

# Knowledge Transfer Dynamics in Family Businesses Through Digitalisation: A Systematic Literature Review

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**Abstract:** In the current unpredictable and constantly evolving scenario, knowledge is a strategic resource for businesses (Argote L., Ingram P., 2000), particularly in the case of family businesses (Zapata – Cantu L. et al., 2023). In this context knowledge transfer is most important and technology and innovation can concretely support the transfer of information, both inside and outside organizations; but family businesses are not very technology-oriented (Bouncken R. & Schmitt F., 2022). So, the aim of this study is to understand how digitalization could impact on knowledge transfer dynamics in family businesses and in particular on codifying explicit knowledge, on transfer of tacit knowledge and on generational succession in family businesses.

**Keywords:** Knowledge Transfer Dynamics, Family business, Digitalization

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## 1. Introduction

In recent years many authors, such as Drucker, point out that the only significant resource for businesses is knowledge (Nonaka et al., 1996) and how management of this knowledge is essential for organisations and their survival in the existing context (Omotayo, 2015). Furthermore, it is also one of the most important sources for competitors of an organization to gain an advantage. Indeed, the relationship between knowledge and performance can be better comprehended by focusing on the four fundamental components of knowledge management: knowledge creation, knowledge acquisition, knowledge coding and knowledge transfer; the last is the element in which this study focuses on. Specifically, knowledge transfer is an efficient process used to increase the productivity of an organisation (Argote, 2000) and to obtain the best results and achieve an elevated level of innovation (Riege, 2007). According to Argote and Ingram (2000), knowledge transfer affects one unit through the experience of another. In particular, knowledge transfer improves the behaviour and activities of an organisation's members, (Omotayo, 2015) and therefore cannot be considered as simple as the movement of knowledge between people or from one place to another (Riege, 2007). Indeed, although most studies of business organisation address the issue of knowledge transfer dynamics by focusing on the characteristics and attitudes of the parties involved, it has emerged that these dynamics are influenced by the intrinsic nature of knowledge and its complexity (Szulanski, 1996). This complexity depends on the different understandings of knowledge. While the traditional Taylor and Herbert's theory point that is explicit, formal and systematic (Nonaka et al., 1996), others such as Nonaka and Takeuchi, who in agreement with Michael Polanyi, recognize a tacit knowledge that is hard to communicate, to transfer or to share with others.

In this context, digitalization, which can be defined as a socio-technical process of mass adoption of digital technologies (Yonghong et al., 2023), can concretely support the transfer of information, both inside and outside an organization (Bouncken et al, 2022), as it can eradicate the boundaries between an enterprise and external organizations (Yonghong et al., 2023). Indeed, digitalization and technology help organizations to connect, to cooperate, to communicate, to gain knowledge (Yonghong et al., 2023) and to facilitate the relationship with internal and external agents. It also allows for the reduction in information asymmetries (Nieto et al., 2023) rendering the information received more productive, fostering a greater learning from and with a variety of partners (Brynjolfsson et al., 2023). For these reasons digitalization is vitally important to organizations, undeniably becoming a priority for managers and policy-makers (Legner et al., 2017). Not all companies however, are digitally oriented and a clear example of this are family businesses (Nieto et al., 2023). It is in fact family businesses that are the object of this present research. Admittedly, some authors, namely Lubatkin and Schulze, point out that they are less innovative when compared to other types of enterprises (Bouncken et al, 2022). And in order to survive they must constantly learn, create, transfer and apply knowledge in an effort to adapt more easily to changes in the environment in which they operate (Zapata – Cantu L. et al., 2023). They need to manage the diffusion of information inside the organization, allowing the transfer of knowledge to increase the success of the family firm's succession process (Valenza et al., 2021) and beyond the perimeters of

the family business, outside, between organizations into its own external environment. It is necessary to deepen the various types of knowledge which can be transferred (Mustake et al., 2017) and to also understand which forms are most important for the growth of the organization (Valenza et al., 2021). In this regard different studies illustrate how the differences between family and non-family firms depend on their own socio-emotional characteristics (Gómez-Mejía et al., 2007), as it particularly influences the tacitness level of family firm's knowledge and when this is very high, it can be very difficult to digitalize knowledge transfer (Brynjolfsson et al., 2023).

Based on the arguments discussed, the aim of this study is to understand how digitalization can impact on knowledge transfer dynamics in family businesses that are complex and influenced by various factors including the nature of the knowledge, the roles of family members, and the impact of digitalization.

