the cognitive steps through which informational inputs are translated into decision outcomes (Ford *et al.*, 1989; George, 1979; George and McKeown, 1985). Since then, the scope of process tracing applications has considerably broadened and includes a widening spectrum of disciplines in the social sciences such as political science, historical institutionalism, sociology and political economy (Falleti, 2016). Nowadays, scholars converge in regarding it as a battery of methods, rather than a single method, underpinned by different inferential logics, being process tracing applied both in a deductive and an inductive fashion (Trampusch and Palier, 2016). Despite these differences, process tracing is jointly regarded as a within-case strategy of causal analysis. Its methodology is tied to the ontological assumption that social phenomena are brought about by causal mechanisms and to the epistemic assumption that the identification of such mechanisms permits the explanation of the phenomena of interest.

Process tracing affinity with the practice perspective started being acknowledged lately, concomitantly to the upsurge of the practice turn in the social sciences. Scholars of political sciences, who have been forerunners in the adoption and conceptualization of process tracing, have also been the first to start a systematic reflection in this respect (Checkel, 2021; Norman, 2015; Pouliot, 2015). Process tracing is regarded as particularly suitable for a practice perspective when employed *inductively* to infer social mechanisms from empirical evidence. Broadly understood, mechanisms are complexes of individuals organized in such a way that from their actions and interactions causal processes unfold leading to relevant outcomes (Little, 1991, 1995; Schelling, 1999; Steel, 2004, 2007; Stinchcombe, 1991) [4]. More specifically, *social mechanisms* result from (or consist in) the interplay between three main elements: individuals categorized as members of a social group, defined in turn by a salient position its members occupy vis-à-vis the others in the relevant social whole (e.g. society, community or family). The second element is represented by the practices in which individuals engage, whose meaning stems from the socially organized context in which these practices are enacted. Finally, the third element refers to the organization of the different parts in the social

whole, in virtue of which practices causally interconnect in the particular context. By orchestrating evidence of social mechanisms and their operation, process tracing articulates unfolding processes which eventually explain relevant social outcomes.

In the social sciences, process tracing inference has permitted the explanation of phenomena as various as social revolutions (Skocpol, 1979), regional advantage (Saxenian, 1994), Western European growth (Acemoglu *et al.*, 2005). Here, we illustrate how this research strategy works with the help of *Coral Gardens and their Magic,* the study by cultural anthropologist Bronislaw Malinowski on Trobriand Islanders published in 1935. The masterpiece by Malinowski has been acknowledged as an exemplary application of process tracing *ante litteram* as his extensive ethnographic notes (it is a two-volume work of about 1,000 pages) form the empirical basis through which Malinowski reconstructs several social mechanisms at work in Trobriand society (Steel, 2004, 2007). The study is also paradigmatic in that it highlights starkly the complexity of process tracing inference being set in a context foreign to the investigator and culturally distant from him. Finally, it arguably has some thematic affinity with family entrepreneurship which makes it particularly relevant here. As will become apparent in the discussion below, social practices among Trobrianders have strong economic implications and are deeply embedded in a family system; a system that, as we shall see, turns out to be quite intricate and unconventional.

To characterize process tracing *modus operandi*, we describe it from an analytic point of view as a two-stage inferential procedure. Process tracing starts with documenting social action, and to this end, it avails of techniques of data collection such as fieldnotes, interviews, video and audio tools, but also secondary texts such as diary and chronicles. What these methods enable, in fact, is the direct or indirect observation of *praxis* by keeping track of who did, or said, what, when, where and how. This piece of information we refer to as causal-process observations (Collier, 2011; Collier *et al.*, 2010) correspond to actions and events enriched with the description of the particular circumstances (i.e. temporal, spatial, material, symbolic, etc.) in which they are performed and occur. As shown by the excerpt below, however, moving from *praxis,* the actual activity as it unfolds in real life, to *practices* and *practitioners* requires a first inferential leap.

