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## Exploring Customer Relationship Research in Family Businesses: A Scoping Review and Future Insights

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### ABSTRACT

This paper aims to demonstrate the relevance of customer relationship research in the context of family businesses, to structure existing literature, and to identify promising areas for further research. By conducting a scoping review of relevant peer-reviewed journal articles published from 2005 to 2021 and adhering to the Prisma protocol for enhanced transparency and quality, this paper underscores the pivotal role of customer relationship management in the success of family businesses, emphasizing a tendency towards conservative and traditional approaches. The owner-manager involvement, especially in the BtoB segment, is recognized as a distinct advantage, urging an exploration of specific strategies for managing customer relationships in both B to C and B to B sectors. Also, social capital is deemed crucial, extending its significance beyond customers to suppliers and employees, focusing on the influence of generational transitions on stakeholder relations. The imperative for deliberate relationship strategies during successions is emphasized. Moreover, the significance of customer orientation for success, impacting satisfaction, loyalty, and overall performance, highlights the necessity for empirical studies to gain nuanced insights. Additionally, consumer behavior towards family businesses, shaped by the communication of familial identity, underscores the need for further research on diverse communication approaches. Lastly, acknowledging the positive impact of corporate social responsibility practices on loyalty and reputation in family businesses underscores the call for context-specific investigations, taking into account corporate social responsibility reporting regulations across countries.

### INTRODUCTION

In a contemporary global market characterized by intense customization leading to fierce competition, businesses encounter various challenges in catering to the diverse needs of customers (Yin *et al.*, 2017). Sustaining competitiveness demands continual enhancements in efficiency, flexibility, and overall performance (Supizet J, 2002). Customers have become more demanding than ever therefore it is difficult to retain and satisfy them. Companies will only succeed in these challenges if they adopt a global management approach that places the customer at the heart of its processes (Suphan N, 2015). Thus, the battle of any company is to retain its customers and acquire new ones in an increasingly aggressive environment and for increasingly volatile and demanding customers. To do this, companies deploy a set of practices and tools in order to consolidate their relationships with customers. This explains the particular attention that has been given in recent years to customer relationship management within companies, both in the professional and academic worlds (Bellaaj, 2014). However, it is surprising to note the lack of studies that address this topic within family businesses (Cooper *et al.*, 2005; Arsic *et al.*, 2018, El hail & EL Koraichi, 2022), while taking into account their characteristics and specificities. Surprisingly, the limited scholarly focus has been directed toward this subject, especially in the context of family businesses (Cooper *et al.*, 2005; Arsic *et al.*, 2018), despite

their prevalence and significance in the global economic landscape (Kenyon-Rouvinez & Ward, 2004). In fact, family businesses significantly contribute to wealth creation, job opportunities, and competitive dynamics (Westhead & Cowling, 1998), warranting a meticulous examination of their managerial practices in academic research (Gedajlovic *et al.*, 2012). Extensive literature primarily rooted in agency theory (Charlier *et al.*, 2009), stewardship theory (Le Breton-Miller & Miller, 2009), and social capital theory (Khalfaoui & Mokhtari, 2017) has been employed to dissect and analyze the behavior and performance of family businesses.

Despite their economic relevance, researchers have found that there are a limited number of studies on them from a marketing perspective (Benavides-Velasco *et al.*, 2013). Also, very few studies have apprehended the practices that fall under the scope of customer relationship management in the context of family businesses, while taking into account their specificities. The present work is placed within this perspective and aims to address the following question: “What is the current state of research on customer relationships within family businesses, its limits and its perspectives?”

To answer this question, we advance, in the first part, the arguments in favor of the study of customer relationships within family businesses, the objectives of the study as well as the adopted methodology. In the second part, a scoping review will be carried out in order to examine the

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articles identified, to organize the scientific debate on the theme of customer relationships within family businesses, to draw results and to provide research insights in order to deepen knowledge in this research field.

