

2023

## Succession Planning Strategies in Polish Family-Owned Businesses

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# Walden University

College of Management and Human Potential

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Jan Marcin Klaczak

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Walden University  
2023

Abstract

Succession Planning Strategies in Polish Family-Owned Businesses

by

Jan Marcin Klaczak

MS, London School of Economics and Political Science, 2019

BS, Goldsmiths, University of London, 2018

Doctoral Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

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## Abstract

Family-owned businesses contribute to social and economic advancement, yet many business owners struggle with employing succession planning during intergenerational leadership transitions. Family business leaders are concerned with identifying effective succession planning strategies for the leadership transition to the next generation for business continuity. Grounded in Rothwell's seven-step model for succession planning, the purpose of this qualitative multiple-case study was to explore succession planning strategies Polish family business leaders used for the leadership transition to the next generation. Three Polish family business leaders who successfully implemented succession planning in their organizations participated in the study. Data were collected through semistructured interviews, journal notes, and a review of company documents. Using Yin's five-step analysis approach, four themes emerged: systematic succession, grooming the successor, communication with non-family stakeholders, and long-term sustainability. A key recommendation is for family business leaders to develop succession plans containing specific milestones, areas for successors' managerial and technical development, and evaluation criteria to bolster business continuity and growth. The implications for positive social change include the potential to improve family business survival, thereby creating continuous job opportunities, supporting community advancement, and enhancing diverse stakeholders' well-being.

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## Dedication

I dedicate this doctoral study posthumously to my grandparents, Maria and Piotr Klaczak. They tirelessly encouraged me to pursue my dreams and embark on this doctoral journey. Completing this doctorate would not have been possible without their wisdom, love, and support.

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## Section 1: Foundation of the Study

Family businesses contribute to economic and social development around the world (Arregle et al., 2021). However, intergenerational leadership transition often results in family firms' decline and discontinuity (Porfírio et al., 2020). Therefore, understanding effective succession planning strategies enables family business leaders to foster their firms' survival and growth (Kiwia et al., 2019). In this qualitative multiple case study, I explored succession planning strategies that Polish family business leaders use to conduct an effective intergenerational leadership transition.

### **Background of the Problem**

Family businesses are the backbone of most economies. They represent over two-thirds of businesses worldwide, produce 70-90% of the world's gross domestic product (GDP), and account for 50-80% of jobs in most economies (Miroshnychenko et al., 2021). Therefore, family business continuity and growth affect global development across economic, social, and environmental domains (Arregle et al., 2021). Nevertheless, family business survival remains a significant challenge for scholars and practitioners (Olubiyi et al., 2022). Only 30% of family-owned businesses survive beyond the first generation, while less than 15% reach the third generation (Porfírio et al., 2020). Moreover, solely 3% of family firms remain operational beyond the fourth generation (Mariotti et al., 2021). Hence, succession planning should be used by family business leaders seeking to ensure their firms' continuity.

Business environments have become increasingly complex and volatile, creating novel challenges for family business leaders. Empirical studies have supported the link

between succession planning, organizational sustainability, and survival (Nazer & Llorca-Jaña, 2022). Nevertheless, many family business leaders refrain from implementing formalized and systematized succession plans, reducing their firms' prospects for growth and survival (Kiwia et al., 2019). Limited family business succession planning has been observed in post-communist economies where many firms face the need for leadership transition for the first time, and practitioners lack the knowledge and experience to conduct the process effectively (Worytkiewicz-Raś, 2020). Hence, it is critical to advance research on family business succession planning to support practitioners facing challenges to their firms' sustainability (LeCounte, 2022). Through this study, I contributed to family business research and practice by exploring effective succession planning strategies that Polish family business leaders employ to support their firms' continuity and development.

### **Problem and Purpose**

The specific business problem was that some Polish family business leaders lack succession planning strategies for leadership transition to the next generation. Therefore, the purpose of this qualitative multiple case study was to explore succession planning strategies Polish family business leaders use for leadership transition to the next generation.

### **Population and Sampling**

Data were collected from three purposefully sampled business leaders of three family firms in Poland who successfully concluded an intergenerational ownership and leadership transfer. Business leaders were interviewed using a semistructured interview

process designed to understand the succession planning strategies they used to conduct leadership transition to the next generation. I also reviewed organizational documents for relevant information and took extensive researcher notes.

### **Nature of the Study**

Considering the nature of a study enables researchers to identify and choose a suitable research method. Qualitative, quantitative, and mixed are the three methods employed in formal research (Lo et al., 2020). Scholars conduct qualitative research when embarking on a context-sensitive, adaptable, and data-driven problem investigation (Reuber & Fischer, 2022). Contrary to that, quantitative research is suitable when using numerical data or pursuing hypothesis testing (Powell, 2020). Mixed methods research incorporates elements of quantitative and qualitative approaches to gather and analyze data, integrate results, or establish inferences (Molina-Azorin & Feters, 2019). Quantitative and mixed methods research approaches were unsuitable for this study, as it did not rely on numerical data to address the research question. In contrast, this study rested upon an interpretative approach to foster a comprehensive understanding of the research problem and formulate its detailed description. Thus, the qualitative method was chosen as the most appropriate to understand the succession planning strategies used to conduct leadership transition to the next generation.

Scholars pursuing qualitative studies aim to acquire a rich and deep understanding of a research problem. Narrative, ethnographic, phenomenological, and case study research designs are used in qualitative studies (Tomaszewski et al., 2020). Narrative designs enable researchers to explore individual or group life stories (Andrews, 2021).

Ethnographic designs involve exploring collective behavioral patterns, beliefs, and assumptions of cultural groups (Beckett & Kobayashi, 2020). Phenomenological designs are employed to represent people's lived experiences and understand their meaning comprehensively (Stilwell & Harman, 2021). Narrative, ethnographic, and phenomenological designs were not suitable for this study, as they allow comprehending individuals' lived experiences, life stories, or behavioral patterns instead of strategies used by business leaders to plan intergenerational succession.

I used the multiple case study research design in this study. Using a case study research design allows scholars to investigate the intricacy of a case in the most comprehensive manner possible through extensive data collection, entailing diverse kinds and sources of information and documenting descriptive themes (Cakar & Aykol, 2021). Researchers can use single or multiple case study designs (Welch et al., 2022). A multiple case study research design was used for this study, as it included several family-owned businesses that successfully concluded an intergenerational succession. As Yin (2018) suggested, a multiple case study design is appropriate as it supports a more exhaustive inquiry and provides an abundance of detail that includes several cultural perspectives not attainable when conducting a single case study.

### **Research Question**

What succession planning strategies do Polish family business leaders use to conduct leadership transition to the next generation?

### **Interview Questions**

1. What succession planning strategies did you use at your family business to conduct leadership transition to the next generation?
2. What key skills and abilities did you look for in potential successors during the succession planning process at your firm to conduct leadership transition to the next generation?
3. How did you communicate your succession planning strategies to prospective successors and other stakeholders to conduct leadership transition to the next generation?
4. What specific leadership development strategies did you use to prepare the successors for post-transition family business leadership?
5. What challenges did you encounter when implementing your succession planning strategies to conduct leadership transition to the next generation?
6. How did you address the challenges affecting the implementation of your succession planning strategies to conduct leadership transition to the next generation?
7. How did you assess the effectiveness of your succession planning strategies to conduct leadership transition to the next generation?
8. What additional information can you share about strategies for succession planning in your family business to conduct leadership transition to the next generation?



## **Conceptual Framework**

I chose Rothwell's (2015) seven-step model for succession planning as the conceptual framework for this study. According to Ghazali et al. (2022), succession planning is conceptualized as a deliberate and systematic effort by organizational leaders to ensure management continuity in pivotal domains, retain and advance knowledge and intellectual capital, and contribute to stakeholders' professional development. In his seminal work, Rothwell differentiated between succession planning and succession management, arguing that they are independent but co-occurring processes. Nevertheless, Ahmad et al. (2020) noted that management researchers had refined the constructs' conceptual underpinnings over the years, with succession planning becoming the dominant and exclusive phenomenon investigated in the subject-matter literature.

The seven-step model for succession planning entails seven consecutive steps that allow organizational leaders to design and implement an effective management transfer. As a first step, the organizational leaders should commit to a systematic succession planning program. Then, they should evaluate the existing work requirements in key positions (Jackson & Allen, 2022). As a third step, business leaders should assess individual performance. Afterward, the decision-makers should assess prospective work requirements and human resource demands. Upon completion, an objective process to evaluate future individual potential should be conducted (Barton, 2019). As a sixth step, decision-makers should formulate a program for leadership development to cultivate future leaders internally (Ghazali et al., 2022). Organizational leaders should also consider alternatives to traditional promotion-from-within ways for attaining succession

demands. As a final step, decision-makers should evaluate their succession planning program (Ahmad et al., 2020). Such perpetual evaluation should be used to make ongoing improvements and sustain a commitment to systematic succession planning.

The seven-step model for succession planning has been extensively employed in research on various types of organizations. In particular, family business literature has benefitted from using the model as a framework for empirical inquiry (Ifekwem et al., 2021). Ghazali et al. (2022) encouraged management scholars to implement the framework when attempting to investigate succession planning in family businesses in a systematized manner. Due to its underpinning's alignment with succession planning research, the seven-step model for succession planning provided a lens for me to explore succession planning strategies Polish family business leaders use for leadership transition to the next generation.

### **Operational Definitions**

*Business continuity*: A business' socio-technical ability to withstand and revive from intra- and extra-organizational contingencies (Niemimaa et al., 2019).

*Family business*: A business in which at least two individuals of a family are active in a firm's control, governance, and management (Roffia et al., 2021). The presence of at least one family member is necessary across all roles.

*Intergenerational leadership transfer*: A situation when a family business' ownership is transferred from a family member to another family member or close relative (Yuan, 2019).

*Intrafamily succession:* The transfer of management to a family member that takes control of a family business when the incumbent owner vacates the leadership position (Hidayati et al., 2020).

*Leadership development:* A process that allows individuals to improve their capacity to succeed in leadership roles within organizations (Wallace et al., 2021).

*Non-family succession:* The transfer of management to a non-family member that takes control of a family business when the incumbent owner vacates the leadership position (Mahto et al., 2021).

*Primogeniture:* The right of the firstborn son to inherit most of the family assets, including the family business (Eze et al., 2021).

*Succession:* A process in which new owners, from inside or outside the owner family, join a firm as owners and provide capital and resources that have implications for organizational processes and outcomes (Porfírio et al., 2020).

*Succession planning:* An intentional and organized process of ensuring the maintenance of organizational knowledge necessary for business continuity (Obianuju et al., 2021). It involves identifying and grooming future leaders who can replace existing leaders when they die, retire, or leave the organization.

### **Assumptions, Limitations, and Delimitations**

As producers of research, scholars should comprehensively understand what is required to generate legitimate, valid findings and conclusions (Theofanidis & Fountouki, 2018). By recognizing and communicating assumptions, limitations, and delimitations, researchers enhance their study's usefulness in academic and professional contexts

(Shahriari & Rasuli, 2020). This component contains the assumptions, limitations, and delimitations that underpinned the study.

### **Assumptions**

Assumptions are statements by the researcher of those specific aspects of the study that are considered true (Armstrong & Kepler, 2018). Five assumptions underpinned this study. The first assumption was that succession planning is essential for Polish family businesses' survival and their local communities' advancement. The second assumption was that the study participants should be open to providing accurate responses and disclosing information on succession planning in their family businesses. The third assumption was that data provided by participants through interviews and organizational documentation should advance scholarly and practitioner understanding of the research problem. The fourth assumption was that a qualitative multiple case study is a suitable research approach for exploring succession planning in Polish family businesses. The fifth assumption was that the results of this study should enable the development of strategies for conducting family business succession planning effectively.

### **Limitations**

Limitations denote deficiencies within a research design that may impact the results and conclusions of the study (Ross & Bibler Zaidi, 2019). Thus, researchers are obliged to the academic community to depict all known limitations affecting their investigation (Shahriari & Rasuli, 2020). This study had five limitations affecting the research process. The first limitation was that the results might not be transferable to family businesses outside Poland. The second limitation was that interviewees' responses

might be affected by their biases and the ability to precisely recollect their experiences with family business succession planning. The third limitation was that participants could refrain from disclosing confidential details about their families or firms, distorting the description of the succession planning process. The fourth limitation was that the interviews with Polish family business leaders would be conducted in English, and their language skills could potentially influence data analysis. The fifth limitation was that the organizational documentation provided by family business leaders could be intentionally limited, affecting its use in the research process.

### **Delimitations**

Delimitations are the limitations the researchers consciously set to support attaining their study's aims and objectives (Theofanidis & Fountouki, 2018).

Delimitations specify the parameters of the investigation (Yin, 2018). In business research, the delimitations often encompass items such as population, sample, setting, and instrumentation (Theofanidis & Fountouki, 2018). Four delimitations underpinned this study. The first delimitation of the study was that it was geographically restricted to Poland. The second delimitation was that the scope of the study extended to firms fulfilling Roffia et al.'s (2021) criteria for family businesses. The third delimitation involved limiting the study participants to family business owners. The fourth delimitation pertained to restricting the study to family businesses that successfully conducted an intergenerational leadership transfer.

### **Significance of the Study**

Succession planning remains at the forefront of family business research and practice. Its effective implementation determines family firms' continuity and influence on communities (LeCounte, 2022). Thus, it is essential to consider succession planning's influence on professional practice and social development ((Lumpkin & Bacq, 2022; Zybura et al., 2021). In this component, I discuss the study's potential contribution to business practice and implications for positive social change.

### **Contribution to Business Practice**

Business practitioners identify the importance of family businesses for the economic growth of organizations and economies. Family firms account for approximately two-thirds of businesses globally, produce 70–90% of yearly global GDP, and represent 50–80% of jobs in most countries (Miroshnychenko et al., 2021). Therefore, family businesses propel economic growth and contribute to global advancement. However, the dominant reason for family firms' failure is the unpreparedness for leadership succession, which is necessary for business continuity and long-term viability (Obianuju et al., 2021). During intergenerational leadership changes, successors of family-owned businesses mobilize innovation, creativity, and future orientation to promote business continuity and growth (Zybura et al., 2021). The results from this study could be advantageous for business practice by clarifying diverse strategies for effective succession planning in family businesses that leaders could employ in their organizations. Family business leaders could derive value from evidence-based practices enabling effective succession for business sustainability and longevity.

### **Implications for Social Change**

The findings from this study might allow family firm leaders to understand effective succession planning practices for business continuity. Thus, the study results could contribute to positive social change by enhancing family business survival upon intergenerational leadership transitions, creating continuous job opportunities, supporting community advancement, and improving diverse stakeholders' well-being. By securing family business continuity, communities can increase economic activity to reduce unemployment and promote community members' professional development (Lumpkin & Bacq, 2022). Furthermore, business leaders of well-performing family firms may act philanthropically to develop and share wealth and legacies across generations (Ge & Micelotta, 2019). Therefore, family business research could positively impact the human condition.

### **A Review of the Professional and Academic Literature**

The purpose of this qualitative multiple case study was to explore succession planning strategies Polish family business leaders use for leadership transition to the next generation. Nevertheless, before initiating the empirical component of this study, it was vital to conduct a literature review to lay a foundation for further endeavors. A literature review positions one's research within the context of extant scholarship on the subject matter, unveiling the value and necessity of further inquiry (Paul & Criado, 2020). It demonstrates a researcher's knowledge and comprehension of a given field, along with their ability to critically summarize and synthesize scholarly resources to formulate an argument for undertaking a study (Paul et al., 2021). In this study, Rothwell's (2015)

seven-step model for succession planning served as the conceptual framework for addressing the following research question - what succession planning strategies do Polish family business leaders use to conduct leadership transition to the next generation?

I acquainted myself with diverse resources spanning peer-reviewed articles, trade journals, governmental reports, and scholarly seminal books to complete an exhaustive literature review essential for understanding succession planning in family businesses. However, to remain mindful of the field's evolution, I concentrated on peer-reviewed scholarly articles published within 5 years of the study's anticipated completion. In the peer review process, independent scholars, who are experts in specific disciplines, assess research quality prior to its publication (Hanafizadeh & Shaikh, 2021). That system fosters originality, validity, and significance of the scholarly output (Emile, 2021). To access peer-reviewed scholarly literature, I primarily relied on the Walden Library. I used the following databases: Business Source Complete, EBSCO Host, Emerald Insight, ERIC, Google Scholar, ProQuest Central, SAGE Journals, ScienceDirect, and Taylor and Francis Online. Moreover, the search encompassed keywords associated with various aspects of succession planning in family business contexts. Keywords included: *succession planning, succession planning model, family business governance, socioemotional wealth, strategic planning, business continuity, business survival, knowledge transfer, leadership transition, intergenerational succession, family business, family-owned business, and family firm*. In the literature review component of this study, I identified 207 (99%) peer-reviewed scholarly articles, of which 194 (93.7%) were published in or after 2019.



When organizing the literature review, several elements became foundational for demonstrating the state of the field and conducting the empirical inquiry. They include: (a) the conceptual framework of Rothwell's (2015) seven-step succession planning model, (b) an alternative conceptual perspective for viewing succession planning in family businesses, (c) the scholarly understanding of the succession process in the family business context, (d) contemporary studies on the factors affecting family businesses and their sustainability, (e) the family business founders' and successors' influence on the succession process and business longevity, (f) the extent to which family business leaders prepare for the succession process, (g) successor mentoring to support intergenerational leadership transfers in family businesses, (h) potential outcomes of effective succession processes in family businesses, and (i) family business research in the Polish context.

### **Rothwell's Seven-Step Model for Succession Planning**

Most organizations encounter succession dilemmas at some stage. Nevertheless, the need for effective succession is particularly pronounced in family firms as it often determines business continuity and survival (Kiwia et al., 2019; Umans et al., 2020). Due to succession planning's far-reaching implications for most organizations, management scholars have devised various frameworks to improve the process' understanding (Al Suwaidi et al., 2020; Barton, 2019; Jackson & Dunn-Jensen, 2021). As Sreih et al. (2019) noted, family business leaders benefit from procedural models as they support implementing management succession practices, especially in organizations that lack experience in that domain. Among succession planning researchers, William Rothwell remains one of the most prominent theorists (Ghazali et al., 2022). The seven-step model

for succession planning, also known as the seven-pointed star model, has gained extensive approval from business scholars and practitioners (Abdellah, 2021). Rothwell devised the model in 2001 and refined it over the next decade (Ghazali et al., 2022). Therefore, the framework has undergone several revisions and extensions since its inception.

Management scholars express divergent understandings of succession planning. The seven-step model rests upon the assumption that succession planning is an intentional and systematic organizational effort to secure leadership continuity, safeguard intellectual capital, prepare for external changes, and encourage human resource development (Ahmad et al., 2020; Rothwell & Prescott, 2022). Therefore, Rothwell (2015) described succession planning as a foundation for longitudinal organizational development and survival, attained through leadership sustainability and stability. Moreover, succession planning might protect firms' intellectual capital and support leaders and employees in identifying and forging career paths (Bano et al., 2022). Thus, in Rothwell's model, succession planning is a comprehensive and holistic process allowing organizations and their members to approach change systematically and thrive upon its completion, appreciating the potential and capabilities of all internal stakeholders (Desarno et al., 2021). The seven steps supporting the succession initiative are outlined below.

The first step of the seven-pointed star model includes the succession intention. It involves identifying and committing to a systematic succession planning process by business leaders and incorporating the endeavor into organizational strategy (Ahmad et

al., 2020; Rothwell & Prescott, 2022). At the outset of the initiative, business leaders prepare a formalized action plan outlining the process's early stages and communication patterns aimed at convincing stakeholders about the need to engage in succession planning (Tucker, 2020). Moreover, this step includes dividing tasks between managers and employees, collectively supporting reaching the desired outcome (Abdellah, 2021). As Izadi Shahnani et al. (2022) emphasized, business leaders must achieve a consensus on the milestones and goals to develop procedures and achieve congruent decision-making that navigates stakeholders through change's intricacies. Nevertheless, some flexibility should be accounted for as succession planning should not have a detrimental effect on organizational culture (Abdellah, 2021). Hence, the first step of the seven-pointed star model engages stakeholders in the succession planning initiative and orients them on strategic organizational needs.

