LUMEN ET VIRTUS

Tradition and innovation: The resistance to change of small family retail businesses

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ABSTRACT

Resistance to change is one of the main challenges faced by family businesses in the innovation process. This study aimed to investigate the aspects that influence the resistance to change in the innovation processes of small family businesses in retail, using as a basis the dimensions of the Innovation Radar and recent studies on innovation in family businesses. The research was carried out with family businesses in the Metropolitan Region of Recife - PE. The results obtained through the Innovation Radar revealed areas of greater and lesser resistance to changes in the innovation process, reflecting the specific dynamics of these organizations. Despite the evolution observed in all dimensions of the Innovation Radar between Radar 0 and Radar 1, the companies together did not reach the level of occasional or occasional innovative organizations. The efforts leveraged during the course of the Program to break the paradigm of resistance to change could develop positive consequences with regard to the opening of the business culture to the innovation process. The study highlights the importance of an integrated and continuous approach in the innovation process, considering the particularities of family businesses and the challenges inherent in resistance to change. The information collected can support the planning of new efforts for the implementation of the innovation process in companies of this profile, consolidating strategic efforts in points of greater resistance to change.

Keywords: Innovation, Family businesses, Resistance to change.

INTRODUCTION

Resistance to change is a complex phenomenon and has been widely studied over the years by several authors, such as Taylor (1947), Lewin (1947), Watson (1971), Conner (1995), Motta

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(1998), George and Jones (2001), and Freire et al. (2010). Recently, researchers such as Sirmon and Hitt (2022), Pereira and Santos (2021), Senge et al. (2019), and Kotter (2021) have contributed significantly to the understanding of the mechanisms and dynamics involved in resistance to change. It can be described as any attitude that seeks to maintain the status quo in the face of the need to modify it, being one of the main barriers to successful changes in companies (WATSON, 1971; FREIRE et al., 2010; KOTTER, 2021). These resistances are especially evident in the implementation of organizational changes and innovation processes (HERNANDEZ; CALDAS, 2001; SIRMON; HITT, 2022).

When observing the changes arising from the innovation process, it can be highlighted that it aims at the continuous development of new ideas and modifications in an integrated and structured manner (TIDD; BESSANT, 2021). In recent years, scholars such as Westerman et al. (2020), Christensen, Ojomo, and Dillon (2019), Chesbrough (2019), and Teece (2022) have contributed significantly to the understanding of the dynamics and challenges faced by organizations in the innovation process. The innovation process is not limited to isolated events of change, but needs to be integrated in a structured way with all organizational activities (TIDD; BESSANT, 2021). Thus, isolated efforts in innovation in different areas of the company affect the overall performance of the organization, while the lack of integration can compromise the overall strategic result (TIDD; BESSANT, 2021; TEECE, 2022).

Several researchers have contributed significantly to the study of the origins and dynamics of the organizational change process. In addition to Hernandez and Caldas (2001), authors such as DiMaggio and Powell (2018) stand out, whose work on the new institutionalism in organizational analysis offers deep insights into how institutions shape and are shaped by processes of change. Pettigrew, Woodman, and Cameron (2020) address contemporary challenges in research on organizational change and development, enriching the understanding of the complexities involved. Ford and Ford (2019) explore people's contemporary experience at work in the face of organizational change, highlighting the interactions between individuals and organizational structures during periods of transformation. Recently, Kotter (2021) and Sirmon and Hitt (2022) have deepened their understanding of change management and resistance in family businesses, respectively. These studies broaden the panorama on how different theoretical and empirical perspectives contribute to a more comprehensive and up-to-date understanding of the processes of change in organizations.

In the context of family businesses, resistance to change presents unique challenges due to the specific dynamics of these organizations. Sirmon and Hitt (2022) highlight that the overlap between family and company can intensify resistance, since organizational changes can affect not only the structure of the company, but also family relationships. In addition, the presence of multiple generations in management and the strong influence of family values and traditions can hinder the

adoption of new practices and technologies (PEREIRA; SANTOS, 2021). However, recent studies also point out that family businesses can benefit from their unique characteristics, such as long-term orientation and greater flexibility in decision-making, to overcome resistance and promote strategic changes (KOTTER, 2021; SIRMON; HITT, 2022).

