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Hybrid model of strategic planning for decision making in family businesses

Modelo híbrido de planeación estratégica para la toma de decisiones en las empresas familiares

MIRELES-MEDINA, Antonia†*, PAREDES-BERUMEN, Luis Enrique and DE ÁVILA-MÁRQUEZ, Francisco

Instituto Tecnológico Superior Zacatecas Norte-Tecnológico Nacional de México, Campus Zacatecas Norte
Universidad Autónoma de Zacatecas-Unidad Académica de Contaduría y Administración

ID 1st Author: *Antonia, Mireles-Medina* / **ORC ID**: 0000-0001-9773-9108, **CVU CONACYT ID**: 299436

ID 1st Co-author: *Luis Enrique, Paredes-Berumen* / **ORC ID**: 0000-0002-8010-0153, **CVU CONACYT ID**: 1091563

ID 2nd Co-author: *Francisco, De Ávila-Márquez* / **ORC ID**: 0000-0003-0862-9914, **CVU CONACYT ID**: 1091436

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Abstract

This article consists of a proposal that allows promoting the implementation of strategic planning as a tool that supports decision-making in family businesses. This considers a set of elements derived from a hybrid strategic planning model designed by the authors of this document. This was done once a content analysis on strategic planning models for family businesses had been carried out; The proposed model is based on family philosophy and the stages of the strategic planning process, which are: philosophical stage, analytical stage, operational stage and control stage. The first stage, which is the philosophical one, is made up of the following topics: corporate mission, corporate vision, and corporate values. While the second stage, which is analytics, is composed of: both internal and external analysis of the company and the strategies. Then the third stage, which is the operative one, considers: the strategic objectives, policies, plans, programs, procedures and budgets. Finally, the fourth stage considers the strategy map and the control board as a tool.

Strategic planning, Decision making, Family businesses

Resumen

Este artículo consiste en una propuesta que permita promover la implementación de la planeación estratégica como herramienta que apoye la toma de decisiones en las empresas familiares. Esta considera un conjunto de elementos derivados de un modelo híbrido de planeación estratégica diseñado por los autores del presente documento, esto se realizó una vez de haber efectuado un análisis de contenido sobre modelos de planeación estratégica para empresas familiares; el modelo que se propone se cimienta en la filosofía familiar y las etapas del proceso de la planeación estratégica que son: etapa filosófica, etapa analítica, etapa operativa y etapa de control. La primera etapa que es la filosófica se compone de los siguientes tópicos: misión corporativa, visión y valores corporativos. Mientras que la segunda etapa que es la analítica se compone: del análisis tanto interno como externo de la empresa y las estrategias. Luego la tercera etapa que es la operativa considera: los objetivos estratégicos, políticas, planes, programas, procedimientos y presupuestos. Finalmente, la cuarta etapa, considera como herramienta el mapa estratégico y el tablero de control.

Planeación estratégica, Toma de decisiones, Empresas familiares

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*Correspondence to Author (e-mail: mirelesmed_7@hotmail.com)
†Researcher contributing first author.

Introduction

For family businesses to thrive, it is necessary that they have a clear vision of what they do and want to do, so that they can define the efficient strategies that allow them to achieve the objectives set. According to (Roche, 2005) he considers that both organizations and individuals today are more often forced to reflect on the path to be addressed in the future, on what to do, where to go, that is, they are forced to plan. This action must be carried out not only in large companies, but it is also necessary and indispensable that it be considered in micro-enterprises.

In general, strategic planning is a managerial process that supports the company to endure, grow and achieve success in situations of hesitation, crisis and conflict, that is, it allows to overcome turbulent realities in an intelligent way as expressed (Best, 2007), an important reason that family businesses must take into account in order to lay the foundations they require to consolidate their existence and are not subject to failure but to a exuberant success in the market where they are established.

Family microenterprises regularly lack formal planning that supports them in decision-making in internal areas of the company such as productivity, marketing and finance, for this reason it is necessary to do this work in which through reflection and analysis of their internal and external environment it is possible to specify the current situation in which they find themselves so that from there they are generated strategies that allow you to achieve the objectives you intend successfully speaking. Now, "the lack of strategic planning is a reason for SMEs not to survive in the long term" he says (Moreta, 2017), if this can happen to SMEs with greater reason than microenterprises that are regularly family. Another reason why it is necessary to consider strategic planning as a tool to support family microenterprises in decision-making.

Since resources are always limited, a strategic market plan is needed that indicates the desired positions in the future, sales growth and expected profits. The strategic market plan establishes the direction to be followed and sets guidelines for the future destination of resources.

Companies need to develop a process of strategic planning of their markets to be able to specify strategic directions and efficient destination of their resources in the short and long term. (Best, 2007)

Once the strategic plan or the implementation of strategic planning in family microenterprises is achieved, they will benefit in the sense that their decision-making will no longer be by intuition, blind or ambiguous, but with a basis of cause given that their reality is known and under that reality the ideal strategies will have been generated so that the microenterprise with a firm step decides the Congratulations that will lead you to success.

Itis important to note that family businesses are centers of contribution to the country's economy, according to Carlos Núñez Urquiza Mexican family businesses contribute more than 62% of the Gross Domestic Product (GDP) and 70% of employment in the country as mentioned (Martínez, 2019).

Finally, to carry out the proposal of a hybrid model that implements strategic planning in family businesses, it has been necessary to use the technique of content analysis, since according to (Porta & Silva, 2003) this technique "is configured, as an objective, systematic, qualitative and quantitative technique that works with representative materials, marked by completeness and with possibilities of generalization". In addition, it is a technique that "offers us the possibility of investigating the nature of discourse".

Reference framework

Planning is the first phase of the administrative process, so each of the phases that make up this process are defined below (Chiavenato, 2007):

1. **Planning:** Companies do not improvise. Planning is listed as the first administrative function because it is the basis of the others. Planning is the administrative function that determines in advance what objectives must be achieved and what must be done to achieve them.

2. **Organization:** Consists of a) Determine the specific activities necessary for the achievement of the planned objectives (specialization), b) Group the activities in a logical structure (departmentalization) and c) Assign the activities to specific positions and people (positions and tasks).

3. **Direction:** Third administrative function, consists of putting into action and dynamizing the company. Management is related to action, to start-up, and it has a lot to do with people.

4. **Control:** It is the fourth administrative function that, together with planning, organization and management is part of the administrative process; its purpose is to ensure that the results of what was planned, organized, and directed are adjusted as much as possible to the established objectives. Its essence lies in checking whether or not the controlled activity achieves the objectives or expected results.

Cuarta (2008) defines the administrative process stages as follows:

1. **Planning:** Determines the objectives they want to achieve in the future and the actions that must be taken to achieve them.

2. **Organization:** It is the structure of the organization where fundamental elements intervene for the assignment of functions and delimitation of responsibilities through the positions, in order to achieve the objectives.

3. **Direction:** It consists of executing what is planned through the human resource; it is the one that must be led, through an efficient administration that leads to the achievement of what is proposed.