After committing to a systematized succession planning process, business leaders should proceed to the second step, which involves evaluating existing work environments. At this stage, business leaders responsible for conducting the succession process investigate their followers' job descriptions and adjust them to fit new objectives associated with the leadership transition (Batool et al., 2022). In particular, the second step revolves around supervising individuals participating in the succession process and depicting the initiative's implications for professional development. Business leaders identify the skills and competencies needed to address specific tasks and devise a procedural form to track human resource development during the succession process (Chukwuma et al., 2021). Moreover, Izadi Shahnani et al. (2022) indicated that the

procedural form serves as a basis for designing, implementing, and assessing employee training. Hence, the second step of the framework helps business leaders comprehend the setting in which succession occurs.

The third step of the seven-pointed star model involves appraising individual performance. Business leaders critically evaluate the job performance of individuals expected to qualify for career development during the succession process (Abdellah, 2021; Rothwell & Prescott, 2022). High-performing individuals enable leadership transition by mobilizing their knowledge, skills, and abilities to implement organizational change and foster sustainable performance. Therefore, business leaders should comprehensively review internal stakeholders to ensure an alignment between organizational succession goals and human resource potential (Siewert & Louderback, 2019). Moreover, appraising individual performance supports talent management and personal growth (Batool et al., 2022; Jindal & Shaikh, 2021; Omotunde & Alegbeleye, 2021). As Najam ul Hassan and Siddiqui (2020) noted, being considerate of human resources transforms the succession planning process into a pathway toward personal and professional growth for stakeholders. Therefore, the third step of the framework reveals the role of human resources in the succession process.

The fourth step of the framework includes assessing future work and people requirements. It pushes business leaders to use their strategic foresight to consider the competencies needed to compete in shifting markets and secure organizational sustainability (Abdellah, 2021; Chobakhloo et al., 2022). Contemporary work environments undergo perpetual changes, and succession planning should serve as an

opportunity to prepare the organization and its members for future challenges that could hamper its growth and survival (Zhao et al., 2020). Therefore, the decision-makers should rely on accumulated knowledge and available resources to evaluate the internal and external factors affecting long-term business operations and select and develop individuals who could face future demands (Jindal & Shaikh, 2021; Tucker, 2020). As Izadi Shahnani et al. (2022) suggested, business leaders should draft several potential scenarios and devise developmental programs to prepare internal stakeholders for diverse contingencies. A holistic approach prepares individuals participating in the succession process for prospective duties (Ahmad et al., 2020; Siewert & Louderback, 2019). Business leaders should draw from insights accrued in the previous steps as they enable adopting a dynamic view on organizational development.

The fifth step of the seven-pointed star model involves appraising future individual potential. This step is a continuation of the prospective environment's evaluation. Business leaders employ this phase of the framework to consider how well-prepared individuals participating in the succession process are for facing future challenges (Chukwuma et al., 2021; Rothwell & Prescott, 2022). Moreover, they should account for people's openness to undergo personal and professional development (Abdellah, 2021; Jindal & Shaikh, 2021). Therefore, instead of searching for candidates possessing the abilities needed to face future demands, business leaders should establish opportunities for individuals willing to dedicate personal resources for gradual improvement (Ali et al., 2019). Ghazali et al. (2022) stressed that the fifth step of the framework requires business leaders to become future-oriented rather than fixated on

individuals' current or past performance. Business leaders should also attempt to establish an objective process or a series of processes to conduct the potential appraisal (Martin & O'Shea, 2021). As Jackson and Dunn-Jensen (2021) emphasized, it is essential to minimize the effect of biases on the assessment as it could be detrimental to business continuity. Business leaders should conduct a transparent and rigorous appraisal of human potential.

The sixth step of the framework requires business leaders to close the developmental gap. Succession planning and management necessitate continuous investment in human resources to meet organizational needs and sustain a competitive advantage (Ahmad et al., 2020; Bano et al., 2022; Desarno et al., 2021). Therefore, business leaders should devise and execute training programs for internal stakeholders, recognizing that business environments undergo changes, and such interventions should be regularly updated to ensure applicability (Jackson & Dunn-Jensen, 2021). Furthermore, organizations should not neglect talented individuals outside their boundaries as their contributions to business growth could be transformational (Abdellah, 2021). That could be one of the pathways to meeting succession needs that extends beyond promotion-from-within methods (Desarno et al., 2021). As Phillips (2021) emphasized, leadership development programs are vital for closing the developmental gap. Such endeavors allow business leaders to use evidence-based practices to harness critical competencies needed to succeed in complex and volatile business environments.

The final step of the seven-pointed star model concludes the process. It involves assessing the succession planning program (Abdellah, 2021). Tucker (2020) argued that

succession planning should be viewed as a perpetual process rather than an isolated event. Many organizations refrain from investing resources in succession planning, viewing the initiative as restricted to specific contexts or phases of business activity (Chang & Besel, 2021). However, Chukwuma et al. (2021) stressed that succession planning is a pathway to sustainable organizational performance. Therefore, business leaders should devise rigorous methods to appraise succession planning and management in their organizations objectively and unbiasedly (Seema & Ali, 2021). Rigorous approaches should serve as a foundation for enhancing the process for long-term organizational success and maintaining a commitment to succession planning and management.

The seven-pointed star model of succession planning has received extensive attention from business scholars and practitioners. The framework has been used in attempts to optimize the process' effectiveness (Desarno et al., 2021; Rothwell & Prescott, 2022). Therefore, many business leaders have used the framework to design and implement succession programs that facilitate management continuity and knowledge transfer (Keerio et al., 2022; Rajagani, 2019). That pertains to family and non-family organizational contexts (Abdellah, 2021; Ahmad et al., 2020; Kowo et al., 2021). Business scholars have investigated numerous succession processes in family firms in line with the seven-pointed star model (Magasi, 2022). The investigations took place in diverse cultural, economic, and social settings.

Empirical research on succession planning in family firms using the seven-pointed star model was conducted in Asian business environments. In their case study of

the Indonesian family-owned company PT.BJE, Wahyuningsih and Ferijani (2021) employed the seven-pointed star model to understand the phases that resulted in the leadership transfer from the founder to his son-in-law. The researchers discovered that the succession process predominantly occurred following the framework. However, the business leaders neglected some essential steps to prepare, train, and appraise individuals adopting managerial positions post-transition. As the founder's children decided not to become the family firm's leaders, it became essential to consider more distant family members to sustain the organization's character. The case study demonstrated that some family businesses abide by the seven-pointed star model but do not maximize the efforts to formalize the process or align potential successors' capabilities with prospective responsibilities.

The seven-pointed star model was also employed in studies on African family businesses. In contrast with Wahyuningsih and Ferijani's (2021) findings, Magasi's (2022) empirical study conducted among Tanzanian family business leaders using the succession planning model demonstrated the significance of an alignment between individual factors and workplace duties. The results revealed that seeking to transfer organizational leadership to a family member does not affect the firm's continuity and survival. However, ensuring a competent successor with the knowledge, skills, and abilities needed to lead a family-owned business through the transition stage has far-reaching implications for the firm's sustainability prospects. Magasi concluded that family business founders considering potential successors should evaluate the desire, commitment, opportunity cost, interests, industry nature, and experiences before selecting



a suitable candidate. The study uncovered the need for a holistic consideration of the succession planning process.

The succession planning model was used in other empirical attempts to comprehend succession planning in African family businesses. Abiri-Franklin and Olugasa (2022) examined succession planning in Nigerian family businesses from the perspective of female successors. The researchers employed the seven-pointed star model to understand whether family business founders employ effective strategies to assess and choose suitable successors with the skills needed to lead organizations in challenging environments. In some cultural contexts, family firm founders prefer primogeniture to an objective and unbiased appraisal of potential successors (Akhmedova et al., 2020; Kandade et al., 2021). The succession planning model equipped Abiri-Franklin and Olugasa (2022) with a framework for evaluating emerging family business leaders according to their preparedness for organizational management. The study findings showed that excluding female family members from succession planning can propel the unsustainability of family firms. Cultural and religious bias, patriarchal systems, and the absence of governance structures lead to the exclusion of women. Ghazali et al. (2022) noted that employing the seven-pointed star model could encourage business leaders to appraise female family members objectively in the succession planning process, as that would improve family firms' sustainability, productivity, and profitability. Thus, management researchers have identified how cultural and socioeconomic factors affect female family members' succession challenges.

The seven-pointed star model has received a rigorous appraisal from management scholars and practitioners. Such assessments have revealed the advantages of the framework's application across diverse professional settings (Abdellah, 2021; Izadi Shahnani et al., 2022; Pourmohammadshahini & Ranjbar, 2019). The conceptual framework enables business leaders to align the firms' current and prospective talent, facilitating the firms' approach to operational and strategic problems (Bano et al., 2022; Rothwell & Prescott, 2022). Moreover, business leaders can minimize the consequences of internal weaknesses and external threats by developing and enforcing a longitudinal succession plan that relies on internal company strengths and prospective external pressures (Armugam et al., 2019; Ghazali et al., 2022). Furthermore, the model's emphasis on talent management supports employees' personal and professional development during the succession process (Hous et al., 2018; Jindal & Shaikh, 2021). High-performing individuals can anticipate acquiring novel skills and abilities when their organizations implement the seven-pointed succession planning model (Abiri-Franklin & Olugasa, 2022; Magasi, 2022). Finally, Hosseini et al. (2018) noted that the framework's application promotes employee productivity and citizenship behaviors, enabling sustainable organizational performance without compromising stakeholder well-being. Therefore, using the seven-pointed star model could yield benefits for family business scholars and practitioners.

Nevertheless, the seven-pointed star model has weaknesses that undermine its use in family business scholarship. While Rothwell and Prescott (2022) argued that the framework has far-reaching implications for family business leaders pursuing an

intergenerational ownership and management transition, most empirical studies have been undertaken in other types of organizations (Abdellah, 2021; Hosseini et al., 2018; Hous et al., 2018). Therefore, the framework possesses limited empirical foundations for applications in family firms (Abiri-Franklin & Olugasa, 2022; Wahyuningsih & Ferijani, 2021). Nevertheless, Rothwell and Prescott indicated that family business research could benefit from the model's further empirical applications. Furthermore, the seven-pointed star model rests upon talent management, leadership continuity and development, and knowledge management (Candra Susanto & Henokh Parmenas, 2021). However, the framework does not entail immediate considerations of cultural and technological factors (Armugam et al., 2019). In increasingly globalized and digitized business environments, business leaders undertaking succession planning should account for diverse factors affecting modern organizations (Ahmad et al., 2020; Barton, 2019). Hence, Ali et al. (2019) called for management scholars to refine succession planning frameworks to account for changes in organizational life. Nonetheless, a rigorous assessment of conceptual frameworks is vital when conducting empirical research.

### **Alternative Conceptual Framework: Upper Echelons Theory**

The upper echelons theory is an alternative conceptual framework for this study. Hambrick and Mason (1984) devised the upper echelons theory in the 1980s, drawing from Carnegie School theorists' research on the concept of bounded rationality (Abatecola & Cristofaro, 2018). According to the upper echelons theory, organizational leaders encounter complexity, ambiguity, and excessive stimuli in their occupational life, which prevent them from using technical rationality when making strategic decisions (Ali

et al., 2022; Bassyouny et al., 2020). Instead, organizational leaders rely on mental shortcuts, professional experience, and personal interpretations when making choices (Raziq et al., 2020). Thus, despite their efforts to think and behave rationally, organizational leaders inject their subjectivity into workplace decision-making, causing them to act in a boundedly rational fashion (Bassyouny et al., 2020; Popli et al., 2022). Therefore, Ali et al. (2022) argued that the upper echelons theory alters some deterministic views of businesses. The framework demonstrates how individual experiences and biases shape organizational behavior.

Family business founders and owners exert significant influence on their firms' strategic and operational performance. Thus, management scholars have extensively employed the upper echelons theory when researching succession planning in family-owned businesses (D'Allura, 2019; Zhao et al., 2020). LeCounte (2022) indicated that studies using other conceptual approaches, such as stewardship or game theories, often lack comprehensiveness and underestimate the emotional and behavioral implications affecting succession planning in family firms. Therefore, the upper echelons theory allows management scholars to address the family business founders' worldviews which influence the organizations they developed and nurtured (Zhao et al., 2020). The upper echelons theory addresses cognition, perception, and values that affect strategic change decisions for navigating family businesses through the power transition (LeCounte, 2022; Lu et al., 2022). Hence, Vandekerckhof et al. (2019) stressed that the founders' worldviews determine succession planning policies and their continuous monitoring and adequate implementation for business continuity. Moreover, the framework equips

researchers with a perspective on governance throughout the succession process as family business leaders' personalities, experiences, and belief systems shape the initiative's effectiveness (Carney et al., 2019; LeCounte, 2022). As D'Allura (2019) emphasized, acknowledging multiple factors through upper echelons theory's use allows scholars and practitioners to enhance the succession process in family businesses and improve organizations' long-term performance. Therefore, the upper echelons theory offers a holistic perspective on behaviors occurring in organizations.

Researchers have used the upper echelons theory in recent empirical studies on succession planning in family businesses. For instance, in their study of Chinese family businesses, Lu et al. (2022) discovered that the business founders' temporal focus is positively associated with succession planning. Moreover, family relationships bolster the link between the founders' past focus and succession planning and weaken the relationship between the founders' future focus and succession planning. Furthermore, the researchers found that past-focused family business founders are more likely to prepare for succession in ambiguous business settings than present-focused founders. Similarly, in their study of Nigerian family businesses, Ugwu and Enudu (2022) found that innovation investment, mentoring, and leadership succession planning positively influence the family firms' profitability, service quality, and survival. Furthermore, Aladejebi (2021) conducted a multiple case study of Nigerian family businesses undergoing succession planning during the pandemic using the upper echelons theory as the conceptual framework. The researcher found that management abilities, experience, negotiating skills, people management, understanding of the market, gender, and

religious bias are the key factors influencing the family business founders' decision to initiate and conduct succession planning. Finally, Zybura et al.'s (2021) investigation of family businesses in the final stages of the succession process revealed that an intergenerational leadership transition could boost the organizations' innovation capacity. In combination, the empirical studies demonstrate that the upper echelons theory can serve as a foundation for family business research, emphasizing the founders' role in the succession process.

Nevertheless, the upper echelons theory has some weaknesses reducing its usefulness in succession planning research. Neely et al. (2020) conducted a literature review of the theory's critiques, uncovering its shortcomings that require further scholarly activity. First, the upper echelons theory fails to capture mechanisms that mediate the association between executive orientation and organizational outcomes (Steinbach et al., 2019). Second, the framework does not adequately address the behavioral manifestations of executive orientation and how such behaviors affect the relationships, motivations, and actions of the stakeholders contributing to organizational performance (Simsek et al., 2018). Ultimately, Neely et al. (2020) argued that the upper echelons theory does not sufficiently consider the role of contextual factors in moderating the effect of executive characteristics on business results. Due to the upper echelons theory's weaknesses, Rothwell's succession planning model served as the current study's conceptual framework.

## **Family Business Succession and Its Barriers**

Business scholars investigating succession planning in family firms often emphasize the need to understand the succession element of the phenomenon. Porfírio et al. (2020) indicated that family firms foster economic growth and development, and business scholars should advance family business theory to comprehend such organizations' uniqueness and specificities. Succession is a critical research area in family business studies, with scholars concentrating on leadership, power transitions, intergenerational conflicts, communication, and the presence of formalized plans outlining the rules for succession (Daspit et al., 2021; Fries et al., 2021; Hillen & Lavarda, 2019). Nonetheless, research on family business succession remains fragmented, preventing scholars from comprehensively understanding the process and its implications for various stakeholders (Yates et al., 2022). Thus, further succession studies are essential for enabling organizational continuity and success.

Rigorous empirical investigations into facets of family business succession require sound conceptual foundations. Porfírio et al. (2020) defined succession as a process during which new owners, from inside or outside the owner family, become business owners and leaders and furnish novel capital and resources that have implications for company processes and results, including innovation, entrepreneurial orientation, and growth. During the process, which may differ in duration, the founder progressively hands over power to the next generation of business leaders (Bell & Pham, 2020; Ejupi-Ibrahimi et al., 2020). Hence, succession in family businesses incorporates elements of the process, its progress and development, the effectiveness of the

intergenerational leadership transfer, and the process of clarifying the successor's will to take over the company (Porfírio et al., 2020; Teixeira et al., 2020). Succession considerations should also entail the factors and contexts that influence the succession process, such as next-generation leaders' choices and intrinsic motivation to manage the family firm (Bertschi-Michel et al., 2020; Yezza et al., 2021). Given succession's conceptual complexity, family business scholars should maintain a holistic, interdisciplinary outlook supplemented by evidence-based sources.

Nevertheless, there is no consensus on succession's theoretical foundations, and some researchers present divergent perspectives on the phenomenon's components. Cisneros et al. (2018) stressed that family business succession is a complex and long-term endeavor. Still, the scholars argued that other definitions fail to acknowledge the overlapping systems of family, business, and ownership underpinning the process. The interconnectedness further complicates leadership transfers and company control in family business settings (Freiling & Pöschl, 2020). The systems perspective on family business succession creates a need to determine the degree to which complex family relations, rivalries, and conflicts, as well as incumbent and successor attributes, successor selection, resistance to transfer leadership, personal goals and ambitions, and legal and financial aspects affect succession's realization and long-term family business sustainability (Caputo et al., 2018; Ejupi-Ibrahimi et al., 2020; Hillen & Lavarda, 2019). Moreover, alternative conceptualizations of family business succession depict cooperation for firm sustainability between business owners and successors, describing it as role adjustment (Bertschi-Michel et al., 2020). Such arrangements allow business



founders to remain engaged in organizational life by providing support, experience, and expertise and allowing the successor to restructure the company in line with the new leadership vision (Cisneros et al., 2018; Umans et al., 2020). Hence, alternative definitions of family firm succession underscore the process' sophistication and the need for agility to stay competitive.

The conceptual underpinnings of family business succession reveal potential areas hampering firm sustainability. Many scholars have noted that most family business leaders choose not to engage in organized succession planning, which often creates constraints when transferring ownership and management becomes imminent (Rumanko et al., 2021). Yet, barriers to succession planning can occur on environmental, organizational, and personal levels (Cater et al., 2019; Visser & van Scheers, 2018). Moreover, some scholars identified additional factors impeding succession: personal, relational, financial, contextual, and processual obstacles (Chukwuma-Nwuba, 2019). Those diverse perspectives reveal possible causes of long-term family business failure.

Personal barriers pertain to family business owners, potential successors, and family relationships. Many business owners display resistance toward a leadership transition, which can be driven by the attachment to the company, fear of letting go, or concerns about losing respect and status upon retirement (Chang et al., 2020; Nandi et al., 2019). Additionally, family business owners' identities can be closely tied to their organizations and transferring power can be detrimental to their self-esteem (Chukwuma-Nwuba, 2019). In contrast, potential successors could lack the ability or motivation to become business owners enabling long-term competitive advantage (Akhmedova et al.,

2020; Gagné et al., 2021). Potential successors could also possess alternative career choices or lack interest in family business management (Baù et al., 2020; Byrne et al., 2019; Tien et al., 2019). Individual factors are further exacerbated by relational difficulties. Potential relationship-driven barriers to effective succession include conflicts and rivalries among family members and lack of trust in potential successors by family members (Bertschi-Michel et al., 2020; Umans et al., 2021a). Therefore, personal factors can have far-reaching implications for the succession process.