This study focuses on investigating the aspects that influence resistance to change in the innovation processes of small family businesses in retail. Understanding the main resistances faced by these companies allows the development of more effective innovation strategies, considering their particularities and specific challenges (SEBRAE, 2020; PEAR TREE; SANTOS, 2021). Based on the dimensions of the Innovation Radar (BACHMANN; DESTEFANI, 2008) and in recent studies on innovation in family businesses (SIRMON; HITT, 2022; PEAR TREE; SANTOS, 2021), the study examines the behavior and challenges of family businesses in a capital city in northeastern Brazil.

By integrating this knowledge, it seeks not only to understand the difficulties faced by family businesses in the innovation process, but also to highlight the importance of integrated management of the changes that innovation demands (KOTTER, 2021; TEECE, 2022). This work aims to identify the factors that most impact resistance to change and propose strategies that can overcome these specific barriers, providing valuable insights for the formulation of future innovation management approaches adapted to the needs of small family businesses in Brazil (SEBRAE, 2020; PEAR TREE; SANTOS, 2021; SIRMON; HITT, 2022).

LITERATURE REVIEW

To understand the importance of work in breaking paradigms regarding the inertia of the status quo, it is essential to analyze the context of family businesses and their resistance to changes in the innovation process. It is known the difficulty of abandoning the traditional in this profile of companies, and to assist in this process of change, the profile of family businesses was studied, as well as the importance of the innovation process as a necessary tool for the growth of companies today. In addition, we sought to identify the factors of greatest resistance to change in family businesses, considering the contributions of recent research on the subject (PEREIRA; SANTOS, 2021; SIRMON; HITT, 2022).

FAMILY BUSINESSES AND CHANGES

Family businesses are organizations where business ownership and management are controlled by members of the same family, where the beliefs and values of the organization are equal to those of the family environment. Recently, researchers such as Sirmon and Hitt (2022) and Pereira

and Santos (2021) have deepened the understanding of the specific dynamics and challenges faced by family businesses in the process of change and innovation.

In the structure of a family business, the beliefs, values and visions of the founder are commonly found, which, in turn, from these imposed truths, make up the company's identity, creating its organizational culture. This strong influence of family values and traditions can hinder the adoption of new practices and technologies (PEREIRA; SANTOS, 2021).

There is an understanding that, in family businesses, the owner, through his actions, behaviors and attitudes, tends to create and shape the company's organizational culture. Generally, its history is intertwined with the history of the company itself. Creating in this historical sense, the attachment to tradition and the legacy built by the "figure" of the founder. This attachment to tradition and to the "founder's way of managing" leads to resistance to changes in the company's management processes.

However, the market constantly becomes more dynamic and competitive, and the non-adaptation to the market routine can lead companies to have difficulties in survival. In family businesses, a large part of these difficulties comes from the discomfort of the 'deconstruction' of the patriarch's history in the company.

On the other hand, companies that seek longevity and survival in the market need to adapt to economic transitions, as well as to the frequent changes in the demands of their customers. Adapting and, therefore, changing becomes a mandatory condition for the survival of organizations. Thus, being aware of market changes and changing with them becomes, today, a fundamental role for organizations. Kotter (2021) highlights the importance of change management for organizations to achieve results that are difficult to imagine in uncertain and volatile times.

Sirmon and Hitt (2022) point out that the overlap between family and company can intensify resistance, since organizational changes can affect not only the structure of the company, but also family relationships. However, the authors also point out that family businesses can benefit from their unique characteristics, such as long-term orientation and greater flexibility in decision-making, to overcome resistance and promote strategic changes.

Thus, changing, creating solutions, improving existing processes, being aware of new ways of doing things to serve the end customer, become indispensable tools for the competitive survival of today's companies. In this sense, innovation management, a concept that will be discussed below, comprises the appropriate approach for this new competitive business management.

INNOVATION

From the perspective of a competitive market, where globalization has widened the gap between markets, innovating has become a necessary tool for companies seeking survival and

growth. Innovation is currently one of the key factors for the economic growth of companies that seek to stand out in the competitive market (RESE; BAIER, 2011). Teece (2022) reinforces this view, highlighting that innovation is essential for the organization and growth of companies.