4. **Control:** Allows you to compare results during and after the processes, which serve to make decisions and apply the necessary correctives.

As can be seen in the previous definitions, planning is the basis for the implementation of the rest of the stages of the administrative process, since it determines the objectives that are intended to be achieved in the future. George Terry establishes that these phases are constituted by different stages that respond to five basic questions of the administration (Table 1):

Administrative process			
Stages			
Planning	Organization	Direction	Control
What do you want to do? What is going to be done?	How is it going to be done?	See what is done	How has it been done?

Table 1 Basic questions in the stages of the administrative process
Source: (Chávez, 2017)

Once each of the stages of the administrative process has been defined, it is necessary to address the issue that is relevant in this study, which consists properly of strategic planning as a tool to support business decision-making, which was derived from the problems currently presented by family microenterprises, since planning allows to determine What do you want to do? and What is going to be done?

Strategic planning

The neoclassicists developed the school of strategic planning with the adoption of a formal process of strategic formulation through a strongly prescriptive and normative approach. The most influential book was Corporate Strategy de Ansoff, published in 1965 (Chiavenato, 2007).

"The process by which an organization, once analyzing the environment in which it operates and setting its medium and long-term objectives, chooses (selects) the most appropriate strategies to achieve those objectives and defines the projects to be executed for the development of those strategies. All this by establishing a permanent monitoring system that adapts the aforementioned objectives, strategies and programs to the possible changes, external and internal, that affect the organization" (Roche, 2005).

(Moreta, 2017) citing (Roger, 2007) points out that "in general, strategic planning is a managerial process that helps the company to survive, grow and achieve success in situations of uncertainty, crisis and conflict, that is, it allows to overcome turbulent situations in an intelligent way". (Chiavenato, Administración: Proceso Administrativo, 2001) states that "planning carried out at the institutional level of a company is called strategic planning. The leaders, at the institutional level of the company, fulfill the primary task of facing the uncertainty generated by the uncontrollable and unpredictable elements from the task environment and the general environment".

(Martínez T. E., 2001) consider "A modern definition of Strategic Planning is: process by which an Institution or an Organizational Unit defines its being and it's what to do in the environment, discovering opportunities and threats, and therefore, new purposes and objectives, strengths and internal weaknesses and from this, raises its future actions".

Another definition of strategic planning that the authors (Moreno, Madrigal Moreno, & Guerrero Dávalos, 2015) consider in their research is that of (Drucker, 2002) which says that strategic planning is the continuous process, based on the broadest possible knowledge of the future considered, which is used to make decisions in the present, which implies future risks due to the expected results; it is to organize the necessary activities to put into practice the decisions and to measure, with a systematic reevaluation, the results obtained against the expectations that have been generated.

Characteristics of strategic planning

Strategic planning has the following characteristics according to (Chiavenato, 2001):

1. It is projected in the long term, at least in terms of its effects and consequences.

2. It is oriented towards the relations between the company and its task environment and, consequently, is subject to the uncertainty of environmental events. To deal with uncertainty, strategic planning bases its decisions on judgments and not on data.

3. Includes the company as a whole and covers all its resources to obtain the synergistic effect of the entire capacity and potential of the company. The company's strategic response includes global and systemic behavior.

Stages of strategic planning

According to (Chiavenato, 2001) the following stages in strategic planning are considered:

1. Determination of business objectives.
2. External environmental analysis.
3. Internal organizational analysis.
4. Formulation of strategic alternatives and choice of business strategy.
5. Elaboración de la planeación estratégica.
6. Implementation through tactical and operational plans.

Elements of strategic planning

The fundamental elements that are considered in a strategic planning process are the mission, vision, objectives, diagnostic elements (SWOT) and action plan (Muchnick, 2000). Consulting other authors such as (Guiliany, Prieto Pulido, García Cali, Sukier, & Martínez, 2017) agree on the elements of strategic planning in the study they carry out, which are: Strategists, Organizational Principles, Mission, Vision, Strategic Objectives, Strategic Diagnosis and Objectives.

Mission

"In the end, every organization is created to fulfill the purpose of offering a product or a service to society. Mission represents this purpose or purpose. In other words, mission is the essential reason for the organization's being and existence and its role in society." (Chiavenato, Administración: Proceso Administrativo, 2001).

Roger Harrison (1986), cited by C. Soler, provides his definition: "The mission must reflect the ultimate goal of the Organization and the values that people associate with the benefit of the Organization. (...) The mission leaves its mark on the statements regarding the objectives and philosophy of the company.

It can be inferred through decisions and their priorities. Strategies and structures are subordinate to mission." (S.V., 1996). In this last sentence Harrison clarifies in a forceful way the subordination of strategies and structures to the mission of the company.

"Mission is the set of contributions with which an organization responds to real market needs".

But not just any contribution is a mission. Only those that characterize the identity and give meaning to the existence of the company" (Cardona & Carlos., 2004). They also define it as: "The contribution that characterizes the identity of a group or organization."

Vision

"The vision serves to look at the future you want to achieve. The vision is the image that the organization defines regarding its future, that is, of what it intends to be" (Chiavenato, Administración: Proceso Administrativo, 2001). Peter Druker says, "The common vision, common understanding, unity of direction and effort of the entire company requires a definition of what our business is and what it should be." While (Calpena, 2009) considers that the vision refers to the profile that is desired for the company in the future, with special focus with respect to other rival organizations. For Simón Dolan, Salvador García and Bonny Richley (2006): "the vision needs to be ambitious enough to provoke enthusiasm, sufficiently comprehensive to be accepted by all, consistent enough to be understood and realistic enough to assure shareholders that their investment will be profitable".

The mission and vision are the central core of the cultural and strategic dimension in an organization. Values are the conclusion of these, the way in which it is put into practice and all components of a company act under a series of shared values that distinguish them from others and potentially lead them to success. Values are, therefore, the patterns of behavior within them and should be the guides for the establishment of their objectives and their achievement in coherence with their cultural and strategic perspective (Calpena, 2009).

Objectives

Companies are certain classes of organizations or social units that seek to achieve specific objectives, and their raison d'ed is to meet them. A goal of the company is a desired situation that it intends to achieve. From this perspective, business objectives serve many functions (Chiavenato, Administración: Proceso Administrativo, 2001).

According to Harold Koontz, the objectives of the organization are those material, economic, commercial and social aspects, in the direction to which organizations direct their energies and resources, those aspects are profits, profitability, good image, social responsibility, productivity, quality products or services, good customer perception, etc. They are the objectives you want to achieve, in order to operate satisfactorily within the socio-economic environment. According to many authors, internal and generic objectives for all organizations would be achieved (Psicologíayempresa, 2013):

1. **Efficiency:** It is the optimal use of the material, economic, time, man and effort resources of the organization, to achieve effectively, in the programmed time and with the same cost, the organizational objectives.