Organizational barriers to effective succession processes in family businesses include internal stakeholders and resources. Management scholars have recognized the lack of successors' acceptance by non-family managers and employees, financial struggles slowing business founders' exit from the organization, inability to raise capital and resources to implement new leaders' visions, or changes to firm performance due to ownership and leadership changes (Chukwuma-Nwuba, 2019; Fries et al., 2021; King et al., 2022; Wang et al., 2019). Furthermore, company size, ownership and governance structures, and the nature of the business are significant factors affecting process effectiveness (Botella-Carrubi & González-Cruz, 2019; Dinh & Calabro, 2019; Duréndez et al., 2019). Some scholars additionally argued that small family businesses might lack governance foundations to facilitate an intergenerational leadership transfer (Kiwia et al., 2019). Hence, organizational barriers are significant contributors to succession process achievement.

Environmental barriers to succession processes in family firms encompass legal, cultural, and values-driven factors undermining the initiative's realization. Empirical

research has revealed that culture reflected in inheritance laws, family systems, and formal education, training, and development extensively affect the completion of family business succession (Anggadwita et al., 2020; Chukwuma-Nwuba, 2019). In some cultural contexts, family business owners remain motivated by primogeniture, excluding possible female successors from power transfer considerations (Chen & Wu, 2022; Kubíček & Machek, 2019). By ignoring individuals' skills and abilities in organizational leadership and using the potential successor's gender as the decisive factor, family business owners put their companies at risk of failure (McAdam et al., 2020). Moreover, values often underpin strategic decision-making in organizations, and the impact of local culture could prevent family business leaders from considering all available options for addressing succession dilemmas (Alvarado-Alvarez et al., 2020; Rovelli et al., 2021). Thus, when undertaking succession in family firms, business owners and leaders should remain mindful of environmental factors' implications for company survival and attempt to make unbiased decisions enabling performance and sustainability.

### **Factors Affecting Family Business Sustainability**

While family businesses are significant contributors to national economies worldwide, they encounter unique challenges undermining their survival and intergenerational transitions. As Chahal and Sharma (2020) indicated, family firms' survival prospects decrease with each subsequent leadership transfer among family members. Empirical studies demonstrate that only 30% of family businesses transition to the second generation, 15% to the third generation, and 3% to the fourth generation

(Oudah et al., 2018). Given such low survival rates, it is crucial to consider factors beyond succession planning that influence family business sustainability.

Strategic planning fosters long-term family business sustainability and survival. The process involves devising an organizational strategy for developing internal and external operations to support profitable firm growth (Arcese et al., 2020). Empirical studies have revealed that family businesses engaging in strategic planning enhance their survival prospects by delineating company scope and longitudinal objectives (Oudah et al., 2018; Tien et al., 2019). Strategic planning allows family business leaders to assign resources and competencies to attain the necessary scope and objectives in shifting environments (Beech et al., 2019). However, strategic planning in family firms differs from strategic planning in non-family businesses as it needs to account for family aspects and needs (Oudah et al., 2018). Furthermore, Arcese et al. (2020) indicated that strategic planning for family businesses should begin with a family commitment to continue the business into the long-term future. Hence, strategic planning factors include a family commitment to continuity and family aspects and goals.

Management scholars researching family business survival strategies have also displayed considerable interest in corporate governance. Family businesses require robust governance for the family's and the organization's longevity (Tanjung, 2020). Corporate governance in family businesses varies from non-family business governance as the family has a longitudinal relationship with the business, reflects its cultural values and norms in business operations and the successive generations, and the stakeholders and business leaders have family relations (Filipović, 2021; Li, 2022). Hence, the company

and the family could benefit from organized governance to ensure their long-term interests (Oudah et al., 2018). Family business governance allows organizational leaders to shape decision-making, planning, and problem-solving structures to address the challenges related to separating family matters from business matters, effective decision-making, legacy, and leadership (Leopizzi et al., 2021; Tanjung, 2020). Thus, corporate governance aids family business leaders in making strategic decisions affecting the firm's survival and performance.

Many researchers have also investigated the role of family business values in facilitating family firms' continuity and survival. Family business values support firm longevity by shaping a shared vision and determining work ethics (Astrachan et al., 2020). Moreover, values enable formulating coherent goals for family and business life. As inconsistent goals often propel conflicts among stakeholders in family business contexts, values create a common ground between the organization and the family (Short & Payne, 2020). Thus, values facilitate strategic decision-making and reduce contradictions between family and business norms and expectations (Zapata-Cantu et al., 2022). The advantageous effects of family business values extend beyond firm owners and leaders (Short & Payne, 2020). While values become more embedded with each generation, value-driven employees are the foundation for company sustainability (Astrachan et al., 2020). As Oudah et al. (2018) suggested, quality, hard work, and honesty are the foundational business values allowing family firms to survive across generations. Thus, family business values contribute to firms' survival.

Family capital advances family firms' accomplishments and long-term sustainability. Family capital includes diverse resources that positively affect businesses and enhance individual and organizational performance (Herrero, 2018). According to Llanos-Contreras et al. (2021), family capital includes human, social, and financial resources owned by the managing family to attain a competitive advantage. Human capital entails family members' business-related knowledge, energy, experience, and ability (Oudah et al., 2018; Porfírio et al., 2020). Family business leaders acting with an appreciation for human capital distribute occupational responsibilities based on one's skills and abilities rather than connections (Llanos-Contreras et al., 2021). Social capital in family business contexts pertains to the relationships with stakeholders who facilitate organizational development and sustainability (Fendri & Nguyen, 2019). When used skillfully, human and social capital propel financial capital's growth (Oudah et al., 2018; Wu et al., 2020). In combination, the diverse facets of family capital allow family firms to reach and protect financial sustainability while preserving human and social resources to face market demands in the long term.

While many family business owners and leaders successfully mobilize strengths to enable organizational sustainability and survival, external support can also act as a catalyst for allowing firms' potential. Some family businesses use advisors' help to address issues such as devising the family's personal, financial, succession, and strategic plans, aligning family objectives with organizational goals, and conflict management (Strike et al., 2018). Extant studies have shown that family business advisors are valuable resources for family-owned enterprises. However, family business advisors must adopt

distinct approaches when considering family, business, and ownership due to complex emotions and possible personal and business conflicts (de Groote & Bertschi-Michel, 2021; Kammerlander, 2022). Moreover, family firms tend to be more resistant to professionalization than non-family companies, primarily when recruiting non-family managers or requesting external support (Bertschi-Michel et al., 2020). Yet, family firms can rely on advice from formal, informal, and family business board advisors (Oudah et al., 2018). Examples of formal advisors include lawyers, accountants, bankers, and family therapists (Oudah et al., 2018; van Helvert-Beugels et al., 2020). In contrast, informal advisors span trust catalysts and mentors (Kubíček et al., 2021). Family business board advisors are often professionals experienced in addressing organizational performance, strategy, conflicts, and succession (Ungerer & Mienie, 2018). Most importantly, an advisor should possess the skills and expertise needed to facilitate family firms' sustainability.

In combination, numerous factors facilitate family business continuity, sustainability, and survival. Therefore, family firm owners and leaders need to remain mindful of internal and external strengths that should be prioritized to stay competitive in challenging and ambiguous business environments (Kubíček et al., 2021; Oudah et al., 2018). With family businesses' survival rates decreasing with each intergenerational leadership transition, using survival-focused strategies becomes advantageous for organizations and national economies.

## **Family Business Founders' and Successors' Roles in Succession Planning**

Family business founders and successors exert a significant influence on their firms' strategic and operational performance. In their organizational behavior, family business leaders rely on values and trust to care for the company, family, and future generations (Astrachan et al., 2020; Iaia et al., 2019). Therefore, founders' tenure as business leaders often forces them to face two conflicting paradigms - continuity and change (Erdogan et al., 2020). At some point, family business founders need to consider whether to conduct an intergenerational leadership transfer or sell the company (Gagné et al., 2021; Vardaman & Montague-Mfuni, 2021). If family business founders choose succession as the preferred solution, they initiate a transfer of values, knowledge, leadership, and eventually ownership (Rajagani, 2019; Tan et al., 2019; Tien et al., 2019). Family business founders and successors are the most critical stakeholders in the intergenerational leadership transfer (Lauto et al., 2020; Lušňáková et al., 2019). Their cooperation and engagement in transmitting consequent components of succession determine the process' effectiveness (Lee et al., 2019a; Rychta, 2022). Due to succession's far-reaching implications for organizational growth and survival, it is essential to consider the process from the founders' and successors' perspectives.

As family business founders possess unique ties with their organizations, management scholars have investigated their motives for initiating or postponing succession planning. Many researchers note that family business founders who decide to implement succession planning in their firms often perceive organizational survival and family harmony as key factors underpinning their readiness to transfer ownership and



leadership (Rumanko et al., 2021; Umans et al., 2021b). Nevertheless, successful family businesses are the effects of the founders' lifetime entrepreneurship which potentially explains why some incumbents struggle to surrender management of their firms easily (Azizi et al., 2021; Hanson & Keplinger, 2021; Marques & Silva, 2020). Therefore, founders' difficulty in letting go of their businesses has underpinned burgeoning literature on resistance to succession.

Management scholars have identified the antecedents of incumbents' resistance to succession planning. Chang et al. (2020) suggested that incumbents in good health and with personal identities linked to their firms might resist succession planning due to intrinsic barriers to change. Successors' unpreparedness or unavailability for business leadership and lack of interest in the family business could further elevate incumbents' resistance to succession planning (Husien et al., 2019; Nandi et al., 2019). Yet, when potential successors possess needed skills and abilities and exhibit interest in leading the family firm, incumbents' self-interests could compromise business sustainability (Mendez & Maciel, 2020; Vardaman & Montague-Mfuni, 2021). In such instances Husien et al. (2019) indicated that self-reflection, post-succession career planning, and developing the ability to disassociate from the family firm could be viable strategies for overcoming founders' barriers to succession planning. Ensuring family business continuity and safeguarding family interests should be incumbents' leading motives for succession planning.

When family business founders overcome barriers to succession planning and decide to conduct an intergenerational leadership transfer, their attitudes and behaviors

become pivotal for the process' effectiveness. The foundational role of the incumbent during the succession process is to select an appropriate candidate, train them, and eventually pass on organizational ownership and leadership (LeCounte, 2022; Yuan, 2019). If family business owners seek intra-family succession and have several offspring, they should evaluate individuals' leadership and technical skills before selecting a suitable successor (Rumanko et al., 2021; Rychta, 2022). Moreover, family business founders might consider shared leadership solutions to employ multiple individuals' abilities to organizational advantage (Fries et al., 2021). Yet, in some cultural contexts, incumbents use primogeniture to guide successors' selection process (Hamilton et al., 2021; Lu et al., 2021). Primogeniture can be detrimental to family firms' sustainability by restricting leadership opportunities for female and younger male successors (Eze et al., 2021). Potential talented and skilled successors could be excluded from succession considerations due to primogeniture (Mismetti et al., 2022). Hence, incumbents should seek to assess potential successors' skills and abilities in an unbiased manner.

Upon choosing successors, incumbents should direct their attention toward developmental activities and eventual leadership transfers. Many management scholars have emphasized the value of formal and informal entrepreneurship education in enhancing succession's effectiveness and promoting knowledge transfer between generations of family business leaders (Lušňáková et al., 2019; Rumanko et al., 2021). Thus, incumbents should create opportunities for successors to join the family firm and observe business operations and strategies from the inside (Hanson & Keplinger, 2021; Porfírio et al., 2020). Husien et al. (2019) suggested sharing power with successors to

groom them into their new position. Learning through practice exposes successors to organizational challenges and allows them to identify and test success-oriented strategies.

In addition to experiential learning, incumbents should evaluate the applicability of organized activities. Researchers have depicted investments in formalized leadership and technical development programs for successors as potentially valuable for successors' professional growth (Barrett & Moores, 2020; Rumanko et al., 2021). Mentoring is another systematic strategy for preparing successors for new career challenges (Madarasiné Szirmai & Németh, 2019). In addition to transferring knowledge among stakeholders, mentoring develops communication and trust among incumbents and successors (Chaudhary et al., 2021; Rychta, 2022). Afterward, incumbents should carve out time and space for successor reflection to conclude the educational phase before the formal ownership and leadership transfer (Bell & Pham, 2020; Mussolino et al., 2019). Reflection should be supplemented with frequent communication between stakeholders to foster relationship depth and trust (Chang et al., 2020; Husien et al., 2019; Somboonvechakarn et al., 2022). Incumbents should then step back and allow successors to lead the family firm, offering support and guidance when necessary (Bertschi-Michel et al., 2020; Cho et al., 2022; Ng et al., 2021). Incumbents' stepping back concludes the succession process from the family business founders' perspective.

Successors perform a pivotal role in family business continuity following the succession process. Nevertheless, most empirical studies focus on the founders' perspective (Buckman et al., 2020; LeCounte, 2022). Yet, extant literature reveals how successors participate in the succession process and shape effectiveness (Gagné et al.,

2021; Kandade et al., 2021). In particular, management scholars have identified diverse factors encouraging potential successors to engage in intergenerational leadership transfers in family businesses (Lauto et al., 2020; Schell et al., 2020). Chanchotiyān and Asavanant (2020) suggested that successors' knowledge, skills, experience, motivation to work for the family firm, and family relationships determine individuals' readiness to take part in the succession process. The interplay between factors further affects the process' success (Bell & Pham, 2020; Kiwia et al., 2019). Thus, considering successors' motivations is needed to understand succession planning in family firms comprehensively.

Different factors determine a potential successor's decision to become involved in an intergenerational leadership and ownership transfer in a family business. Potential successors' knowledge, skills, and experience affect their readiness to become family business leaders (Aladejebi, 2021; Kandade et al., 2021). Previous work experience in the family business and other companies and industry-specific knowledge and skills underpin successors' preparedness (Ameni et al., 2021; Chanchotiyān & Asavanant, 2020). Such experiences and skills allow successors to gain proficiency in business operations, strategizing, and management and acquire context-specific capabilities. Moreover, motivation to become family business leaders and owners is crucial to potential successors' interest in the leadership transfer (Baù et al., 2020; Gagné et al., 2021). Researchers have identified satisfaction with reward or cash compensation, personal interests or needs, and organizational commitment as foundational enablers of the succession initiative (Aladejebi, 2021; Toska et al., 2021). When potential successors

achieve an alignment between personal, professional, and family business goals while also being satisfied with the compensation, they are likely to engage in succession planning (Ameni et al., 2021). Furthermore, family relationships determine potential successors' willingness and readiness to participate in the succession process (Campopiano et al., 2020; Chanchotiyan & Asavanant, 2020). Honest relationships and harmony among family members are significant predictors of successors' intentions (Humphrey et al., 2021). Family members' trust in the successor also increases the likelihood of an intergenerational ownership transition (Chaudhary et al., 2021; Urban & Nonkwelo, 2020). Therefore, an array of antecedents underpins successors' readiness and intentions to lead.

When potential successors commit to engaging in an intergenerational leadership transfer in a family firm, they may approach the process in distinct ways. Porfírio et al. (2020) suggested that successors may behave proactively or reactively throughout the ownership and leadership transition. Proactive successors perceive succession as a developmental opportunity for themselves, their organizations, and their families (Porfírio et al., 2019). Therefore, they seek to efficiently use family business founders' experiences and knowledge to identify and implement novel pathways to organizational growth and sustainability (Porfírio et al., 2020; Selig, 2020). Proactive successors strive to legitimize their positions as new family business leaders by establishing virtuous communication with company stakeholders and revealing their visions for organizational change (Barrett & Moores, 2020; Gemu et al., 2022). Moreover, proactive successors display openness to mentorship, experiential learning, and employing evidence-based

strategies facilitating succession's effectiveness (Letonja & Duh, 2020; Porfírio et al., 2019; Rychta, 2022). In contrast, reactive successors perceive succession as the natural course of events for the company to stay within families' control or as the only option for the family to continue (Porfírio et al., 2020). In such instances, necessity might motivate successors to participate in the intergenerational transfer, which could hamper the initiative's long-term effects (Porfírio et al., 2019; Schell et al., 2020; Więcek-Janka et al., 2020; Wu et al., 2020). Nonetheless, despite divergent behavior from their proactive counterparts, reactive successors should still seek the legitimization of their new role to ensure business continuity (Achtenhagen et al., 2022; Ahrens et al., 2019; Porfírio et al., 2020). Thus, it remains essential to tailor the succession process to successors' motives behind the decision to become family business leaders.

### **Leadership and Succession Planning**

Each ownership and management transfer challenges family firms' sustainability, revealing the vitality of effective leadership for company survival. Empirical research has shown that many family businesses underperform beyond the founder's generation (Vardaman & Montague-Mfuni, 2021). Therefore, effective family business leadership and leadership development have become important research areas in management scholarship as they facilitate firm sustainability across generations (Fries et al., 2021; Kandade et al., 2021). Studies represent scholarly investigations of the business and technical skills of successors, as well as the role of high-quality relationships in developing next-generation family members involved in organizational management

(Huynh, 2021). Leadership research equips practitioners with strategies for fostering family business survival and growth.

Leadership in family firms differs from that in other types of organizations. Family business leaders often possess emotional links with the companies, exert significant influence on the organization and the stakeholders, and have long tenures (Fries et al., 2021; Kandade et al., 2021). Moreover, idiosyncratic leadership contexts sometimes drive family business owners and successors to adopt approaches such as paternalistic leadership behaviors (Baykal, 2019; Lau et al., 2019). Additionally, succession processes in family firms may result in sibling leadership teams' emergence, which requires openness to distributed management (Parada et al., 2019). Yet, studies on leadership styles and behaviors during family business succession planning remain limited and fragmented (Fries et al., 2021). Therefore, attempting to incorporate leadership in succession investigations should interest management scholars.

Studies on leadership styles enabling family business continuity across generations have uncovered approaches that support firm longevity. In particular, many scholars described transformational leadership as compatible with the demands of family firm CEOs (Giang & Dung, 2021). There is an extensive overlap between the approach's conceptual bases and leadership behaviors needed to conclude intergenerational ownership and management transfers in family firms (Fries et al., 2021). First, transformational leadership scholars depict charisma as a critical ability allowing individuals to articulate visions coherent with organizational values, which fosters employee performance and psychological well-being (Zhang et al., 2021). Therefore,

charismatic family firm leaders often exhibit steward leadership behaviors (Bormann et al., 2021). As succession planning requires devising a vision for change, charisma is a valuable ability for family business owners and successors (Fries et al., 2021). Second, intellectual stimulation underpinning transformational leadership bolsters succession planning by stimulating knowledge management, entrepreneurial mindsets, and safeguarding long-term employee motivation (Giang & Dung, 2021). Entrepreneurial leadership behavior establishes a foundation for implementing and cementing a successor's behavior (Tien et al., 2019), securing long-term sustainable organizational performance (Basly & Hammouda, 2020). Finally, inspirational motivation pertains to a leader's ability to promote enthusiasm, optimism, and cohesion among stakeholders, which provides psychological comfort during change associated with succession planning (Fries et al., 2021; Giang & Dung, 2021). Therefore, transformational leadership behaviors can be beneficial when conducting succession planning in family firms, making them a source of long-term competitiveness.

Diverse antecedents underpin the role of leadership in family business succession planning. Fries et al. (2021) identified business leaders' attributes, business complexity, and family complexity as critical factors shaping leadership in family firms. Business leaders' attributes pertain to their personality, gender, and family relationships affecting desirable behaviors' emergence (Kelleci et al., 2019; Martino et al., 2020). Depending on the phases of the succession process, family firm owners and successors may need to display steward, paternalistic, or transformational leadership behaviors (Fries et al., 2021; Giang & Dung, 2021; Kandade et al., 2021). Attributes determine how business leaders



can evoke such behaviors for organizational success (Martino et al., 2020). Business complexity pertains to family firms' board structure, organizational culture, and corporate governance practices (Fries et al., 2021). Centralization and unique values affect leadership during succession planning in family firms, influencing the interactions between key stakeholders during power transfers (Astrachan et al., 2020; Tien et al., 2019). Finally, family complexity refers to socioemotional wealth, family members' involvement in organizational management, and the degree of successor nurturing (Fries et al., 2021; Ng et al., 2021; Razzak & Jassem, 2019). Family complexity affects the use of transformational and participative leadership behaviors during the succession in process (Fries et al., 2021; Giang & Dung, 2021; Kandade et al., 2021). In combination, various antecedents impact leadership during family firm succession planning, determining the employment of specific behaviors for the process' effectiveness.