## **2. Methodology**

The methodology adopted in this study consists of a systematic review of the literature (Tranfield et al., 2003). This methodological approach, based on predefined criteria, is the reference standard for synthesizing evidence thanks to their methodological rigor.

### **2.1 Search Strategy and Selection Criteria**

Three major academic databases were selected for the purpose of this study: Scopus, Web of Science and Google Scholar. These databases, having extensive archives of scholarly articles, conference proceedings and critical academic publications in the fields of business management and digital technologies allow for a thorough and robust analysis.

As the objective of this research is to understand the dynamics of knowledge transfer in family businesses through digitisation, three specific initial keywords were chosen to capture the relevant literature and the essentials of the study: "digital\*", "knowledge transfer dynamic\*" and "family business\*". Using these keywords, a comprehensive search strategy was developed, employing the Boolean AND operator to refine the search queries and improve the accuracy of the results

The search focused on peer-reviewed articles published up to July 2024 to ensure the inclusion of contemporary and relevant studies on the interaction between digitalization, knowledge transfer dynamics, and family businesses published in English. Attention was also paid to research that includes empirical data, theoretical frameworks, and case studies relevant to the topic. These criteria were applied to ensure the relevance, quality, and focus of the selected studies, resulting in a refined set of articles for detailed analysis.

The initial search founded no results in all databases used. For this reason, the second step was to modify the string replacing the keyword "family business\*", step by step, with "family firm\*", "family enterprise\*", "family organization\*" and "family compan\*". Also in this case the search founded no results. Due to this, alternating this different synonyms in the string in all databases selected, the keyword "knowledge transfer dynamics" was replace with "knowledge transfer" to include a major number of articles in which the selection was made in function of the knowledge transfer dynamics concept. The results were then rigorously screened based on titles and abstracts to assess their relevance to the research questions.

### **2.2 Thematic Analysis and Synthesis**

The articles selected after initial screening were subjected to in-depth full-text review through careful reading. The purpose was to check the relevance of the article to the research objectives and to include in the final analysis only those studies consistent with the topic under study.

Each article was read thoroughly to confirm its direct relevance to the research questions concerning the interplay between digitalization, knowledge transfer dynamics and family businesses. Detailed information was extracted from each article using a standardized data extraction form. This form included fields for authors' names and affiliations, year of publication to ensure the timeliness of the data, research methodologies, key findings, theoretical frameworks, and the identification of research gaps.

The data collected were systematically organized into specific thematic categories. This process allowed similar findings and theoretical references to be grouped together to promote a coherent synthesis.

Specifically, the mechanisms through which digitization influences the transfer both tacit (implicit, uncoded) and explicit (codified, easily shared) knowledge dynamics within organizations were attended to. It emerged, in this regard, how digital tools and platforms can support communication, collaboration and knowledge sharing especially in family businesses. With the chosen strings, the process of systematically analysing and organizing the extracted data provided a comprehensive understanding of the current state of research of digitization to support knowledge transfer dynamics within family businesses. This process simplified the detection of key trends and existing gaps in the literature, paving the way for future research directions. To increase the reliability and validity of the results obtained, data from the three databases were compared and cross-referenced for consistency and robustness of the identified themes. The comparison of the results obtained from the different sources was intended to reduce bias and strengthen the credibility of the conclusions.

Finally, a synthesis of the data obtained was made to more easily identify any gaps in the literature from which future theoretical studies could be drawn. The purpose was to contribute to a comprehensive understanding of the current state of research on the topic studied to better clarify the impact of digitization on knowledge transfer dynamics in family businesses.

### 3. Results

The search strategy yielded varying results across the three academic databases, highlighting the importance of utilizing multiple sources for a comprehensive literature review. The following table shows results obtained.

**Table 1:**

Keywords	Scholar	Web of Science	Scopus	Total results
Digital*, Knowledge transfer dynamic*, family business*	0	0	0	0
Digital*, Knowledge transfer dynamic*, family firm*	0	0	0	0
Digital*, Knowledge transfer dynamic*, family enterprise*	0	0	0	0
Digital*, Knowledge transfer dynamic*, family organization*	0	0	0	0
Digital*, Knowledge transfer dynamic*, family compan*	0	0	0	0
Digital*, Knowledge transfer, family business*	314	2	4	320
Digital*, Knowledge transfer, family firm*	152	0	2	154
Digital*, Knowledge transfer, family enterprise*	37	0	0	37
Digital*, Knowledge transfer, family organization*	6	0	0	6
Digital*, Knowledge transfer, family compan*	2	0	1	3
<b>Total results</b>	<b>511</b>	<b>2</b>	<b>7</b>	<b>520</b>

After the initial retrieval of 520 articles, a meticulous screening process was conducted to assess the relevance of each article. This rigorous screening aimed to filter out articles that did not directly address the research questions or did not meet the quality and focus criteria established for this review. After this careful evaluation, 45 articles were identified as highly relevant and suitable for in-depth analysis.