2. **Effectiveness:** It is to achieve the objectives of the organization in any way, it is to achieve profits, surpluses and profits, which will redound in favor of shareholders, employees and society, and will allow the growth of the organization.

3. **Effectiveness:** It is the ability of the organization to respond appropriately and quickly to the situations given at a given time and meet its objectives and satisfy consumers, customers or users of the product or service.

According to Santiago Lazzatti, "effectiveness is to achieve the objectives and if this is done efficiently, that is, using resources optimally, it will have been effective. Effectiveness is the sum or multiplication of efficiency and effectiveness under a concept of synergy."

Values

"Values are relatively stable strategic learning over time, that one way of acting is better than its opposite, to get things right" he quotes it (Calpena, 2009), when he refers to García, S., Simón L. D. in his doctoral thesis.

The values are intended to achieve a certain level of homogeneity when acting in the company by all the components of the organization. When an organization defines its values it is communicating to people who know the way in which it is considered that the work should be done as well as why it should be done in this way and how they have to do it, it is a way of being and acting, therefore the values can not be defined from outside but it is up to those responsible for the organization to get them to live and perceive as such, the coherence between what is preached and practiced every day is fundamental for these to become action. (Calpena, 2009)

Pablo Cardona and Carlos Rey (2005) propose a classification on them:

1. **Business values:** Related to the activity of the company, such as perseverance, efficiency, professionalism, results orientation. These represented 30% of the total values.

2. **Relational values:** They have to do with the quality of relationships at all levels such as communication, teamwork, respect for people. These meant 26%.

3. **Development values:** These are those referred to achieving differentiation and continuous improvement of the company such as innovation, creativity, learning and continuous improvement. These values were 22%.

4. **Contribution values:** They are those who seek contributions to stakeholders beyond strict business relationships such as customer satisfaction, interest in people, corporate social responsibility etc., which meant 22%.

SWOT analysis

SWOT originated in the 1960s–1970s (Humphrey, 2004). At that time, the Stanford University Research Institute (SRI) appointed the group of Marion Dosher, Dr. Otis Benepe, Albert Humphrey, Robert Stewart and Birger Lie to determine, with the funds provided by fortune magazine companies, the reasons why the companies' corporate planning failed. At that time the proposed model was called "Logical Chain of Events"; which defined four variables SOFT (Satisfactory, Oportunity, Fault y Threat), but in name it was modified in 1964, where the model was presented to Uric and Orr at the long-term planning seminar held at the Dolder Grand Hotel in Zurich Swizerland (Otero &Gache).

These acronyms come from the acronym in English SWOT (strenghts, weaknesses, opportunities, threats); in Spanish, they allude to fortalezas, oportunidades, debilidades y amenazas (Sarli, González, & Ayres, 2015), they also affirm that this consists of carrying out an evaluation of the strong and weak factors of the current situation of the company; as well as the external context of the same which are defined as opportunities and threats as shown in Figure 1:

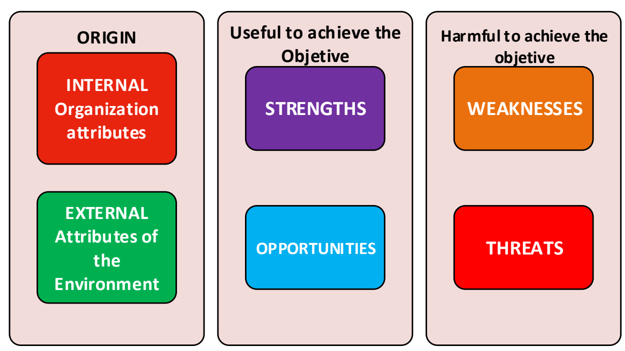

Figure 1. General structure of SWOT
Source: *(Sarli, González, & Ayres, 2015)*

Thompson and Strikland (1998) establish that SWOT analysis estimates the effect that a strategy has to achieve a balance or adjustment between the internal capacity of the organization and its external situation, that is, opportunities and threats.

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June 2021 Vol.7 No.19 30-50

Next, we consider (Rojas, 2009) who says: that the SWOT situational diagnosis is a tool that makes it possible to know and evaluate the real operating conditions of an organization, based on the analysis of these four main variables, in order to propose actions and strategies for its benefit. The strategies of a company must arise from a process of analysis and concatenation of resources and purposes, in addition to being explicit, so that they constitute a viable "way" to achieve its objectives.

Strategies

A company's strategy consists of competitive efforts, business approaches that are used to satisfy customers, compete successfully, and achieve the company's objetives. The strategy constitutes the responses of the management to various aspects such as expanding a range of customers or focusing on a niche of markets, if it must develop a line of products, how to respond to the changing needs of the client, how to achieve long-term growth as stated by the author (Flores, 2016) in her thesis of Master in Business Administration of the Technological University of the Mixteca.

(Sierra, 2013) cites in his research Chandler (2003), who considers that strategy is the determination of the goals and objectives of a company in the long term, the actions to be undertaken and the allocation of resources necessary for the achievement of these goals.

Competitive strategies

In his article entitled "competitive strategies in European industries and the application of strategic maps: bibliographic review (2000-2018) the author (Chasque, 2019) says that competitive strategies according to Andrews as cited in Calderón Hernández, Álvarez Giraldo, & Naranjo Valencia (2010) describes them as the set of policies, plans and goals for the achievement of the objectives, allowing you to identify the current situation of the company and where you want to go. Chasque also mentions that in addition Pedrós D. (2012) specified that in relation to the strategy there are two interrelated elements, but clearly differentiated: the formulation and the execution.

Procedures

According to (Koontz, Weihrich, & Cannice, 2012) the procedures are plans that establish a method of action necessary to support future activities; they are chronological sequences of required actions, guidelines for acting, rather than thinking, that detail the precise way in which certain activities should be performed.

Rodríguez (2002) says that the procedure consists of describing the logical and chronological sequence of the different operations or activities concatenated, indicating who, how, when, where and for what they have to be carried out.

Finally, a procedure is elaborated with the aim of being presented in writing and in order: to whom?, how?, when? and where? an activity should be carried out in order to improve skills, solve repetitive activities and provide better quality obtaining optimal results (Flores, 2016).

The Programs

The programs are a guide to the activities that a company lists to be carried out within a certain period. Lerma & Bárcena (2012, p.14) indicate which program is a sequential list of the actions that must be executed to achieve something, determine the times of realization of the various actions, scheduling to organize time of the actions and instructions.

Kontz et al. (2012, p.113) Programs are a complex of goals, policies, procedures, rules, task assignments, steps to follow, resources to employ, and other elements necessary to perform a given course of action; they are usually supported by an allocated budget.

Mainly in the program answers are established to What is going to be done?, When is it going to be done? Where is it going to be done? In what period of time? Who is responsible? Who will supervise the activity? How much money do I have to invest in this activity? (Flores, 2016).

Budgets

In his thesis (Flores, 2016) he identifies the following definitions of budgets:

1. A budget specifies or at least makes a systematic estimate of how, in what amounts and where financial and human resources will be allocated, is a way of quantifying the objectives. (Lerma & Bárcena, 2012, p.14).