Family business leadership produces positive organizational outcomes, including during the succession process. While socioemotional wealth remains at the forefront of leadership research in family business contexts, firms must also generate adequate financial performance to ensure organizational development and longevity (Abiodun et al., 2019; Alonso-Dos-Santos & Llanos-Contreras, 2019). Effective leadership, especially transformational, supports firm longevity and succession completion, making it a desirable approach for family firm founders and managers conducting an intergenerational ownership transfer (Kamener et al., 2022). Furthermore, transformational leadership enables knowledge management in family firms (Pellegrini et al., 2020), vital for maintaining firm competitiveness when passing company ownership

and management across generations (Alonso et al., 2019). In contrast, autocratic and paternalistic leadership behaviors enhance family success by cementing members' control over the organization during succession planning (Fries et al., 2021). Yet, transformational leadership improves employee satisfaction during organizational change associated with succession in family businesses (Querbach et al., 2022). Transformational family business leaders use charisma and entrepreneurial orientation to formulate a compelling vision and rally employees around their agenda (Abiodun et al., 2019; Giang & Dung, 2021; Zhang et al., 2021). Hence, leadership is a critical success factor in family business succession planning.

### **Successor Mentoring for Family Business Continuity**

Owning and managing a family business requires many sacrifices on the part of the founder, which is why family business owners often strive to pass their companies to family members. Keeping the business' ownership and leadership in the family is often the most desirable solution (Baù et al., 2020; Bika et al., 2019; Rychta, 2022). Hence, business owners perceive their children as natural heirs and continuators of family traditions and values (Kotlarz, 2019a; Tan et al., 2019; Young & Cater, 2019). Business owners adopt a unique approach to potential successors as they feel responsible for their education, development, and preparation for organizational leadership (Bertschi-Michel et al., 2021; Cater & Young, 2022; Woodfield & Husted, 2022). Therefore, the founder and family members who represent similar values and seek to maintain their family firm's continuity engage in mentoring activities to prepare the successors for challenges after the intergenerational leadership transfer.

The concept of mentoring comes from Greek mythology. In ancient times, a mentor was a person with the knowledge and skills needed to solve social problems (Stephen, 2019). Nowadays, the term mentor is used to describe a trusted teacher, master, guide, or advisor of the learners (Mullen & Klimaitis, 2021). A mentor should possess personality traits such as the ability to transfer practical knowledge, communicativeness, active listening, and professionalism (Haran & Jeyaraj, 2019; Rychta, 2022). Such personality traits support building authority and making mentors role models for learners (Eby & Robertson, 2020). From the organizational perspective, a mentor is an expert in a given field who transfers knowledge and facilitates a learner's personal development for the benefit of both the individual and the entire enterprise (Banerjee-Batist et al., 2019; Haran & Jeyaraj, 2019). Moreover, a mentor is a person who inspires learning and professional activity, helps in discovering and developing the mentee's potential, and effectively motivates learners to achieve occupational goals (Eby & Robertson, 2020; Mullen & Klimaitis, 2021). Hence, a mentor can contribute to personal and organizational growth across dimensions.

Mentoring in family business settings rests upon the acceptance and support the business founder provides to their successor to hone the emerging leader's skills and behaviors. Thus, mentoring facilitates the successor's professional development, which is vital when managing an organization and family wealth (Cater & Young, 2022; Tan et al., 2019). Nonetheless, trust-based relationships between family members are the foundation of a sustainable family business and are a prerequisite for using mentoring (Bika et al., 2019; de Groote & Bertschi-Michel, 2021; Hanson & Keplinger, 2021;

Rychta, 2022). Moreover, family business founders and successors should ensure that conflicts do not undermine intergenerational communication and relationships, as cooperation is crucial for transferring knowledge and developing the skills of emerging family firm leaders (Cater & Young, 2022; Woodfield & Husted, 2022). Therefore, some conditions need to be fulfilled for mentoring to provide value for the stakeholders and family firms.

Mentoring in family business settings is a mechanism for accelerating knowledge exchange between company founders and successors. In particular, succession planning creates a unique environment that facilitates communication and knowledge exchange (Kandade et al., 2021; Rychta, 2022). Moreover, mentoring during the succession process supports specifying learning goals (Bertschi-Michel et al., 2021; Bika et al., 2019; Young & Cater, 2019). Yet, mentoring for family firm sustainability can be ineffective due to poor communication between business founders and successors, a limited interest of successors in personal development, and delays in initiating the succession process (Rychta, 2022; Woodfield & Husted, 2022). On the contrary, bringing up a successor in a friendly and supportive atmosphere enabling the development of leadership skills and interests, creates a strategic advantage for family businesses, arousing the successor's interest in the organization (Bika et al., 2019; Cater & Young, 2022; Kandade et al., 2021). The business founder should also strive to be an authority figure and a role model for the successor (Hanson & Keplinger, 2021; Rychta, 2022). In that case, the latter is more likely to adopt positive workplace behaviors and become more interested in the intergenerational leadership transition (Bertschi-Michel et al., 2021; Woodfield &

Husted, 2022). Therefore, business founders should strategically use mentoring to maximize its benefits for their successors and the organization.

When skillfully used, mentoring during succession planning can be advantageous for family businesses and key stakeholders. Dhaenens et al. (2018) found that mentoring behaviors undertaken by a business owner towards the successor increase the involvement of the younger generation in the learning process and the adoption of new duties, which significantly elevates the successor's knowledge of family business management. Therefore, the business owner should openly share knowledge with the successor as they not only leave a valuable resource within the company and family but also establish opportunities for viewing existing knowledge in a novel manner (Rychta, 2022; Woodfield & Husted, 2022; Young & Cater, 2019). Moreover, Kandade et al. (2021) discovered that the relationships between generations and the resulting mentoring practices such as teaching, advising, explaining occupational tasks, active listening, exchanging views, and answering questions allow successors to comprehend the family business environment, management style, and organizational culture. Hence, successors acquire leadership skills through mentoring activities (Bertschi-Michel et al., 2021; Young & Cater, 2019). Yet, business founders, acting as mentors, can also derive value from the effort (Bika et al., 2019; Cater & Young, 2022). When actively participating in successor development, a business owner can experience satisfaction and contentment and develop a sense of security for the company, family, and future generations (Rychta, 2022; Tan et al., 2019). Hence, mentoring can be beneficial for many stakeholders involved in succession planning.

## **Effects of Succession Planning**

Researchers have investigated the outcomes of succession planning in different types of organizations. In family firm contexts, stakeholders often seek to ensure business continuity, sustainability, and growth (Cater & Young, 2022; Wu et al., 2020). Therefore, most empirical studies on succession planning's outcomes in family businesses depict performance, continuity, and growth as key factors (LeCounte, 2022). In their research of Tanzanian family businesses, Kiwia et al. (2019) found that planned, founder-driven succession processes produce beneficial performance outcomes on individual and organizational levels. Similarly, Bokhari et al.'s (2020) research on Pakistani family-owned businesses revealed that succession planning predicts business sustainability and continuity. Additionally, Ali et al. (2019) found that succession planning enhances employee performance through career development and performance appraisal. Thus, multiple empirical works have supported the benefits of succession planning for organizations. Yet, considering other outcome factors could unveil a more comprehensive perspective on succession planning's value for family firms.

Beyond performance-oriented perspectives on succession planning's outcomes, business scholars have called for reviewing other factors underpinning the effectiveness of intergenerational leadership transfers. In a study of Japanese family enterprises, Chirapanda (2020) discovered that sustainability factors associated with successful succession processes include innovation, competitive advantage, leadership, team management, and establishing relationships with the local community. Moreover, Bell and Pham's (2020) investigation of Vietnamese family enterprises showed that

knowledge transfer from incumbents to successors affects post-succession business continuity and growth, making it a pivotal factor in determining the process' completion. Furthermore, as per Rothwell's (2015) seven-step succession planning model, talent management is a critical element of succession planning. Ensuring an alignment between human capital and organizations' operational and strategic objectives should be at the forefront of family business leaders' goals (Okoro & Iheanachor, 2020; Wang et al., 2019). Hence, empirical endeavors have revealed that succession planning positively influences various aspects of organizational life.

Family business researchers have also considered the effects of succession planning on the stakeholders involved in the process. From the incumbents' perspective, effective succession planning should result in comprehensive knowledge and skills transfer to the successor without compromising relationships and communication patterns between key stakeholders (Agbim, 2019; Lévesque & Subramanian, 2022; Ng et al., 2021). Moreover, sustained or enhanced performance following the intergenerational leadership transfer contributes to incumbents' perception of process effectiveness (Rychta, 2022). From the successors' viewpoint, perpetual professional development through formal and informal leadership and technical training should characterize successful intergenerational transitions (Martini & Dewi, 2020; Rumanko et al., 2021). Successors should feel prepared to use their newly acquired knowledge, skills, and abilities to lead family businesses through organizational change, instilling confidence in stakeholders about their visions' viability (Fries et al., 2021; Umans et al., 2021a). Therefore, follower approval and readiness to implement new family business leaders'

vision are factors underpinning succession planning's accomplishment. From the managing family's perspective, maintaining harmony among members, solidifying trust in the successor, and creating opportunities for members to employ their talents to organizational advantage mark the process' realization (Ferrari, 2019; Gagné et al., 2021). For non-family members, succession planning should culminate in chances for professional development, perceptions of psychological security, and an alignment with new leaders' vision of change (Arambhan & Seetharaman, 2022; Hiebl & Li, 2020; Lee et al., 2019b). Therefore, succession planning has far-reaching effects on many stakeholders, with possibilities for significant benefits.

### **Family Business Research in Poland**

Polish management scholars have displayed extensive academic interest in family businesses, especially in the context of macroeconomic changes. Following the Polish political and economic transformation of 1989, many entrepreneurial individuals used the emergent opportunity to establish businesses and use the free market to their advantage (Majzel & Byczkowska, 2019). More than 3 decades later, there are close to 1.7 million family businesses in Poland which account for 40% of the country's GDP and supply 3 million jobs to the labor market (Biegajło, 2021). Hence, Doborzyński et al. (2019) indicated that 92% of Polish companies are family-owned. Yet, only 8.1% of Polish family businesses have potential successors inside the family (Biegajło, 2021). Therefore, succession planning has been at the forefront of Polish family firm research.

As family businesses significantly contribute to societal and economic development in Poland, many management scholars have investigated strategies for



enhancing such enterprises' development and minimizing barriers to company success. For instance, Worytkiewicz-Raś (2020) used primary data from the Polish Agency for Enterprise Development and the Family Business Institute to recognize that most family businesses in Poland have not yet faced the succession process and consequently lack the understanding of the succession planning process. Wysocka (2019) noted that first-generation business leaders own and manage 71% of Polish family firms, demonstrating how few family-owned businesses have undertaken succession initiatives. Thus, Polish family business leaders could benefit from educational initiatives focused on succession planning strategies for firm sustainability and long-term competitiveness (Domanowska, 2020; Rychta, 2022; Sabal, 2019). Furthermore, Polish empirical studies have demonstrated the paramount role of family values and their intergenerational transfers for family business survival (Kotlarz, 2019b). Drafting a so-called family constitution is a potential formalized strategy for solidifying family values and preparing a succession plan (Kotlarz, 2019a; Wysocka, 2019). Hence, extant literature reveals the enablers of succession planning in Polish family business settings.

Polish management researchers have also investigated barriers to effective intergenerational leadership transfers in family businesses. Doborzyński et al. (2019) identified numerous barriers to family business continuity. From the managing family's perspective, incumbents' nepotism and family involvement in organizational leadership could hamper the implementation of succession planning (Thier, 2020). From the incumbents' and successors' viewpoint, limited management abilities, reluctance to engage in professional development, and neglecting strategy in favor of operations have

been shown to undermine successful intergenerational transitions in Polish family firms (Rychta, 2022). Moreover, poor access to small business management training programs and the inability to recruit external specialists to support the succession process could compromise family business leaders' succession-focused efforts (Kołodkiewicz, 2021; Kotlarz, 2019a). Finally, the external environment could be a barrier to succession planning in Polish family firms (Doborzyński et al., 2019). Complicated corporate, labor, and tax laws have prevented many family business leaders from engaging in formal succession planning (Kotlarz, 2019a; Prusiecka-Sobczak, 2020). Moreover, economic crises, relatively high inflation rates, compromised access to financial services, and rising labor costs have negatively affected Polish family firms and their succession prospects (Doborzyński et al., 2019). Therefore, various dimensions of barriers could weaken Polish family business leaders' willingness and ability to pursue succession planning.

### **Transition**

In this study, I explored succession planning strategies used by Polish family business leaders to conduct leadership transition to the next generation. In Section 1, I laid the foundation for the study by demonstrating the role of family businesses in the global economy, the intricacies of the succession planning process, and its challenges for business survival and growth. That supported formulating the study's problem and purpose. Moreover, Section 1 included the introduction of Rothwell's (2015) succession planning model as the conceptual framework serving as the lens for viewing the research topic. Furthermore, Section 1 entailed the research question supporting the response to the problem. Contributions to business practice and implications for positive social

change were also considered. Finally, an exhaustive literature review of scholarly and professional literature allowed for positioning the study in a broader context and guiding prospective empirical inquiry.

In Section 2, I consider my role as an independent scholar contributing to applied business research. I discuss research methods and design, population and sampling, and practices for upholding the study's ethical standards. Moreover, the criteria for recruiting study participants are described in Section 2. The data collection and analysis processes are also presented. Upon completion, I define the procedures for improving the reliability and validity of the study.

In Section 3, I scrutinize the gathered qualitative data and report my study findings. I also discuss my results in the context of extant scholarly and professional literature and the conceptual framework. This section also contains the findings' influence on professional practice, especially family business management, and implications for positive social change. Finally, I formulate recommendations for further research on succession planning in family businesses to advance subject matter knowledge and alleviate challenges faced by business practitioners.

## Section 2: The Project

In Section 1, I introduced the research problem of succession planning in Polish family businesses and laid a theoretically- and empirically-motivated foundation for the scholarly project. In Section 2, I evaluate my role as a qualitative researcher, explain the criteria I used for participant selection, consider the research method and design, and describe the population and sampling. Afterward, I discuss the data collection instrument and technique, the data organization technique, the data analysis, as well as the reliability and validity strategies employed in the study. Thus, in Section 2, I describe how I designed and implemented the study to produce valuable results, contribute to applied business research and professional practice, and support positive social change.

### **Purpose Statement**

The purpose of this qualitative multiple case study was to explore succession planning strategies Polish family business leaders use for leadership transition to the next generation.

### **Role of the Researcher**

Researchers perform a critical role in qualitative studies. Qualitative scholars serve as the primary data collection instruments (Yin, 2018). Their responsibilities include personally collaborating with the participants through interviews, maintaining an alignment between the study's components, gathering data, conducting data analyses to recognize patterns and themes, and demonstrating findings supported by extant literature (Busetto et al., 2020; Saunders et al., 2019). Moreover, qualitative researchers should concentrate on presenting findings in an accessible manner, acknowledging and

minimizing bias, reducing conflicts of interest, adhering to rules underpinning scholarly endeavors, and acting ethically toward individuals engaged in the study process (Hair et al., 2019; McGrath et al., 2019; Stenfors et al., 2020). Qualitative researchers should also display the study results as valid and reliable for other scholars and potential readers (Hayashi et al., 2019; Lester et al., 2020). Therefore, qualitative scholars assume diverse roles while conducting research contributing to academia and professional practice.

As a doctoral-level business researcher and practitioner, I have advanced my knowledge of family businesses through academic endeavors and career choices. My initial attempt to comprehend succession processes occurred at the undergraduate level when I completed a dissertation on Silesian family businesses. Moreover, I have spent my entire professional career serving as a third-generation family business leader in Poland. Therefore, I have had the opportunity to observe strategic changes in family businesses from scholarly and practitioner perspectives, which underpins the scholar-practitioner model's emphasis on transferable knowledge as described by Nguyen et al. (2019). Yet, to minimize potential conflicts of interest and biases, I participated in various events for Polish family firms to network with business leaders with whom I have limited or no professional or personal relationships. Therefore, despite academic-and work-related links to the research topic and area, I strived to minimize non-research relationships with the participants to bolster the study's potential value.

Researchers should remain vigilant of personal biases undermining the study results. As Fusch et al. (2018) noted, qualitative scholars bring their bias to the research and share it with others while attempting to mitigate its influence on the interpretations of

the participants' experiences, perspectives, and values. I implemented several practices to reduce personal biases' effect on data collection and analysis. As per Yin's (2018) recommendation, I screened candidates before the study to ensure their preparedness to provide valuable contributions to the research topic. Nevertheless, before conducting the interviews, I only established that the participants served as family business leaders who successfully implemented succession planning to complete an intergenerational ownership and management transfer at their organizations. While more information about the participants was available online, I purposefully avoided the resources until conducting data analysis to remain as neutral as possible.

Moreover, I planned to collect data from multiple sources to further minimize biases hampering the research process. I conducted data triangulation to interpret the participants' implicit and explicit meanings. Data triangulation includes using numerous external data collection methods on the same occurrences to improve several external analysis methods (Farquhar et al., 2020; Natow, 2020). Thus, data triangulation improves qualitative studies' validity, reliability, and legitimation (Moon, 2019). Moreover, triangulation supports data saturation (Fusch et al., 2018). Additionally, I used interview protocols and member checking to further reduce personal biases' impact on the research process. Interview protocols allow qualitative researchers to align the interview and research questions, facilitate an inquiry-driven conversation with the participants, collect feedback on interview protocols, and guide corrective actions (Jiménez & Orozco, 2021; Saddour, 2020). Member checking involves providing the study participants with interview transcripts and the researcher's interpretations to seek their verification and

bolster accuracy (FitzPatrick, 2019; Hamilton, 2020). In combination, member checking, data triangulation, and the interview protocol supported minimizing personal biases' effect on the qualitative inquiry process and adhering to research standards.

In addition to mitigating personal biases, scholars should address ethical concerns associated with the research process. Hence, I ensured that my study adhered to the guidelines found in the *Belmont Report*. The National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research published the *Belmont Report* in 1976 to formulate fundamental ethical principles and guidelines addressing ethical problems associated with pursuing studies with human subjects (Nagai et al., 2022). The *Belmont Report* describes researchers' respect toward the participants as critical (Tolchin et al., 2020; White, 2020). Thus, subjects may withdraw from the research process at any stage (Bazzano et al., 2021). My interview protocol contained explicit information for the participants about their freedom to end involvement in the interview at any time. Moreover, the *Belmont Report* underscored that scholarly activities should not harm the participants (Grady, 2019). Hence, the interview protocol safeguarded the participants' identity and physical and psychological well-being. The *Belmont Report* also accentuated the need to treat human subjects fairly (Tolchin et al., 2020; White, 2020). Thus, the interview protocol included identical interview questions for all the participants to create a maximally stable data collection environment and prevent divergent and possibly unfair treatment of the interviewees. Therefore, the *Belmont Report's* underpinnings affected the interview protocol's development, putting ethical concerns centerstage.

## Participants

Researchers should carefully search for potential participants who can extensively contribute to studies. Eligibility criteria allow researchers to undertake effective participant selection, collect useful data, and improve the study findings' trustworthiness and value for other scholars (Capili, 2021; Saunders et al., 2019). Furthermore, eligibility criteria enable reducing potential bias compromising the results and recommendations for practitioners (Ngulube, 2021). I used the following criteria when recruiting participants for my doctoral study on succession planning strategies in Polish family firms: (a) be a business owner and leader of a family business per Roffia et al.'s (2021) conceptualization, (b) operate a business in the Republic of Poland, (c) possess knowledge of succession planning, and (d) have successfully devised and implemented succession planning in their organization to conduct an intergenerational leadership transfer. Hence, the eligibility criteria were closely aligned with the research question and facilitated participant search for the study.