> So far we have merely watched throngs of people forgathering, carrying the fruits of their labour, not to their own village but to quite a different one, displaying them in this latter, and offering them on the part of someone to someone else. We have vaguely divined that there is some system in this apparent confusion, that there is a giver and a recipient; that among the helpers and the carriers, the measurers and the admirers, there obtain certain sociological relations as between one group and another. But what are these relations? What forces move these people, what incentives make them toil and pant and find satisfaction in their work? Above all, what motive can make one man offer the best part of his offer to another? These questions still remain unanswered and the answer is neither simple nor obvious. Traditional decrees are framed into a complex system of economic, legal, and sociological rules, which at first appear to us almost perverse in their complexity and obliqueness. (Malinowski, 1935, p. 188)

Practices are carriers of meaning that depends on the particular social context. As such, their meaning cannot be elicited through the "mere observation" of patterns of actions, since a repeated action *per se* (e.g. people forgathering, carrying the fruit of labor, offering them and so on) does not amount to a practice. At the core of the inferential leap from *praxis* to *practices* and *practitioners* lies the interpretation of the set of activities actually observed in the light of the social context where the *praxis* unfolds. To this effect, process tracing draws on and orchestrates different strands of evidence to reconstruct the "complex system" which Malinowski refers to. In the case at hand, the system encompasses two principles of filiation: the household, featuring the husband as the head of the family, composed by the father, the mother and the children; and the "real kindred", featuring instead the wife's brother as the

head of the genealogical unit, composed by the mother, her children and her brother(s) [5]. The real kindred is, in fact, the most important unit in terms of legal, economic and sociological implications (Malinowski, part I, Sec. 9). In light of this principle, what appears at first as the forgathering, carrying, displaying and offering of yams by people across villages is then interpreted as *urigubu*, the practice whereby brothers (the *practitioners*) provide the best part of their harvest as sustenance to their sisters' livelihood (the *practice*). As Malinowski himself points out below, failures to interpret *praxis* in the light of the social context leads to either trivial or incorrect inference:

> When I first came to Omorakana in June, 1915, I not unnaturally started with the assumption that the harvest produce given to the chief was a 'tribute' from his subjects. I also received the impression that this tribute was given as from village communities and not from individuals. [The investigation, however, led me to understand that] the *urigubu* is the duty of one individual to another, in virtue of their relationship by marriage. *Urigubu* is not a tribute, and it amounts to a tribute only in that it is integrated over a whole district through the chief's polygamy [...] I was made understand that the enormous gifts received by the chief are marriage contributions and that they are of the same nature as those given by every man to his sister's husband for the maintenance of her household. (1935, p. 408)

Besides disclosing the peril of mistaken inference, the passage above reveals another facet of process tracing. It incidentally hints to the second inferential step in which process tracing engages, that is disentangling the chain of causation through which practices are interconnected in the particular context. As Pouliot observes (2015), the social context sheds light not only on the meaning of practices but also on their generative power, which from such a context depends: "practitioners react to what a given set of actions *counts as*, in the current situation, with related practices that structure the interaction and *cause* practitioners to do a number of things which they may not have done otherwise" (2015, p. 242). It is in virtue of such a generative power that practices trigger a chain of causation leading to relevant social outcomes. In the case at hand, in virtue of their polygamy, chiefs amass a considerable number of yams. As all other commoners they receive yams from each of their wives' brothers and, in the good old days, used to have tens of wives [6]. Recognizing such an offering as *urigubu*, chiefs react to it accordingly. While having the power to accumulate agricultural produce, they are in fact the ones who have both the right and duty to use this accumulated wealth effectively:

> At the chief's bidding, objects of wealth are produced, canoes constructed, large storehouse and dwellings built. Again he is the organizer of big enterprises. Finally the wealth which he accumulates, or such a wealth as is produced by means of this accumulated food, he can use to organize war, to pay a sorcerer for killing a man by witchcraft, or even to pay a man for spearing an offender [...] In the long run, all the wealth accumulated by him flows back to his subjects. This pooling and reapportionment, however, is not a mere idle play of changing hands. In the course of it, some wealth becomes transformed into permanent objects, and again a great many events and institutions in tribal life are organised by this process of concentration and redistribution. It is this process which allows for industrial specialization as exists. It is this process which makes wealth an instrument of political organization (1935, p. 47).