2. The budget is the amount of money that is expected to be used for the realization of the activities of the area, that is, the allocation of resources to specific activities. (Fernández, 2007, p.158).

3. A budget is, in numerical terms, the report of expected results can be called a quantified plan (Kontz et al., 2012).

Strategy map

According to (Pérez, Flores León, & Abarca Cano, 2015) the concept of strategic maps was developed by Robert Kaplan and David P. Norton, in the book they co-authored entitled "Strategy Maps" (2004), although it had previously been introduced in his book "Balanced Scorecard" (1996). Strategy Maps are a tool that allows companies to detail the relationships between intangible assets and value creation, that is, it graphically shows cause and effect relationships in the organization's strategy (Kaplan & Norton, 2004).

The last modification of the Balance Scorecard introduced the strategy map, which represents the model, to translate, communicate and measure the strategy (Kaplan and Norton, 2004). By using cause and effect diagrams, a strategy can be represented in a way that is evident not only to those in charge of strategic formulation, but also to the employees in charge of executing the strategy (Salas K, & Huxley C, 2013). (Wang G. 2014) states that its main purpose is to facilitate the translation of strategy into operational terms and to communicate to employees how their jobs relate to the overall objectives of the organization. (Chasque, 2019)

Similarly, Chasque (2019) mentions that the strategic map is the basis of the Balanced Scorecard (BSC). The phases for the elaboration of strategic maps are: choosing the main objective, identifying the cause and effect relationships, hierarchizing the importance of processes; and the connection of the elements with the strategy for their socialization.

Each company must have a fundamental objective for which it strives to achieve and thus meet the needs of stakeholders (Scholey C. 2005). Cause and effect maps are used to examine the causes of problems, allowing the root cause and the ultimate results of the problem to be identified (Antony et al. 2005).

(Pérez, Flores León, & Abarca Cano, 2015) citing (Smart Book, 2011) consider in their study seven important elements that must be taken into account in a strategic map:

1. Contain, on a single page, all the information, to facilitate strategic communication.

2. Present the four perspectives: financial, customer, internal (processes) and learning and growth.

3. Demonstrate the creation of long-term value through productivity strategy, to improve cost structure, asset utilization and a growth strategy to expand opportunities and favor customer value.

4. Support strategic improvement with price, quality, availability, selection, functionality, service, partnerships and brand positioning (branding).

5. From an internal perspective, customer operational and management processes help create product and service attributes; and innovation and regulatory and social processes collaborate in relationships and image.

6. All processes are supported by the allocation of human capital, informational capital and organizational capital. Organizational capital encompasses company culture, leadership, alignment, and teamwork.

7. The links drawn on the map should describe a cause-and-effect relationship.

Balanced scorecard

The Balanced Scorecard (BSC) was developed by Robert Kaplan, a professor at Harvard University, and David Norton, a business consultant.

They conducted a research study of a dozen companies exploring new methods to measure the activity and the results obtained (Costa, Domínguez, Hernández, Leiva, & Verdú, 2003). The BSC considers four perspectives: financial, clients, internal process and training and growth see Figure 2:

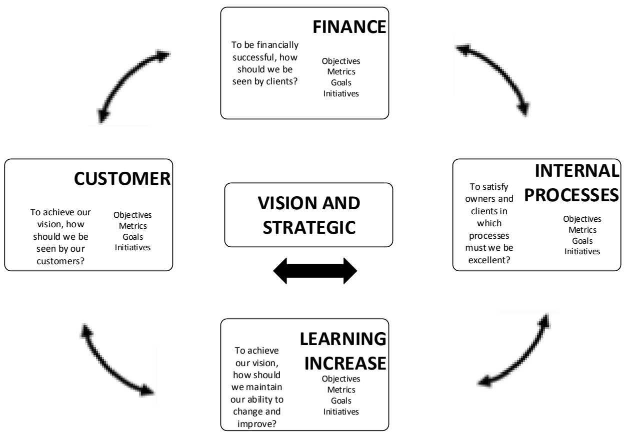

Figure 2. Balanced Scorecard Categories
Source: (Costa, Domínguez, Hernández, Leiva, & Verdú, 2003)

Benefits of Strategic Planning

The following are the benefits that Strategic Planning will bring according to (Noguera, 2011):

1. It allows to be proactive and not reactive, since the company defines its own future.

2. It helps to propose better strategies, in a more systematic, logical and rational way.

3. Communication and dialogue are an important key to the whole process.

4. If managers and employees understand what the company does and their motives, they become part of it and commit to it.

5. It grants power, an act of stimulating efficiency by encouraging and rewarding for participating in decision-making, motivating initiative and imagination.

Family businesses develop strategic planning processes similar to other types of companies, however, most family businesses have the strategic foundation based on a shared vision of ownership and enterprise (Ward, 2006). The benefits of planning, according to Ward (1988), are evidently related to such purposes. He also suggests other benefits such as the achievement of a family commitment, the definition of techniques that help the preservation of the business, the development of an agreement between the family and the management, and the fulfillment of the objective of continuity. (Leandro, 2017)

Strategic planning models in the family business proposed by (Leandro, 2017)

The author in question conducted in his research a review of the literature on strategic planning models in family businesses, in such a way that he identified five:

1. **Business planning interdependence model:** Ward (2006) proposes this model, the product of one of the first investigations into the critical reasons and benefits of strategic planning in family businesses. In his analysis, he proposed that formal planning was not necessary as long as there was strategic thinking and the family business was small.

2. **Model of the strategic management process:** Sharma et al. (1997) formulated this conceptual framework of strategic management, which was developed from an in-depth literature review. They mention that the process of strategic management, both for family businesses and non-family businesses, is presented in the same sense: formulation, implementation and control, focused on the fulfillment of objectives.

3. **Sustainability model of companies:** Proposed by Stafford et al. (1999), and formulates that the sustainability of the family business depends on the fulfillment of the objectives, both of the family and the company, in addition to the operations that are carried out between both systems. In this way, the main goal of this model is strategic planning, the typification of resources, demands, processes and operations that must be developed at the family and company level that favor the sustainability of family businesses.

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4. **Parallel planning process model:** Carlock and Ward (2003) propose this model, called parallel planning process (PPP), which involves two aspects: family and business. In the family, PPP involves core values, family commitment, family vision, and continuity plan.

5. **Model of the strategic management process of the family business:** proposed by Ussman (2004), which has two elements: situational analysis and strategic management. It is a combined management model in which both family and business objectives are mixed.