Note that the choice of a scoping review as the review method is well-supported in this study. Firstly, this method aligns seamlessly with our research objective, as we intend to address an exploratory research question with the goal of mapping key concepts, types of evidence, and research gaps in a specified area (Colquhoun *et al*, 2014). Secondly, our study aims to explore a fragmented knowledge domain with minimal resources, a situation for which the scoping review is deemed suitable (Armstrong *et al*, 2011).

## LITERATURE REVIEW

Effectively managing and understanding customer relationships is crucial for business success and survival (Ozgener & Iraz, 2006). This practice not only imparts a competitive edge but also cultivates loyalty, thereby contributing to revenue growth (Lizbetinova *et al*, 2020). The positivity embedded in customer relationships plays a pivotal role in shaping brand image and reputation, influencing customer perceptions. Furthermore, these relationships serve as a valuable source of feedback, enabling businesses to adapt to market changes and foster innovation. In fact, strong customer connections act as a resilient buffer during challenging times, mitigating risks and ensuring stability in the business environment (El Hail & El koraichi, 2022). Ultimately, customer satisfaction forms the core foundation for sustained profitability, underscoring the significant importance of studying and enhancing customer relationships in the ever-evolving business landscape (Nasir S, 2015). Therefore, it is imperative for every individual within the company, regardless of their position, to align themselves with this commitment to quality and customer-focused objectives (Agotilla & Agustin, 2022).

Within the special context of family businesses, this subject gains heightened interest as it facilitates a profound comprehension of the distinct dynamics, singular values, and specific strategies that define these enterprises (Allouche & Aman, 2000). Features such as generational continuity, direct involvement of family members, emphasis on family values, and management of relationships with stakeholders contribute to creating a distinctive business context (Miller & Le Bretton-Miller, 2005). Understanding these specific aspects helps grasp the unique challenges and advantages faced by family businesses, thus fostering in-depth research and enriching perspectives in the field of business and management studies. In this section, the arguments justifying the relevance of exploring customer relationships in the unique context of family businesses will be outlined.

### Socio-Economic Relevance of FBs

Family businesses stand as a cornerstone of global economies, wielding substantial influence worldwide across all countries (IFERA, 2003; Sharma and Sharma,

2011). Their significance is underscored by their contribution of 60 per cent to GDP and employment of more than 80 per cent of the workforce (PwC, 2016). Given their socio-economic relevance, understanding how FBs manage and maintain strong customer relationships becomes crucial, impacting not only their individual success but also their contribution to overall economic well-being. Also, the study of customer relationships within FBs provides insights into how these key players interact with their customers, influencing the overall economic dynamics and emphasizing their role as drivers of socio-economic development. Furthermore, this research facilitates the identification of best practices in customer relationship management for broader application and aids in diagnosing and rectifying any deficiencies impacting their relational approaches. Considering that FBs regard customer service as a pivotal criterion for their success (Hoover and Hoover, 1999), a comprehensive study encompassing all facets of customer relationships within these entities is warranted.

### Perpetuation of Family Businesses

Family businesses (FBs) serve as primary sources of income and employment for family members, fostering opportunities for learning and socio-professional integration. Consequently, ensuring continuity, striving for success, and fostering sustainability stand as pivotal objectives for FBs, underpinning their long-term vision. Owner-managers perceive the company as an asset requiring growth, preservation, and succession planning for future generations, rather than merely consumable wealth (Allouche J, Amann B, 2012). To achieve these objectives, they prioritize establishing and safeguarding a robust customer portfolio, requiring diverse tools and strategies to retain and engage customers. Moreover, the evaluation of FB performance is intricately tied to various metrics rooted in customer relationships, with their sustainability fundamentally reliant on maintaining a cohesive customer base. Therefore, the desire for succession within family businesses creates an essential connection with the study of customer relationships. This relationship revolves around the need to preserve the continuity of established customer relations, anticipate potential impacts on brand reputation during succession, manage customer trust in the face of change, effectively plan succession by including key customer relations, enhance customer loyalty by capitalizing on family values, and understand how these values influence interactions with customers. In essence, exploring customer relationships within family businesses becomes crucial to ensure a smooth and enduring transition while preserving customer trust and loyalty (Ashley *et al*, 2013).

