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Effective Organizational Succession Planning Strategies for Retaining Knowledge From Retiring Employees

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This is to certify that the doctoral study by

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has been found to be complete and satisfactory in all respects,
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Abstract

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MS, Excelsior University, 2020

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Research Project Submitted in Partial Fulfillment

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Abstract

A lack of succession planning to retain critical knowledge from retiring employees poses significant risks to organizational revenue and long-term survival. Organizational leaders are particularly concerned about succession planning because failure to capture employee knowledge threatens organizational performance and survival. Grounded in the 7-step model for succession planning theory, the purpose of this qualitative pragmatic inquiry project was to identify and explore effective succession planning strategies that some organizational leaders use to retain knowledge from retiring employees to avoid a negative impact on organizational revenue and survival. The participants included eight senior human resource managers from different organizations in the U.S. state of Virginia with successful experiences using such strategies. Data were collected from semistructured interviews and publicly available organizational documents. Three themes emerged from the thematic analysis: (a) strategies for structured succession planning, (b) strategies to address employee resistance to knowledge transfer, and (c) strategies to obtain executive buy-in and stakeholder engagement. A key recommendation is for organizational leaders to implement standard operating procedures that formalize succession planning and knowledge-sharing expectations by providing support in the form of visible endorsements and resource allocation. The implications for positive social change include the potential for organizational leaders to increase organizational revenue, contributing to community welfare through economic stability; increased tax contributions; and reinvestment in social infrastructure, such as schools, parks, and public services.

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Dedication

This project is dedicated to my parents, Bill and Janice Watkins, in loving memory. The journey of pursuing my Doctor of Business Administration degree has been made possible by the life lessons they instilled in me.

To my wife, Debra, your steadfast belief in me has been my greatest source of strength. Thank you for being my anchor, my inspiration, and my sounding board throughout this journey.

To my children, Brianna, Danaya, Darian, and Davion, your faith in me and your boundless energy reminded me daily of the importance of perseverance. Your belief gave me the determination to continue to press forward.

To my sister, Samantha Stewart; my Aunt Rhonda Zellner; and Aunt Betty Bryant, your constant encouragement and faith in me have been a guiding light along the way.

Lastly, to William Chaney, Jason Barrett, and Robert Magani, thank you for being a sounding board on the rough days and for reminding me that challenges are only stepping stones to success.

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Section 1: Foundation of the Project

Background of the Problem

Organizational leaders face a critical need to establish effective succession planning, especially for the knowledge workforce, due to the increasing trend of senior employees retiring (Carlson, 2023). There is an emergent need for capable organizational leaders to replace incumbents in critical positions in cases of resignation, retirement, promotions, death, growth, expansion, and creation of new jobs (Desarno et al., 2021). Fry (2020) noted that over 28,600,000 senior employees retired in 2020, an approximate 3,200,000 increase from the previous year. Organizations that do not consistently practice succession planning produce dwindling results; therefore, it is in the interest of organizational leaders to develop effective succession planning to achieve successful goals (Ramachandran & Suresh, 2021).

Succession planning is significant in terms of retaining and transferring firm-specific knowledge, as more organizations' competitive advantage shifts to employee knowledge. McKee et al. (2019) found that demographic shifts also lead to an increase in the number of senior employees reaching retirement age, resulting in a lack of skilled employees to replace the employees lost to retirement. The availability of sufficiently trained organizational leaders able to succeed in the roles of soon-to-retire senior employees is imperative to ensure continuity (McKee et al., 2019). Succession planning is crucial for a firm's revenue and survivability. Successful succession planning and knowledge transfer are key to organizational success (Teng, 2020). The purpose of this qualitative pragmatic inquiry project was to identify and explore the practical strategies

that some organizational leaders use to retain knowledge from retiring employees to avoid a negative impact on organizational revenue and survival.

Business Problem Focus and Project Purpose

The specific business problem was that some organizational leaders lacked effective succession planning strategies for retaining knowledge from retiring employees, which could negatively impact organizational revenue and survival. Therefore, the aim of this qualitative pragmatic inquiry project was to identify and explore the effective succession planning strategies that some organizational leaders use to retain knowledge from retiring employees to avoid a negative impact on organizational revenue and survival. The project's target population consisted of eight senior human resource managers from different organizations in the U.S. state of Virginia. I used purposive sampling to select participants meeting the established participation criteria. Researchers use the purposive sampling method to select participants who meet the established participation criteria and obtain information to answer their overarching research question (Campbell et al., 2020). Eligibility criteria were established based on participants' experience with succession planning strategies, aiming to retain knowledge from retiring employees and prevent a negative impact on organizational revenue and survival. Qualified participants had to possess at least 5 years of successful experience using strategies to retain knowledge from retiring employees to avoid a negative impact on organizational revenue and survival.

To gain access to project participants, Krause (2020) recommended that researchers maintain effective communication with relevant organizational leaders,

understand the target population, and employ multiple methods for recruiting participants. Human resources managers were used for the project. In terms of data sources, I conducted semistructured interviews with open-ended questions and reviewed organizational documentation and artifacts that were publicly available. I determined that the data collected from conducting semistructured interviews aligned with the data collected from reviewing publicly available documentation and artifacts.

The conceptual framework that grounded my doctoral project was Rothwell's (2005) 7-step model for succession planning. Rothwell's 7-step model for succession planning consists of seven consecutive steps that organizational leaders use to design and implement an effective leadership succession plan. Therefore, I selected Rothwell's 7-step model for succession planning to serve as a valuable foundation for identifying and understanding the effective, practical strategies that some organizational leaders use to retain knowledge from retiring employees, thereby avoiding a negative impact on organizational revenue and survival.

Research Question

What effective succession planning strategies do organizational leaders use to retain knowledge from retiring employees to avoid a negative impact on organizational revenue and survival?

Assumptions and Limitations

Assumptions

Assumptions are facts considered to be true, but which cannot actually be verified by the researcher (Verostek et al., 2022). I assumed that the data collected during the

interviews would accurately reflect the participants' experiences. I also assumed that the concept of succession planning is universally applicable across all industries, cultures, and organizations. I also assumed that the data collected from participants would help answer the following overarching research question: What strategies do organizational leaders use to retain knowledge from retiring employees to avoid a negative impact on organizational revenue and survival?

Limitations

Limitations are potential study weaknesses that cannot be addressed by the researcher (Theofanidis & Fountouki, 2019). For example, a limitation of the project was that only a few organizational leaders would participate. Conducting a project with only a limited number of organizational leaders from a few different organizations limited the applicability of the findings across the industry. In addition, some organizational leaders could have chosen not to participate in the project.

Transition

Section 1 included the background of the problem statement, business problem focus, project purpose, research question, and assumptions and limitations. Section 2 includes a review of professional and academic literature, including the conceptual framework. I review key literature related to the study topic. The literature review has several subsections, beginning with an introduction that explains the literature search, the percentage of articles identified as peer-reviewed, and their publication dates. Several subsections focus on the applicability of the literature to the research question and the purpose of the project. The themes that emerged in the literature review included

succession planning, knowledge transfer, and organizational performance. I evaluated and analyzed the findings and recommendations of previous research studies, identifying any associations with the project. Section 3 includes the following subsections: project ethics; nature of the project; population, sampling, and participants; data collection methods; interview questions; data organization and analysis techniques; reliability and validity; and the transition and summary. In Section 4, I will present the findings, provide business contributions and recommendations for professional practice, overview the implications for positive social change, and offer recommendations for further research and the conclusion.

Section 2: The Literature Review

A Review of the Professional and Academic Literature

I searched the literature on succession planning in several journal articles and books using Walden University's library databases. I also used Google Scholar, which provided an abundance of data points. Walden University's library allows researchers to access and review numerous journal articles, books, and other resources rich in information about succession planning. Walden University's library databases included ABI/INFORM Complete, Academic Search Complete, Business Source Complete, Emerald Management, ProQuest Central, and SAGE Premier. Additionally, I accessed peer-reviewed open journals to retrieve articles on succession planning through AOSIS OpenJournals. Lastly, government websites also served as a resource for finding information about succession planning.

Using keywords and phrases in databases is just one of the strategies I used to filter through the literature and narrow down the search results. The filters applied included exclusive keywords, periods, and search engines and databases that enabled me to retrieve specific facts for my literature review. Using Google Scholar allowed me to access articles published in or after 2021, thereby ensuring the literature was relevant for the overall study. Moreover, I used the Walden University library as the primary resource. The keywords and phrases used were *succession planning, knowledge transfer, knowledge management, succession management,* and *knowledge retention*. I used Ulrich's Periodicals Directory to verify peer-reviewed articles. The 169 references in this project comprise 128 scholarly peer-reviewed articles (76%), 20 non-peer-reviewed

articles (12%), and 21 books (12%). The total number of references in this project published within the 2021–2025 period is 141, which is 83% of the total number. The literature review contains 40 references, with 31 references published within the 2021–2025 period, representing 78%, and 37 from scholarly peer-reviewed sources, representing 93%.