Strategic planning process

The process of strategic planning that is oriented to future decisions according to (Ulloa & Arevalo, 2017) considers four important stages: Philosophical, analytical, operational and control as shown in Table 2:

Philosophical Stage	Philosophical precepts	Mission Vision Values
Analytical Stage	Analysis of the situation	Analysis of the environment SWOT Strategic Objectives
Operational Stage	Policies, plans, programs, budgets	Actions and activities
Control Stage	Control and innovation	Strategy map /Balance Scorecard

Table 2 Strategic planning process
Source: (Ulloa & Arevalo, 2017)

(Ulloa & Arevalo, 2017) consider in each of the stages of strategic planning the following:

1. In the so-called philosophical stage, the vision that the company will have, its mission that represents its raison d' existence, its values and general policies are defined. The corporate strategy of the organization can also be established, which consists of establishing the policy regarding products, market, objectives and resources.

2. While the second stage, which is analytics, analyzes the situation of the company both internally and externally, defining the strengths and weaknesses, as well as the opportunities and threats, both internal to the company and the external environment, it is also important to analyze the competition.

3. The next stage is the operational, in this we proceed to establish the long-term strategic objectives of the company, which must be transformed into strategies and these into operational objectives, the commitment and participation of the staff and the allocation of resources must be sought. Policies, procedures, programmes must then be defined and the corresponding budgets determined.

4. The last stage is the control, verification and feedback of management indicators and the growth and development of the Company depends on this.

Strategic planning in the family business

The term strategic planning was coined in the 1950s and was in common use from the mid-1960s to the mid-next. Then in the 1980s this ended it was discontinued, but in the 1990s it brought with it the resurgence of strategic planning, so that it is now applied worldwide in all companies (Montoya, Aguilera Arroyo, & Padilla López, 2015).

In the research carried out by (Leandro, 2017) it is identified that strategic planning in the family business is a process of diagnosis, methodical, introspective and collective, of decision making, in relation to its activities and the direction that the business family must take in the future to adjust to the changes and demands of the environment and its family structure, which will help its continuity over time, with triumphant business results. As mentioned by the author Leandro, it is of great importance to ensure the future success of family businesses through the analysis and reflection of activities carried out, hence the importance of strategic planning as a tool to support decision making.

Ward (2006) says that strategic planning in family businesses is the development of a business strategy that considers aspects of both the company, the family, and the context, with a transparent orientation towards growth.

ISSN: 2444-5010

This strategy incorporates the company's mission, business vision and action plans to achieve strategic objectives. Likewise (Ward, 2006) indicates that family businesses develop strategic planning processes similar to other types of companies, however, most family businesses have the strategic foundation based on a shared vision of ownership and company.

"Every family business wants the family to remain the owner of the business from generation to generation, for this they must plan what they are going to do so that this wish becomes a reality. This plan cannot ignore the strategic plan of the company or the strategic plan of the family, so that both achieve, jointly, the goals they propose" (Leandro, 2017). For this to happen, the authors of this work consider it necessary for the family business to have its mission, vision and clear objectives well defined to ensure that the company can continue from generation to generation.

Strategic planning has become one of the most relevant concerns in recent years for this type of company because there is a need to develop an efficient process that allows the transfer of intergenerational knowledge and that can face the socioeconomic changes that allow them to survive with profitability, liquidity and family harmony. (Leandro, 2017)

Well says (Leandro, 2017) in the conclusions of their research that the most important contribution to the issue of strategic planning of family businesses is made by Carlock and Ward (2003), who point out in their model that companies and families follow predictable life cycles, as well as that it is possible to learn from their own experiences and from others, that the values, culture and goals of the family really influence more than other achievements, that external forces will influence the future performance and long-term viability of the company and that the capabilities of the company are a critical influence on the business strategy.

Strategic Plan

A concept of strategic plan is the one that he considers (Martínez T. E., 2001) in his research: "A Strategic Plan is a set of elements and / or concepts that guide, unify, integrate and give coherence to the decisions that give direction and destination to an organization, department or unit of agricultural production".

Another important opinion that cannot be overlooked in the present study is that: "The elaboration of the strategic plan resembles in some way a puzzle in which we create the pieces that we then place in a way that makes sense and coherence. Each of them represents a reality and has a specific function, but it needs to be integrated with other pieces to acquire all the meaning and, in this way, to be able to establish a consistent plan" (Vicuña, 2017).

The first four stages of a strategic plan according to (Vicuña, 2017) are: the analysis of the internal and external situation, the diagnosis of the situation, the determination of the system of corporate objectives and the choice of strategies (corporate and functional). Hence, such stages are interrelated with each other, so much so that there can be no objectives without strategies, nor can they be drawn or formulated if the opportunities, threats, weaknesses and strengths have not been considered.

Now, the idea of the strategic plan must regularly arise from the direction of the organization, depending on the structure of society, that is, from the person or persons whose mission is to take the reins of the company to lead it to success. "Sometimes the help of an expert is essential to develop a strategic plan that is useful, credible and technically coherent" they affirm (Pedrós & Milla Gutiérrez, 2005), hence the authors mention that the key to the success of the project is the correct planning of this and the perfect coordination between the organization and external professionals, that is why teamwork is very important.

Objectives of the strategic plan

In her thesis the author (Flores, 2016) alludes to the objectives of the strategic plan according to Álvarez (2006), which the latter considers the following:

1. Have a practical methodology that allows the company to periodically formulate and redefine objectives and strategies.

2. Orient the efforts of the organization towards the consolidation of its vision, mission, objectives and competitive position.

3. Develop the specific objectives of each area (production, personnel, marketing and finance) consistent with the mission and vision of the company.

4. Develop improvement procedures that accelerate the level of planning.

5. Guarantee through monitoring, the fulfillment of objectives.

6. Guarantee organizational development through control in the coming years.

While from the point of view of Roche (2005) the objectives of strategic planning are:

1. Reflect on the medium and long-term objectives of the organization, on the strategies, the most appropriate ways to achieve them.

2. Establish and set, for the entire organization, these objectives and strategies in such a way that if the planning is formal it constitutes a guide for the daily management of all the people who collaborate or work in the entity.

3. Involve and motivate the workers of the company in relation to the goals to be achieved by itself.

4. Be prepared for the future. The establishment of a system of monitoring, control and permanent adaptation of the plans; when things are going well it allows you to make the most of resources and opportunities, when times are difficult, minimize risks, react in time, set priorities more accurately.

As can be seen, both authors agree that objectives, strategies, mission must be established and prepared for the future; it is important to have the general knowledge of the strategic plan in order to carry out actions that influence companies, to publicize the elements that make up the strategic plan, to serve as a guide in the elaboration of a plan according to the needs of microenterprises. (Flowers, 2016)

Elements of the strategic plan

(Flores, 2016) in order to know the structure of a strategic plan is based on several authors. First it is based on the authors Para Herrera M. & Gabriel L. (2007) where they consider as the main elements of a strategic plan the following:

1. Purpose or mission
2. Vision
3. Premises
4. Objectives and goals
5. Strategies
6. Rules and Policies
7. Procedures
8. Programs
9. Budget

(Flores, 2016) is based on Lerma & Bárcena (2012, p.173) which say that the elements of strategic planning must be interconnected and established sequentially, as detailed below in Figure 3.