### Intergenerational Transition and Its Challenges

Exploring customer relationships within family businesses becomes crucial due to the significant challenges presented during the transition phase. The survival rates of family businesses decline sharply across generations,

with only 30% making it to the second generation, about 13% to the third, and merely 3 to 4% successfully passing to the fourth (Gaumer and Shaffer, 2018). This decline is attributed to factors such as the incompetence and lack of commitment of the second generation, coupled with the founder's struggle to ensure a comprehensive and integrated transmission (Dyer, 1988; Fattoum and Fayoll, 2008; Allali, 2019). Beyond the transmission of asset ownership, family businesses face a major challenge in transferring their social network and customer portfolio. To overcome this challenge, these businesses are compelled to formalize their relationships with customers, aiming to establish tangible and transferable assets. Additionally, the transition to the next generation introduces changes in the dynamics of relationships, leading to potential customer attrition. The transmission occurs in a busy and stressful context, where relationships established with customers may not receive the necessary attention, negatively impacting the hard-built and accumulated customer portfolio (Ashley *et al.*, 2013). Understanding and managing customer relationships during this critical phase are essential for the sustained success and continuity of family businesses.

In summary, exploring customer relationships within family businesses is relevant due to the unique characteristics, values, and dynamics inherent in these entities. Understanding and leveraging these aspects contribute to the sustainability, competitive advantage, and overall success of FBs.

## METHODOLOGY

We conducted a scoping review of the literature relating to customer relationships within family businesses published between 2005 and 2021. This type of review, positioned between narrative and systematic reviews in terms of complexity, serves to examine the depth of research within a specific field while identifying areas requiring further exploration (Arksey & O'Malley, 2005). Its primary purpose is to synthesize evidence and assess the scope of literature on a topic and describe its current state of art.

Despite being a relatively recent addition to literature search methodologies (Davis *et al.*, 2009), the prevalence of scoping reviews is on the rise. It sets itself apart from systematic reviews, which are geared towards formulating well-defined questions and conducting quantitative and qualitative analyses of pertinent evidence, often followed by a meta-analysis (Ferrari R, 2015). Conversely, a scoping review efficiently highlights pertinent literature for researchers, aiming to swiftly map out key concepts within a research domain and provide an all-encompassing overview of the subject under investigation (May, Pop, & Popay, 2005).

### Scoping Review Objectives and Protocol

Before embarking on a scoping review, it's imperative to set a priori search strategy to define the review's objectives, methods, and reporting, ensuring transparency.

This process entails outlining criteria for including and excluding evidence sources and determining relevant data extraction and presentation methods. Our review employed the Preferred Reporting Items for Systematic Reviews and Meta-Analyses (PRISMA) extension for Scoping Reviews, following the structured framework by Arksey and O'Malley (2005). This meticulous approach ensures transparency, credibility, and facilitates replication, thereby enhancing the study's reliability. Establishing clear study objectives is pivotal as it guides the study's trajectory and dictates the information to be gathered. In our study, the intended objectives are:

- ✓ To list the main articles dealing with customer relationships within family businesses, in order to establish a state-of-the-art ;
- ✓ To identify gaps that require further research ;
- ✓ To situate our research work and justify its relevance and originality.

Note that the central research question that guided our review is: "What is the current state of research on customer relationships within family businesses, its limits and its perspectives?"

### Eligibility Criteria

To well conduct this review, a set of inclusion and exclusion criteria was formulated to ensure a rigorous, transparent, and reproducible search, minimizing bias and yielding reliable conclusions. In fact, the inclusion criteria outline the essential characteristics that a document must possess to be considered relevant to this scoping review. In contrast, the exclusion criteria encompass additional features present in an otherwise relevant document, leading to its disqualification from inclusion in the review (Patino & Ferreira, 2018). The review scope includes English or French original papers published in peer-reviewed journals between 2005 and 2021. Articles were selected based on titles incorporating keywords such as "Customer," "Consumer," or "Client" along with "Family Firm," "Family Business," or "Family Company." However, to maintain rigor, the selection excluded articles that were not peer-reviewed, conference proceedings, press articles, or book chapters.