Literature Review Organization

The literature review is divided into several subsections. I start with an introduction that outlines the strategy for searching the literature, including the frequency of peer-reviewed articles, their percentages, and publication dates. The focus of the next section is the application of the literature, which is based on the research question. Additionally, there is a brief account of the purpose of the project. In the next section, I discuss the themes that emerged after reviewing the literature, including succession planning, knowledge transfer, knowledge management, organizational performance, organizational revenue, and organizational survival. To support the project, I compared different perspectives from previous findings and research documented in the literature review.

I begin with the first theme, succession planning, which involves a synthesis and analysis of the conceptual framework, specifically Rothwell's (2005) 7-step model for succession planning. The section consists of rival or contrasting theories from the literature on succession planning, including knowledge management, strategic leadership, and path–goal leadership theories. Second, I will provide an overview of knowledge transfer, which focuses on how human resource managers use this process to retain

knowledge from retiring employees through combined succession planning strategies. Additionally, I used different definitions and antecedents to illustrate common concerns related to the consequences of succession planning. The third and final theme discussed is organizational performance. I will begin by providing a general overview of strategies for preventing loss of organizational revenue and ensuring organizational survival, particularly in the context of succession planning. The subsections covered topics on organizational revenue and survival.

Application to the Applied Business Problem

In this section, I briefly discuss the project's method and design, which is the qualitative method and pragmatic inquiry research design. The goal of this qualitative pragmatic inquiry project was to identify and explore practical strategies that some organizational leaders use to retain knowledge from retiring employees to prevent a negative impact on organizational revenue and survival. The qualitative method, combined with a pragmatic inquiry design, was used to understand human resources managers' strategies to gain insight into succession planning.

The project's findings aim to demonstrate that human resources managers can develop effective strategies to retain knowledge from retiring employees, thereby mitigating negative impacts on organizational revenue and survival. For leaders to enhance the current succession planning process, they must first grasp the underlying meaning of the themes that have emerged before developing suitable strategies for succession planning. Furthermore, after reviewing the findings, readers may understand that the project could enhance business practices, leading to higher productivity and

increased organizational competitiveness. Finally, the social change implications involve developing strategies that may boost succession planning and personal well-being.

Seven-Step Model for Succession Planning Theory

Private, public, and governmental organizations face challenges related to the loss of knowledgeable employees due to retirement or retention issues. Succession planning is an enterprise approach that has gained interest from all firms because of the high demand for knowledge retention and the shortage of skilled workforce (Bano et al., 2022a). Rothwell (2005) is known as one of the preeminent theorists in the succession planning field (Ghazali et al., 2022). Rothwell's 7-step model for succession planning has had many iterations over the past few years (Ghazali et al., 2022). This literature review begins with an analysis of the conceptual framework based on Rothwell's 7-step model for succession planning.

Rothwell's (2005) 7-step model for succession planning can be an effective tool for organizations to maintain their human capital talent pool in case of retirement, resignation, or promotion; thus, the first of seven steps consists of having senior-level buy-in to be successful. According to Bano et al. (2022b), succession planning is a function of top-level management, and a succession-planning program can only be effective if the organizational leadership is committed to it. In contrast, Al Suwaidi et al. (2020) posited that organizational leadership needs to be aware and convinced of the program's value proposition by demonstrating how it aligns with strategic goals, mitigates leadership gaps, fosters talent development, and prevents a negative impact on organizational revenue and survival. To develop an effective succession plan program,

such as Rothwell's 7-step model, support for C-suite leadership members is essential (Barton, 2019). Executive management buy-in ensures full support for the benefits succession planning can bring to the organization. Rothwell's model includes stages that will eventually lead to an efficient talent pool for the organization. Next, I will cover the second step, which includes assessing the current work and personnel requirements.

The second step involves assessing present work and labor requirements, especially in key positions, which involves thoroughly evaluating the current workforce to understand which further steps will be based on. Nazer and Llorca-Jana (2022) postulated that mapping the current talent inventory consists of creating a comprehensive overview of the current workforce, including key roles, skills, experience, and performance levels. Bano et al. (2022a) posited that priority should be on individuals who consistently exceed expectations, demonstrate leadership qualities, and are driven to learn and grow. Senior managers, along with human resources leaders, should select candidates possessing the traits, experience, and organizational skills that are best suited to the position. Other factors worth considering are innovation, communication skills, problem-solving abilities, flexibility toward change, and adaptability (Odiachi et al., 2023). The 7-step model provides organizations with the strategy to select the most qualified employees available after their assessment. In the next section, I cover the third step, which involves appraising individual performance.

The third step involves regularly and periodically assessing employees' performance to evaluate their potential for future promotions. Chukwuma et al. (2021) noted that the results of the appraisals enable the leadership to understand each

employee's strengths, weaknesses, and ability to be in higher-level positions. Abdellah (2021) posited that the results could be used to develop targeted training/development plans to equip selected employees with the required skills and competencies for high-level roles. Managers should be equipped with the tools and resources to evaluate the best-qualified candidate for the position. Kiwia et al. (2020) found that it is also necessary to incorporate feedback from peers, subordinates, bosses, and clients to gain a holistic view of each employee's performance and leadership potential. Managers must conduct assessments to ensure consistent valuations, confirming the best fit for the prospective upgrade position. Next, I will cover assessing future staffing and personnel needs in the fourth step.

In the fourth step, organizational leaders assess potential work needs and human resource requirements. Siambi (2022) elucidated that this step helps the leadership to understand the amount and nature of work the organization will require in the future and the number of people needed to perform the anticipated roles. This goal can be achieved by analyzing the organization's future strategic goals, industry trends, and challenges expected (Siambi, 2022). The analysis results will assist in identifying future positions and roles, including the necessary skills and competencies. Cox and Overby (2023) postulated that another strategy is to map future needs for key leadership positions within the organization, which requires defining their skill sets, experiences, and leadership styles. Human resources managers can help senior leaders identify future needs that best align with the organization’s goals. In the next section, I will cover assessing future individual potential.

The fifth step involves evaluating future individual potential. After understanding future work and people's requirements, the next step is to assess whether employees can meet these upcoming needs. Barton (2019) elucidated that this step primarily involves matching individual strengths and development potential with the firm's future needs. This step can be achieved by using various assessment tools like personality tests, leadership simulations, and skill-based evaluations to identify employees with the right mix of skills and potential for future roles (Al Suwaidi et al., 2020). Business managers must develop various scenarios when deciding on the right candidate for available positions. Chukwuma et al. (2021) posited that it is necessary to develop assessment centers where high-potential candidates can participate in simulated exercises to demonstrate their abilities in decision making, communication, overall leadership, and specific functions for various roles. Senior human resources managers must trust that the nominee can excel and succeed after evaluating the potential candidate's abilities to take on a key position. The upcoming section will focus on closing the developmental gaps in the sixth step.

The sixth step involves creating an individual development plan (IDP) to help close the gap between current skills and future requirements, thus preparing select employees for upcoming roles. Abdellah (2021) stated that professional development programs are designed to overcome deficiencies and address the gap between current performance and future expectations. Kiwia et al. (2020) postulated that creating personalized IDPs for selected high-potential employees could address their skill gaps and align with their career aspirations and the organization's future needs. To accomplish

this, organizational leaders must offer access to training programs and mentorship opportunities that directly meet the specific development needs outlined in each IDP. Jackson and Allen (2022) found that assigning each candidate a mentor is also advisable to give them firsthand guidance on the roles of their positions. Managers should ensure that each chosen candidate's specialized plan aligns with the organization's succession planning strategies. In the final section, I will cover Step 7, which focuses on assessing the succession planning program.

The last step in Rothwell's (2015) seven-step model is to regularly assess the succession planning program to identify its strengths and weaknesses. Rothwell posited that the activities at this stage include tracking the program's progress against set goals and objectives, measuring the impact of development initiatives, and adjusting as needed. Ghazali et al. (2022) claimed that a continuous evaluation is necessary to determine specific gaps and identify possible corrective measures to improve the program's effectiveness. Executive management needs to track, monitor, and measure the program's progress against established goals, such as talent pool development and leadership effectiveness. This strategy also involves determining whether the program implementation aligns with the above or is beyond the predetermined schedule (Al Suwaidi et al., 2020). Senior leaders and human resources managers need to establish a process for regularly collecting and analyzing feedback from all stakeholders involved in the program to identify potential challenges and areas for improvement, thereby enhancing the program's effectiveness. In the following section, I will cover additional aspects of the 7-step model's knowledge management components.

The 7-step model for succession planning was created to assist organizations in retaining talent and identifying future employee knowledge needs. Atwood (2020) elucidated that succession planning involves a process of defining future leaders of an organization and requires a culture that values talent development from the outset. Abdellah (2021) noted that the 7-step model can be used as a deliberate and systematic effort by which a firm can ensure the continuity of filling its key leadership positions to preserve its intellectual/knowledge capital. To preserve organizational knowledge, executive leaders and human resources managers must ensure the talent pool contains the necessary candidates with the skills for key roles within the company. Ghazali et al. (2022) postulated that meaningful positive relations between stakeholders become more effective when strategic succession planning is used. Knowledge management enables organizational leaders to combine tools with Rothwell's (2005) 7-step model to develop long-term strategies effectively. Next, I will discuss the conceptual framework of the 7-step model's relevance to the organization's ability to achieve success.