To sum up, starting from the documentation of praxis, process tracing leads to the articulation of social mechanisms constituted by practitioners, practices and their social organization. By modeling how practices performed by practitioners causally interlock in the field, process tracing eventually explains social outcomes. The inference consists in the first place in grouping particular agents acting in context into relevant social categories – in Malinowksi case, these are brothers, chiefs and sisters' households – and in interpreting the practice the agent enacts *qua* member of the relevant category. In Malinowski case, individuals who are observed conferring yams to other members of the community do so *qua*

brothers-in-law enacting *urigubu*. Second, social practices and groups are arranged in a social structure by examining their relations and interconnectedness, in virtue of which spatial–temporal processes unfold thereby leading to observed outcomes. In Malinowski case, the *urigubu* leads to the accumulation of wealth among Trobriand chiefs and, eventually, to undertake public endeavors and industrial specialization in Trobriand society.

The inferential leap from observed *praxis* to *practices* and their causal interconnection involves the shift to a higher level of abstraction through a form of *causal-mechanistic reasoning*. This type of inference is the hallmark of process tracing and distinguishes it from other forms of qualitative inquiry. If compared to methods typically employed in the practice approach such as participant observation, ethnography, interviews and audio and video recording, process tracing is more appropriately understood as a strategy for data analysis than data collection. Indeed, it is a strategy for analyzing and orchestrating evidence obtained through the methods listed above and, in this sense, it is not alternative, but rather complementary to them. When used in tandem with such methods, its specific contribution lies in formalizing the interpretation of evidence along the lines of a causal mechanistic model whereby *praxis*, *practices* and *practitioners* are related in a way that is context-dependent and conducive to particular social outcomes. If compared instead to qualitative research more broadly understood, it stands out as a "hybrid methodology" (Pouliot, 2015) that straddles the line between interpretivism and positivism. Causal mechanistic reasoning as underpinned by an ontology of practice, in fact, implies both the interpretation of social meaning of which practices are carriers as well as the analysis of the causal connection between practices that stems from such a meaning and its generative power.

6. The significance of process tracing for family entrepreneuring
Several features of process tracing make it an attractive method for furthering the adoption and implementation of a practice approach to family entrepreneurship.

First, process tracing is a within-case research strategy concerned with the in-depth investigation of *situated* processes and mechanisms that account for the phenomena's specificity and uniqueness. To put it differently, process tracing focuses on particulars rather than generals. In this sense, it is consistent with a practice ontology that demands attention to the materiality and the "site" of social phenomena (Schatzki, 2003). In the study of family entrepreneurship, this would respond to the demand voiced by several scholars for situating the family in the historically relevant context rather than treating it as an a-historical entity (Aldrich and Cliff, 2003; Sasaki *et al.*, 2019; Soleimanof *et al.*, 2018). As recent studies have demonstrated, social, economic and cultural trends have changed gender stereotypes, norms governing the division of labor within the family and the way in which income is earned and used. These trends have an impact on processes such as family formation and evolution across time and on the very idea of what constitutes a family. Studying family entrepreneurship under process tracing guidance thus means rooting entrepreneurship in processes investing the family that are spatially and temporally situated (Aldrich *et al.*, 2021).

Furthermore, situatedness coupled with the *mechanistic reasoning* around which process tracing organizes evidence and builds inference provides a methodological anchoring for the family embeddedness perspective to family entrepreneurship. As argued above, the family embeddedness perspective recognizes that actors are rooted in webs of social and family relations and that their actions are deeply informed by this context (Aldrich *et al.*, 2021; Dacin *et al.*, 1999; Zellweger *et al.*, 2019) [7]. On its part, the practice approach has been shifting from a focus on the habits and tacit knowledge of actors to the question of how and why actors get things done in complex settings (Gartner *et al.*, 2016; Rouleau and Cloutier, 2022). It thus calls for attention to the way in which and the reasons why entrepreneurial action engages with, is transformed by and in turn transforms the context in which it unfolds. In this respect, the

family embeddedness perspective and the practice approach speak to each other. By facilitating the identification of social mechanisms, process tracing builds a link between the agent and its social context thus enabling the fulfillment of a research agenda informed by a practice approach and a family-embeddedness perspective.