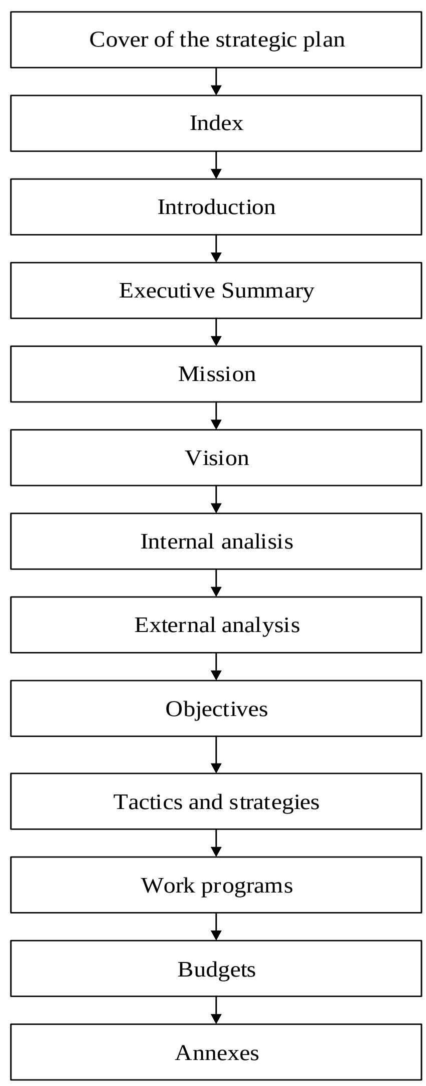

Figure 3 Elements of the strategic plan
Source: (Lerma & Bárcena, 2012)

ISSN: 2444-5010

(Flores, 2016) refers to Álvarez (2006) who indicates that thanks to the strategic plan an organization knows clearly, what results it must achieve (objectives), how it will achieve them (strategies), what activities it will develop throughout the planning period (work program), who and when these activities will be developed. It is of great importance that when establishing and formulating each of the elements of the strategic plan, they must be attached to the expectations and reality of the company; otherwise it would not support the company in its decision-making.

Components that contribute to the success of the strategic plan

Flores (2016) says that "It is substantial to have the strategic plan in a written document, however, it is more relevant to carry it out and evaluate that what was written in the document is executed, so there are two elements that contribute to achieving the success of the strategic plan are those detailed below":

1. **Implantation:** Once the objectives, mission, vision, strategies and policies have been established, it is necessary to carry out what is planned, that is, the program of activities, but not only to implement, but also to establish control measures. The true degree of participation depends on the superior and the subordinate, but mainly on the communication that is established between the two, the subordinates must be trained and willing to participate in the implementation (Steiner, 1998).

2. **Evaluation and monitoring:** It is a process that consists of analyzing, studying and considering what was planned, giving them a value, thus supporting decision making. (Rodríguez, 2001, p. 286). The action of evaluating facts or administrative phenomena is the first step to improvement, evaluation is the answer to the question: where can I make improvements?

Family businesses

(Olvera, 2015), citing Becker, considers that “The family is the center where the first learning of individuals takes place, it is logical to think of it as the first learning community to which a human being has access, therefore, for a family business, the family is the main human capital builder, a term coined by Becker (1993)”. Not only is the family a center of learning development, but it is also the trainer in values of each of its members that make it up.

(Betancourt, Betancourt Ramírez, & Zapata Cuervo, 2012) in their research consider the following with respect to family businesses: "A high percentage of existing companies in the world are family-owned, which make a great contribution to the world economy and to that of the countries where they operate. In developed countries these companies reach 80% of existing ones, while in developing countries they reach 98% (Poza, 2010)".

The family business plays an important role in the economic and social environment of Mexico. It is estimated that 90% of the country's companies are family-owned. However, they often present serious continuity problems due to the many shortcomings they present; the lack of planning is the most prominent as they say (Montoya, Aguilera Arroyo, & Padilla López, 2015).

(Figueroa, 2007) defines a family business as one whose ownership, direction and control of operations is in the hands of a family. Its members make the basic decisions (strategic and operational) taking full responsibility for their actions. While (Crespo, 2004) defines it as one in which capital and, where appropriate, management and / or government are in the hands of one or more families, who have the ability to exert sufficient influence over it to control it, and whose strategic vision includes the purpose of giving it continuity in the hands of the next family generation.

Donnelley (1964) mentions that family businesses are those that are identified with at least two generations of the family and where this link leads to an influence in the company of the interests and objectives of the family.

(Moreno, Madrigal Moreno, & Guerrero Dávalos, 2015) point out by reference to (Rodríguez & Ramírez, 2004) that family organizations traditionally start under a trial and error work scheme and over time come to establish clear policies, procedures and functional ways of working.

Given the current situation of the markets, those managers who are in charge of the family business must bear in mind that there are many challenges they have to face, the main one being to know at all times the existence of three types of relationships that will be interacting and conditioning these companies, the property, the company and the family, and that must be taken into account in the strategic planning. (Leandro, 2017)

Strictly (Mucci, 2008) he defines it as: "A family business is one that has been founded by a family member and has been passed on, or is expected to be passed on, to their descendants, sometimes through marriage. The descendants of the original founder or founders will have ownership and control of the company. In addition, family members work and participate in the company and benefit from it."

He mentions (Olvera, 2015) that "One of the peculiarities of family businesses is that three subsystems coexist (family, business, property) that determine their complexity and condition their organizational evolution and business performance. Likewise, their interrelations with the environment explain their decision-making processes and strategies, without there being in many cases awareness of it and the information they require, which generates a multiplicity of roles and characterizes their complexity. (Belausteguigoitia, 2013)".

Family businesses are the backbone of economic activity in developed countries and will continue to be so, since it is proper to human freedom to want to undertake and it is proper for parents to be concerned about the training and economic security of their children. The enterprise, when well oriented, is a means that the family can employ effectively in achieving its ends. The family business can be conceived, according to Tagiuri and Davis, as the merger of three dimensions: company, family and property. (Rooster, 2004)

As can be seen in the previous texts referring to family businesses, these are of great importance, since they contribute to the economy, to the generation of jobs and to satisfy the needs of their customers or consumers.

Characteristics of family businesses

Family businesses have a series of characteristics, some of these characteristics are coincident in these companies either partially or totally as indicated (Mucci, 2008):

1. They maintain a marked autocratic style that makes them resistant to change.
2. Many family members hold managerial positions.
3. There is an excessive rigidity in leadership that prevents the development of other people to access key positions.
4. Experience appears as an almost irreplaceable value and a reason for little discussion.
5. The questioning of power is not admitted.
6. Fidelity is valued much more thanskill.
7. There are difficulties or the incorporation of non-family experts is hindered.
8. They are usually small and medium-sized enterprises in their beginnings.
9. They tend to become familiar with all relationships, including those that exist with suppliers and customers.
10. Ancestors sometimes emerge as untouchable and highly idealized myths.
11. The managerial succession comes from the family position.
12. The choice of the future, on the part of young people, is in direct relation to the expectations of the family-company.
13. There is a marked identification of organizational and family values.
14. Drivers, on the other hand, intend to impose continuity by incorporating young people, but, on the other hand, reject their ideas or suggestions.
15. There is a high commitment to a product or service that is part of the tradition and that is identified with the "family name" which hinders the eventual deactivation of these and their strategic analysis. The same can even be said of certain production styles or technologies.