The 7-step succession planning model has been a mainstay in today's business world. Desarno et al. (2021) stated that business practitioners widely use the framework globally to optimize processes in their firms. Marques et al. (2019) elucidated that the framework has been used to implement succession planning programs that enable management stability and knowledge transfer. The 7-step model can improve a company's ability to strengthen their succession planning strategies for success. Abdellah (2021) posited that organizational development incorporates succession planning to attain leadership sustainability and ensure organizational stability. Rothwell's 7-step model acts

as a conceptual framework, giving organizations the institutional strength needed for long-term sustainability.

This qualitative pragmatic inquiry project has been conducted using the 7-step model for succession planning, resulting in varied findings on the model's effectiveness. Susanto and Parmenas (2021) found that the 7-step model, when used with an organization's retention plan, enhances talent identification in readiness to meet the future needs of a position in a firm. Susanto and Parmenas postulated that implementing the 7-step model is more effective when firm managers categorize the candidates and prepare based on their readiness levels to take up the desired roles. Organizational leaders working with human resources can ensure their succession planning programs are effective by aligning the 7-step model with their processes. Moreover, as companies implement the 7-step model framework in most of their subsidiaries, Susanto and Parmenas found that talent development programs that include in-house training as part of the succession planning process are adjusted according to each candidate's proficiency level and desired output. Organizations can develop suitable and effective succession planning models, such as the 7-step model, to build a pool of qualified candidates for future critical roles.

Higher institutions have shown a strong interest in the 7-step model's detailed processes that can improve their succession planning for internal leadership roles. Ahmad et al. (2020) examined the 7-step model in the context of higher education institutions and found that firms need strong leadership for business maintenance, growth, and continuity. Additionally, A. R. Ahmad et al. found that promotion from within the

organization is essential because, for the 7-step model to be effective, the firm must have some means by which to replace key job incumbents as vacancies occur in their positions. Organizational leadership should ensure that its internal processes align with the 7-step model, which will help emphasize the importance of a strong positional selection process. A. R. Ahmad et al. elucidated the significance of a 7-step model for an organization because every organization needs to invest in training and developing individuals so that they would be well-equipped and have the qualifications to take over any position. A. R. Ahmad's research shows that, by using the 7-step model, leaders can effectively identify positions and develop candidates for potential key positions within an organization.

The importance of using succession planning models like the 7-step model has been a key topic among corporate leaders and stakeholders. Researchers have verified the effectiveness of the 7-step model in improving a company's current retention strategies. Pandey and Kumar (2023) postulated that through the 7-step model, businesses can ensure that they have future business leaders in place at the right time. Pandey and Kumar found, through evidence collected through a literature review and exploratory study approach, that ongoing trends in succession management practices implemented through the 7-step model are responsible for the successful selection of qualified candidates for various positions throughout the organization. Organizational executives can collaborate with human resources to ensure that the 7-step model remains a key part of their organization's succession planning process. Pandey and Kumar recommended a 7-step model implementation to promptly develop the leadership pipeline to cater to future

business uncertainties and ensure the organization moves towards its strategic mission. Pandey and Kumar posited that succession management procedures, choices, and trends should work with the 7-step model to assess various relationships in the organizational environment. Organizations should continue to use succession management tools that align with the 7-step model, emphasizing succession planning globally.

Organizational leaders adopt succession planning models, like the 7-step model, to promote organizational success in retention efforts. Researchers have reviewed key literature to assess the relevance of the 7-step model as a strategic tool for organizational success. Chukwuma et al. (2021) found that the role of the 7-step model within an organization, paired with human resources in the retention process, helps organizations avoid critical pitfalls in their selection of qualified candidates. Chukwuma et al. posited that the 7-step model is instrumental in dealing with various organizational challenges, including leadership concerns, technical skills transfer, and organizational culture transfer. Human resources managers have learned that the 7-step model is a strategic tool that can be exploited appropriately if executed effectively. Chukwuma et al. postulated that the 7-step model also plays a significant role in firms, including improving employee engagement, highlighting strategies to help exploit strategic firm knowledge, and achieving organizational goals. Effective execution involves applying proven models, such as the 7-step model. The model requires cooperation between employees and management and is instrumental in developing employees' capabilities and skills for organizational posterity.

Educational institutions have taken a keen interest in the 7-step model over the years due to its structured process of identifying successful strategies in the context of succession for school principals. Abdellah (2021) found that through a descriptive research design, the 7-step model outlines sequential steps and executive procedures of structures to mentor alternative leaders in education institutions competently. Abdellah posited that scholars and educational leaders can use frameworks such as the 7-step model to contribute to academic leadership development. Institutional leaders must recognize the benefits of integrating the 7-step model into their existing higher learning processes, thereby fostering leadership retention and stability. Abdellah elucidated that underlining the usage of the 7-step model to ensure teaching and school leadership continuity and firm resilience in school would ensure institutional permanence. Through the process mentioned above, educational institutions can manage leadership changes more effectively and maintain organizational effectiveness in the face of changing educational challenges and opportunities.

The 7-step model has been widely adopted around the world to improve organizational succession planning, significantly influencing leadership development for future talent and mentoring candidates for senior roles. Ghazali et al. (2022) found that using a solid 7-step model as a key framework was the most important factor in successful executive retention planning. Ghazali et al. noted that the emergence, systematic procedures, and measurement of success of the 7-step model were influential in enhancing the retention and preparedness of individuals to lead in the future. Organizational leaders need to ensure that their processes align with the 7-step model,

which offers valuable insights into retention strategies that work well with organizational leadership development goals. Ghazali et al. emphasized the importance of establishing a strong 7-step model and a systematic approach to demonstrate the central role of strategic retention objectives in achieving organizational success. The strategies discussed highlight the 7-step model's usefulness and adaptability across various industries, providing crucial information for companies aiming to build effective leadership pipelines and secure long-term continuity.

Organizational retirement planning can be improved with the 7-step model to better replace retiring employees. The common view is that succession planning addresses employee retirements. Batool et al. (2022) found that the 7-step model can boost retention efforts in cases of unplanned retirements, which have significant implications for organizations because they directly affect human resources planning. Batool et al. suggested that the 7-step model can help organizations prepare for timely retirements as well as early or delayed departures, which can harm workforce management. The model can also be helpful when positions become vacant due to unexpected events, not just retirement. Batool et al. explained that employees might leave through resignations or promotions; therefore, implementing the 7-step model for every critical role is advisable. Overall, the 7-step model provides a structured process for organizations to plan better and prepare for unexpected departures, ensuring they have viable options for filling key positions.

The 7-step model has been widely used in higher education as a framework for evaluating the effectiveness of academic retention strategies. S. Ahmad et al. (2019)

found that the 7-step model, when used alongside school administration, can be an effective tool within higher education institutions. S. Ahmad et al. stated that the importance of the 7-step model, when incorporated into the institution's systematic planning, is that it improves focus on assessing key roles and developing future leaders in academia. Alignment of institutional administration with the 7-step model can be crucial in selecting qualified candidates at the higher education level, providing practical insights for institutional leaders. S. Ahmad et al. argued that applying the 7-step model allows scholars and academic leaders to understand the complexity of retention planning and make informed decisions that support strategic initiatives. This approach can promote leadership continuity and enhance organizational effectiveness.

Other Supporting and Contrasting Theories

In this section, I will discuss supportive and contrasting theories. The contrasting theories are strategic leadership theory and path–goal leadership theory. The supporting theory is knowledge management theory. The first contrasting theory, strategic leadership theory, has practical implications for how organizations can brainstorm and then align their strategic goals with firm performance. The second contrasting theory, the path–goal leadership theory, is based on assumptions and is broader in scope to align with my project's objectives. Knowledge management theory, which supports the 7-step model of succession planning, has its limitations.

Knowledge Management Theory

Since the start of industrialization, the knowledge economy has demanded that organizations develop a structure for managing their human capital to stay competitive.

Drucker (1968) introduced the knowledge management theory. Drucker explained that knowledge requires a shift in how we think about innovation in large business organizations, whether it is technical, product-related, or strategic. Abd-El Aliem and Abou Hashish (2021) argued that knowledge management theory includes techniques and processes that combine capturing, storing, disseminating, and applying knowledge to boost organizational performance and innovation. As a foundation for preserving generational knowledge and maintaining intellectual capital, knowledge management theory underpins the continuity of the organization's advisory process despite leadership changes.

Hislop et al. (2018) argued that introducing knowledge management theory platforms and communities of practice can help organizations improve the transfer of tacit knowledge from experienced leaders to future successors. Geisler and Wickramasinghe (2015) highlighted that knowledge management theory and sharing are essential issues that need a trust-based and collaborative culture. Ritchie (2020) explained that to ensure the successful implementation of knowledge management theory, organizations should develop a culture, processes, technology, and leadership that incorporate knowledge management into the core of the company and maximize its strategic value. The knowledge management theory supports the 7-step model of succession planning.