Thirdly, process tracing pays attention to *temporality* by reconstructing what are, in fact, spatial–temporal processes. As such, it well resonates with the dynamic and processual dimension characterizing the practice ontology (Kouamé and Langley, 2018; Vaara and Whittington, 2012; Whittington, 2006). The processual dimension is particularly apparent in phenomena that typically concern the field of family entrepreneurship such as the temporal evolution of the family and its business, the daunting issue of longevity and of family business survival over time (De Massis *et al.*, 2014; Sharma *et al.*, 2014). It has been argued, for instance, that the life cycle of the family, that is the subsequent stages of development throughout which a business family moves over time, is related to the family predisposition to engage in entrepreneurial practices; predisposition which varies depending on the specific stage of development in which the family finds itself (Minola *et al.*, 2016). Furthermore, the relevance of the temporal dimension not only manifests in the attention paid to the unfolding of phenomena over time; it is actually part and parcel of some foundational concepts in the field, which inherently possesses a processual dimension. Consider, for instance, the very idea of transgenerational entrepreneurship. Transgenerational entrepreneurship does not simply entail theorizing and empirically observing the temporal trajectory of entrepreneurial phenomena; from a conceptual point of view, it posits *transgenerationality* as a defining dimension of entrepreneurship in a family business context shaping the way in which entrepreneurial actions and decisions are formed and enacted (Habbershon *et al.*, 2010; Jaskiewicz *et al.*, 2015; Zellweger *et al.*, 2012).

Fourth, process tracing encompasses the *recursiveness* of action. Recursiveness is an inherent feature of practices (Feldman and Orlikowski, 2011). Actions jointly constitute a practice insofar as they are somehow repeated, routinized or habitual (Jarzabkowski, 2004; Reckwitz, 2002). Process tracing captures this aspect by lumping together actions and events that recur over time and share a degree of functional similarity while being implemented by the same particular individual or different ones. While functionally similar actions are lumped into practices, the agents who enact those actions are grouped in the same social category. Recursiveness is a salient feature of phenomena and concepts that are relevant to family entrepreneurship. Tradition, for instance, and other constructs related to it through a sort of family resemblance such as heritage and legacy are distinctive of family business and have been investigated from a variety of angles (Aronoff, 2004; De Massis *et al.*, 2016; Hammond *et al.*, 2016; Micelotta and Raynard, 2011; Jaskiewicz *et al.*, 2015). Typically, tradition is treated as a "stock of knowledge, competencies, materials, manufacturing processes, signs, values, and beliefs pertaining to the past" (De Massis *et al.*, 2016; Messeni Petruzzelli *et al.*, 2012). However, at its core lies the idea that certain elements of the business and of the family are *reproduced* and thereby maintained, over time. In this sense, tradition can be easily conceptualized as being constituted by practices that enable reproduction of knowledge, values, competencies and so on. A practice-based understanding permits not only explicating tradition but also its opposite, that is innovation (De Massis *et al.*, 2016; Erdogan *et al.*, 2020), as processes of stability and change emerge through the enactment of practices.

Lastly, the way in which process tracing organizes evidence and builds inference establishes *dialectic* between individual agency and social structure, thus finding a meeting point between praxis and practice. The transcendence of the dualism between agency and structure is one of the most salient imports of the practice approach in social theory and across the sciences (Feldman and Orlikowski, 2011; Schatzki *et al.*, 2001; Tatli *et al.*, 2014; Vaara and Whittington, 2012). On the one hand, an individual is guided by extant practices in his/her ordinary activity (Schatzki *et al.*, 2001); on the other hand, his/her action contributes to

the reinforcement *and* to the development of the practice itself. This type of dialectic imported to family entrepreneurship research can reveal the dynamism inherent to phenomena particularly significant for family business such as values, norms and identity. Consider, for instance, religion which has recently attracted increasing attention in the family business scholarly community (Astrachan *et al.*, 2020; Discua Cruz, 2013). Several studies have shown that religion does have an impact on family business organizational and entrepreneurial behavior and practices (Carradus *et al.*, 2020; Eze *et al.*, 2021; Fathallah *et al.*, 2020; Kavas *et al.*, 2020). The practice perspective invites to expand such investigation by avoiding a reified conception of religion, which evokes the idea of a crystallized repository of beliefs and values exerting an exogenous influence on individual action, and instead points to the particular ways of doings and sayings that, in a business context, while enacting religious practices contribute in turn to change them. A similar reasoning can be extended to phenomena related to the organizational identity of the family business as shown in studies by Dalpiaz *et al.* (2014) and Parada and Viladás (2010).