### Information Sources

Our scoping review was conducted exclusively within two databases, Scopus and Web of Science. Two main reasons justify this decision. First, these two databases are the largest repositories of peer-reviewed articles, and only a negligible portion is in a non-English language. Second, the content of the Web of Science (WOS) significantly overlaps with Scopus (Adam *et al.*, 2019).

These databases were systematically searched using a scoping review framework following the PRISMA-P reporting protocol (AC Tricco *et al.*, 2018). Additionally, a manual search of reference lists from identified articles was conducted, and Google Scholar was consulted to explore primary sources within grey literature, as recommended by Haddaway *et al.* (2015). They cautioned



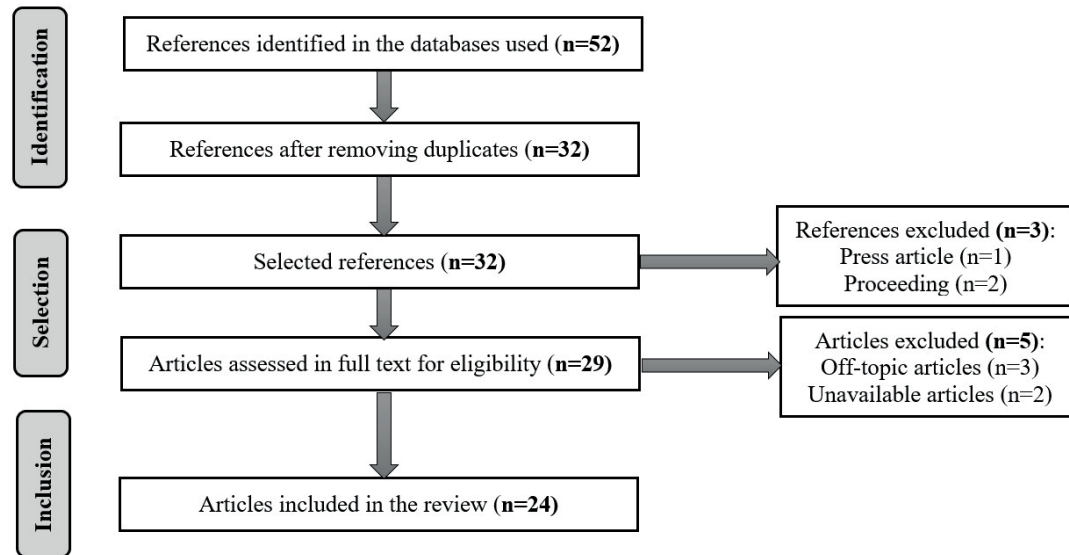
against relying solely on search engine results, which could exclude articles due to personalized searches or biased algorithms.

### Articles Selection Process

Our review identified 52 articles. Initially, an Excel spreadsheet was employed to code each article's abstract, keywords, and title into relevant themes, facilitating the removal of duplicates and preliminary classification.

Subsequently, a refined second round of coding was conducted to select eligible articles and identify addressed sub-themes.

Due to limited abstract details, entire articles were skim-read, leading to the emergence of new subcategories. [Figure 1] presents an overview of the review stages, illustrating the flow of information and the number of articles identified, included, and excluded, along with reasons for exclusions.



**Figure 1:** Prisma Flowchart of the Study Selection Process

## RESULTS AND DISCUSSION

Twenty-four relevant and eligible articles were included in our review. To facilitate the thematic analysis and synthesis process, articles have been divided into six clusters according to the sub-themes covered. Note that a quantitative analysis of the findings was not attempted because most of the papers lacked a common set of attributes that could be combined. Note that data in scoping reviews is generally descriptive (Lockwood *et al*, 2019), and the way it is analyzed is largely dependent on the purpose of the review and the author's own judgment. Given that our objective is to draw up a state-of-the-art dealing with customer relationships within family businesses and to raise theoretical gaps, we judge that the thematic synthesis is the most suitable for our case. Therefore, the end product of our scoping review is typically a narrative presentation (Peterson *et al*, 2017). In order to present structured and organized outputs, each paragraph of this section contains a synthesis of the literature on the themes identified as well as the theoretical gaps raised and perspectives for future research. So, from the limited and heterogeneous literature that was synthesized, the following themes emerged:

### Customer Relationship Management within Family Businesses

Customer Relationship Management (CRM) stands as a critical lever enabling the survival and success of family

businesses (Hoover & Hoover, 1999). In fact, the unique position occupied by FBs lies in their ability to transform relationship-building endeavors into a sustainable competitive advantage. This distinct advantage stems from their inherent characteristics, including a quick customer response, a commitment to delivering quality products or services under the family name, and a genuine dedication to providing outstanding customer service (Mediano *et al*, 2019). These foundational elements not only underscore the significance of CRM in the context of family businesses but also highlight their potential for fostering enduring and robust relationships with customers. In essence, CRM becomes a key lever for family businesses, enabling them to not only survive but thrive in the competitive business landscape.

Despite the fact that family businesses perceive excellent customer service as critical to their success, there is limited research on the CRM practices of family businesses.

A comparative study of CRM practices adopted by family and nonfamily businesses, examining their importance, knowledge, and success in CRM initiatives revealed that both family and nonfamily businesses reported similar attitudes toward the importance of CRM and their knowledge of it. However, the actual implementation strategies of family businesses were found to be significantly different from those of nonfamily businesses. In fact, FBs tend toward more conservative and less risky approaches. This inclination toward traditional methods

within FBs can be attributed to several factors:

✓ Implementing CRM necessitates substantial modifications to company processes, policies, and overall strategy (Farhan *et al*, 2018). However, this stands in contrast to the conservative nature of FBs, which tends to resist change and innovate (Duran *et al*, 2016).

✓ Family businesses face multiple challenges in adopting CRM, including a lack of technological expertise, insufficient competence among family members in marketing roles, and a reluctance to invest in technology to gain a competitive advantage (Cooper *et al*, 2005).

✓ Despite the efficiency of customer service in family businesses operating without formal CRM procedures, there is a prevailing perception that the potential risks associated with CRM implementation outweigh the anticipated improvements. This apprehension may contribute to a hesitancy among FBs to embrace formal CRM initiatives.

In summary, this study highlights the importance of understanding the unique CRM practices and challenges faced by family businesses compared to nonfamily businesses, emphasizing the need for further research to delve deeper into these aspects and provide valuable insights for effective CRM integration within these firms. In fact, while FBs place a greater emphasis on customer-oriented approaches, their engagement in formal CRM initiatives may not be as proactive. This prompts an investigation to understand why family businesses may show reluctance or delay in adopting CRM tactics. Furthermore, exploring how the absence of CRM implementation may impact family business performance is essential. Additionally, there is a need to elucidate the methods employed by these companies to cultivate sustainable competitive advantages through relationship building, even in the absence of explicitly implementing a CRM tool.

Moreover, this highlights the necessity for upcoming research that focuses on the factors influencing CRM implementation within family businesses (FBs), considering their unique characteristics. Subsequent studies have the potential to enhance conceptual frameworks that clarify FBs' choices regarding CRM adoption. These studies could empirically examine the factors that accelerate or hinder this adoption process, prioritizing their influence on decision-making. The ultimate objective is to extract practical recommendations for the effective integration of CRM within family businesses.

#### Owner-Manager Involvement and FB Competitiveness

The distinctive involvement of owner-managers in CRM and marketing activities underlines the unique character of family businesses (Arsić *et al*, 2019), offering exclusive advantages to FBs (Danes *et al*, 2009). The primary difference in CRM between family and non-family companies lies in B2B relationships, where family business owners are heavily engaged in managing such relationships in terms of time and responsibility.

Consequently, they craft strong customer relationships through intimate knowledge and anticipation of their needs, establishing a partnership dynamic with a select customer base. Over time, successors expand these collaborations to encompass new customers, further nurturing these created partnerships. The invaluable tacit knowledge of owner-managers becomes a potent competitive asset, allowing them to foresee customer needs and introduce new products, enabling smaller FBs to remain competitive against larger competitors offering similar goods and services (Dessi *et al*, 2014).