Strategic Leadership Theory

The first contrasting theory was developed to explain the concept of strategic leadership by Chandler (1962) and later improved by Ansoff (1977). Ansoff argued that

the value of an organization was a true reflection of its senior and top actors and that an organization's performance depended on its decisions. Luciano et al. (2020) stated that a critical premise of this theory is that leaders can learn and have the capacity to identify, train, and develop talents. Weisblat (2018) argued that leaders at top management are essential in shaping an organization's direction when implementing strategic leadership theory. Strategic leadership theory helps to explain the need for leaders to develop and transfer knowledge to leaders in critical positions for the continuity of an organization's operations. Luciano et al. posited that strategic leadership lays out the significance of top executives in determining the firm's direction, aligning the resources, and leading toward a culture of innovation and adaptability. Chen and Fernando (2022) postulated that strategic managers stock a pool of leaders who can assume management roles whenever needed by identifying and enabling gifted individuals to grow and mature. Applying strategic leadership theory requires synchronizing succession planning tasks with the organization’s objectives and targets. Chen and Fernando found that through various methodologies, such as talent assessment and succession planning exercises, organizational bodies can develop essential competencies and capabilities for future success. Strategic leadership theory presents practical implications for how firms may brainstorm and consequently orient their strategic goals and the firm's performance.

Path–Goal Leadership Theory

The contrasting theory is the path–goal leadership theory, developed by House et al. (1979). House et al. posited that leaders could develop those individuals working under them along their path to achieve individual goals and still attain the goals of an

organization. House et al. stated that this theory outlines a rapid change in leadership, noting that current leaders, unlike previous times, are more flexible and transparent, and inspire their followers. Marques et al. (2019) found that motivated and experienced staff are also more likely to improve the performance of an organization, thus confirming profitability. In line with knowledge transfer and explaining succession planning, this theory can be adopted to help explain the role that leaders can take in transferring skills to their followers through the influence they have. Marques et al. explained that leaders motivate their employees by adopting an empowering and active leadership style and inspiring subordinates to acquire the technical skills and competencies needed in future leadership roles. Chen and Fernando (2022) argued that this strategy would allow leaders to adopt their patterns of direction based on situational demands as well as the characteristics of the followers. Marques et al. elucidated that leaders delivering personalized guidance and mentoring can develop individuals' confidence and have them take control of their career development, preparing them to participate in the firm's subsequent leadership roles.

Knowledge Transfer

The importance of knowledge sharing remains crucial in every organization. However, assessing the amount and quality of knowledge transfer differs among organizations due to various factors. Ge and Campopiano (2022) posited that knowledge management is an influential agenda that needs immediate attention to ensure that firms retain critical skills and knowledge from experienced employees. Ge and Campopiano found that knowledge management involves collecting skills gained by senior employees

and transferring them to others designated in the organization. Organizational leadership consistently aims to implement strategies that pass essential skills and knowledge from one worker to the next, thereby enhancing competition and sustainability. This is where knowledge transfer comes in as a solution. Ge and Campopiano argued that knowledge transfer gaps resulting from reduction, resistance to change, technological change, and departures of retiring employees pose threats to knowledge management and transfer. Clearly outlined plans and strategies can help lessen knowledge loss and support organizational sustainability and viability.

Planning, sharing, and implementing knowledge transfer mechanisms are essential for an organization to stay competitive. Increasing awareness of succession planning should be paired with effective knowledge transfer methods to ensure companies remain successful in the long term. Manfredi Latilla et al. (2018) suggested that the increase in retirees and the' decrease in skilled staff threaten the continuity of many organizations. Ge and Campopiano (2022) argued that knowledge transfer is vital to an organization's strategic processes. It is a systematic and strategic approach to identifying, capturing, and leveraging a firm's collective knowledge to improve performance and achieve organizational goals. It involves creating processes, systems, and an organizational culture that promotes sharing and utilization of both explicit and implicit knowledge. Rothwell (2005) explained that knowledge transfer ensures valuable insights and expertise are stored efficiently and accessible to individuals throughout the organization. Knowledge transfer focuses on moving knowledge from one individual or group to others within the organization, ensuring that crucial information, skills, and

expertise from experienced employees are passed to others who need them to boost their knowledge or performance. Additionally, knowledge transfer plays a key role in capturing essential information from retiring employees.

Knowledge Transfer and Employee Retirement

Retiring employees represent a wealth of experience and knowledge that, if lost, can negatively impact an organization's revenue and threaten its survival. Ge and Campopiano (2022) elucidated that adopting effective strategies and measures is necessary to ensure the seamless and effective transfer of essential knowledge and skills from senior to junior employees before the seniors retire from their active roles. Jackson and Allen (2022) posited that integrating knowledge transfer and experience can ensure a smooth transition between the two sets of critical information employees. Pairing retiring employees with potential successors through formal knowledge transfer leads to ongoing mentorship. Marques et al. (2019) stated that this arrangement enables the retiring employee to coach and mentor their potential successors directly, ensuring the latter learn first-hand from proven experts. The arrangement also allows potential successors to shadow retirees in their daily tasks, enabling them to observe and absorb their practical expertise. Similarly, Jackson and Allen (2022) found that succession planning tracks critical metrics such as knowledge retention rates, employee competency levels, and project success rates, which evaluate the program's overall impact. Organizational leaders can benefit from knowledge transfer and succession-planning processes, which are structured to ensure that the organization's internal knowledge is passed from retirees to the incumbents.

When collaborating with succession planning, knowledge transfer requires and mandates that retiring employees document their processes, procedures, and organizational knowledge, thereby preserving explicit knowledge that might otherwise be lost. Chukwuma et al. (2021) found that their successors and other future employees could use documentation and knowledge repositories as guidelines or reference manuals. Ferreira et al. (2018) postulated that the processes overlap periods, allowing for an organized transition before senior employees retire. During the overlap period, retiring employees work alongside their successors before leaving, promoting hands-on training, knowledge sharing, and addressing specific questions to ensure a smoother transition. Marques et al. (2019) opined that the training or preparation of potential successors includes cross-training initiatives, in which they are trained in multiple roles. This strategy prepares incumbents for promotions and ensures a backup for critical positions, reducing the impact of retirements on day-to-day operations. Ge and Campopiano (2022) posited that knowledge transfer provides room for learning and improvements, ensuring potential retiree successors have sufficient time to learn and hone their skills before they take over the roles. In case of any changes, the programs are flexible and allow unlearning and relearning, preparing potential successors for diverse circumstances and environments.

Organizational Performance

Companies' leaders consistently seek a competitive advantage to maintain organizational performance that will keep them ahead in terms of revenue and survivability. Jackson and Allen (2022) opined that employees are the key players in an

organization's performance. This is because they are responsible for the organization's daily operations, and if they fail to perform their duties effectively, the organization's goals will not be achieved, leading to poor performance. Jackson and Allen found that while all employees play a critical role in achieving desired organizational performance, senior employees are always at the forefront. This finding is due to employees clearly understanding organizational goals, culture, and aspirations. Similarly, Cox and Overby (2023) argued that senior employees have experience in industry dynamics, which can significantly influence the organization's performance. Effective succession planning will improve the organization's performance by boosting its revenues and ensuring its survival even after employees retire.

Organization Revenue Through Succession Planning

Succession planning is closely connected to organizational revenue. Nazer and Llorca-Jana (2022) found that organizations lost a significant amount of revenue in the absence of a proper succession plan. Nazer and Llorca-Jana opined that failure to plan for succession in firms was attributed to reduced employee participation, lack of competent successors, and squandering business revenue. Effective succession planning has been linked with improvements in organizational revenues. Kiwia et al. (2020) argued that effective succession planning ensures that competent individuals committed to the organization's goals and objectives hold critical positions in the organization. The absence of such commitment is what drives down focus on organizational growth and efficiency. Zafar and Hummayun (2020) reported that hiring, retaining, and preparing competent individuals for critical roles in an organization is 2.5 times more likely to lead

to organizational revenue growth compared to hiring and training individuals from external avenues. Devoe (2023) postulated that part of succession planning is transitioning the organizational financial plan, which can prove difficult when hiring an unprepared or external employee. Therefore, the association between succession planning and organizational revenue is vital.

Succession planning guarantees a smooth leadership transition and safeguards an organization's ongoing revenue stream. Jackson and Allen postulated that the departure of key staff, particularly retiring employees, can cause disruptions in business operations, affecting revenue generation. Okwakpam (2019) found that succession planning allows organizations to accurately diagnose and close skill gaps in their workforce, recognizing that employees need specific competencies to improve revenues. Well-designed planning strategies are key to leadership positions. Okwakpam postulated that this preventive method saves both time and resources, and critical role-filling activities are delayed, thus increasing the overall workload. By developing succession planning strategies, organizations would therefore become proficient in human capital management, boosting employee loyalty and retention, and generating steady revenue.