7. Conclusion

In this paper, we advocate the adoption of a practice approach for the study of family entrepreneurship. We discuss what it entails to look at family entrepreneurship through a practice lens and why it is fruitful. Moreover, we propose a research strategy novel to the field through which such investigation can be pursued, namely process tracing. We examine its inferential logic and argue that it complements other practice methods by inferring social mechanisms from empirical evidence and thereby establishing a connection between *praxis*, *practices* and *practitioners*. As discussed in the previous section, the adoption of process tracing permits to enlighten salient features of family entrepreneurship in need of attention, such as its socio-historical situatedness, inherent temporality, recursive nature as well as the dialectic between agency and structure. Arguably, such features are present, and even pervasive, not only in family entrepreneurship but more generally in the family business research field. On this ground, we suggest that phenomena other than the entrepreneurial ones could be equally enlightened by the adoption of a process tracing research strategy.

Consider, for example, family control which is a central construct in the family business field. Indeed, the key characteristic distinguishing family firms from their nonfamily counterparts is that in the former, family members exert control over strategic decisions (Chua *et al.*, 1999). Control, here, is desired, achieved and maintained because it is the means through which the socio-emotional wealth, that is the affective endowment of the family, is preserved (Berrone *et al.*, 2012; Gomez-Mejia *et al.*, 2007). Family business scholars usually define and measure family control by some specific and tangible features, such as the percentage of shares in the hands of the family and/or the number of family members sitting in the board of directors. However, this view ends up with reifying the underlying phenomenon and overlooking what control *actually* means. Family business scholars are very familiar with stories of family members walking through the plant where the operations are based early in the morning and late in the night; just to be sure that everything is okay, every single day of their entire life and weekends were included. Similarly, family members are usually involved in every single activity going on under the family business roof, from the negotiation of an acquisition to the definition of the content of the company webpage and to the planning of a social event. Process tracing could help make sense of these mundane recursive actions in a practice perspective, thus leading to a reconceptualization of control that does not reduce to counting shares and board chairs, but ultimately unties the set of practices by which control is in fact constituted and enacted.

There are also practical reasons why process tracing deserves to be welcome in the toolkit of practice-based researchers. As discussed in section five, process tracing structures the inference from *praxis* to *practices* and *practitioners* in accordance with causal-mechanistic reasoning. By so doing, it can guide the articulation of what Jarzabkowski *et al.* (2016) describe as an "integrated model" of practice. Integrated models are such that, while formalizing the relationship between the three pillars of the practice approach, namely *praxis*, *practices* and *practitioners*, they also show how their interconnection leads to outcomes which they jointly shape. Hence, the value of such models lies in the fact that they eventually enable the assessment of the *impact* that practices, as instantiated in a particular context in a particular way, produce. Relating practices to outcomes is a step forward for an approach that intends not only to be descriptive but also explanatory, and whenever possible, provider of evidentiary grounds for policy action and intervention. Process tracing offers guidance in articulating such an integrated model, which is, in this case, of a causal mechanistic type. As such, it relates *praxis*, *practices* and *practitioners* in the light of the social organizational context where they are situated. By shedding light on the generative power of practices, process tracing reconstructs the chain of causation unfolding in the particular context and the outcome to which it leads.

Notes

1. Other forms of entrepreneurial behavior studied in the context of family firms are habitual entrepreneurship, portfolio entrepreneurship and serial entrepreneurship (Minola *et al.*, 2021).

2. The literature so far has used *entrepreneurial family* (e.g. Nordqvist and Melin, 2010), *enterprising family* (e.g. Habbershon and Pistrui, 2002; Minola *et al.*, 2016) and *entrepreneuring family* (Uhlaner *et al.*, 2012) as synonyms referring to the same type of entity. In this paper, we draw a distinction among these concepts and suggest redefining the *entrepreneuring family* in a practice perspective not as an entity endowed with specific properties but as a nexus of practices.

3. A parallel process-oriented strand of literature developed in those years also in organizational studies, starting from Lawrence B. Mohr.

4. Depending on the field of application and the research problem of interest, relevant outcomes include empirical regularities, specific occurrences as well as causal relationships between variables of interest.

5. The discussion of Malinowski's study is drastically simplified here as well as the complexity of his findings. The selection and rendition of material has been streamlined purposefully to give the sense of how process tracing works.

6. Malinowski estimates that in old days chiefs must have received four hundred times as much as commoners (1935, p. 189).

7. In hindsight, the study by Malinowski discussed in section 5 could well qualify as a study informed by the family-embeddedness perspective as much as the practice approach.

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