Upon devising eligibility criteria, I focused on finding potential participants for the study. I identified potential participants during networking at events for Polish family businesses organized by Forbes and the Family Business Institute. I also used social media (i.e., Facebook and LinkedIn) to find potential participants for the study. Upon identifying a family firm, I emailed the business owner using the official contact information to verify if they fulfilled the eligibility criteria and would declare interest in engaging in research. To promote participation, I underscored the advantages of the study for business practitioners associated with comprehending succession planning in Polish



family firms. I subsequently contacted potential participants after 5 working days to verify their interest in participating in the study and address any questions associated with the research process. I then strived to develop a working relationship with the participants by providing exhaustive details on the study and emphasizing my commitment to ethical research using the informed consent form. Developing a working relationship with the participants builds trust and facilitates effective communication (Busetto et al., 2020; Hair et al., 2019; Pessoa et al., 2019). I used the informed consent form, the interview protocol, and digital communication channels. The strategies enabled effective and ethical collaboration on the study.

Furthermore, expressing gratitude for engaging in the study is essential for establishing a working relationship with the participants. As DeJonckheere and Vaughn (2019) noted, a working relationship with the participants improves the richness and trustworthiness of the scholarly output. After receiving the Walden University Institutional Review Board (IRB) approval for participant recruitment, I prioritized protecting the participants' identity and privacy. Scholars' recognition of ethical behaviors supports honesty and trust levels among individuals engaged in the research process (Banner et al., 2021; Moriña, 2021; Pessoa et al., 2019). Such factors foster mutual respect, prepare the participants for the research process, and improve confidence in the study results.

## **Research Method and Design**

Scholars investigating applied business problems should make scrupulous research methods and design decisions to generate valuable results. Strijker et al. (2020) indicated that researchers select from qualitative, quantitative, and mixed methods to advance their understanding of phenomena. I employed the qualitative approach for this study. Moreover, I used the multiple case study design to explore the succession planning strategies used by Polish family business leaders to conduct effective intergenerational leadership transfers. I discuss the rationale for my research method and design choices below.

### **Research Method**

Scholars should be guided by their individual research philosophies when selecting a suitable research method. Therefore, I decided to pursue a qualitative study due to my fundamental belief in interpretivism. Interpretivists infer that access to reality is attainable through social constructions such as consciousness, language, shared meanings, and instruments (Elliott & Timulak, 2021; Hackley, 2019). Hence, some scholars have positioned interpretivist philosophy in opposition to positivism in the social sciences (Irshaidat, 2019). Consequently, interpretivist scholars have advocated using qualitative research to appreciate individual differences and explore meanings (Hair et al., 2019). Therefore, my qualitative study on succession planning strategies in Polish family businesses rested upon participant engagement to develop a richer understanding of the phenomenon and lead to meaningful conclusions advancing management research and practice. As per Tomaszewski et al.'s (2020) indication, I employed semistructured

interviews, archival documentation, and observations to develop a rich comprehension of the participants' lived experiences associated with succession planning in family business settings. Moreover, Yin (2018) noted that qualitative researchers use questioning techniques to capture a phenomenon's what, how, and why. Therefore, the qualitative approach facilitated the understanding of succession planning in Polish family firms comprehensively.

Before settling on the qualitative approach, I assessed its appropriateness against other possible research methods. I considered the qualitative method most appropriate, as it enables the scholar to exhaustively explore the understandings, perceptions, and idiosyncrasies underpinning a specific research problem (Saunders et al., 2019; Tomaszewski et al., 2020). Moreover, the qualitative method involves using open-ended questions for data collection (Bleiker et al., 2019), which facilitates gathering multifaceted information on succession planning in family businesses. In contrast, the quantitative method was unsuitable for the study, as Saunders et al. (2019) emphasized its usefulness when examining the correlations between independent and dependent variables. Moreover, I did not intend to test hypotheses or investigate cause and effect variables, which according to Park et al. (2020) are the foundational elements of quantitative inquiry. Furthermore, the mixed methods approach was inadequate for the study, as it involves using aspects of qualitative and quantitative approaches to develop an understanding of a research problem unattainable with a single method (Kinnebrew et al., 2021; Saunders et al., 2019). Yet, the study involved exploring succession planning strategies in Polish family businesses without testing hypotheses or examining

correlations between variables. Therefore, the qualitative method was most suitable for the study.

### **Research Design**

Selecting a research design equips scholars with methods and techniques to conduct a study. Qualitative scholars often adopt inductive research approaches to shift from focused observations about unique phenomena to holistic generalizations and theories (Lanka et al., 2021). Moreover, qualitative scholars can choose from several research designs, including narrative, ethnographic, phenomenological, and case studies (Renjith et al., 2021; Saunders et al., 2019; Tomaszewski et al., 2020). I chose the multiple case study research design for this qualitative research on succession planning strategies in Polish family businesses. Yin (2018) defined a case study as an empirical method for comprehensively exploring an existing phenomenon in its real-world setting, mainly when the boundaries between the phenomenon and the circumstances may not be apparent. My decision to pursue a multiple case study was motivated by the research design's applicability to the study and its potentially beneficial role in devising valuable results. Case studies enable qualitative scholars to investigate technically varied contexts comprising numerous variables of interest, build upon extant theoretical foundations when developing and conducting a study, and use multiple sources of evidence that later need to converge in a triangulating manner (Fathi et al., 2020; Reisoğlu & Çebi, 2020). Therefore, the multiple case study design was most suitable for exploring succession planning in Polish family business contexts.

Beyond selecting the case study research design, scholars should decide whether to employ single or multiple case studies to advance a phenomenon's understanding. Yin (2018) suggested that such decisions should be context-driven. In multiple case studies, the scholar explores several cases to comprehend the discrepancies and similarities between them (Hancock et al., 2021; Rashid et al., 2019). The multiple case study research design also allows scholars to analyze data within each situation and across situations (Fàbregues & Fetters, 2019). Therefore, multiple case studies contribute to the literature by depicting contrasts and similarities among cases (Goodrick, 2020; Hancock et al., 2021). Moreover, multiple case studies tend to generate more reliable findings by grounding results on more diversified evidence (Saunders et al., 2019). Thus, I decided to employ the multiple case study research design to produce robust and valuable data and comprehend how different family businesses in Poland approach succession planning for organizational sustainability and growth.

Yet, scholars should also evaluate why alternative research designs are inappropriate for specific academic endeavors. Ethnographic research designs involve investigating collective behavioral patterns, beliefs, and assumptions of cultural groups (Asenahabi, 2019; Beckett & Kobayashi, 2020). Thus, the ethnographic design was not suitable for the study as it focused on business leaders' succession planning strategies rather than comprehending how people make sense of social interactions. In contrast, phenomenological designs are used to understand and depict the universal essence of phenomena (Stilwell & Harman, 2021). Hence, as the study's goal was not to understand how individuals make sense of experiences but to uncover succession planning strategies,

I did not select the phenomenological design. Researchers use narrative designs to investigate individual or group life stories (Asenahabi, 2019). The study did not involve collecting accounts of how individuals describe and interpret experiences. Thus, I did not select the narrative research design. In sum, narrative, ethnographic, and phenomenological designs were not suited for the study as they enable understanding people's lived experiences, life stories, or behavioral patterns instead of strategies employed by organizational leaders to plan effective ownership and management succession in family business settings. Therefore, I decided on the multiple case study design due to its alignment with my research goals.

Furthermore, I chose to pursue a multiple case study to enable data saturation. Sebele-Mpofu (2021) noted that many novice scholars fail to reach data saturation, negatively influencing research quality and content validity. While researchers do not agree on a universal definition of data saturation, many agree that the lack of new data, themes, coding, and the ability to replicate the study indicate its attainment (Sebele-Mpofu, 2020). To reach data saturation, I implemented several strategies proposed by Fusch and Ness (2015). First, I maximized the number of interviews to collect as much data as possible. Second, I conducted semistructured interviews to ensure that the participants responded to many identical questions. Third, I searched for diverse participants to prevent data overshadowing. Finally, I avoided approaching gatekeepers to retain access to key informants at research sites. Moreover, I conducted member checking, which per Saunders et al. (2019), enhances data accuracy through participants' comments on the interview transcripts and researcher interpretations. Therefore, the

strategies enabled data saturation when exploring succession planning strategies in Polish family firms.

### **Population and Sampling**

To boost the reliability and validity of a qualitative study, researchers should carefully consider the population in which the phenomenon occurs and derive an adequate sample from that population. As investigating the research problem in the entire population is often practically impossible, scholars attempt to select a representative sample (Pandey & Pandey, 2021). Recruiting a representative sample from all possible cases allows researchers to reduce the resources and time needed to undertake a study (Saunders et al., 2019). As Kabir et al. (2021) indicated, choosing an appropriate sampling method is essential for reaching data saturation and formulating meaningful results. Thus, researchers should underscore the role of population and sampling in their studies.

Before selecting the sampling method for this study, I evaluated the criteria for recruiting the participants. The subjects needed to fulfill specific eligibility criteria to qualify for participation. I employed the following eligibility criteria when selecting participants for the study on succession planning strategies in Polish family firms: (a) be a business owner and leader of a family business per Roffia et al.'s (2021) conceptualization, (b) operate a business in the Republic of Poland, (c) possess knowledge of succession planning, and (d) have successfully devised and implemented succession planning in their organization to conduct an intergenerational leadership transfer. As only 29% of Poland's 1.7 million family businesses are not owned and

managed by the first generation (Biegajło, 2021; Wysocka, 2019), the whole population of family business owners who experienced the succession process should not exceed 500,000 individuals. Nevertheless, Worytkiewicz-Raś (2020) noted that many family business leaders do not plan the succession process, which should further reduce the population of individuals satisfying the eligibility criteria to less than 250,000 nationwide. Nonetheless, researching all individuals in the population remained impossible for practical reasons.

I used the purposive sampling method when approaching possible participants from the population meeting the eligibility criteria. Scholars undertaking purposive sampling, a non-random method, deliberately and purposefully choose the sample they deem most useful in addressing the research question (Saunders et al., 2019; Staller, 2021). The selection process requires evaluating foundational variables or qualities of possible participants that influence their input to the study (Farrugia, 2019; Hennink et al., 2020). Such variables could be basic demographics such as age, gender, or socioeconomic status but could entail more sophisticated elements such as specific attitudes or beliefs (Farrugia, 2019). Purposive sampling enables researchers to approach potential participants who are particularly informative, select cases in specialized populations, and recognize specific types of information-rich cases for in-depth investigation (Campbell et al., 2020; Mweshi & Sakyi, 2020; Staller, 2021). Moreover, purposive sampling could be adequate when the researcher possesses limited resources (Bakkalbasioglu, 2020; Saunders et al., 2019). Therefore, I used purposive sampling in my study on succession planning strategies in Polish family businesses to recruit



participants from a specialized population of organizational leaders with the knowledge and experience of succession planning. I used my professional knowledge of family businesses in Poland to select possible cases with significant contributions to family entrepreneurship practice across generations. Afterward, upon receiving the participants' informed consent to engage in the research process, I rented a conference room at a local hotel where I conducted interviews with family business leaders.

For this multiple case study on succession planning strategies in Polish family firms, I used purposive sampling to reach a sample of three family business leaders from three distinct Polish family firms who successfully designed and implemented succession plans to undertake an intergenerational leadership transfer. I chose to focus on three participants for academic and practical reasons. As Yin (2018) noted, qualitative scholars should explore two or more cases when conducting multiple case study research to collect rich data, reach data saturation, and formulate meaningful results. Nonetheless, Schoch (2019) argued that qualitative researchers should not attempt to investigate more than three to four distinct cases to ensure gaining an in-depth understanding of the phenomenon and exploring rich data. Thus, I decided to select three cases to maximize the depth rather than breadth of data and develop a nuanced understanding of the phenomenon.

The sampling method also has implications for data saturation. Despite being a non-random method, purposive sampling requires using the researchers' expertise to select participants with a unique and extensive understanding of the phenomenon (Mweshi & Sakyi, 2020; Saunders et al., 2019). Therefore, rich data collected from the

participants could bolster data saturation (Aguboshim, 2021). Moreover, conducting multiple case studies allows researchers to draw from various data sources (Schoch, 2019). I used data collected during the interviews with family business leaders, researcher notes, and organizational documents to explore the phenomenon. In qualitative studies, triangulation should enable data saturation (Aguboshim, 2021; Fusch et al., 2018). Moreover, I engaged in member checking to ensure that my interpretations of the participants' interview responses aligned with their thought processes and intentions. Qualitative scholars have used member checking to enhance data saturation (Busetto et al., 2020). Thus, I relied on diverse strategies to support data saturation in my qualitative study on succession planning strategies in Polish family businesses.

### **Ethical Research**

Scholars are morally obligated to behave ethically toward all study participants across all stages of the research process. As ethical challenges emerge during each phase of a scholarly endeavor, it is the researchers' responsibility to appropriately and to acceptably align with broader social norms of behavior and uphold professional values (Anabo et al., 2019; Saunders et al., 2019). Thus, before initiating the data collection process, I applied for the Walden University IRB's approval to conduct the study and the associated approval number. My Walden University IRB approval number was 02-07-23-1029342. Institutional review boards, also known as research ethics boards, perform a foundational role in scholarly projects by protecting study participants, using societal resources with equity and fairness, and supporting researchers in the ethical conduct of their studies (Cumyn et al., 2019; Quickfall, 2022). Hence, it was paramount to design a

coherent study and obtain the Walden University IRB's approval before interacting with the participants for research purposes.

Studies might pose various risks to the participants depending on the scientific discipline. Nonetheless, research in the social and behavioral sciences often does not pose risks to the participants beyond those experienced in daily life (Durdella, 2022).

However, the Belmont Report underscores the researcher's ethical obligation to reveal any possible risks and associated benefits before seeking the participants' approval to engage in the scholarly endeavor (Nagai et al., 2022; Pritchard, 2021). Thus, I used the informed consent process to notify the potential participants comprehensively about the study's purpose and features. Anabo et al. (2019) emphasized that, as per the *Belmont Report*, the participants should be well-advised about the scholarly project they are considering engaging in to possess sufficient details to make an informed decision. Thus, disclosing exhaustive details about the study to the possible participants was pivotal in the research process.

The significance of the informed consent process is far-reaching. Hence, I asked the participants to accept the informed consent form to receive their voluntary approval to participate in the study. The informed consent process enables the participants to understand their rights during the scholarly endeavor, particularly regarding voluntary participation and withdrawal at any stage (Josephson & Smale, 2021; Yusof et al., 2022). I provided the participants with the informed consent form, which contained information about their right to withdraw from the study without any penalties. I notified the participants that they could communicate their withdrawal decision verbally or in writing.

Moreover, I informed the participants through the informed consent form about safely storing study data for at least 5 years before completely destroying it to protect confidentiality. Nosek et al. (2022) emphasized the importance of adequate data storage to protect the participants, especially in contemporary digital environments. Therefore, protecting the participants underpinned the research process.

Furthermore, I protected the names of the individuals and organizations participating in the study. Throughout the research process, I did not disclose the names of the individuals and organizations engaging in this scholarly endeavor, and I did not use them in the document. I used pseudonyms in lieu of the participants' and organizations' names. Surmiak (2020) noted that researchers prioritize participants' confidentiality to prevent their exposure to harm associated with the research process. Moreover, I decided not to offer any incentives for the participants to partake in the study. Instead, I only stressed the value of their contributions to advancing applied business research and enhancing professional practice. I also shared the study findings with the participants. While Abdelazeem et al. (2022) suggested that incentives might improve the consent rate and reduce recruitment failure, I decided to refrain from them to foster transparency in the research process. Thus, I reviewed the informed consent form with each participant and responded to any questions related to participation and the research process. Upon attaining the participants' understanding of their role in the study, I asked them to respond to the email containing the informed consent form with the phrase "I consent." I ensured an alignment with ethical and professional standards throughout data collection, analysis, and findings dissemination.

### **Data Collection Instruments**

I was the primary data collection instrument in this study on succession planning strategies in Polish family businesses. In qualitative investigations, the researcher acts as the primary data collection instrument or a medium through which the study is conducted (McGrath et al., 2019; Roberts, 2020). Qualitative scholars perform an essential function in generating and interpreting data and presenting findings (Yoon & Uliassi, 2022). Therefore, qualitative researchers should be reflexive, conscious, and aware of how they might affect the scholarly process (McGrath et al., 2019). Rather than performing a passive role, qualitative researchers actively engage in the process and respond to the study participants (Roberts, 2020). Hence, qualitative researchers need to mobilize their competencies, abilities, and experiences to avoid biasing data and develop an in-depth understanding of the phenomenon under scrutiny (McGrath et al., 2019; Yoon & Uliassi, 2022). Thus, I have refined my qualitative research skills and abilities to contribute to the research process virtuously.

Furthermore, I conducted in-person semistructured interviews, reviewed organizational documents, and took extensive researcher notes to gather data for the study. I used the semistructured interviews to collect rich qualitative data from Polish family business leaders about succession planning strategies employed to conduct successful intergenerational leadership transfers. Semistructured interviews are undertaken conversationally and contain closed- and open-ended questions, often supplemented by follow-up questions (Bearman, 2019; DeJonckheere & Vaughn, 2019). Thus, the interview revolves around the topics on the agenda instead of adhering

exclusively to the standardized questions to uncover unexpected aspects of the research problem (Ruslin et al., 2022). As Bearman (2019) suggested, effective semistructured interviews can generate rich and thick descriptions of phenomena. In the process of preparing for data collection, I had developed the interview protocol (Appendix) and the interview questions to guide the interview, ensured coherence with ethical and professional standards, and provided an appropriate environment for family business leaders to discuss their succession planning strategies. DeJonckheere and Vaughn (2019) noted that adequate preparation for semistructured interviews supports trust and rapport development between interviewers and interviewees. Moreover, I reviewed organizational documents and took extensive researcher notes to corroborate data collected through interviews with family business leaders. Qualitative researchers seek corroboration to minimize faulty observations, biased analysis, and inaccurate conclusions (Gadwal, 2022). Therefore, I conducted in-person semistructured interviews with Polish family business leaders, reviewed organizational documents, and took extensive researcher notes during the data collection process.

Qualitative researchers should implement strategies to enhance the reliability and validity of the data collection process. In this study, I used the interview protocol, data triangulation, member checking, and practice interviews with fellow doctoral researchers to bolster the data collection process quality. Yeong et al. (2018) indicated that well-developed interview protocols improve the data collection process' reliability and validity by allowing scholars to gather data comprehensively, consistently, and systematically. Furthermore, data triangulation involves collecting data from diverse sources to

interrogate various ways of comprehending a phenomenon, create a richer perspective on the research problem, and compensate for weaknesses in study designs (Vivek & Nanthagopan, 2021). Furthermore, many scholars noted that qualitative researchers should consider using member checking to increase the investigations' trustworthiness by verifying if the collected data reflects the participants' perspectives on a phenomenon (Motulsky, 2021). Additionally, practice interviews allow researchers to refine the data collection instruments, emphasizing participant understanding and the recording process (Saunders et al., 2019). For this study, I conducted practice interviews with fellow doctoral researchers to enhance the data collection process before its initiation. Thus, I used several evidence-based strategies to improve the data collection process' reliability and validity.

### **Data Collection Technique**

Semistructured interviews were the primary data collection technique in this study on succession planning strategies in Polish family businesses. DeJonckheere and Vaughn (2019) indicated that a significant advantage of semistructured interviews is that they allow qualitative researchers to gather insights from key informants who possess an extensive understanding of the phenomenon under scrutiny. Moreover, semistructured interviews can elicit narratives that can be highly meaningful, as they incline the interviewees to respond to questions in a storytelling manner (Mahat-Shamir et al., 2021). Nonetheless, semistructured interviews have some disadvantages as a data collection technique. Semistructured interviews might be time-consuming for novice researchers and might not directly lead to themes and outcomes (Andrew et al., 2020). Thus, novice

researchers should develop skills related to undertaking semistructured interviews to benefit from this data collection technique.