Organizational Survival Through Succession Planning

The successful implementation of strategic planning is a critical milestone for all organizations on their way to success in long-term survival and sustainability. Odiachi et al. (2023) postulated that the succession planning process aids enterprises in making a bench of future candidates that enables them to replace retiring employees and control ongoing affairs that enhance the firm's survival. Marques et al. (2019) found that through

continually identifying and nurturing talent within the company, businesses can cost-effectively cope with uncertainty and keep their heads above water in the changing markets and economies. Furthermore, Marques et al. opined that succession planning offers a platform for transferring knowledge and skills from retiring employees to their successors, saving the organization from losing knowledge and increasing sustained survival. Such knowledge transfer enables the firm to compete at a higher level and respond to challenges, thereby ensuring organizational survival. Nazer and Llorca-Jana (2022) posited that with succession planning, the development and retention of talent are enhanced, leading to high agility and adaptability of the organization and giving firms a competitive edge even in highly volatile environments. Investing in succession planning initiatives is an investment in the long-term success and survivability of the organization, safeguarding its legacy and ensuring continuity in leadership and operations.

For organizational survival, human resources managers should seek to implement succession planning strategies that promote a culture of training and development. Ritchie (2020) found that by developing their employees' skills, organizations can train and develop a workforce capable of solving current problems and contributing to organizational survival. Ritchie postulated that succession planning strategies create a workplace where employees can develop and improve their careers, and research shows that such practices lead to higher employee engagement and sustained survivability. The correlation between personal and organizational targets and objectives is favorable for staff retention and the proportion of employees lost due to retirement, which becomes vital for stability and survival. Ritchie elucidated that succession planning helps

organizations adjust to market dynamics and emerging trends while having the right talent to capitalize on new opportunities. Maintaining organizational survival is essential; thus, succession planning can be seen as a central element of firm agility, and corporate entities can quickly adapt to uncertainties and, at the same time, achieve long-term success and sustainability.

Transition

Section 2 covered the literature review, which had several subsections, starting with an overview of the literature review and the percentage of articles identified as peer-reviewed, along with their publication dates. Some subsections addressed the applicability of the literature to the research question and the project's purpose. The themes that emerged from the literature review included the 7-step model for succession planning, knowledge transfer, and organizational performance. I assessed and analyzed the findings and recommendations of previous research studies, noting any connections to the project. In Section 3, I will cover the following subsections: project ethics; nature of the project; population, sampling, and participants; data collection activities; interview questions; data organization and analysis methods; reliability and validity; and the transition and summary. In Section 4, I will present the findings, outline the business contributions and recommendations for professional practice, discuss the implications for positive social change, offer suggestions for further research, and provide a conclusion.

Section 3: Research Project Methodology

In this section, I will provide more details on the methodology for the research project. The section includes the following subsections: project ethics, the nature of the project, population, sampling and participants, data collection activities, interview questions, data organization, and analysis methods. I will address issues related to the project's reliability and validity. Finally, I will offer a transition and summary.

Project Ethics

The role of the researcher during data collection consists of obtaining access to participants, building a connection with a group of participants for the project, organizing the research project, carrying out the research, collecting the data, and analyzing the results (Mushafiq, 2023). As the primary research instrument in the project, I managed parts of the research process that included defining concepts, collecting data from various sources, conducting semistructured interviews, transcribing the interviews, analyzing data collected, and developing themes, as recommended by several researchers (Collins & Stockton, 2022). According to Haughton (2023), the qualitative researcher should collect data from various sources, such as semistructured interviews, organizational documents, and artifacts. As the researcher of this project, I conducted semistructured interviews and reviewed the firms' publicly available documents and artifacts to gather data from different sources. Partnering with human resources leaders of different organizations was essential in identifying a list of viable candidates.

I have 30 years of work experience as an administration officer in the United States Navy and government civil services, which gives me an awareness of various

human resources relationships. My involvement in human resources and succession planning strategies across different industries has taught me that various scenarios and conditions exist, broadening my worldview. Through my experience with human resources and succession planning, I have developed the ability to craft questions that help clarify variability in participant experiences. My familiarity with human resources staff helped me in securing a sample of respondents who met the project participation criteria and shared their personal and confidential information.

Researchers must be mindful of ethical principles while conducting social research, including guidelines and requirements enforced by professional organizations and review boards (Head, 2020). Researchers are responsible for following the ethical guidelines in *The Belmont Report* (Shaw, 2023; U.S. Department of Health & Human Services, 1979). In this study, I adhered to the three principles of *The Belmont Report*. The three principles are *respect for persons, beneficence,* and *justice* (U.S. Department of Health & Human Services, 1979). Researchers responsible for applying the respect for persons principle should be aware of the participants' autonomy, as some participants may have limited autonomy or lack autonomy altogether (U.S. Department of Health & Human Services, 1979). According to the *beneficence* principle, independent scholars agree not to cause harm to participants and endeavor to maximize benefits (U.S. Department of Health & Human Services, 1979). In a research study, the principle of *justice* reminds researchers to treat participants fairly regarding any benefits and burdens that may come from the research (U.S. Department of Health & Human Services, 1979). Researchers must be mindful of ethical principles while conducting social research,

including guidelines and requirements enforced by professional organizations and review boards.

Information on ethical principles can be obtained from the protocol section found in *The Belmont Report*. This section references the purpose and reason of informed consent, risk-benefit assessment, and selection of participants. This part is essential because it emphasizes information disclosure, understanding such information, and voluntary participation (U.S. Department of Health & Human Services, 1979). I was obliged to follow (a) the ethical principles of *The Belmont Report* protocol, (b) the requirements of their Institutional Review Board (IRB), and (c) any extra ethical requirements of the organizations involved. The initial step in the project was to obtain approval from the IRB before beginning the project. Creating a participant information sheet that explained the importance of the informed consent principle and included participants' signed consent forms was my first step in ensuring that the research project involving humans was ethical. Also, the project participants were assured that their participation was voluntary and fair, and they were informed that they could withdraw from the project at any time and that their confidentiality was protected. Attaining informed consent for any study is one of the processes that should be given the highest attention **(**Millum & Bromwich, 2021). Participants were provided with and signed an informed consent form for their participation in the project. The informed consent form included a description of the project's involvement, participant expectations, potential risks and benefits, and my phone number for further questions, as recommended by

several scholars (Godskesen et al., 2023). Information on ethical principles can be obtained from the protocol section found in *The Belmont Report*.

As Millum and Bromwich (2021) postulated, I provided guidance and informed the participants that they had the right to participate voluntarily in the project. Research participants have the right to leave the project at their convenience without giving any explanation (M. S. George et al., 2023). The participants were notified and informed that they could leave the project at any time without consequences or needing to give a reason. The consent form explicitly stated that a participant could withdraw from the project at any time simply by expressing a desire to stop, whether verbally or in writing, without any penalty. The privacy and confidentiality of the participants should be of the utmost concern in such studies (Tsindos, 2023). Each participant was notified and informed about their free will regarding their participation. Research studies can turn biased if any participant receives material or immaterial compensation (Baldwin et al., 2022). The project participants did not receive any material or immaterial compensation during or after the project.

I used fictitious names for research participants and their associated institutions to protect confidentiality. Aside from this measure, the project did not include any characteristics that could reveal the identities of participants or organizations. After the conclusion of a study, a researcher should provide ethical, reliable, and relevant results while minimizing the impact on the participants (Shaw, 2023). I have captured and locked all research-relevant material in a password-protected drive on my computer desktop. Any works in paper format shall remain inside a locked drawer at my dwelling

for 5 years. Lastly, after 5 years, I will delete and destroy all the research-related data, complying with Walden University's IRB (Walden University, 2023). The IRB approval number for this research project at Walden University is 11-25-24-1069053.

Nature of the Project

A researcher chooses the most appropriate research method using the nature of the study as the foundation. Three primary research methods are available to scholars to conduct a study: qualitative, quantitative, and mixed methods (Ellis, 2023). Researchers employ qualitative methods to investigate phenomena subjectively (Tenny et al., 2022). The focus of qualitative research is to understand the lived and observed phenomenon within a context using participants meeting the established participation criteria (Defina, 2021). The qualitative methodology is a viable tool for investigating experiences, opinions, points of view, and attitudes (Yu et al., 2021). The qualitative method was employed to identify and explore the effective succession planning strategies used by some organizational leaders to retain knowledge from retiring employees, thereby mitigating the negative impact on organizational revenue and survival.

Researchers use the pragmatic inquiry design when conducting an inductive study that utilizes and combines established qualitative methods strategically to meet a study's needs using a conceptual framework as a guide and participants acting within a real-world problem (Ramanadhan et al., 2021). The selected research design for the project is pragmatic inquiry, which is based on Dewey's (1938) model of inquiry. Pragmatic inquiry was the chosen research approach for conducting an inductive study using established qualitative data collection and analysis methods. The project centered on

participants facing a real-world issue. I identified and explored effective succession planning strategies that some organizational leaders use to retain knowledge from retiring employees, thereby avoiding a negative impact on organizational revenue and survival.