Innovation is defined by the Oslo manual (OECD, 2018, p. 20), as "a new or improved product or process (or a combination thereof) that differs significantly from the unit's previous products or processes and that has been made available to potential users (product) or used by the unit (process)." With this comprehensive definition, the innovation process can comprise a broad set of possible innovations, so the Oslo Manual divides innovations into process, organizational, marketing, and product innovations.

Tidd and Bessant (2021) describe the innovation process as the conception and increment of new effective routines in the company. Where it should be conceived as a process and not as an isolated event. The authors emphasize that the innovation process is not limited to isolated events of change, but needs to be integrated in a structured way with all organizational activities.

In this sense, despite the types of innovations cited by the Oslo manual (2018), the authors emphasize the need for all innovation to be developed and managed in an integrated way, when they state that "innovation needs to be managed in an integrated way; it is not enough to manage or develop skills in just a few of these areas" (TIDD; BESSANT, 2021, p. 82).

Thus, Bachmann and Destefani (2008) present the dimensions (Table 1) of influences in the implementation-innovation process and place them as different dimensions that correlate with each other, pointing out paths for the integrated innovation process.

All dimensions in the field of innovation seek to increase innovations of different types in the organization, depending on the reality of each company, where these will directly influence the innovative level of the company (BACHMANN; DESTEFANI, 2008). In this way, these dimensions seek to assist in the organization of actions and projects within companies so that they can develop their innovative culture and treat innovation as a process integrated with the organization's growth (TROTT, 2021).

Table - 1 Dimensions of the Innovation Radar

DIMENSIONS	DESCRIPTION
Bid	It refers to the products offered by the company to the market.
Platform	It refers to assembly methods or technologies that are used, in a "modular" way, in the construction of a product portfolio.
Brand	It refers to the set of symbols, words (slogan) or formats by which a company conveys its image, or promise, to customers.
Clients	It refers to customers and node-centric innovation methods for optimizing business processes.
Solution	It refers to the customized and integrated combination of goods, services and information capable of solving potential customer demands.
Relationship	It refers to the Customer experience, it takes into account everything that the consumer sees, hears, feels or experiences in some way at all times when interacting with the company.
Aggregation of Value	It refers to the mechanisms by which a company captures part of the value created.
Processes	Refers to the settings of the activities used in conducting the company's internal operations
Organization	It refers to the way the company is structured, what partnerships are established, and the role and responsibility of employees.
Chain of Supply	It refers to the sequence of activities and agents that move products, services, and information from origin to delivery.
Presence	It relates to the distribution channels that the company uses to place its products on the market and also to the places where these items can be purchased by consumers.
Network	It refers to the aspects related to the ways in which the company connects with its customers.
Ambience Innovative	It refers to the measurement of the team and innovation-oriented environment

Source: SISTEMALI (2017), adapted from Bachman and Destefani (2008).

However, the primary action of innovation is change, which reflects in the modification of routine patterns, which will affect the integrated process of managing the organization. And the resistance to change in this process builds barriers for companies to create an innovative profile in their culture. In this process, family businesses - in addition to the need to innovate to be within the competitive level of the market - need to overcome the internal challenges of their own characteristics, adapting their patriarchal traditionalism to the new market scenarios and the indispensability of change, through innovation (RESE; BAIER, 2011; SIRMON; HITT, 2022).

Pereira and Santos (2021) highlight that understanding the main resistances faced by family businesses allows the development of more effective innovation strategies, considering their particularities and specific challenges. In this sense, recent studies on innovation in family businesses (SIRMON; HITT, 2022; PEAR TREE; SANTOS, 2021) seek to examine the behavior and challenges of these organizations in the innovation process.

By integrating this knowledge, it seeks not only to understand the difficulties faced by family businesses in the innovation process, but also to highlight the importance of integrated management of the changes that innovation demands (KOTTER, 2021; TEECE, 2022). Identifying the factors that most impact resistance to change and proposing strategies to overcome these specific barriers are essential for the formulation of innovation management approaches adapted to the needs of family businesses (PEREIRA; SANTOS, 2021; SIRMON; HITT, 2022).