Using semistructured interviews to collect qualitative data from Polish family business leaders necessitated conscious planning before, during, and after the interview. After receiving Walden University's IRB approval, I undertook practice interviews with fellow doctoral researchers to refine the data collection process and ensure that the study participants could provide meaningful responses to the interview questions. Saunders et al. (2019) noted that practice interviews allow researchers to conduct a preliminary assessment of the questions' validity and the potential reliability of the data. Initially, I used purposive sampling to select and recruit participants who met the eligibility criteria. As Bakkalbasioglu (2020) indicated, purposive sampling allows researchers to reach potential participants who can provide meaningful and extensive contributions to specific research topics. Thus, recruiting Polish family business leaders with extensive professional experience in succession planning allowed the collection of rich data. I informed potential participants about their voluntary engagement and the possibility of withdrawing from the research process at any stage without consequences. I also emphasized the value of the participant's contributions to family business research and practice and indicated not using any incentives. Conscientious and mindful researchers should communicate clearly with study participants to provide extensive information about the research process, build rapport and trust, and improve interview effectiveness (Eeckhout et al., 2022; Xu et al., 2020). After receiving a written response about participation to the informed consent form, I invited the participants to the interview that



took place in a rented conference room at a hotel near the business leaders' offices. I asked the business leaders to dedicate approximately an hour to the interview process. The steps served as preparation for the interview.

I used the interview protocol (Appendix) to guide the interviews with Polish family business leaders. Roberts (2020) argued that interview protocols are valuable for novice researchers as they support aligning investigations' key components, ensuring adherence to ethical standards, and minimizing mistakes' impact on the quality of collected data. Initially, I thanked the participants for partaking in my study. I also reminded them about their voluntary participation and the ability to withdraw from the study at any time. I also addressed their questions and briefly introduced the research question. Then, I asked the participants for their permission to record the interviews. Afterward, I began asking the interview questions. I also asked follow-up questions when the interviewee provided a response that further enhanced the understanding of succession planning strategies in Polish family firms. Follow-up questions enrich semistructured interviews by allowing researchers to consider and understand potentially novel aspects of the phenomenon under scrutiny while ensuring that the questions are well understood by the participants (McGrath et al., 2019). While interviewing the participants, I watched for their body language, remained mindful of the need to gather rich data, took notes, and attempted to minimize personal biases' effect on the data collection process. Gunawan et al. (2022) indicated that non-verbal aspects of the interview process could have significant implications for the subsequent data analysis. Hence, immersing oneself in the interview supports gathering rich data.

Furthermore, upon collecting responses to all interview questions, I thanked the participants for their time, responded to any emergent questions, and asked to schedule a follow-up session to conduct member checking. As Candela (2019) suggested, member checking creates a reflective opportunity for the participants, enabling qualitative scholars to attain an accurate depiction of participant voices by allowing participants to verify the accuracy and interpretations of data. Moreover, I used the follow-up meeting with the participants as a chance to conduct data triangulation. During the follow-up meetings, I viewed and scanned organizational documents related to succession planning. The participants presented documents containing information about family business management and succession planning that they previously shared with a Polish business school delivering postgraduate family business programs. The documents were used to develop case studies for postgraduate students at the business school. The documents included information about processes and milestones related to succession planning, as well as some educational resources. The participants also shared transcripts of the lectures they delivered for educational purposes. Beyond organizational documents, I accessed publically available data published by the Polish Ministry of Justice containing financial details. Accessing additional data during follow-up meetings might be more appropriate due to the relationship between the researcher and study participants (Roulston, 2021). Thus, the follow-up meetings enabled member checking and data triangulation.

### **Data Organization Technique**

Data organization is a critical phase of the qualitative research process. Lester et al. (2020) stressed that qualitative studies generate considerable data output, which necessitates preparing and organizing data for subsequent analysis. Furthermore, diligent data collection, organization, storage, and analysis underpins ethical and professional standards in research (Saunders et al., 2019; Temple, 2019). I collected primary data for this study through in-person semistructured interviews with Polish family business leaders with knowledge and experience related to succession planning for organizational survival and continuity. Furthermore, I reviewed organizational documents and took extensive researcher notes pertaining to succession processes in participating companies. Therefore, I took great care to manage data in line with the best scholarly practices.

In-person semistructured interviews were the primary data sources in this study on succession planning strategies in Polish family businesses. After receiving the participants' permission, I recorded each interview on a password-protected audio device. Subsequently, I manually transcribed the interviews using Microsoft Office Word. Moreover, upon receiving the participants' permission, I scanned organizational documents on succession planning for further exploration. Additionally, I took extensive researcher notes throughout the entire investigation. To organize the data, I created a database containing all files related to this research study on a password-protected computer. Given the diverse data sources, as per Yin's (2018) suggestion, I prepared a master list of all audio files and documents to manage research data adequately. Furthermore, I developed a research journal that included comprehensive information

about each source, including significant findings, comments, and storage location. Bassot (2021) argued that research journals enable novice researchers to externalize thoughts, keep track of the research process, provide records for future revisits, remain accountable, and question assumptions. Therefore, I employed master lists and research logs to organize primary and secondary data collected for research purposes.

Furthermore, scholars should also organize data for security reasons. Researchers should manage data consciously to protect the study participants from harm and safeguard their confidentiality (Gray, 2021; Lobe et al., 2020). I removed all personal identifiers from the data to protect the study participants' confidentiality. Additionally, I stored all data on a password-protected computer that only I can access. Any hard copies of data will be stored in a password-protected and fireproof vault. I will treat all data as confidential and store it for 5 years. Afterward, I will destroy all data by permanently deleting all data stored on the computer, shredding hard copies of data, and deleting all emails exchanged with the study participants. Hence, the chosen data organization techniques included a significant participant safety component.

### **Data Analysis**

I used methodological triangulation to analyze the collected data. Triangulation involves employing several data sources or methods to understand a phenomenon comprehensively (Dzwigol, 2020; Noble & Heale, 2019). Moreover, qualitative researchers employ triangulation as a research strategy to verify validity by converging information from various sources (Koneru et al., 2020; Purwandari et al., 2022). In his seminal work, Denzin (1978) identified four types of triangulation: (a) methodological

triangulation, (b) investigator triangulation, (c) theory triangulation, and (d) data triangulation. As Fusch et al. (2018) noted, data triangulation allows qualitative researchers to improve social research's objectivity, truth, and validity. I employed methodological triangulation in this study, which per Nwanna-Nzewunwa et al. (2019), entails using multiple data collection methods about the same phenomenon. Hence, I analyzed data from semistructured interviews with member checking follow-up interviews, organizational documents presented by business leaders during follow-up interviews, and researcher notes taken throughout the process. As Aguboshim (2021) noted, methodological triangulation is an effective strategy for achieving data saturation in qualitative investigations, alongside member checking. Thus, methodological triangulation, supplemented by member checking, was most appropriate for the chosen research design.

Qualitative researchers can benefit from using frameworks for data analysis. I decided to rely on Yin's (2018) five-step approach to ensure a logical and sequential data analysis process. Yin's five phases for analyzing data include: (a) compiling data, (b) disassembling data, (c) reassembling data into themes, (d) interpreting the data, and (e) concluding the data. Thus, I began the data analysis process by compiling the data. I manually transcribed the interviews in Microsoft Office Word. Afterward, I shared the interview transcripts with my preliminary interpretations with the participants for member checking purposes. During follow-up meetings, I refined the transcripts and interpretations per the participants' guidance and scanned organizational documents. Then, I created a digital database on a password-protected computer that included

interview transcripts after member checking, organizational documents, and researcher notes. I simultaneously prepared a master list containing all files and began developing a research journal comprising information and evolving interpretations of each file. I used Microsoft Office Excel to create the master list and the research journal. I then uploaded the files into NVivo. The last activity concluded the compiling phase.

The subsequent phase of the data analysis process involved disassembling the data. Castleberry and Nolen (2018) indicated that disassembling the data requires separating the data and establishing meaningful groupings through coding. Busetto et al. (2020) described coding as a process whereby researchers make raw data sortable. Hence, I assessed and took apart the data through manual coding. I devised initial codes by evaluating the data and attaching labels to the data, while remaining mindful of subject matter literature and the conceptual framework. Thematic coding is planned coherently with amassed data and pertains to the phenomenon under scrutiny and the framework for inquiry (Peel, 2020). Once I finished determining and applying the codes manually, I used NVivo to aid the process. Saunders et al. (2019) asserted that computer assisted qualitative data analysis software, such as NVivo, can be a superior procedure for analyzing qualitative data as its systematic use helps attain continuity, transparency, and methodological rigor. Thus, I used NVivo to expedite the coding process as the software served as a different lens for analyzing the data and identifying patterns stemming from the data. Yet, Yin (2018) emphasized that the data analysis process should primarily rest upon the scholar's research capabilities. Therefore, I relied on my qualitative research abilities during the disassembling phase.

The next phase of the data analysis process involved reassembling the data. Yin (2018) noted that reassembling the data includes putting the codes in context to develop themes. During this phase, I bundled the codes iteratively until I identified themes and significant patterns. Per Castleberry and Nolen (2018), themes are patterns in the codes, incorporating various elements of related codes to reveal a bigger picture of the scrutinized problem. I used that definition to differentiate between codes and themes. While reassembling the data, I employed Microsoft Office Excel to cluster similar codes, generate higher-order codes, and eventually identify the themes. When analyzing data, Williams and Moser (2019) stressed the significance of scrutinizing qualitative data in a way that allows themes to emerge and meanings to be construed. I relied on tables to notice patterns and themes by reducing qualitative data and evaluating the relationships between codes. The approach enabled reassembling of the data in a structured manner.

The fourth phase of the data analysis process involved interpreting the data. Castleberry and Nolen (2018) stressed that interpreting the data requires making analytical conclusions from the data presented as codes and themes. According to Yin (2018), interpreting should be complete, fair, representative of the data, credible, and ought to add to extant studies. During this phase, I ascribed meanings to the themes and codes. Thus, I engaged with the reassembled data and devised a narrative depicting the reassembled data. I interpreted the data in an iterative manner, revisiting interpretations with subsequent evaluations of the codes and themes. While interpreting the data, I extensively drew from organizational documents and the researcher notes to enhance the process. In line with Castleberry and Nolen's (2018) recommendation, I created thematic

maps containing themes, codes, and their relationships. The maps included descriptions of themes and patterns I recognized in the coded data. I decided to develop thematic maps to observe the evolution of my understanding throughout the analysis process.

The final step of the data analysis process includes conclusions. During this step, qualitative researchers rely on the previous phases to respond to the research question and address the purpose of the study (Castleberry & Nolen, 2018). Yin (2018) indicated that the scholars should use the final phase of data analysis to make active contributions to subject matter scholarship while also precisely describing the research process to allow fellow researchers to replicate the study. To aid the conclusions of my study, I included direct quotes from the study participants, adhered to academic guidelines when presenting the results, and prepared tables to depict the results. Moreover, I holistically drew from the conceptual framework, the literature review, and the findings to formulate conclusions useful for family business researchers and practitioners. Hence, the final phase of Yin's five-step approach entailed concluding data while accounting for extant literature, peer-reviewed studies published after proposal approval, and Rothwell's (2015) seven-step model for succession planning.

### **Reliability and Validity**

#### **Reliability**

Qualitative researchers who seek to make meaningful contributions to their disciplines must display adequate rigor to allow readers to have confidence in their conclusions. Reliability represents the degree to which outcomes are reproducible, for instance, from one test to another or between two investigations of human behavior



(McDonald et al., 2019; Vu, 2021). Thus, reliability in qualitative research pertains to replicating findings while minimizing bias and errors (Yin, 2018). Moreover, in qualitative research, dependability functions as a parallel quality criterion (Saunders et al., 2019). As conceptualized by Dyar (2022), dependability represents the degree to which researchers could replicate a given study in similar conditions. Dependable qualitative investigations include sufficient information allowing other researchers to repeat the same procedural steps, albeit conceivably arriving at different conclusions (Stenfors et al., 2020). Therefore, throughout the research process, I took extensive notes and journaled on each phase of data collection. Additionally, I used reflexive journaling to detail any modifications in protocol throughout the data collection and analysis phases. However, in this study on succession planning strategies in Polish family businesses, I also employed specific strategies to bolster dependability.

I used practice interviews, member checking, and the interview protocol to improve the study's dependability. Practice interviews allow qualitative researchers to refine data collection plans related to data content and procedures (Yin, 2018). Gani et al. (2020) suggested that novice researchers can particularly benefit from practice interviews to prepare for and improve the data collection process, thereby enhancing its reliability. Hence, I undertook practice interviews with fellow doctoral researchers to ensure that the study participants could comprehend the process and contribute to the research. Moreover, I purposefully incorporated member checking in the interview protocol (Appendix). Member checking is a research strategy for deepening, repeating, and adjusting data gathering and analysis together with study participants (Candela, 2019;

Caretta & Pérez, 2019). Stahl and King (2020) noted that member checking allows qualitative researchers to address dependability concerns during qualitative data collection. Thus, during the interviews with Polish family business leaders, I asked for follow-up meetings to evaluate transcripts and interpretations and make potential amendments to improve accuracy. Therefore, practice interviews, member checking, and the interview protocol underpinned my efforts to safeguard the study's reliability.

### **Validity**

Validity is a marker of rigor in qualitative studies and is vital in social sciences research. Validity in qualitative research, a concept contested by many scholars, pertains to the process of determining the accuracy of the results from the perspective of the investigator, the participants, and the consumers of research (Rose & Johnson, 2020). Therefore, researchers have extensively used the markers of credibility, transferability, and confirmability in qualitative investigations (Schmidt & Brown, 2022; Stahl & King, 2020). I implemented numerous strategies to improve the credibility, transferability, and confirmability of this qualitative study on succession planning in Polish family businesses.

I enhanced credibility through member checking, participant validation, and triangulation. In qualitative studies, credibility pertains to the degree to which the research results and conclusions can be believable (Johnson et al., 2020; Nassaji, 2020). Thus, credibility indicates the results' truthfulness and the degree to which they mirror the reality of the phenomenon under scrutiny (Saunders et al., 2019). Qualitative researchers seeking credibility need to comprehend the study participants, context, and

processes accurately and comprehensively to devise exhaustive interpretations (Amin et al., 2020). Potential strategies to enhance credibility include member checking, participant validation, and triangulation (Nassaji, 2020; Stahl & King, 2020; Yadav, 2022). Therefore, I employed member checking, participant validation, and triangulation to ensure the study's credibility. Using the strategies enabled me to reach a more accurate and comprehensive understanding of the phenomenon under scrutiny, thus boosting the validity of the results.

I improved transferability by rigorously following the chosen research design's data collection and analysis techniques, using the interview protocol, and seeking data saturation. Transferability involves the degree to which the investigators' interpretations or conclusions are transferable to other comparable settings (Johnson et al., 2020; Saunders et al., 2019). As replicability is often challenging in qualitative studies, scholars should provide thorough and rich descriptions of the research activities and assumptions to make the transfer possible in case readers wish to attempt it (Nassaji, 2020; Stahl & King, 2020). Therefore, I provided detailed descriptions of the research process in this section of the doctoral study and presented the interview protocol (Appendix) to give the readers a comprehensive overview of this scholarly endeavor. Moreover, Johnson et al. (2020) argued that data saturation is a significant marker of rigor in qualitative investigations. Thus, I made methodological decisions enabling saturation across all phases of the research process, particularly choices related to participant recruitment, data collection, and analysis. In combination, adhering to the chosen research design's data

collection and analysis techniques, seeking data saturation, and using the interview protocol fostered the study's transferability.

Furthermore, I used reflexive journaling and the interview protocol to bolster the study's confirmability. Stahl and King (2020) described confirmability as qualitative researchers' attempts to ensure that their findings reflect the data collected from the participants rather than their interpretations or bias. Nassaji (2020) proposed recording and rationalizing all the steps taken and choices made regarding data coding and analysis to bolster confirmability. Therefore, I used reflexive journaling to record the research process from my perspective. Moreover, interviews allowing the study participants to provide open-ended responses enhance credibility (Johnson et al., 2020). Thus, I employed an interview protocol (Appendix) that enabled the study participants to provide open-ended responses to interview questions. Hence, reflexive journaling and the interview protocol served as strategies to increase the study's confirmability.

Researchers should also consider practices to foster data saturation when evaluating strategies to enhance validity. Johnson et al. (2020) noted that data saturation is an essential strategy that scholars use to improve the rigor and trustworthiness of qualitative investigations. Nevertheless, many novice researchers struggle with data saturation, adversely affecting their studies' quality and validity (Sebele-Mpofu, 2021). Data saturation occurs with the lack of new data, themes, coding, and the ability to replicate the research process (Fusch & Ness, 2015; Sebele-Mpofu, 2020). I used several strategies to enhance data saturation. First, per Fusch and Ness's (2015) suggestion, I maximized the number of potential interviews to gather as much data as possible.

Second, I conducted member checking. After manually transcribing the interviews and formulating preliminary interpretations, I conducted member checking follow-up interviews with the participants to refine the collected data per business leaders' guidance. Scholars have associated member checking with data saturation (Schoch, 2019). Third, I employed data triangulation to corroborate findings. Aguboshim (2021) indicated that data triangulation supports data saturation. I used methodological triangulation that included data from semistructured interviews with business leaders, organizational documents presented by the participants during member checking follow-up interviews, and researcher notes. I realized that I reached data saturation once, per Sebele-Mpofu (2020), I ceased identifying new data, themes, and coding. Therefore, I used data triangulation, member checking, and maximizing the number of interviews to enhance data saturation in the study.

### **Transition and Summary**

In Section 2 of this doctoral study, I discussed the methodology used to undertake qualitative research on succession planning strategies in Polish family businesses. I outlined the purpose of the study, my role as a researcher, and the type of research I conducted. I described the participants, population and sampling approach, as well as the research methods, designs, and elements of an ethical investigation. Upon completion, I presented the data collection processes that entailed collection instruments, techniques, organization, and analysis. For each methodology-related decision presented in Section 2, I used scholarly or seminal works to explain and support the choices or procedures.

In Section 3, I summarize the findings discovered from the collected data and discuss coded and emerging themes stemming from the research process. Furthermore, I consider and evaluate the study's implications, limitations, and potential generalizability. Ultimately, I recognize the investigation's possible influence on social change that might occur due to the study and formulate recommendations for action and further research. Finally, I reflect on the study and describe the conclusions.

### Section 3: Application to Professional Practice and Implications for Change

#### **Introduction**

The purpose of this qualitative multiple case study was to explore succession planning strategies Polish family business leaders use for the leadership transition to the next generation. I conducted in-depth semistructured interviews with three business leaders of three different family firms in Poland who have successfully executed succession planning to facilitate leadership transition to the next generation. Additionally, I viewed organizational documents related to succession planning and took extensive researcher notes to develop a comprehensive understanding of the phenomenon. The four themes that emerged from the scrutinized data were (a) systematic succession, (b) grooming the successor, (c) communication with non-family stakeholders, and (d) long-term sustainability. Therefore, the findings showed that Polish family firm leaders committed to long-term business continuity and growth conducted succession in a systematic and organized manner. Moreover, the participants used diverse successor development and stakeholder communication strategies to maximize process effectiveness. Additionally, the family business leaders used various metrics to assess the effectiveness of succession planning in their organizations. In sum, the findings contributed to applied business research, professional practice, and social change by revealing the succession planning strategies used by Polish family business leaders to conduct intergenerational leadership transitions.

### **Presentation of the Findings**

Through this qualitative multiple case study, I sought to answer the following research question: What succession planning strategies do Polish family business leaders use to conduct leadership transition to the next generation? To address the research question, I interviewed three business leaders of three family firms in Poland who successfully implemented succession planning to conduct an intergenerational leadership transfer. I audio-recorded each interview and produced a transcript based on the recording. Afterward, I scheduled follow-up interviews to discuss the transcripts and interpretations and to view organizational documents related to succession planning for methodological triangulation. Throughout the research process, I took extensive notes to aid data analysis.