Population, Sampling, and Participants

Before starting data collection, researchers must screen participants and establish eligibility criteria to make sure the participation criteria align with the overarching research question (Cash et al., 2022). Locating a viable firm and obtaining access to the firm present notable hurdles for researchers (P. Williams, 2020). P. Williams postulated that securing participants' commitment to participate in a research study is another significant challenge. Researchers establish participant eligibility criteria to ensure participants possess experience in the phenomenon under study (Cash et al., 2022). Candidates for participation in a study are deemed qualified depending on whether they have experience in the phenomenon being studied (Stratton, 2023). Researchers must screen participants and establish eligibility criteria to make sure the participation criteria align with the overarching research question.

Eligibility criteria were established for participants based on their experience using effective succession planning strategies to retain knowledge from retiring employees, thereby avoiding a negative impact on organizational revenue and survival. My selected participants all had 5 years of experience using effective succession planning strategies to retain knowledge from retiring employees, thereby avoiding a negative impact on organizational revenue and survival. I purposively identified eight senior human resources managers from different organizations in the state of Virginia. The

selected participants were best suited for this project, having collaboratively accumulated a diverse range of work experience and practical exposure in human resources, with responsibilities that included facilitating succession planning to retain knowledge from retiring employees.

The most prominent challenge for researchers is to gain access to qualified individuals and organizations for a research study (P. Williams, 2020). In attempting to surpass this obstacle, MacKay et al. (2020) advocated that researchers get involved in collaborative efforts with influential organizational employees, devise additional recruitment strategies, and develop insight into target populations. Stratton (2023) maintained that engaging the participants reveals the researcher's assumptions and portrays the importance of the appropriate setting for the study. Given the nature of my project, networking with key organizational personnel, particularly those in the executive team and the human resources department, was crucial for gathering data. I actively interacted with stakeholders and openly discussed the project's intended objective to obtain their support, which proved to be relevant for acquiring participants and organizational resources.

Part of the process for securing the trust and acceptance of participants is building rapport (Rowlands, 2021). Klykken (2022) noted the importance of frequent dialogues with participants to collect rich data. Regularly communicating with the project participants will help create trust, build rapport, and gain mutual understanding, enhancing the probability of getting rich data (Rowlands, 2021). Therefore, my strategy

was essential for my frequent interaction with participants to establish and maintain trust and build rapport, enabling me to gather in-depth data.

Researchers choose a research design to ensure they align participants with the central research question (Stratton, 2021). The eligibility criteria that researchers establish should lead to the recruitment of participants with experience and knowledge in the phenomena under investigation to help researchers answer the central research question (Indrayadi, 2020; Raifman et al., 2022). I established participant eligibility criteria to select participants with knowledge and experience in the phenomenon under study, which helped me answer the project's central research question.

The selection of a suitable sampling method plays a key role in the credibility of a research study (Hennink & Kaiser, 2022). Purposive sampling helps narrow the number of participants by ensuring that they meet the established criteria to give in-depth information about the phenomenon under investigation (Stratton, 2023). With the purposive sampling method, a researcher identifies and selects participants meeting established eligibility criteria (Mweshi & Sakyi, 2020). I used purposive sampling, which purposely filtered the participants to meet precise eligibility criteria for extracting significant information.

I collected data from senior human resources managers in the state of Virginia who had successfully implemented succession planning strategies to retain knowledge from retiring employees, thereby avoiding a negative impact on organizational revenue and survival. Researchers establish sample size by considering the study's exploratory nature, the depth of the data collected, and the possibility of extrapolating to a larger

population with at least one case study (Gill, 2020). Stratton (2021) argued that three to five participants should be adequate for a case study protocol. According to Sukmawati et al. (2023), the respondents must have sufficient knowledge of the phenomenon under study. Determining the appropriate sample size in case study research remains one of the most challenging aspects (Indrayadi, 2020). Despite this challenge, Gill (2020) stated that two or three cases are enough for case study research. I was able to reach data saturation with eight participants.

Data saturation takes place when the researcher exhausts the potential for new participant insights or data (Muhammad et al., 2024). Semistructured interviews, typically conducted with four or five participants, as advocated by Adeoye-Olatunde and Olenik (2021), may provide sufficient information to achieve data saturation. Researchers use semistructured interviews to gain depth and breadth of information, ensuring comprehensive topic coverage (Cash et al., 2022). I employed semistructured interviews with open-ended questions to effectively navigate diverse perspectives and extract rich, detailed insights to achieve data saturation. To maintain ethical standards, I invited qualified participants to participate in my project and obtained their consent before the interview process, which involved initial communication via email or phone.

Data Collection Activities

Lincoln and Guba (1985) presented the concept of the researcher as the principal research instrument. Qualitative researchers are the primary data collection instrument (Adler, 2022). When engaging in pragmatic inquiry research studies, researchers acquire several kinds of data through various methods, such as interviews, observations, and

document analysis (Adler, 2022; Bhangu et al., 2023). In this project, I was the primary instrument of data collection. I conducted semistructured interviews with open-ended questions and examined both internal and public organizational documents. The components of an interview protocol are the general guidelines, which designate the general procedure of the interview, preliminary and concluding statements, and the questions and probes to be used during the interview (Lê & Schmid, 2022). To ensure that all participants receive the same information regarding the project and its purpose, I employed the interview protocol outlined in Appendix A. Appendix B contains the interview questions utilized during the data collection process.

The most common type of interviews in qualitative research includes semistructured interviews using open-ended questions (Adler, 2022). Interviewing participants allows researchers to obtain knowledge of a phenomenon from the participants' perceptions (Lê & Schmid, 2022). Using semistructured interviews, the researchers can ask probing questions during the interview, thus providing interpretive context (Stahl & King, 2020). Researchers strive to collect rich data from participants about the phenomenon under study (Bhangu et al., 2023). Researchers collecting rich data through semistructured interviews could open new avenues in the data-gathering process and present new themes (Stahl & King, 2020). Researchers use semistructured interviews with predetermined, open-ended questions to obtain an opportunity to ask follow-up questions for additional clarity (Lê & Schmid, 2022). Besides using semistructured interviews, researchers review organizational documentation directly related to the phenomenon under study to gain an improved understanding of the

phenomenon under investigation (Stahl & King, 2020). Researchers increase the rigor of their studies by collecting data from several sources because they can conduct methodological triangulation (Adler, 2022). Researchers conduct methodological triangulation by comparing the results from conducting semistructured interviews with results obtained from reviewing organizational documentation to determine if both sets of data are aligned (Adler, 2022). I employed methodological triangulation by comparing the results of conducting semistructured interviews with those derived from the review of organizational documentation to assess the consistency between both data sets.

As the principal research instrument for data collection in the interview process, I incorporated recordings and transcribed semistructured interviews in accordance with the interview protocol outlined in Appendix A. Throughout the interviews, participants were asked to answer all the questions as shown in the interview protocol. Upon conclusion of the interview, the participants were asked to provide any additional feedback related to effective organizational succession planning strategies for retaining knowledge from retiring employees. The parting thoughts question allows the participants a chance to express any knowledge, feeling, perception, or thought concerning the study phenomenon that might not have been given during the interviews (Stahl & King, 2020). Bias is inherent in any research study, and the researcher cannot avoid this fact (Johnson et al., 2020). This bias is addressed using researcher reflexivity (Lê & Schmid, 2022). Researcher reflexivity refers to a researcher reflecting on the thoughts and decisions made regarding the data collected (Adler, 2022). Researchers use reflexivity to address their own biases and give transparency to the research process (H. Williams, 2021). To

overcome bias, I engaged in reflexivity, which allowed me to document my thoughts and decisions about the data collected.

Another technique a researcher employs to collect data is the review and analysis of documents and artifacts within an organization (Stahl & King, 2020). By conducting interviews and examining publicly available documents and artifacts used by the organization, the researcher can gain a deeper understanding of the phenomenon being studied. It enhances the rigor of the study because interviewing and reviewing documents and artifacts allow researchers to conduct methodological triangulation (H. Williams, 2021). The documents that the researcher may use may consist of annual reports and accounts, annual budget justification, and information on money spent (Hendren et al., 2023). Organizational documents may help determine actual details relevant to the pragmatic inquiry, including the correct spelling of individuals' names or the chronological progression of events (Lê & Schmid, 2022). To accomplish the research objectives, I reviewed publicly accessible organizational documents, including standard operating procedures (SOPs), human resources processes, internal guidelines, and strategic plans that focus on effective organizational succession planning strategies for retaining knowledge from retiring employees.

A researcher employs member checking so that participants can refine, verify, extend, or expand on a particular part of the data gathered in the study, thus enhancing its credibility (Johnson et al., 2020). Member checking refers to the researcher requesting that participants check the accuracy of the interpretations that the researchers have made of participants' answers to interview questions (Hendren et al., 2023). I employed

member checking to enhance the credibility of the data I gathered by asking participants to verify the accuracy of my interpretations of their responses.