Exceptional customer service serves as another competitive edge for FBs, with over 75% employing email to enhance communication and service quality for existing customers. Leveraging best practices includes utilizing email to address potential customer inquiries, tapping into niche markets, and adopting sophisticated online tools for product demos, ordering, and delivery tracking. These insights were gleaned from a quantitative survey of leading FBs in e-CRM services (Levenburg NM, 2006). While literature attributes FBs' competitiveness to their social capital (Arregle *et al*, 2004), customer-centricity (Tokarczyk *et al*, 2007), and owner-manager involvement in CRM and marketing activities (Arsić *et al*, 2018), specific implementation strategies employed by these businesses to cultivate, sustain, and manage customer relationships in both BtoC and BtoB segments remain underexplored. In fact, the level of centralization in CRM for family businesses needs further examination with international cross-cultural understanding, considering variations in power dynamics among family owners and managers in different countries. Additionally, opportunities for future research may lie in scrutinizing the impact of family business-related characteristics on customer service strategies, comparing practices between each segment, and delving into their respective specificities. Such investigations could illuminate how FBs tailor their approaches to different customer segments, shedding light on effective customer relationship management strategies.

#### The Social Capital of Family Businesses and Succession Impact

To better understand the specificities and advantages that family businesses enjoy, some researchers have employed the theory of social capital, highlighting the competitive advantages stemming from informal relationships and mechanisms within these enterprises. This theory emphasizes the connection between family relationships and the competitive advantages of family businesses, relying on the concept of "familiness." This concept corresponds to the unique resources possessed by a family business through interactions between the family, the employees, and the business activity (Habbershon and Williams, 1990).

Overall, the familiness approach highlights the importance of family relationships, social networks, and shared values within family businesses. These assets, constituting the

social capital of family businesses, reduce transaction costs, facilitate information flows, knowledge creation and accumulation, and enhance organizational efficiency (Arregle *et al*, 2007). Thanks to this strong social capital, the quality of information exchanges within family businesses improves. Individuals are more inclined to cooperate, seek help, and take risks with new creative ideas (Gaumer and Shaffer, 2018). Interpersonal trust within family businesses can also foster high-quality learning and attentive and sensitive behavior. These advantages confer competitive advantages to family businesses and ensure their sustainability (Martin Santana *et al*, 2020; El Hail *et al*, 2022).

However, the transition to the next generation could potentially disrupt these relationships, necessitating managerial foresight. Customers, suppliers, and employees may feel uncertain and apprehensive about impending changes, demanding a strategic approach that prioritizes nurturing customer ties, honoring supplier agreements, and investing in employee development. Neglecting this approach risks eroding the company's loyal customer base and may even lead to business failure. Ashley *et al*. (2013) corroborate this notion, emphasizing the importance of preserving relationships with stakeholders during generational transitions to safeguard existing social capital and prevent customer turnover. Their study highlights the challenging context of this transition phase, wherein established relationships might not receive sufficient attention, threatening hard-earned brand equity. Therefore, deliberate relationship strategies are vital to avert second-generation business failure.

Although the current body of literature recognizes the pivotal role played by social capital in family businesses and acknowledges the impact of intergenerational transitions on stakeholder relations, there is a need for further analysis of successors' attitudes and behaviors in relation to these critical relationships. Subsequent research should delve into the specific measures successors might employ to reassure and retain customers, suppliers, and employees during the transfer of authority. It is crucial to assess whether the agreements established by predecessors with customers will be upheld and if these relationships will be maintained. Ultimately, the levels of retention and satisfaction among key stakeholders will significantly shape the success or failure of the business. Therefore, it is imperative to explore these correlations in future research endeavors.