The participants were assigned pseudonyms (P1, P2, and P3) to protect their identities. Moreover, I replaced any names the participants used in their interview responses with XXX. I analyzed the collected data relying on Yin's (2018) five-step approach with the support of NVivo software. The following themes emerged: (a) systematic succession, (b) grooming the successor, (c) communication with non-family stakeholders, and (d) long-term sustainability. The themes aligned with the conceptual framework, Rothwell's (2015) seven-step model for succession planning, and numerous peer-reviewed articles from the literature review. Table 1 contains a summary of the participants and the frequency with which the themes emerged during the interviews with Polish family business leaders.



**Table 1***Themes and Number of References by Participant*

Theme	Number of references	Participant
Systematic succession	31	P1, P2, and P3
Grooming the successor	28	P1, P2, and P3
Communication	19	P1, P2, and P3
Sustainability	14	P1, P2, and P3
Total	92	

**Theme 1: Systematic Succession**

Theme 1 from the study participants' responses was systematic succession. All three business leaders recognized their commitment to systematic succession as a strategy to conduct an intergenerational leadership transfer at Polish family firms. Three subthemes emerged related to systematic succession: successor identification, goal-setting and timelines, and financial and legal considerations. Table 2 contains a summary of the frequency with which the participants indicated systematic succession as a strategy for intergenerational leadership transfers at Polish family firms.

**Table 2***Participants' References to Systematic Succession*

Participant	Number of references	%
P1	11	35.48
P2	12	38.71
P3	8	25.81
Total	31	

### *Successor Identification*

All three participants identified successor identification as an initial strategy organizational leaders should implement when planning succession at Polish family businesses. P1 indicated:

I have two adult sons who have worked at the company since high school. When I became serious about succession and writing a plan, my first and biggest worry was to pick one of them to be my successor. That wasn't easy because both give 100% at work. A company can't have two leaders, and I don't want fights for power. I looked at their performance for a long time and picked the one that manages people better. It wasn't easy, but I made a fair decision.

Therefore, P1 discussed the challenges associated with selecting a suitable successor, especially when family business owners have more than one child. Similarly, P2 emphasized the significance of identifying a successor in the early phases of succession planning:

Choosing a successor to control the business after my departure was the biggest issue when I began working on succession. We are not immortal, so I needed the best person to keep the business running later. My son and niece are managers in the firm. Maybe it's natural to pass the business to my son, but my niece is more active and interested. It was a long process, and I made her the new leader in 2020, before COVID.

P3 also noted that successor identification was a challenge to address at the outset of succession planning at their family business. Nevertheless, P3's circumstances differed from those described by P1 and P2. P3 stated:

Compared to my friends who have family businesses, I am lucky to have one child. Decision was simple. I always wanted my daughter to replace me. I have employees who work for me from the beginning, so they help her in the new role.

The subtheme of successor identification further appeared in the organizational documents shown by all participants during the follow-up interviews. Organizational documents presented by P1 and P2 contained criteria used by the family business leaders to select the most appropriate successor. P1 and P2 used management, technical, and soft skills to guide their successor-related decisions. In contrast, P3's documents solely listed successor identification as a phase in the succession process but lacked criteria for making the successor's choice. Thus, successor identification was a subtheme that emerged during the interviews and in the organizational documents.

### ***Goal-Setting and Timelines***

All three participants recognized the need for setting goals and devising timelines when planning succession at Polish family businesses. P1 noted:

Succession is a process. It doesn't happen overnight. Talking to other entrepreneurs who finished succession and business professors, I learned how important it is to be strategic with this process. That's why I spent a lot of time preparing a careful plan with goals and dates. My intention was to prepare my son

for his new role, give him the necessary training, and prepare employees and clients for the company without me every day. I wanted to stay on top of it.

P2 also acknowledged the vitality of devising a succession plan with temporal considerations. P2 stated, “Milestones and time are what make succession happen.” P3 further stressed how critical goal-setting is for effective succession planning by indicating:

Preparing the plan was the tough part. When you have a family business, there’s not much time for planning. But how can I be sure about her success if I don’t plan properly? I knew this was important. I prepared what I call a succession roadmap. It has all steps she needed to take to be ready for the role. I gave her as much time as she needed. After all, the firm was at play.

Besides interview responses, all participants presented organizational documents detailing goals underpinning the succession processes in their businesses. P1’s and P3’s documents included goals and objectives which had to be attained to ensure the successors, managers, employees, and entire organizations could perform during the intergenerational leadership transition. Furthermore, P1’s documents specified approximate duration for each activity to support the process’ timely completion. In contrast with P1’s and P2’s documents, P3 supplemented goals and timelines with context-specific quizzes to verify if the successor acquired the foundational knowledge associated with each goal. Therefore, the interview responses and organizational documents revealed that family business leaders perceive goal-setting and timelines as critical components of succession planning.

### ***Financial and Legal Considerations***

All participants considered the legal and financial aspects of succession planning in Polish family businesses. The participants suggested that integrating legal and financial considerations into their succession plans was essential for ensuring the process' sustainability. P2 stated:

This firm is the most important asset in my family. Two generations worked for it. Succession, just like any change, can be risky. I worked with financial and legal advisors to protect the firm for future generations. I want it to create safety for our family and make us proud.

Furthermore, P3 discussed close cooperation with legal and financial experts in the process of developing the succession plan at the family business. P3 noted:

Polish law is hard to navigate. It changes all the time, and it's hard to keep track. During our succession, we had to figure everything out by ourselves. Thankfully we work with a law firm, and they helped us get through succession. I can't imagine doing it without their help. They focus on businesses like ours, so they helped us make the best economic decisions.

Organizational documents presented by all participants revealed the extent to which financial and legal considerations influenced succession planning in the family businesses under scrutiny. Some elements of P1's, P2's, and P3's documents briefly described the reasons and goals for cooperating with external advisors who possess strategies for safeguarding family's wealth during the intergenerational leadership transfer while supporting firms' longevity in turbulent business environments. Furthermore, P2's

documents contained the business leader's interview responses detailing their thought process on potential legal solutions to maximize the succession process' benefits. Hence, all participants' succession planning entailed aligning the strategies with legal and financial objectives.

### ***Relevance of the Findings to the Conceptual Framework and Literature***

Theme 1, systematic succession, aligned with the conceptual framework and extant literature. The conceptual framework for this study was Rothwell's (2015) seven-step model for succession planning. The conceptual framework depicts succession as an intentional and systematic endeavor by business leaders to promote management continuity in critical areas, retain knowledge and intellectual capital, and foster professional development (Ghazali et al., 2022). Moreover, the seven-step model for succession planning consists of seven steps occurring cyclically to aid the leadership transfer (Ahmad et al., 2020). Theme 1 was congruent with the conceptual framework as the findings revealed the participants' emphasis on systematic succession processes. Furthermore, the subthemes of successor identification, goal-setting and timelines, and financial and legal considerations aligned with the first two steps of Rothwell's succession planning model. Determining the scope of succession planning and devising a strategic plan are the first steps in the model (Jackson & Allen, 2022). The findings showed that the participants committed to succession in their firms, selected successors, and created specific plans. Thus, the results aligned with the framework.

Theme 1 and the associated subthemes reflected contemporary literature and effective business practice. Bell and Pham (2020) indicated that succession is a process

that varies in duration, during which the founder progressively transfers power to the next generation of organizational leaders. The results revealed that the participants perceived succession as a process that requires meticulous preparation and planning. Moreover, Rumanko et al. (2021) emphasized that business leaders who refrain from succession planning expose themselves to potential risks, including compromised organizational sustainability and growth. The findings indicated that the participants understood the consequences of not engaging in succession planning for their firms during the intergenerational leadership transitions. Moreover, Doborzyński et al. (2019) suggested that the Polish entrepreneurial context creates unique legal and economic constraints for family business leaders, undermining succession efforts. All participants identified legal and financial aspects as factors affecting succession planning. Additionally, Simkhada's (2023) cutting-edge research on succession planning in Nepalese settings demonstrated that human resource planning and succession planning have advantageous effects on organizational performance. The current study results were coherent, as they showed that family business owners engaged in systematic succession with a focus on successor identification. Finally, per scholarly literature on effective business practice, strategic planning improves organizational performance, especially when strategic planning is measured as formal strategic planning (George et al., 2019). The study results showed that systematic and strategic efforts underpin succession in many Polish family firms. Theme 1 aligned with extant literature and effective business practice.

## Theme 2: Grooming the Successor

Theme 2 from the study participants' responses was grooming the successor. All three business leaders identified successor grooming as a succession planning strategy used during intergenerational leadership transfers at Polish family businesses. Three subthemes appeared related to systematic succession: formal education, on-the-job training, and mentoring. Table 3 contains a summary of the frequency with which the study participants indicated grooming the successor as a succession planning strategy for intergenerational leadership transitions at Polish family businesses.

**Table 3**

*Participants' References to Grooming the Successor*

Participant	Number of references	%
P1	12	42.86
P2	9	32.14
P3	7	25.00
Total	28	

### *Formal Education*

All three participants identified formal education as a vital strategy business leaders should use when grooming the successors to become new business owners and leaders at Polish family firms. P1 indicated:

I can't stress it enough - nothing trumps learning. It's the only thing they can't take away from you. I always tell my sons to never stop learning, and it resonates with them. Both of them studied management in London. XXX then got his MBA in Switzerland, and XXX did his master's in finance and accounting in Denmark.



They came back completely different, full of new ideas. We have partners everywhere in Europe. International experience is what we need here. Now after succession, I see a real difference, and education abroad has a lot to do with it.

Furthermore, P2 discussed the value of formal education in the context of succession planning in Polish family businesses. P2 stated:

Our family believes in the value of education. My father was a sociology professor, so me and my sister grew up with science at home. The same with my son and niece. They keep learning until now, even when they work full-time at the company. They studied international business and psychology. After almost a decade at the company, they started family business studies together. We have such studies here, and they teach young entrepreneurs how to manage employees and companies. I am satisfied they graduated just before succession because they can use new skills immediately.

Similarly to other study participants, P3 indicated, “I told him – finish university before you work for me. You have time, there’s no rush. You will work enough before you retire. Studies will make you better at what you do.” Moreover, in contrast with other participants’ documents, P3’s documents related to succession planning encompassed details on short courses delivered by higher education institutions that the successor completed during the succession process. The courses allowed the successor to acquire managerial and soft skills. Hence, the subtheme of formal education had significant implications for successor development during succession at Polish family businesses.

### ***On-The-Job Training***

All three participants recognized on-the-job training as a valuable strategy organizational leaders should employ when preparing the successors to become new owners and leaders at Polish family businesses. P1 stated:

To be a good leader, you need different skills. You can't just focus on what you enjoy. It's important to be ready for all kinds of problems and situations. I told my sons they had to work in all departments to get to know all employees and understand their problems. They worked in the warehouse, accounting, sales, and so on. They did most basic jobs and very demanding ones. The good thing is they can now see all processes in the company and improve them. In fact, practice is no less important than education.

In contrast to P1, P2 underscored the human aspect of on-the-job training, discussing the value of acquiring practice-focused skills by observing top performers or experienced employees. Thus, P2 signaled:

Running a business has never been more difficult, at least I can't remember. In my opinion, leadership development is all about learning best behaviors from role models. We have almost 80 employees. Part of my plan included working closely with top-performing managers. XXX learned from different managers for close to a year. She worked with them operationally and strategically, traveled to meetings with business partners, and learned how to manage people. This was the best way to get knowledge about the business and management.

Nevertheless, P3 displayed the most unique approach to on-the-job training. Instead of relying entirely on internal resources, P3 organized training for the successor at diverse organizations with various specializations. Therefore, P3 stated:

University is great but you can't be a great manager without years of practice. My daughter needed a crash course in managing a firm. How did I do it? She learned from the leaders. Our company is strong in procurement, so she learned buying here. My best friend has a logistics company, so she learned all about transport over summer in this company. Same with accounting, HR, sales, and so on.

Organizational documents presented by the participants further revealed their strategies for on-the-job training for successors. In the case of P1 and P2, the documents contained brief information on the departments overlooking on-the-job training. P3's documents contained information on the practical skills the successor had to acquire, along with indications of whether on-the-job training occurred inside or outside the organization. Therefore, on-the-job training was a significant subtheme in grooming the successor theme.

### ***Mentoring***

All three participants recognized mentoring as an effective strategy business leaders should use when grooming the successors to become new owners and leaders at Polish family firms. P1 indicated:

The most rewarding moments during succession happened when I spent time with my sons. I have years of experience under my belt. Sharing my knowledge and experience with my sons makes me confident they can use it when necessary.

Some people will say it's best to learn from mistakes. I don't see it this way. Take my tried and tested business knowledge and use it in our company.

The other participants also recognized mentoring as a critical component of successor development. P2 stated, "I carve out at least 2 hours each week to sit down with XXX and XXX and teach them a lesson about business. My father taught me many valuable lessons about our society the same way." Additionally, P3 noted, "Families are at the heart of family businesses, so I had to teach my daughter how to be a good businesswoman that doesn't forget the role family plays in life." Therefore, P3 discussed how successors should become mindful of the unique contexts they exist in. Moreover, organizational documents presented by all participants contained references to phases during which the founders worked one-on-one with the successors to mentor them and prepare them for new workplace responsibilities. Hence, mentoring was an essential strategy the participants used during the intergenerational leadership transitions at their organizations.

### ***Relevance of the Findings to the Conceptual Framework and Literature***

Theme 2, grooming the successor, aligned with the conceptual framework and extant literature. Rothwell's (2015) seven-step model for succession planning was the study's conceptual framework. Theme 2 and the associated subthemes reflected several steps of the conceptual framework. The model's third step involves identifying talent gaps by evaluating skills needed for effective organizational leadership (Jackson & Allen, 2022; Rothwell & Prescott, 2022). The findings revealed that the participants recognized essential skills needed to succeed as family business leaders before initiating successor

development. During the fourth step, organizational leaders rely on their strategic foresight to evaluate the competencies required to thrive in evolving markets and promote company sustainability (Abdellah, 2021; Chobakhloo et al., 2022). The results showed that the participants acknowledged the contemporary business environment's complexity and sought to prepare their successors for upcoming challenges through targeted training and mentoring. The fifth step necessitates considering a person's long-term potential by evaluating their openness to personal and professional development (Abdellah, 2021; Jindal & Shaikh, 2021). The findings revealed that the participants emphasized sustainability in their behaviors and used a combination of formal education, on-the-job training, and mentoring to encourage perpetual learning and holistically develop their successors. Thus, the results were congruent with the conceptual framework's underpinnings.

Theme 2 and the associated subthemes aligned with recent literature and effective business practice. Business researchers have stressed the role of formal and informal management education in improving succession's effectiveness and facilitating knowledge exchange between stakeholders involved in intergenerational leadership transfers in family firms (Lušňáková et al., 2019; Rumanko et al., 2021). The findings revealed that the participants recognized the importance of creating opportunities for university-level business education and on-the-job training for their successors. Moreover, scholars indicated that family business leaders should allow their successors to observe business operations and strategic endeavors inside the organization (Hanson & Keplinger, 2021; Porfírio et al., 2020). The findings showed that on-the-job training was

a pivotal strategy business leaders employed to acquaint their successors with the organizations and business environments. Learning through practice prepares the successors for workplace responsibilities and problems, enabling them to verify success-oriented strategies (Husien et al., 2019). Additionally, Wu et al.'s (2023) cutting-edge research on the strategies for successful entrepreneurship demonstrated that occupational experiences shape entrepreneurial entry. The current study findings showed that the successors were exposed to formal and informal educational schemes. Therefore, the findings on formal education and on-the-job training were coherent with current, cutting-edge peer-reviewed literature.

The findings on mentoring were coherent with the scholarly literature. Madarasiné Szirmai and Németh (2019) emphasized that mentoring is a valuable strategy for developing successors for new responsibilities as family business leaders. Mentoring supports knowledge exchange between incumbents and successors, strengthens intergenerational communication, and creates trust among family business leaders (Chaudhary et al., 2021; Rychta, 2022). The results revealed that all participants engaged in mentoring to offer lessons on effective business practice in family business settings. Business practice researchers have noted that investments in holistic leadership and technical development are valuable for the successors' personal and professional development (Barrett & Moores, 2020; Rumanko et al., 2021). Hence, the findings associated with Theme 2 reflected academic literature on family firm management and effective business practice.

### **Theme 3: Communication With Non-Family Stakeholders**

Theme 3 that emerged from the study participants' responses was communication with non-family stakeholders. All three business leaders described communication with non-family stakeholders as a vital strategy to implement during intergenerational leadership transfers at Polish family businesses. Two subthemes emerged related to communication with non-family stakeholders: communication with employees, and communication with business partners. Table 4 contains a summary of the frequency with which the study participants indicated communication with non-family stakeholders as a succession planning strategy for intergenerational leadership transitions at Polish family businesses.

**Table 4**

*Participants' References to Communication With Non-Family Stakeholders*

Participant	Number of references	%
P1	7	36.84
P2	4	21.05
P3	8	42.11
Total	19	

#### ***Communication With Employees***

All three participants identified communication with employees as a strategy leaders should use when planning succession at Polish family firms. P1 indicated:

Explaining to employees what's in succession for them takes work. With succession comes a major change in leadership. When people are used to you being their boss for years, they can resist accepting and following your child

whom they have known since he was a kid. To prevent that, I kept explaining people how his creativity and new ideas can take us to the next level. I did it methodically until people saw in him what I see.

P1's interview responses revealed that the business leader intended to strengthen the successor's positive image to encourage followership from employees. As the successor had been known to many employees since their childhood, P1 intended to transform employees' perception of the new leader through systematic communication. Moreover, P2 and P3 expressed similar concerns pertaining to boosting successor acceptance through communication with employees and managers. P2 stated, "I brought XXX to every important company meeting to show everyone that they need to treat her seriously. I let her decide on important issues in front of others to communicate her position." In contrast, P3 signaled:

Every year, I organize teambuilding trips for employees from across the country to get to know each other better and discuss company strategy for the year. In the year of succession, a whole day was about XXX and her plans for the company. Our staff asked her questions and she answered confidently. That was a clear signal for everyone to respect her.

Organizational documents presented by the participants contained additional details on how communication with employees was used as a succession planning strategy. P1 presented a transcript of a speech they gave at an event for organizational leaders, during which they discussed succession in family businesses. The transcript included P1's references to building a strong successor image through effective internal



communication. Furthermore, P3 presented an itinerary of the company teambuilding trip, which depicted time dedicated to acquainting employees with the successor. Thus, communication with employees was a vital succession planning strategy the participants used at their firms.

### *Communication With Business Partners*

Two participants, P1 and P3, recognized communication with business partners as a strategy leaders should employ during succession at Polish family firms. P1 noted:

It was a long process to convince our suppliers and customers to accept a new decision-maker. I am the kind of person who needs to know about everything happening in the firm and make the final decision. That's why I needed to methodically show our partners that XXX is my chosen successor and he will be their new contact person for key issues. I use email a lot, so I started copying XXX into important exchanges and giving him the freedom to have the final say.

Thus, P1 argued that displaying the successor's decision-making competencies through digital communication channels was an effective strategy for preparing business partners for an intergenerational leadership transfer. Similarly, P3 signaled, "To build the position of my daughter, I told the clients – I am stepping back, talk to her now; she is prepared and can help." Moreover, documents presented by P1 and P3 depicted communication with business partners as a strategy used during succession planning. For instance, P1 presented a transcript of a speech they gave at an event for organizational leaders where they discussed the need for sharing decision-making with the successors as a strategy for

communicating succession to business partners. Thus, communication with business partners was a critical element Polish family business leaders used during succession.

### ***Relevance of the Findings to the Conceptual Framework and Literature***

Theme 3, communication with non-family stakeholders, aligned with the conceptual framework and the scholarly literature. Rothwell's (2015) seven-step model for succession planning was the study's conceptual framework. Theme 3 and the associated subthemes were congruent with the sixth step of the conceptual framework. As Ahmad et al. (2020) noted, the sixth step of the seven-step model for succession planning involves closing the developmental gap. During that phase of the succession process, business leaders attempt to minimize the discrepancies between human potential and prospective job requirements (Abdellah, 2021; Rothwell & Prescott, 2022). The study results revealed that the participants acknowledged the need for employees and business partners to accept the successor as a new business leader. Recognition of the successor's potential was essential for fulfilling job requirements. Therefore, the theme and the associated subthemes were coherent with the conceptual framework.