The result produced by Scopus, Web of Science and Google Scholar (restricted to 45 after the screening process) offer a nuanced and complete view of the current state of research in this field on basis of the chosen search string. This summary underscores the necessity of utilizing multiple databases to obtain a holistic understanding of the literature landscape and to ensure that no significant studies are overlooked.

It should be noted that the choice of keywords influence the results obtained. So, making variations in the keywords might produce different results by capturing other relevant studies that were not identified using the strings of the present study. This suggests that a more flexible and iterative approach to keyword selection could enhance the comprehensiveness of the literature review.

## **4. Finding and Discussion**

From the reviewed literature, different common denominators emerged. The results of the analysis will be presented below focusing attention on: knowledge and knowledge transfer dynamics in family business and the impacts of digitalization on knowledge transfer dynamics in family business.

### **4.1 Knowledge and Knowledge Transfer Dynamics in Family Business**

In general, knowledge assets, which are challenging to replicate and transfer, have become the primary source enabling organizations to achieve superior results compared to their competitors. Unlike the assets which traditionally formed the basis for competitive advantage, knowledge assets now play a crucial role in driving organizational success (Zapata-Cantu et al., 2022). For these reasons family businesses must stay open to new ideas and continuously update their knowledge to align with emerging market trends and technologies, preventing stagnation and ensuring profitable use of their knowledge base (Andersén, 2015; Filippini et al., 2012; Wang, 2016, Putz et al, 2023). The presence of dynamic changes means that no single solution or routine can be long-term, as such rigidity can hinder business development (Wang, 2016; Putz et al, 2023). In this context, what is important is knowledge renewal that can be sourced from suppliers, customers, employees, and intermediaries and their networks (Boyd et al, 2012; Klewitz et al., 2012; McAdam et al., 2010, Putz et al, 2023). So, intra and inter-organization relationships became essential to exchange information inside and outside (Zahra et al, 2007; Zapata-Cantu, 2021). However, other authors indicate that family firms are less inclined to share knowledge (Mazzola et al., 2008; Botero et al., 2021; Zapata-Cantu et al, 2021) when there is a lack of trust, commitment, predecessor involvement in the training of a successor and organizational culture (Zapata-Cantu et al, 2021). Also, strong social relationships within firms facilitate the adoption of new technologies and resource sharing, enhancing business performance (Meng et al.). Collaboration among family members promotes the dissemination of technological ideas, strengthening continuous innovation and business resilience (Gamba, 2019; Meng et al.). Engaging with stakeholders allows companies to quickly identify and integrate new market trends, crucial for developing new products and services (Chaudhary et al, 2018; Chen et al., 2009; Fredrich et al., 2019). Effective knowledge transfer within companies requires strong communication, facilitating mutual learning and innovation (Szulanski, 1996; Tsai, 2001) especially for tacit knowledge transfer, which is fundamental in creating a strong competitive advantage, as Letonja and Duh (2016) point out.

In this regard, taking into account the importance of relational social capital, i.e. the positive attitudes existing between the parties involved (Nahapiet and Ghoshal, 1998) and cognitive social capital, i.e. the codes, languages and narratives shared between the parties involved (Lane and Lubatkin, 1998) in knowledge transfer dynamics, the role of family members in the knowledge transfer process is crucial; the older generation, often the repository of tacit knowledge, plays a central role in guiding and mentoring the next generation, Zapata-Cantu et al. (2023) emphasise that these older members must be actively involved in the transfer process to ensure that valuable tacit knowledge is not lost. The successors, typically the next generation, are responsible for integrating and applying this knowledge to move the company forward. Valenza et al. (2021) emphasise the importance of successors being properly prepared and involved in this process to facilitate a smooth transition and continued business success. Valenza et al. (2021) point out that ensuring critical knowledge is preserved and passed on to the next generation is vital for maintaining the longevity and success of the business. Maintaining a repository of both tacit and explicit knowledge helps family businesses stay competitive, as underscored by Zapata-Cantu et al. (2023).

Regular evaluation of the knowledge transfer processes is essential for continuous improvement. Feedback mechanisms allow for the assessment of the effectiveness of these processes, enabling businesses to adapt and refine their methods based on changing needs and feedback from participants. This ongoing adaptation ensures that knowledge transfer remains effective and aligned with the evolving goals and challenges of the family business.