METHODOLOGICAL PROCEDURES

With the objective of identifying the areas of innovation with the greatest resistance to change in small family businesses, retailers of construction materials in the Metropolitan Region of Recife-PE, the work sought to be based on a quantitative research, which uses quantification in data collection and information treatment through statistical techniques (CRESWELL, 2007), using questionnaires with closed alternatives for this purpose.

Within the universe of family businesses that retail construction material in the RMR-PE, the sample was delimited to 32 family-owned companies in this segment, participating in the Local Innovation Agents program of Sebrae. In this case, the companies were selected in a non-random way, following profile analysis (CRESWELL, 2007), which characterizes a convenience sampling, suitable for exploratory studies that seek initial insights on a topic (MALHOTRA, 2019).

The program aims to "promote the continued practice of innovation actions in small businesses, through proactive, free and personalized guidance" (SEBRAE, 2015, p.1). During the course of the program, he uses the Innovation Radar (BACHMANN; DESTEFANI, 2008) as a metric to analyze the degree of innovation of small companies in the monitoring of companies.

This methodology was developed by Professor Mohanbir Sawhney, director of the Center for Research in Technology & Innovation, at the Kellog School of Management, in Illinois - USA (BACHMANN; DESTEFANI, 2008). It is applied in companies, within the program, through a closed questionnaire, in which 13 dimensions related to innovation in organizations are evaluated (Dimensions mentioned in Table 1).

Through the application of the questionnaire and the results collected, the Radar scores the company between 1.0 and 5.0 in each dimension, where companies with a Score of 1 are classified as organizations with little or no innovation; companies with a score of 3, such as occasional or occasional innovative organizations and; companies with a score of 5, such as systemic innovative organizations, which already have an innovative culture (BACHMANN; DESTEFANI, 2008).

Thus, for the purposes of the objective of this work, data collection occurred through the Innovation Radar, which was applied twice at different times during visits to each company in the exercise of the activity as a Local Innovation Agent.

The first moment took place at the beginning of the Program in the company, where the Innovation Radar questionnaire was applied to the companies, which resulted in an initial average of innovation for each dimension (Table 1), characterized as Radar 0. Based on the results of Radar 0, innovation actions were proposed for each company, according to the results of the dimensions of its Innovation Radar, so that they could, based on practice, develop their innovative profile. For the execution of these actions, an average time interval of 6 to 8 months was offered so that companies could execute some of the proposed actions. After this interval, starting the second moment, the

actions carried out by each company were cataloged and the Innovation Radar was applied again to observe their evolution in the innovation process, which resulted in an average of the Innovation Radar, called Radar 1.

In this sense, in order to identify which areas in the innovation process had the greatest resistance to change, the average scores of the 13 dimensions of the Innovation Radar in Radar 0 and Radar 1 were analyzed, observing in which of them the companies felt the greatest difficulties in innovating.

For this analysis, in the data processing stage, a descriptive statistical analysis was used (CRESWELL, 2007), where the scores obtained by the companies in the dimensions of Radar 0 and Radar 1, were calculated as an arithmetic mean, so that it was possible to discover the overall level of innovation of the companies in each dimension. After obtaining the averages of the global level of Radar 0 and Radar 1, the total number of actions carried out by all companies in each dimension was counted. From obtaining this information, a table was prepared presenting the global level of innovation from Radar 0 and its evolution to Radar 1, as well as the number of innovation actions completed by the companies.

Through descriptive statistical analysis (CRESWELL, 2007), the evaluation was based on the assumption that the dimensions that evolved in the level of innovation with a high number of completed actions have less resistance to change, while the dimensions with low levels of maturity and few completed actions have greater resistance to change.

The robustness of the method used is due to the combination of a validated tool for measuring innovation (Innovation Radar) with the quantitative analysis of the data, allowing an objective assessment of the areas with the greatest resistance to change. In addition, the application of the Radar in two different moments enables a longitudinal analysis, capturing the evolution of companies in the innovation process and providing insights into the difficulties faced.

However, it is important to highlight the limitations of the study, such as convenience sampling and the focus on a specific segment (construction material retailers), which may limit the generalization of the results to other contexts. Despite this, the method employed offers a relevant contribution to the understanding of resistance to change in small family businesses, serving as a basis for more comprehensive future studies.