Interview Questions

1. What succession planning strategies did you use to retain knowledge from retiring employees to avoid a negative impact on organizational revenue and survival?
2. How did your employees respond to those strategies?
3. How were effective strategies to retain knowledge from retiring employees communicated throughout the organizational ranks and among stakeholders?
4. What modifications did you apply, if any, to any strategy to improve its effectiveness in retaining knowledge from retiring employees?
5. What policies and processes have you used to retain knowledge from retiring employees?
6. What were the key barriers to implementing strategies to retain knowledge from retiring employees?
7. How did you overcome the key barriers to implementing strategies to retain knowledge from retiring employees?
8. What else would you like to add about effective strategies to retain knowledge from retiring employees?

Data Organization and Analysis Techniques

Before performing data analysis, researchers should ensure they have a structure that guides data organization. According to Tomaszewski et al. (2020), qualitative researchers should develop a proper system for data organization before beginning with

data analysis. Popenoe et al. (2021) posited that scholars arranging their data effectively are more likely to undertake rigorous studies. It is convenient to keep data orderly, as with quantitative data in a database (Tomaszewski et al., 2020). I devised an efficient organizational system that enabled me to conduct more rigorous research.

I conducted semistructured interviews with qualified participants in the project, asking them open-ended questions (see Appendix B). Wang et al. (2024) posited that to maintain confidentiality, every participant should have a participant code for coding their responses. Based on this assumption, I obtained data saturation with eight participants. Leader participant codes are labeled with the letter P followed by a number between 1 and 8. Thus, the eight participants in the project were labeled with the following codes: P1, P2, P3, P4, P5, P6, P7, and P8. To avoid compromising the integrity of the research study, I excluded all personally identifiable information from the transcripts. According to Wang et al., maintaining confidentiality can be achieved by renaming participants, other individuals mentioned by them, and locations mentioned by the participants. As a safety measure to preserve the confidentiality of the participants, I transcribed each interview, removed any information from the transcript that could lead to the identification of the participant, and assigned the participant code to the transcript and any other related documents or materials.

To ensure the transparency of the data collection process, I maintained an electronic reflexive journal that documented my thoughts, ideas, decisions, and reactions throughout the interview process, as well as my reflections on coding and theme identification. Maintaining a reflective journal helps researchers provide evidence of the

research process, ensuring transparency and facilitating bracketing (Abrouq, 2024). Maintaining a reflective journal helps researchers document the research process to obtain essential observations and impressions, including emotional responses to an interview or a description of the interview environment (Abrouq, 2024).

Information gathered for research should only be kept for the necessary duration. Data should not be retained for longer than required and should always be kept secure (Adler, 2022). Parker et al. (2022) postulated that research data protection legislation was designed to introduce various policies that a researcher must adopt to protect data before, during, and after the research process. These policies include the requirement to (a) state the reasons data will be collected, (b) obtain consent from participants, (c) collect only relevant information, (d) use data collected for research purposes only, (e) store data for the required period, and (f) safeguard the collected data (Parker et al., 2022).

There are specific ethical requirements that researchers must adhere to, especially concerning information that is collected during a research project. Arias Valencia (2022) indicated that researchers must consider ethical principles relating to data collected in a research study, such as storing hard copies in a locked filing cabinet and electronic data in a password-protected hard drive or external flash drive. At the end of this project and as per the guidelines of Walden University, the original raw data will be locked in a safe for 5 years; upon the expiration of 5 years, all electronic records compiled shall be erased and hard copies shredded.

The use of triangulation increases the validity and credibility of a research study. Different methods, including methodological triangulation, are available to researchers to

improve the validity and credibility of their research studies (Natow, 2020). Methodological triangulation entails using multiple data sources to enhance the data's validity and credibility (Santos et al., 2020). Using methodological triangulation to collect data gives researchers different views when investigating a research phenomenon (Azulai, 2021). For example, when a researcher gathers data from semistructured interviews and reviews organizational documents, the researcher creates convergent evidence. Construct validity in case studies is enhanced considering converging evidence (Cheung et al., 2023). To increase the validity and credibility of the project, I employed methodological triangulation, which involved comparing data from semistructured interviews with data gathered from analysis of organizational documents and artifacts and determined that data alignment had been achieved. To ensure the credibility of the findings, I member-checked the data collected by sending my interpretation of the transcribed data to the participants. I asked them to verify the accuracy of my interpretations of their answers to interview questions. I conducted methodological triangulation by comparing the member-checked data with data collected from reviewing publicly organizational documentation and determined that both sets of data had aligned.

Data analysis is, therefore, cyclic and may sometimes be carried out in parallel with data collection (Mezmir, 2020). Some methods researchers use for analyzing qualitative data include thematic, content, and discourse analysis (Allsop et al., 2022). The thematic analysis involves reviewing the interview transcripts more than once to become acquainted with the text (Mathis et al., 2024). For example, computer-assisted qualitative data analysis software (CAQDAS), such as DeDoose, is used by researchers to

aid in sorting, arranging, and analyzing data (Popenoe et al., 2021). Researchers also found that CAQDAS aids in defining the themes and their relationship (Popenoe et al., 2021).

Researchers employ several steps to analyze the data that they will collect. Byrne (2022); Braun and Clarke (2022) proposed that researchers use six sequential steps in the data analysis process: (a) become familiar with the data, (b) generate initial codes, (c) search for themes, (d) review themes, (e) define and name themes, and (f) write the report. Steps 1–2 involve becoming familiar with the data to generate initial codes. Step 3 involves organizing data to identify patterns and themes across various interview transcripts. Ramanadhan et al. (2021) recommended that researchers use qualitative data analysis software, such as NVivo, to code and analyze the research evidence. Researchers use NVivo to quickly organize, code, and categorize large amounts of data (Dalkin et al., 2021). Step 4 entails reviewing the themes. Step 5 involves defining and naming the themes by conducting a thematic analysis to validate the interpreted data against the interview transcripts. Qualitative researchers engage in thematic analysis to identify patterns and themes in the data to answer the research question (Mezmir, 2020). I utilized NVivo in the data analysis process to categorize data by common themes and codes, and to interpret the raw data from the interview data and documentation reviews. I used NVivo to group codes, map themes, and identify relationships between themes in the data sets. Using thematic analysis, researchers use member checking to validate the interpreted data with the participants (Mathis et al., 2024). I member checked the transcript-interpreted data with the research participants for accuracy. I provided

participants with my transcript interpretation of their answers to interview questions and asked them to verify the accuracy of these interpretations. In step 6, I wrote the report.

I employed a pragmatic inquiry research design, characterized by several key traits, including the use of multiple data sources (Bhangu et al., 2023). Natow (2020) posited that data collected are enhanced through triangulation to obtain richness and depth of data. Researchers use methodological triangulation to ensure the credibility of multiple data sources collected from semistructured interviews and document reviews (Ramanadhan et al., 2021). Using publicly accessible organizational documents and artifacts was the second data source gathered to conduct methodological triangulation. Popenoe et al. (2021) postulated that numerous data analysis methods are available for document review data analysis. These are thematic and content analyses (Mathis et al., 2024). I used content analysis to analyze publicly available organizational documents. To identify emerging themes, I employed content analysis to systematically classify the identified codes, as several researchers (Xu & Zammit, 2020) recommended. Different data analysis methods are used in processing documents, and among them, content analysis contains three steps, which are preparation, organization, and report phases (Allsop et al., 2022). To ensure data alignment, I conducted methodological triangulation by comparing data from semistructured interviews with data from a review of publicly available organizational documents. Step 5, the final step, concerns formulating a conclusion and recommendation based on the findings to respond to the general research question (Xu & Zammit, 2020). I organized the gathered data, disaggregated it by codes, regrouped it by themes to comprehend the research phenomenon, employed thematic

analysis to make sense of the data, and finally derived conclusions from the research results.

Mapping connections between topics in data collection enables the researcher to concentrate on significant issues in the research data to respond to the most critical research question (Allsop et al., 2022) and coordinate key themes in the literature and the conceptual framework (Lester et al., 2020). The use of label codes assists researchers in connecting significant themes to data categories, thus making it easier to examine (Ramanadhan et al., 2021). Frequency analysis enables researchers to statistically identify how often thematic codes occur in each data category (Xu & Zammit, 2020). I utilized NVivo's data-coding feature to map significant data themes into categories to address the issue of trustworthiness in this project. The following action is to identify critical themes in the literature about the conceptual framework (Allsop et al., 2022). Scholars employ the conceptual framework to get an interstate connection to previous studies, research methods, and results. I linked the main themes with the literature and the conceptual framework for the project.

Reliability and Validity

To establish reliability and validity when conducting qualitative studies, scholars can use the widely accepted criteria created by Lincoln and Guba (1985), which include dependability, credibility, transferability, and confirmability. Enworo (2023) elucidated that researchers collectively trust the four criteria established by Lincoln and Guba. Researchers can address the equivalent of a quantitative study’s reliability and validity by

demonstrating dependability, credibility, transferability, and confirmability (Enworo, 2023).