### **4.2 The Impact of Digitalization on Knowledge Transfer Dynamics in Family Business.**

One of the main observations that emerges from the analysis of the selected literature is that knowledge transfer dynamics in family businesses are influenced by digitisation despite the fact that this type of business is less oriented towards this process than other types of organisations (Zapata-Cantu et al.). Digitisation helps, in fact, to break down internal organisational and external boundaries, fostering better collaboration and communication also with one's partners (Bouncken et al. 2022).

The sourcing, sharing, and processing of information through digital technologies improves the connectivity and dissemination of information within and outside the company (Radicic and Petković, 2023). Through digital platforms advanced technology tools can increase a company's efficiency and better support customers by streamlining organizational processes (Ardito et al, 2021).

In particular, family businesses, which generally have a wealth of industry-specific skills and knowledge-spanning generations (Sirmon et al, 2003; Iwu et al., 2024), can demonstrate a remarkable ability to adapt to new technologies, using digital tools to improve decision-making and management processes. Additionally, these factors could improve the competitiveness of the family business (Prasanna et al, 2019) benefiting from both external and internal environmental knowledge (Breivik-Meyer et al, 2020; Iwu et al, 2024). These benefits encourage family businesses to cooperate (Chirico et al, 2020, Iwu et al, 2024). Digital technologies also support the creation of collaborative environments that enhance intergenerational communication and promote the sharing of competencies, essential for succession and the professionalization of successors (Del Rio Castro et al., 2021, Nieto et al, 2023).

The transfer of tacit knowledge in the digital age poses a challenge. According to Brynjolfsson et al. (2023) tacit knowledge is interpersonal in nature and requires direct interaction that may be difficult to pursue by digital means alone. Furthermore, there are many benefits of effective knowledge transfer, for example, as Riege (2007) argues, improved innovation capabilities that lead to better performance and competitive advantages.

The ability to leverage digital technologies to improve knowledge management and support innovation is seen as a key element for the long-term success of family businesses (Zapata-Cantu et al., 2022).

### **4.3 Implications, Limitations and Future Research Directions**

The findings emerging from the present study could influence future research on the impact digitization has on knowledge transfer dynamics in family businesses. Due to the great importance of digital technologies in improving knowledge management processes, there is a need to identify digital tools and platforms specifically for family businesses. For example, possible solutions could be the adoption of artificial intelligence tools, data analytics and collaborative platforms that have a relevant impact on knowledge creation, sharing and utilization processes. In addition, it is necessary to understand how the specific characteristics of family businesses (e.g., their dependence on socio-emotional wealth and intergenerational dynamics) may limit or promote digital transformation in this type of organization.

Future research should also be conducted by seeking to understand how the characteristics of family businesses may influence the impact of digital technologies on knowledge transfer dynamics. Thus, the role of family governance structures, the involvement of multiple generations in decision making the impact of family values and culture on digital orientation should be considered.

What emerges from this study is the importance of external networks and collaborations that enable family organizations to enrich their knowledge base. For this reason, it is very important to focus on the mechanisms that these enterprises adopt to create relationships with external stakeholders, such as suppliers, customers, and industry associations, to enrich their digital skills and knowledge.

Understanding how family businesses can leverage resources from the external environment to enhance innovation and competitive advantage requires an understanding of these relationships.

Knowledge transfer is a complex process, especially that of tacit knowledge, so future research should deepen, emphasizes the need for further research into methods and practices that can facilitate this process in the digital age. It would be interesting to understand how digital technologies can be designed and applied in organizational settings to support the transfer of tacit knowledge, which in family businesses is represented by the experiences and knowledge of family members. This would make it easier to understand the impact of digitization in family businesses.

The present study was conducted comprehensively on the chosen keywords but nevertheless has limitations. The first is that using specific keywords may unintentionally exclude relevant literature studies using different terminologies. More keywords or a different string should be considered in the future to include studies other than those found with the present study.

For the future, it would be advisable to conduct the studies without neglecting the geographical and cultural context in which family businesses operate, as these aspects influence the adoption and orientation toward digitization in knowledge transfer and by identifying digital tools and platforms that can best contribute to this

process. Finally, future research could be conducted taking into account that the effectiveness of digitization affects the characteristics of family businesses that influence the effectiveness of digitization in knowledge transfer, for example, socio-emotional wealth, governance structures, and intergenerational dynamics.

By overcoming these limitations, future research directions could help to better understand the impact of digitization in knowledge transfer in family business.

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