RESULTS AND DISCUSSIONS

The analysis of the results obtained through the Innovation Radar in the family businesses studied reveals important aspects related to resistance to change, corroborating the existing literature on the subject. As mentioned by Watson (1971) and Freire et al. (2010), resistance to change can be understood as an attitude that seeks to maintain the status quo in the face of the need to modify it,

being one of the main barriers to successful changes in companies. This resistance is especially evident in the implementation of organizational changes and innovation processes (HERNANDEZ; CALDAS, 2001; SIRMON; HITT, 2022).

The results show that, despite the evolution observed in some dimensions of the Innovation Radar, the general level of maturity in innovation of the family businesses studied is still low. As shown in Table 2, the overall average of Radar 0 was 1.6, while in Radar 1 it was 2.0, showing an increase of only 0.4 points. In addition, the total number of actions completed was only 81, which indicates a low level of implementation of innovative practices. These results corroborate what Freire et al. (2010) point out about the resistance to change, especially in the innovation process, by companies with a family profile, where the culture of routine family values transmits security through tradition.

Table - 2 Average Radar and Total Actions taken

GLOBAL AVERAGE OF THE RADAR WITH THE TOTAL ACTIONS TAKEN			
	Radar 0	**Number of Actions Completed**	**Radar 1**
Bid	2,3	7	2,4
Platform	1,1	1	1,2
March	1,5	0	1,6
Clients	1,5	10	1,6
Solutions	1,4	2	1,5
Relationship	1,8	26	2,0
Adding value	1,3	4	1,4
Processes	1,3	5	1,4
Organization	1,4	4	1,7
Supply chain	1,8	3	2
Presence	1	3	1,1
Network	1,3	8	1,7
Innovative ambience	1,4	32	1,7

Source: Prepared by the authors

This security paradigm transmitted by family tradition and by the way of managing business is related to the inertia of the status quo in the face of changes (WATSON, 1971; FREIRE et al., 2010). In the context of the innovation process, resistance to some type of change directly reflects on the level of innovation of the companies studied, since the willingness to change only in some aspects of the organization does not meet the essence of what the innovation process proposes within its continuous and integrated development.

The dimensions with the greatest resistance to change identified in the study, such as Brand, Platform, Presence and Solutions (Table 3), may be related to the specific dynamics of family businesses. Sirmon and Hitt (2022) highlight that the overlap between family and company can intensify resistance, since organizational changes can affect not only the structure of the company, but also family relationships. In addition, the presence of multiple generations in management and

the strong influence of family values and traditions can hinder the adoption of new practices and technologies (PEREIRA; SANTOS, 2021). These dimensions showed low growth between Radar 0 and Radar 1, as can be seen in Table 2, where the Brand dimension grew only 0.1, Platform 0.1, Presence 0.1 and Solutions 0.1 points.

Table - 3 Levels of resistance to change

Dimensions with less resistance to change	Dimensions with greater resistance to change	Dimensions that partially accept changes
• Bid • Clients • Relationship • Supply Chain, • Network • Innovative ambience	• Brand • Platform • Presence • Solutions	• Value Addition • Processes • Organization

Source: Prepared by the authors

On the other hand, the dimensions with the least resistance to change, such as Supply, Customers, Relationship, Supply Chain, Network, and Innovative Environment (Table 3), may indicate areas in which family businesses can benefit from their unique characteristics. Kotter (2021) and Sirmon and Hitt (2022) point out that long-term orientation and greater flexibility in decision-making can help family businesses overcome resistance and promote strategic changes in these areas. These dimensions showed greater growth between Radar 0 and Radar 1, such as Supply with 0.1, Customers with 0.1, Relationship with 0.2, Supply Chain with 0.2, Network with 0.4 and Innovative Environment with 0.3 points (Table 2).

The dimensions Value Addition, Processes and Organization showed a partial acceptance of the changes, indicating that family businesses may be willing to promote some transformations in these areas, but still face challenges for a complete implementation. These dimensions had a moderate growth between Radar 0 and Radar 1, with Value Addition growing 0.1, Processes 0.1 and Organization 0.3 points (Table 2).