Theme 3 reflected contemporary scholarly literature on family business management. After concluding developmental activities for the successors, incumbents should articulate their transfer of leadership responsibilities and assume the role of advisors (Bertschi-Michel et al., 2020; Cho et al., 2022; Ng et al., 2021). The findings showed that the participants used communication strategies to solidify the leadership and ownership transfer and its recognition by employees and business partners. Furthermore, family business researchers have argued that regular communication between

stakeholders enhances relationship depth and trust (Chang et al., 2020; Husien et al., 2019; Somboonvechakarn et al., 2022). The findings revealed the incumbents' intention to develop non-family stakeholders' trust in the successor through clear communication of a leadership and decision-making transition. Thus, the findings reflected contemporary literature on family business management.

Moreover, the results were coherent with cutting-edge investigations and effective business practice literature. Per effective business practice literature, succession planning across organizational settings requires an emphasis on mutual reliance, sincere communication between stakeholders, and pursuing company goals and objectives (Singh & Kataria, 2021). The study participants indicated that sincere communication with non-family stakeholders during the transition phase supported attaining the goals of business continuity and growth by strengthening the successors' position. Additionally, Sacco and Conz (2023) cutting-edge research on corporate heritage communication revealed that business leaders should emphasize heritage for authenticity, market leadership, and continuity in their interactions with stakeholders. The findings showed that the participants communicated succession's underpinnings to non-family stakeholders to foster business continuity, retain the market position, and present the successor's contributions to the organization. Hence, the findings aligned with cutting-edge studies on family business management and effective business practice.

#### **Theme 4: Long-Term Sustainability**

Theme 4 that emerged from the study participants' responses was long-term sustainability. All three business leaders depicted appraising the long-term sustainability

of the process as an important strategy to implement during and after intergenerational leadership transfers at Polish family businesses. Table 5 contains a summary of the frequency with which the study participants indicated assessing long-term sustainability as a succession planning strategy to implement during and after intergenerational leadership and ownership transfers at Polish family businesses.

**Table 5**

*Participants' References to Long-Term Sustainability*

Participant	Number of references	%
P1	6	42.86
P2	3	21.43
P3	5	35.71
Total	14	

While the participants extensively described diverse phases of the succession process, they also shared their perspectives on assessing the endeavor's sustainability and their role following a formal leadership and ownership transfer. P1 stated:

I decided on succession to keep the business in the family. With perseverance, we made it happen. Years later, my sons run the business alone and only sporadically ask me for advice. The business is more profitable than ever thanks to new products and clients in other Central European markets. XXX and XXX successfully put new ideas to life, so I don't see big risks on the horizon. The future looks bright for the business.

Similarly to P1, P3 described their role in the family business after succession and organizational performance as critical metrics of process success. Moreover, P3 referred

to their successor's preparedness to operate in challenging business environments as a predictor of long-term success. P3 indicated:

My daughter is now an independent business owner. She doesn't need me anymore. I never expected to say it, but it feels great. I finally get to travel with my wife and enjoy retirement. I still visit the company a few times each month to catch up on what's happening. But the business thrives, even in tough times. XXX shows a lot of resilience, and it's a good sign for the future.

Furthermore, P2 formulated their prognosis for the organization's continuity and growth based on successor development. P2 signaled, "Taking succession seriously was well worth the effort. All the training and guidance XXX received helps keep the firm healthy." Moreover, I verified the organizations' financial statements freely available to the public in the Polish Ministry of Justice's online database. The financial statements revealed that the family businesses improved or sustained their performance following succession. Despite the coronavirus pandemic and the 2022 Russian invasion of Ukraine, the family firms achieved organizational performance matching or exceeding pre-succession results. Therefore, the results showed that the long-term sustainability of the Polish family businesses was maintained following the intergenerational leadership transfer, at least partially due to succession planning's development and implementation.

#### ***Relevance of the Findings to the Conceptual Framework and Literature***

Theme 4, long-term sustainability, aligned with the conceptual framework and the scholarly literature. Rothwell's (2015) seven-step model for succession planning was the study's conceptual framework. Theme 4 aligned with the final step of the conceptual

framework. Jackson and Allen (2022) noted that the seventh step of Rothwell's succession planning model involves reviewing the effectiveness of the implemented leadership development strategies in the context of extant business environments. Thus, the final step of the framework allows leaders to assess succession planning's effectiveness (Abdellah, 2021). The findings showed that the participants identified the need for assessing process success by scrutinizing organizational performance and leadership outcomes. Therefore, the results were coherent with the final step of the conceptual framework.

Furthermore, the findings reflected recent scholarly literature on family businesses and effective business practices. Seema and Ali (2021) argued that organizational leaders should develop systems to objectively assess succession planning and human capital in their firms. The findings showed that the participants used various metrics, including organizational performance across years, to appraise succession planning in their family firms. Moreover, Husien et al. (2019) stressed that self-reflection, post-succession career planning, and disassociating from the family business could allow business founders to overcome succession resistance. The participants argued that they could let go of their organizations and pursue novel activities in their lives. Additionally, Marques et al.'s (2023) cutting-edge research on succession planning revealed that achieving holistic successor development, especially related to socioemotional wealth, underpins the process' long-term sustainability. The current study findings showed that successor development enabled new family business leaders to manage their organizations independently, aligning with the most recent investigations. Finally, per

effective business practice scholarship, Chukwuma et al. (2021) noted that succession planning enables sustainable organizational performance. The findings demonstrated that the participants identified succession planning as a pathway to business continuity and growth in turbulent business environments. Hence, the study results were congruent with recent scholarly investigations on succession planning in family firms and effective business practices.

### **Applications to Professional Practice**

Family businesses are the backbone of many economies and societies worldwide, but they face unique challenges affecting their survival and growth. Miroshnychenko et al. (2021) noted that family businesses account for over two-thirds of enterprises worldwide, generate 70–90% of the global GDP, and create 50–80% of jobs in most countries. However, only 30% of family firms survive beyond the first generation, while less than 15% reach the third generation and only 3% the fourth generation (Porfírio et al., 2020). The purpose of this qualitative multiple case study was to explore the succession planning strategies that Polish family business leaders use for the leadership transition to the next generation. The study findings indicated that succession planning is essential for family business survival, continuity, and development, especially in contemporary business environments. This study's conclusions include valuable insights into succession planning strategies in family businesses, particularly in the Polish context. Hence, insights from the family business leaders who participated in the study viewed through the scholarly lens could prove advantageous for practitioners searching for effective succession planning strategies to implement in Polish family firms.

The first application to business practice involved recognizing the advantages of succession planning for family firms' sustainability. The study findings demonstrated that family business owners who employ succession planning at their organizations attain beneficial outcomes related to business performance, human capital development and productivity, and the potential to navigate challenging business environments. Extant scholarly literature depicts similar implications of succession planning for organizational performance. For instance, Bokhari et al.'s (2020) investigation of Pakistani family firms showed that planned succession fosters positive performance outcomes on individual and organizational levels. In contrast, family business owners who refrain from succession planning put their firms at risk (Kiwia et al., 2019). Hence, practitioners seeking to employ the study findings in applied settings should acknowledge that succession planning enables long-term sustainability in family firm contexts.

The second application to business practice pertained to identifying the need for employing unbiased approaches to successor identification. The results showed that family business owners should use objective criteria for assessing potential successors' managerial, technical, and soft skills before selecting new leaders for their organizations. When family business owners have several children, they should consider potential successors' leadership and technical skills prior to choosing a suitable successor (Rumanko et al., 2021; Rychta, 2022). The findings also indicated that family business owners should consider family members beyond their children as possible successors. Eze et al. (2021) noted that prioritizing certain individuals could be detrimental to family firms' sustainability. Potential talented and skilled successors could not receive



leadership opportunities due to a biased candidate selection process (Mismetti et al., 2022). Hence, practitioners intending to apply the study findings in organizational settings should use objective and unbiased successor selection criteria.

The third application to business practice involved recognizing that family business leaders should carefully prepare strategies for grooming their successors. The study findings indicated that business owners employed diverse approaches to developing their successors into firm owners and leaders, including formal education, on-the-job training, and mentoring. The participants sought to train their successors holistically, devising learning goals and assessing progress in time. Business scholars indicated that formal and informal management education could be advantageous for family business successors while also enhancing knowledge exchange between generations of family business leaders (Lušňáková et al., 2019; Rumanko et al., 2021). Therefore, family business leaders seeking to use the study results in applied contexts should meticulously design and implement successor development strategies to maximize effectiveness.

The fifth application to business practice was encouraging business leaders to consider non-family stakeholders' role in the succession process to optimize the endeavor's success in their organizations. The study results revealed that Polish family business leaders benefitted from financial and legal advisors' support to navigate the challenges of succession. Doborzyński et al. (2019) indicated that the Polish economic and legal landscape could be problematic to navigate. Subject matter experts can support family business owners in making the most appropriate decisions. Similarly, the results showed that incumbents should skillfully communicate the intergenerational leadership

change to employees and business partners. Singh and Kataria (2021) argued that honest communication elevates trust, which is critical during succession planning. Thus, family firm leaders aiming to apply the findings to business practice need to consider non-family stakeholders' roles when planning succession.

### **Implications for Social Change**

Family businesses drive national entrepreneurship and social advancement in many countries. However, family firms' positive impact on economic and social growth can be undermined by their decreasing survival with each intergenerational ownership and leadership transfer, aggravated by the lack of succession planning (Obianuju et al., 2021). Therefore, the study results could contribute to social change by equipping family business leaders with succession planning strategies that enhance organizational survival and growth. Ge and Micelotta (2019) noted that family businesses are well-equipped to undertake corporate social responsibility initiatives through proactive social engagement. Furthermore, Lumpkin and Bacq (2022) suggested that family firms often display a readiness to tackle societal problems and ills with advantageous outcomes for the neighborhoods, cities, and regions where they operate through civic wealth creation. Thus, the study findings could empower family businesses to strengthen their economic potential and allocate more resources to positive social change initiatives.

In addition to employing succession planning strategies to enhance family business survival and social impact, organizational leaders could use their firms' heritage to model civic behaviors. Ge and Micelotta (2019) argued that family business leaders could engage in philanthropic activities, using their economic potential to propel such

initiatives. The study findings revealed that family business owners often perceive mentoring as a strategy for transferring knowledge and values across generations. Thus, family business leaders could instill social and environmental sensitivity in their successors, preparing them to generate economic returns without neglecting their organizations' broader impact. Hence, the study results could encourage family business leaders to become more mindful about transferring philanthropic values during systematic succession initiatives.

### **Recommendations for Action**

In this qualitative multiple case study, I explored the succession planning strategies that Polish family business leaders use to conduct intergenerational leadership transfers in their organizations. The study results might equip family business owners and managers with effective succession planning strategies to employ in applied settings to bolster firm survival, continuity, and growth. As previous studies on family businesses demonstrated, implementing succession planning during intergenerational leadership transfers can improve process effectiveness and stakeholder experiences (Ali et al., 2019; Bokhari et al., 2020; Kiwia et al., 2019). I encourage family business researchers, practitioners, students, and policymakers to pay attention to the study results, as the conclusions can be used in family firm contexts to produce positive organizational outcomes. The diverse stakeholders could use the study findings to make evidence-based decisions on succession planning in family businesses.

I devised four recommendations for action based on the conclusions from this study. The recommendations for action reflect themes that emerged during the research

process, namely: (a) systematic succession, (b) grooming the successor, (c) communication with non-family stakeholders, and (d) long-term sustainability. First, incumbent family business owners and leaders should recognize the risks associated with inadequate succession planning and undertake efforts to systematically prepare for an intergenerational leadership transfer in advance. Second, family business scholars and practitioners should identify the need for holistic formal and informal education, preparing potential successors for workplace responsibilities and demands. Educators and practitioners should collaborate on developing university- and workplace-based development programs for family business successors. Third, incumbent family business owners and leaders should acknowledge the value of collaboration with advisors during the succession process, especially when addressing legal, financial, or communication challenges. Fourth, incumbents and successors should cooperate on developing metrics for assessing succession's effectiveness that satisfy the stakeholders' expectations. In combination, the recommendations for action should improve succession planning in family business contexts.

I will employ a comprehensive approach to disseminating the findings to maximize the recommendations' implementation in applied settings. I will share the results with the study participants actively engaged in the research process. Moreover, I will distribute the conclusions among family business researchers and practitioners in Poland to provide them with succession planning strategies suitable for the Polish business environment. Furthermore, I will attempt to publish the study findings in a peer-reviewed scholarly journal and present the findings at conferences attracting management

researchers, practitioners, and policymakers. Finally, I will share the findings with Polish governmental agencies responsible for the country's economic development. Thus, approaching diverse actors should enable the distribution of the study results to scholars, practitioners, and policymakers who are active in the area of family business management.

### **Recommendations for Further Research**

Family businesses worldwide continue to face succession as a potential obstacle to their continuity and growth. Thus, researching succession planning in family businesses will remain relevant for scholars and practitioners in the coming years. The problem will remain pronounced in Poland, where 71% of family firms are owned and managed by first-generation business leaders and have not undergone succession (Wysocka, 2019). Therefore, further research should advance the scholarly understanding of the phenomenon and lead to conclusions that can be applied in business settings. Thus, I formulated recommendations for further research driven by the study's weaknesses and novel opportunities for scholarly investigations.

Applied business researchers intending to explore succession planning in family firms in the future should strive to minimize several weaknesses' that impacted this study. First, the study was limited to succession planning in Polish family firms. Thus, future studies could include family businesses from other Central European countries to understand how organizations operating in other post-communist economies perceive succession planning. Second, the data collection process included conducting semistructured interviews with incumbent family business leaders, viewing

organizational documents, and taking researcher notes. Future studies could entail interviews with more organizational stakeholders, possibly successors, and using a broader collection of documents related to the phenomenon under scrutiny. Third, the findings were potentially distorted by confidential information that the business leaders decided not to disclose. Future studies should include a more extended preparation phase to build more participant trust in the scholar and the research process. Hence, addressing the study's weaknesses could improve future research on succession planning in family firms.

Moreover, the study findings and extant literature allowed me to identify further research opportunities. The results revealed that many family business leaders grapple with succession's legal and financial aspects. As Doborzyński et al. (2019) suggested, many family business leaders struggle to make sense of the legal, financial, fiscal, economic, and social factors affecting their organizations' development. Thus, future studies should put a greater emphasis on understanding how family business leaders incorporate legal and financial elements into succession-related decisions. Additionally, the findings revealed that many family business leaders engage in appraising succession's effectiveness beyond the immediate effects of formal leadership and ownership transfer. Thus, future studies could focus more closely on the post-succession phase and its implications for long-term organizational performance, family relationships, human resource management, and communication. Applied business researchers could also investigate how diverse successor development programs influence new family business leaders' preparedness for workplace responsibilities and contribute to long-term process

effectiveness. In combination, the study findings could guide further research into succession planning in family businesses across cultural contexts.

### **Reflections**

When I began my doctorate at Walden University, I was thrilled about embarking on this demanding yet fulfilling journey. I have always dreamed of becoming a scholar who contributes to knowledge development and social change. However, I quickly realized that doctoral research is more about incremental progress toward one's ultimate goal than grand discoveries. Yet, in a fundamentally positive way, the doctoral journey was the most humbling experience in my life. While I did not expect to come to such a realization, I will miss the daily grind, excitement intertwined with frustration, and the feeling of contentment after reaching the milestones along the doctoral journey. My thoughts during the final weeks of the doctoral program became filled with worries about the future. Finding an equally rewarding activity may be difficult.

As I reflect on the doctoral study process, I recognize its transformational effect on my perceptions of modern organizations and societies. I attribute the capstone stage of the doctoral journey to shaping my academic identity. With invaluable support from the faculty at Walden University, I started viewing the world through a fine-tuned lens, mindful of biases and preconceived ideas distorting one's perceptions of reality. In particular, I have managed to suppress the confirmation and negativity biases that clouded my thoughts for as long as I can remember. Thus, I approached the data collection and analysis stages of the doctoral study with clarity, openness, and

mindfulness, which allowed me to hear the participants. The doctoral process was the foundation of my holistic self-improvement and maturation as a social change agent.

### **Conclusion**

Ultimately, the purpose of this qualitative multiple case study was to explore the succession planning strategies that Polish family business leaders use for the leadership transition to the next generation. I collected data through semistructured interviews with three business leaders who successfully implemented succession planning in their family firms in Poland. I also viewed organizational documents and used research notes. Four themes emerged after analyzing the collected data, namely: (a) systematic succession, (b) grooming the successor, (c) communication with non-family stakeholders, and (d) long-term sustainability. The findings revealed that family business leaders who prepare and implement succession planning enhance their firms' survival, continuity, and growth. Moreover, the results demonstrated that incumbent family business leaders should create formal and informal development opportunities for their successors. Additionally, family business leaders should not neglect interactions with non-family stakeholders, as their support for succession planning and chosen successors is pivotal for process effectiveness. Given the Doctor of Business Administration program's focus on positive social change, the current study could enable community thriving by enhancing family business survival and growth. As business environments become increasingly complex and volatile, family business leaders who implement succession planning prepare their firms to face organizational change, remain competitive in the long term, and grow.



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## Appendix: Interview Protocol

Interview Protocol	Interview Script
<p>Read the following highlighted section into the interview audio for transcription purposes.</p>	<p>First, thank you for allowing me the opportunity to speak with you about succession planning in your company. I am conducting a multiple case study on succession planning strategies in Polish family firms. You were selected as a participant for this study because of your expertise in succession planning.</p> <p>This interview is scheduled for one hour and I will attempt to stay within that time frame, while also allowing you time to give a thorough answer for each interview question. Please remember that you participation is voluntary and you may withdraw from the study at any time without any consequences.</p> <p>Do you have any questions about the study or the research protocol that were not addressed in the informed consent form or prior communication? If there are no other general questions, let's begin the interview. May I record the interview?</p>



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Read the following highlighted section into the interview audio for transcription purposes.

The title of the research is: What succession planning strategies do Polish family business leaders use to conduct leadership transition to the next generation?

This is an interview with participant: Include identification number from the participant sheet here.

The Walden IRB protocol number is:

The date is: Insert today's date here.

The time is: Insert time here.

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The interviewer will initiate the interview by asking the first question and then proceeding through the next questions, along with potential follow-up questions until complete. The interviewer will do the following as necessary throughout the interview:

- Use minimal note taking to remain engaged with the interviewee.
- Rephrase questions as necessary
- Watch for nonverbal cues.
- Inquire further in areas where they detect uncertainty from the interviewee.
- Ask any additional questions that emerge from the interviewee responses to increase depth.

1. What succession planning strategies did you use at your family business to conduct leadership transition to the next generation?
  2. What key skills and abilities did you look for in potential successors during the succession planning process at your firm to conduct leadership transition to the next generation?
  3. How did you communicate your succession planning strategies to prospective successors and other stakeholders to conduct leadership transition to the next generation?
  4. What specific leadership development strategies did you use to prepare the successors for post-transition family business leadership?
  5. What challenges did you encounter when implementing your succession planning strategies to conduct leadership transition to the next generation?
  6. How did you address the challenges affecting the implementation of your succession planning strategies to conduct leadership transition to the next generation?
  7. How did you assess the effectiveness of your succession planning strategies to conduct leadership transition to the next generation?
  8. What additional information can you share about strategies for succession planning in your family business to conduct leadership transition to the next generation?
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Finish the interview with a thank you to the interviewee.

Thank you for your time and insight into the topic. Your responses are very helpful in understanding succession planning strategies in Polish family businesses.

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Schedule a follow-up member checking meeting to review the original interview data and interpretations.

I would like to schedule a brief follow-up meeting with you in several days for your review of my comprehension of the responses that you provided in this interview. I will email my summaries of your answers a few days before our next meeting. Then, when we meet, we can address any changes or additions you wish to make.

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Take some reflective notes. Note feelings and write down any passing thoughts about the interview.

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