### Customer Orientation of Family Businesses

Family businesses are widespread across global economies and merit in-depth study due to their distinct resources and capabilities compared to non-family counterparts. Despite their economic importance, academics seek further exploration of family businesses in the marketing field, given the limited studies from this perspective. Researchers aim to understand the complexity, dynamism, and intangible resources that characterize family businesses, exploring how these resources

contribute to their distinctiveness. In this context, customer orientation emerges as a critical capability for family-owned companies. In fact, the superiority of FBs and their exceptional performance are attributed to their emphasis on customer satisfaction, product quality, and familial support in decision-making (Woods *et al* , 2019). This research, rooted in decision theory, explores how certain FB decision-making traits align with achieving both business and family objectives, shedding light on why some FBs make more impactful decisions than others. Notably, aspects like customer orientation, quality approaches, and family cohesion significantly contribute to this success. Customer orientation stands as a crucial facet within FB operations, enabling them to better comprehend customers, enhance services, and carve out differentiation in competitive markets. It hinges on employees' technical and social competencies, motivation, and decision-making authority (Mediano *et al*, 2019). These factors drive FBs to maintain and elevate customer satisfaction levels, leveraging positive word-of-mouth as a valuable asset (Poras JLG, 2019). Furthermore, the organizational flexibility and family involvement inherent in FBs directly influence their level of customer orientation, fostering closer connections with customers, driving employee motivation, and nurturing a conducive work environment.

Despite existing studies on customer orientation within FBs primarily being qualitative, there's a need for empirical research on a larger FB sample. This could delve into how the family dynamic impacts customer-centric decision-making processes, the influence of firm size and industry sector on customer orientation, and the hypothetical relationship between customer focus and FB performance. Conducting such empirical studies could provide valuable insights into the nuanced aspects of customer orientation within FBs and their subsequent impact on business outcomes.

### Consumer Perception and Behavior Towards FBs

A substantial portion of the literature focuses on how consumers perceive and react to family businesses (FBs). Research suggests that communicating the familial nature of an enterprise significantly influences consumer behavior, purchase intentions, and brand loyalty (Kohr *et al*, 2021). Studies (Zanon *et al*, 2019) have highlighted the impact of promoting the family identity of FBs on consumer behavior and engagement. Leveraging social identity theory, these studies reveal that showcasing the familial nature of an FB through digital platforms leads to increased customer engagement. This elevated perception directly boosts the brand's credibility and fosters stronger identification with the company, ultimately resulting in heightened customer engagement levels. FBs can gain a strategic advantage by effectively communicating their familial identity via online channels, significantly enhancing their competitiveness (Ibáñez MJ *et al*, 2021). Aligned with the image transfer theory, research (Alonso dos santos *et al*, 2019) emphasizes how projecting the

family business identity through websites positively impacts attitudes toward the site and purchase intentions. Similarly, studies by Carrigan and Buckley (2008) and Sageder *et al.* (2015) underscore the correlation between consumers perceiving a company's family character and their commitment and loyalty. Carrigan and Buckley's qualitative exploration emphasized the pivotal role of the FB's name in shaping consumer purchasing behavior. Consumers often associate FBs with local, unique entities that boast social capital, a committed workforce, and strong customer relationships, fostering lasting loyalty by better understanding customer needs (Shellong *et al.*, 2019). Moreover, research by Sageder *et al.* (2015) delved into the impact of family ownership on firm reputation and customer loyalty. FBs strive to build a positive brand image, with their identity and nature forming the cornerstone of their external image. This reputation significantly shapes management decisions, influencing customer purchases and bolstering customer retention and loyalty. However, while FBs receive higher ratings for service, employee friendliness, and customer focus, they often lag in product and service selection and pricing aspects. Despite this, consumers exhibit strong trust in the management policies and practices of FBs (Orth and Green, 2009). Overall, promoting the familial aspect reinforces consumer preferences for FBs, primarily due to the relational qualities associated with these businesses (Binz *et al.*, 2013). Nonetheless, exploring the impact of various communication approaches on FB reputation and consumer behavior, analyzing additional factors influencing FB customer engagement and loyalty, and studying how FBs integrate customer orientation into operational CRM strategies could further enrich our understanding of these businesses' success factors.