16. The solidarity of the family members, in a situation of business crisis, make their permanence in it.
17. By way of summary, we can establish "family metaphors" that can be seen in the informality of the bonds, in the solidarity expressed in a community sense (for example, the so-called "family feelings") and where loyalty and strong commitment to and the organization emerge as a common denominator.

Example of family businesses

An example of large and successful family businesses is Grupo Bimbo, Grupo Televisa, Grupo Carso, Cemex, Comercial Mexicana represent the most important Mexican companies of today and that fit in the category of relatives (Aparicio, Navarrete Torres, Pérez Sánchez, & Ancona Alcocer, 2015).

Family commitment

"It translates into a group of people who commit their capital and their professional career to the development of a business project. It is stated that this explains why family businesses are able to overcome economic crises and survive, innovate and add value in so-called mature sectors" (Cruz, 2009).

Microenterprises

Microenterprise is a small economic activity determined by the laws of each country. Size is defined by the number of employees and/or determined by sales volume; microenterprises in Mexico are determined by the number of workers of up to 10 workers. According to the latest economic census of the National Institute of Statistics and Geography of Mexico, Mexican microenterprises contribute 15% of the national GDP, generate 40.6% of jobs and 96 out of every 100 Mexican companies are microenterprises (Meanings, 2013).

In 1985 the former Secretariat of Trade and Industrial Development (SECOFI), now the Ministry of Economy, officially established the criteria for classifying the industry according to its size. On December 30, 2002, the Ministry of Economy published in the Official Gazette of the Federation a stratification under the following criteria (INEGI, 2009) as shown in Table 3:

Size	**Sector**		
	Classification according to number of employees		
	Industria	**Comercio**	**Servicios**
Micro	De 0 a 10	De 0 a 10	De 0 a 10
Small	De 11 a 50	De 11 a 30	De 11 a 50
Median	De 51 a 250	De 31 a 100	De 51 a 100

Table 3 Stratification of companies according to their size
Source: Own elaboration, information consulted in (INEGI, 2009)

Decision making

Another important issue to address in the present study is decision-making where the authors (Koontz, Weihrich, & Cannice, 2012) say it is the core of planning, and is defined as the selection of a course of action among several alternatives.

Managers must choose on the basis of limited or tied rationality, that is, in light of everything they can inform themselves about a situation, which may not be all they should know. *Sufisfacer* is a term sometimes used to describe the selection of a course of action that, given the circumstances, is satisfactory. As there are almost always alternatives (often many) for a course of action, managers must reduce them to the few that allow them to operate within the limiting factors: those who oppose in the way of achieving a desired objetive; therefore, alternatives are evaluated in terms of qualitative and quantitative factors.

Other techniques for evaluating alternatives are marginal analysis and cost effectiveness analysis; experience, experimentation, research and analysis come into play when selecting an alternative. On the other hand, there are differences between programmed and unscheduled decisions: the former are suitable for structured or routine problems and are those made, above all, by managers of lower hierarchical level and non-managers; instead, unscheduled decisions are used for unstructured and non-routine problems, and are almost always made by managers at a higher hierarchical level. (Koontz, et al., 2012)

Article **Journal of Business and SMEs**
June 2021 Vol.7 No.19 30-50

Decision making is a primary activity, since we are all decision makers, however, making sound decisions leads to start with a process of constant and focused reasoning, which can include several disciplines such as philosophy of knowledge, science and logic; especially creativity. Whoever is in charge of the company must make decisions every day, without a doubt the decisions will involve two important factors of the company such as loss or profit; the fulfillment and non-fulfillment of the mission and objectives of the company (Amaya, 2010). The author also considers that in almost all decision-making problems there are the following components:

1. The maker
2. The analyst modeling the problem to help the maker
3. Controllable factors
4. Uncontrollable factors
5. The possible outcomes of the decision
6. Environmental/structural constraints
7. The dynamic interactions between these components.

Classification of decision models

In his book Amaya (2010) he considers two models of decisions: determinists and probabilists:

a. **Deterministic models:** In this type of model, the right decisions generate good results, what is expected is obtained, therefore, the result is deterministic. In this type of model, the right decisions are evaluated only according to their results.

b. **Probabilistic models**: In probabilistic models, decisions are given uncertain results, consequently, making sound decisions may not generate good results. In this type of decision-maker model, it is concerned with both the value of the result and the degree of risk involved in each decision.

Decision-making circuit

In decision making you must choose between two or more alternatives, on the other hand all decisions follow a common process in such a way that there are no differences in administrative decision making as expressed (Solano, 2003).

In his research he refers to Paul Moody (1983) who describes a process as a closed circuit that supports decision making, that begins with the awareness of the problem, continues with a recognition of it and its definition, then possible alternatives are analyzed, as well as their consequences. Once the alternatives have been identified, the decider critically evaluates each one, considering the advantages and disadvantages of each alternative, see Figure 4:

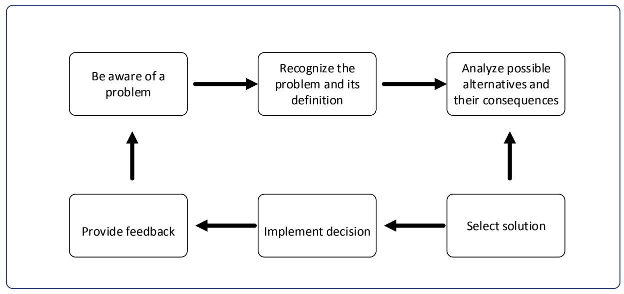

Figure 4 Decision-making circuit (Moody 1983)
Source: (Solano, 2003)

Methodology

The methodology to be followed in this article was defined based on the flowchart corresponding to Figure 5:

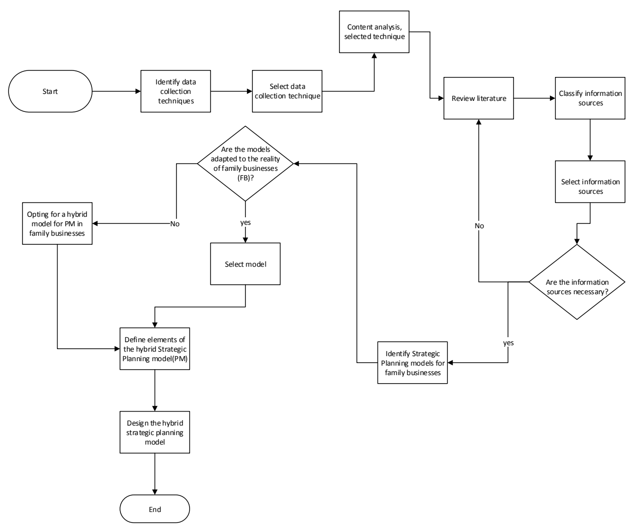

Figure 5 Flowchart on the methodology
Source: Own Elaboration (2021)

Each of the activities considered in the flowchart is described below:

1. **Identify data collection techniques:** To achieve the design of the hybrid model of strategic planning for decision making in family microenterprises, it has been necessary to identify the appropriate data collection techniques to obtain the information.