However, it is believed that the innovation process is not limited to isolated events of change, but needs to be integrated in a structured way with all organizational activities. In this sense, not paying attention to the dimensions with the greatest resistance to change, even if they are fewer in number, will directly influence the objective of innovating as a whole, not being able to reach high levels of innovative maturity.

Therefore, the results obtained in the study reinforce the importance of an integrated and continuous approach in the innovation process (TIDD; BESSANT, 2021), considering the particularities of family businesses and the challenges inherent in resistance to change. Family businesses need to develop specific strategies to deal with resistance in all dimensions, seeking to overcome cultural barriers and promote a stronger culture of innovation (KOTTER, 2021; TEECE,

2022). The data presented in Tables 2 and 3 show the areas that require greater attention and efforts to overcome resistance to change and achieve higher levels of innovative maturity.

In conclusion, the analysis of the results obtained through the Innovation Radar in the family businesses studied highlights the complexity of resistance to change and its impact on the innovation process. The dimensions with the greatest resistance, such as Brand, Platform, Presence, and Solutions, reflect the specific dynamics of family businesses and require targeted strategies to overcome these barriers. On the other hand, the dimensions with the least resistance, such as Supply, Customers, Relationship, Supply Chain, Network and Innovative Environment, indicate areas in which family businesses can benefit from their unique characteristics to promote strategic changes.

However, it is essential to adopt an integrated and continuous approach to the innovation process, considering all dimensions and developing specific strategies to deal with resistance to change. Only in this way will family businesses be able to overcome cultural barriers, promote a stronger culture of innovation, and achieve higher levels of innovative maturity.

FINAL CONSIDERATIONS

The present study sought to investigate the aspects that influence resistance to change in the innovation processes of small family businesses in retail, using as a basis the dimensions of the Innovation Radar (BACHMANN; DESTEFANI, 2008) and recent studies on innovation in family businesses (SIRMON; HITT, 2022; PEAR TREE; SANTOS, 2021). The research was carried out with family businesses in the Metropolitan Region of Recife - PE (RMR-PE), participants of the Local Innovation Agents Program.

The literature review highlighted the complexity of resistance to change and its impact on the innovation process, providing the theoretical basis for understanding the mechanisms and dynamics involved, especially in the context of family businesses. The results obtained through the Innovation Radar revealed areas of greater and lesser resistance to changes in the innovation process, reflecting the specific dynamics of these organizations.

Despite the evolution observed in all dimensions of the Innovation Radar between Radar 0 and Radar 1, the companies together did not reach the level of occasional or occasional innovative organizations. This result highlights the difficulty in innovating as a whole within these companies, considering that they did not have an innovative profile before entering the Program.

The efforts leveraged during the course of the Program to break the paradigm of resistance to change could develop positive consequences with regard to the opening of the business culture to the innovation process. This result reinforces the importance of an integrated and continuous approach in the innovation process, considering the particularities of family businesses and the challenges inherent to resistance to change.

In addition, it is essential to know in depth the individual culture of each company and its managers, so that the information obtained in this research can effectively assist in the planning of the innovation process of each company. Family businesses need to develop specific strategies to deal with resistance in all dimensions, seeking to overcome cultural barriers and promote a stronger culture of innovation.

The information collected in this study can support the planning of new efforts for the implementation of the innovation process in companies of this profile, consolidating strategic efforts in points of greater resistance to change. The importance of continuous efforts to integrate innovation in all areas of the company's activity is emphasized, considering the individual culture of each organization, which, within the profile of family businesses, involves not only traditional management processes, but also individual family values.

Finally, it is suggested that future studies explore qualitative approaches to deepen the understanding of the specific dynamics of each family business, complementing the results obtained through quantitative methods such as the Innovation Radar. This combination of approaches can provide valuable insights for the development of even more effective innovation strategies, adapted to the unique needs and challenges of small family businesses in Brazil.

The present study contributes to the literature on innovation in family businesses, highlighting the importance of considering resistance to change in the innovation process and providing insights into the areas of greatest and least resistance. The results obtained can guide the formulation of policies and programs to support innovation, as well as assist managers of family businesses in the development of strategies to overcome barriers to change and promote a more solid culture of innovation. Finally, we thank Fernanda Cruz for her valuable contribution to data collection, which was fundamental for this study.

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