### Corporate Social Responsibility Practices and Impact on Customer Relationships

Corporate Social Responsibility (CSR) reporting serves as a vital element in a company's dialogue with stakeholders, recognized as a communication tool that enhances customer loyalty and fortifies a firm's reputation. This is primarily because CSR initiatives bolster stakeholder support for the organization (Bronn and Vroni, 2001). A quantitative study conducted in Italy explored the impact of CSR reporting on the revenues of family and non-family businesses. The study reveals that the impact of CSR disclosure varies based on a firm's industry and ownership type. Notably, CSR reporting is found to be significantly effective for companies with consumer proximity, with a positive effect for family firms and a negative effect for non-family companies. The findings suggest that CSR reporting, as a communication tool, may not be universally effective across all industries and can have both positive and negative outcomes (Gavana *et al.*, 2018). Also, the study underscores the importance of considering industry affiliation and ownership type when evaluating the effectiveness of CSR reporting. It suggests that family firms, which are often more engaged

in activities beneficial for stakeholders and society, can enhance their reputation among consumers through positive CSR reporting effects. This implies that CSR reporting is most effective when integrated into a broader dialogue with a firm's constituencies.

In a more focused context within the family hotel sector in Portugal, research demonstrated a positive correlation between perceived service quality, CSR, and several critical factors including customer satisfaction, loyalty, company image, perceived value, and pricing (CM Veloso *et al.*, 2021). These findings offer valuable insights for FBs aiming to implement CSR practices to enhance service quality, corporate image, customer satisfaction and retention. However, it's crucial to note that these results might not be broadly applicable as they stem from studies conducted in specific contexts.

In conclusion, it's important to acknowledge that the obligation to disclose CSR activities varies among countries, being voluntary in some and mandatory in others. Future research endeavors could explore whether regulatory changes, such as a shift from voluntary to mandatory CSR reporting, influence consumer responses regarding a company's CSR efforts. Understanding these dynamics can shed light on how varying regulatory landscapes impact consumer perceptions of CSR initiatives and their relationship with companies.

### CONCLUSION

In summary, this study offers an overview of research dealing with customer relationships within FBs, while providing a synthesis and organization of existing knowledge in this field. The thematic synthesis of the included articles has revealed significant insights across six distinct groups, highlighting various facets such as customer relationship management, owner-manager involvement, social capital, customer orientation, consumer perception, and Corporate Social Responsibility practices. The synthesis underscores the integral role of CRM and customer service in the success of family businesses, noting a propensity toward conservative CRM approaches. Owner-manager involvement, particularly in the BtoB segment, emerges as a unique advantage, yet specific strategies for managing customer relationships in both BtoC and BtoB sectors warrant exploration. Social capital is identified as crucial, extending beyond customers to suppliers and employees, emphasizing the impact of generational transitions on stakeholder relations. Therefore, the need for deliberate relationship strategies during succession is highlighted, urging future research on successors' attitudes. Also, the customer orientation is deemed vital for success, influencing satisfaction, loyalty, and overall performance, urging empirical studies for nuanced insights. In addition, the consumer behavior toward family businesses is influenced by the communication of familial identity, suggesting further research on varied communication approaches. Finally, the role of corporate social responsibility practices in family businesses positively impacting loyalty and reputation



is acknowledged, with the need for context-specific investigations considering corporate social responsibility reporting regulations across countries.

This study significantly contributes to the family firm literature by delving into the relatively overlooked domain of customer relationships within family businesses. It underscores the necessity for deeper exploration into how these firms can cultivate sustainable competitive advantages by leveraging relationships with their customers.

However, this scoping review is subject to specific constraints. Primarily, it grapples with a limited number of studies that were included and analyzed. Additionally, the reliance on titles for inclusion during the screening phase may lead to the exclusion of articles relevant to the subject. Further, the synthesis only incorporates papers in English and French from specific databases for the sake of feasibility. Therefore, relevant articles written in other languages may be missed.

Moving forward, both researchers and managers should address the aforementioned limitations to advance the understanding of this field.

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