ISSN: 2444-5010

2. **Select data collection technique:** Once the data collection techniques have been identified, due to the nature of the research, the technique called content analysis has been selected.

3. **Review the literature:** This phase of the process is very important, because thanks to the review of the literature, the knowledge has been obtained to determine the most viable way of solving the identified problem. In the literature is the foundation of all research or study.

4. **Classify information sources:** Once the literature on the problem has been reviewed, a classification of information sources has been made: primary, secondary and tertiary sources of information. Where a database of information sources has been generated according to the object of this study.

5. **Select sources of information:** In this action, the relationship with the subject of study, its relevance and relevance has been taken into account.

6. **Identify PE models for family micro-enterprises:** Thanks to the search and selection of information, different models of strategic planning for family businesses (FB) were identified that gave the guidelines to determine the design of the hybrid model of strategic planning for family microenterprises.

7. **Design hybrid PE model for family microenterprises:** In accordance with the identified models of strategic planning (SP) for family businesses (FB) and based on the literature, the decision has been made by the authors of this paper to design a hybrid model according to the needs of the company, taking into account the phases of strategic planning. The hybrid model considers the strategic planning process of (Ulloa & Arevalo, 2017), the Strategic Planning Models for family businesses that it proposes (Leandro, 2017) and the elements of the strategic planning of (Guiliany, Prieto Pulido, García Cali, Sukier, & Martínez, 2017).

8. **Define elements of the hybrid model:** According to the phases of the strategic planning, the elements of the hybrid model have been defined, this without neglecting the sources of information consulted.

9. **Design the hybrid model:** It is the core proposal that provides a solution to the problem posed, through this it is intended to improve or influence the process of making sound decisions in family microenterprises. To elaborate it, the elements proposed are considered (Lerma & Bárcena, 2012).

Results

As can be seen in Figure 6, the hybrid model is based on the family philosophy from which the four stages that make it up are derived according to the strategic planning process, such as: the philosophical stage, analytical stage, operational stage and the control stage. In the same way it can be identified that the model contains the elements of a strategic plan, this has been derived from an analysis of the different models of strategic planning for family businesses (Leandro, 2017), such models are:

1. Model of interdependence of business and family planning (MIBFP).

2. Management Strategic Management Process Model (MSMPM).

3. Sustainability model of family businesses (SMFB).

4. Parallel planning process model (PPPM).

5. Model of the strategic management process of the family business (MSMPFB).

Below is a comparative table of the five models for strategic planning for family businesses with each of their phases, Table 4:

ISSN: 2444-5010

1.(MIBFP)	1.Family commitment to the future of the company 2.Assessment of the health of the company 3.Identification of the company's alternatives 4.Consideration of family and personal goals 5.Strategy selection 6. Evaluation of family interests and abilities.
2.(MSMPM)	1.Formulation of objectives 2.Strategy formulation 3.Implementation of the strategy 4. Organizational performance with respect to: market, growth and social financial goals.
3.(MSEF)	**1.Family:** Availability of resources and coercion; **processes**: stability time, interpersonal operations, resource operations, change time; **achievements.** **2.Enterprise:** Availability of resources and coercion; **processes**: stability time, interpersonal operations, resource operations, change time; **achievements.**
4.(PPPM)	**1.Family:** a) Values: essential, b) thinking strategic: family commitment c)Vision of the future: Family vision d) Formulation of plan: Continuity plan. **2.Enterprise:** a) Values: management philosophy, b) thinking strategic: strategic commitment c)Vision of the future: Family vision d) Formulation of plan: Business strategy plan.
5.(MSMPFB)	1.Variables and expectations of family members who decide: a) Analysis of the family: Of the environment and the business. b) Determination of objectives c)Formulation of strategies; business variables; family variables. d) Implementation of strategies.

Table 4. Comparative table of strategic planning models for family businesses
Source: Own elaboration (2021), information consulted in (Leandro, 2017)

Proposal of the hybrid model of strategic planning for decision making in family businesses

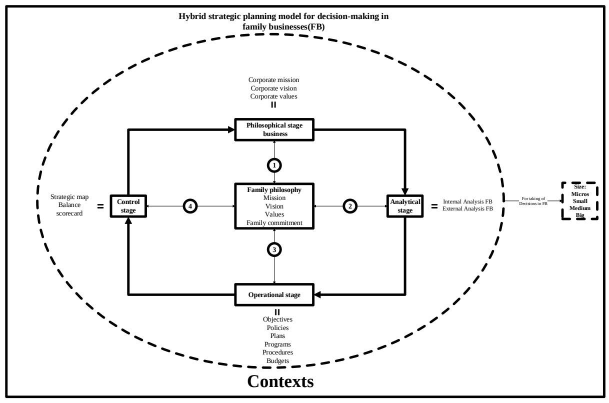

Figure 6 Hybrid model for decision-making in family businesses(FB)
Source: Own Elaboration (2021)

As shown in Figure 6, the proposal of the hybrid model is based and takes its bases on the family philosophy where each of the stages that constitute the model and its corresponding elements are based, which will serve for the generation of adequate strategic plans according to the situation that the company keeps. It is important to mention that the interaction with the center of the model that is the family philosophy in each of the stages is essential so that the purpose that is intended as a family business is not lost and the mission, vision, values and family commitments are not forgotten at any time.

Because it is an integral hybrid model, it can be implemented in micro, small, medium and large family businesses so that no matter the size of the company, what matters is that it can support them in their decision-making process.

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Conclusions

In this research, once the content analysis technique has been used to propose a hybrid model that promotes strategic planning in family businesses, it has been possible to identify its elements so that it is implemented as a tool that allows support for decision-making in family businesses regardless of their size. Likewise, the benefits provided by strategic planning were identified in one of the most important processes of the company, such as making sound decisions.

Similarly, it was possible to identify the models of strategic planning for family businesses and because of the analysis carried out on these models emerged the proposal of a hybrid model that considers the elements in an integral way in the elaboration of the strategic plan, in conjunction with its corresponding stages such as: philosophical stage, analytical stage, operational stage and control stage.

Finally, the hybrid model considers all the elements that allow the elaboration of the strategic plan that supports decision-making in family businesses. It is worth mentioning that the comprehensive strategic planning plan that is developed when implementing this model is focused on achieving success in family businesses, as well as competitive advantages, improvement in their processes, the conquest of markets, the stimulation of their employees and alliances with both customers and suppliers. Currently, the proposed model is being implemented in a family microenterprise in the northern region of the state of Zacatecas, México.

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