Reliability

In qualitative studies, researchers have often found reliability to be an essential aspect to establish. To ensure viable results, scholars must use reliable instruments and measurements (Coker, 2023). When preparing my pragmatic inquiry project, I utilized several sources of evidence, consisting of semistructured interviews and publicly available company documentation and artifacts, as recommended by various researchers (Quintai et al., 2020). Scholars should be mindful that no single source is more favorable than any other; instead, all resources are highly complementary (Camara et al., 2024). A high-quality, qualitative pragmatic inquiry research design consists of as many data collection sources as possible.

Dependability pertains to the enduring and unwavering nature of the research findings when conducting a qualitative study (Ahmed, 2024). Ahmed (2024) posited that various authors have recommended the use of dependability to enhance qualitative research by using the same list of interview questions for each selected participant. To confirm data dependability, I utilized member checking, as recommended by the experts (Motulsky, 2021). The member-checking process consists of providing the research participants with the researcher's interpretation of the participants' answers to the interview questions and asking the participants to confirm the accuracy of such interpretation (Peidra, 2024). Sahakyan (2023) postulated that to ensure that the

researcher's biases are not mixed with facts, member checking is a prominent method to enhance data dependability.

Researchers record the interview sessions to review and reflect upon participants' answers, resulting in reliable transcripts and themes during an interview session (Elhami & Khoshnevisan, 2022). As the researcher, I conferred with the interviewees to elaborate on their answers, providing in-depth details to minimize any chances of bias. Additionally, participants were asked to clarify their answers, which led to more comprehensive and relevant responses. Tavor (2020) postulated that to avoid tainting interviewees' viewpoints, researchers should not reveal any information related to the study to the participants before the actual interviews, resulting in more reliable results. Dmitry (2023) elucidated that to ensure consistency and increase reliability, researchers must follow the interview protocol and refrain from introducing new questions. Before conducting semistructured interviews, I avoided disclosing any project-related information to the participants to prevent influencing their responses to the interview questions. I adhered to the interview protocol, avoiding new or different questions to maintain consistency and reliability.

Validity

To ensure that a solid validation framework is incorporated, the inclusion of credibility, transferability, and confirmability must take place (Mallett et al., 2021). Quintai et al. (2020) postulated that researchers must ensure credibility when using the qualitative pragmatic inquiry research design by collecting data from various sources and comparing these data to ensure data alignment has occurred. When only one researcher is

analyzing the data, the credibility of the analysis depends on the inclusiveness and representativeness of the entire data (Vella, 2024). Researchers must ensure to complete an in-depth review of the interview transcripts, which may result in establishing credibility (Wingate & Bourdage, 2024); therefore, I conducted an exhaustive review of the interviewee's transcript to ensure I encompassed the participant's detailed perspectives. Moreover, as the researcher of my project, I ensured that I was attentive to participants' responses to look for similarities and differences across them. Conducting member checking upon transcribing and before analyzing data collected ensures their validity (Urry et al., 2024). Member checking consists of giving participants the researcher's interpretation of participants' answers to interview questions and asking them to verify the accuracy of such interpretations (Urry et al., 2024). Upon transcribing the interviews, I conducted member checking by providing participants with my interpretations of their responses to interview questions and asking them to verify the accuracy of my interpretations.

Transferability is used to ensure the validity of results between various studies. Researchers should use transferability to refer to the applicability of study results from other similar studies (Zia et al., 2023). Quintai et al. (2020) stated that researchers conducting a qualitative pragmatic inquiry should produce high-quality results by choosing suitable study participants, giving detailed participant demographic information, conducting comprehensive data analysis, and providing results that are easy to understand to enhance the transferability of a study. My goal was to deliver high-quality results by choosing suitable study participants, providing detailed demographic information,

conducting in-depth data analysis, and presenting clear findings to enhance the project's transferability.

Throughout the research study process, scholars can obtain confirmability after the establishment of dependability, credibility, and transferability (Amin et al., 2020). Amin et al. (2020) postulated that researchers should demonstrate the ability to interpret study participants' data without bias. My goal was to listen attentively to each interviewee and take notes of my thoughts and insights while remaining objective and unbiased. As the researcher, my main goal was to ensure that the transcribed interview responses were comprehensive, establishing a clear link between the data and the findings. I used current literature to strengthen the confirmability of the results.

The use of methodological triangulation enhances the validity of a pragmatic inquiry research design. Arias Valencia (2022) stated that conducting methodological triangulation increases the validity of a research study. Arias Valencia posited that to determine if data alignment exists, researchers should use methodological triangulation by comparing data collected from several sources to determine if data alignment has occurred. I employed methodological triangulation by comparing data from semistructured interviews with data from reviewing publicly available organizational documentation and determine that both sets of data had aligned. Collecting data from various sources allows researchers, conducting a pragmatic inquiry research design, to establish a foundation that enables methodological triangulation of data sources to be the primary strategy to support the principles of pragmatic inquiry research validity (Ramanadhan et al., 2021).

One of my goals in the project was to achieve data saturation. Naeem et al. (2024) elucidated that data saturation is the stage of a qualitative research study in which further data collection and analysis do not yield any new and meaningful information. Naeem et al. found that without data saturation, a researcher cannot obtain conclusive findings. I reached data saturation in this project because no additional data collection and analysis produced any new meaningful information.

Transition and Summary

In Section 3, I discussed project ethics; nature of the project; population, sampling, and participants; data collection activities; interview questions; data organization and analysis techniques; reliability and validity; and the transition and summary. In Section 4, I will present the findings, discuss the business contributions and make recommendations for professional practice, consider the implications for positive social change, offer suggestions for further research, and provide a conclusion to the project.

Section 4: Findings and Conclusions

Introduction

The purpose of this qualitative pragmatic inquiry project was to identify and explore the effective succession planning strategies that some organizational leaders use to retain knowledge from retiring employees to avoid a negative impact on organizational revenue and survival. I conducted semistructured interviews with eight human resources leaders with at least 5 years of successful experience in succession planning to retain knowledge from retiring employees. Other data sources included publicly available organizational documents, including mission statements, SOPs, succession planning procedures, and a succession planning nine-box matrix tool. Analysis of data resulted in the following three themes: (a) strategies for structured succession planning, (b) strategies to address employee resistance to knowledge transfer, and (c) strategies to obtain executive buy-in and stakeholder engagement.

Presentation of the Findings

The overarching research question for this qualitative pragmatic inquiry project was, What effective succession planning strategies do organizational leaders use to retain knowledge from retiring employees to avoid a negative impact on organizational revenue and survival? To answer the overarching research question, I conducted semistructured interviews with eight human resources leaders in Virginia, who employed the use of successful succession planning strategies to retain knowledge from retiring employees. Additionally, by examining publicly available organizational documents and artifacts, I

was able to gather data from multiple sources, enabling me to conduct methodological triangulation.

Theme 1: Strategies for Structural Succession Planning

The first theme identified from the analyzed data is structural succession planning strategies. From the data, it was evident that most of the companies had some form of formal, structural succession planning strategies. These strategies focused on building knowledge and skills among employees to ensure there is no loss of competence with the retirement of older individuals, and employees would benefit from effective knowledge transfer processes. All eight participants employed a broad range of strategies to develop structural succession planning, including mentorship and training liaisons (MTLs), effective communication practices guided by organizational leaders, annual talent evaluations to track employees' progress in knowledge development, and the employment of strategic tools to identify potential and future leaders to replace senior retiring employees. These diverse strategies are broken down into three major thematic areas, namely (a) mentorship and training programs, (b) cross-training and job shadowing, and (c) SOPs. While these strategies are interconnected and seldom implemented independently, each has specific implications for structural succession planning.

Mentorship and Training Programs

P4, P6, P7, and P8 highlighted the use of mentorship and training programs for succession planning in their organizations. These participants reported that such structured mentorship programs have diverse benefits for organizations. The programs

ensure seamless data management while fostering talent retention and preservation of corporate knowledge from retiring employees within an organization. Moreover, structured mentorship programs enable organizations to avoid a negative impact on revenue and survival. The key aspects of mentorship and training programs include direct MTLs and the use of alternative strategies and tools to foster knowledge retention from the skilled retiring employees.

P4, P6, P7, and P8 mentioned the use of different forms of MTLs as a tool for structured succession planning to aid in obtaining knowledge from retiring employees. P4 specifically emphasized the importance of identifying knowledgeable and strong performers within the organization, as well as those who require support in terms of knowledge and skills. Once the strong and weak performers have been identified, the organization can implement its mentorship programs, with the strong ones acting as the mentors for the weak performers. The importance of mentorship programs in transferring knowledge from strong individuals to those who are less experienced was emphasized. P7 revealed that “the organization used a range of strategies, including mentorship practices such as implementing MTLs for mentorship roles, which foster structured succession planning for retaining key knowledge from retiring employees.” According to P7,

> Their company maintains a comprehensive knowledge repository within each department, encompassing Standard Operating Procedures, training materials, "How-To Guides," best practice sharing, After-Action Reviews, and the implementation of mentorship and training liaisons (MTLs) for mentorship roles.

P7 revealed “that organizations and their leaders recognize the need for MTL programs and implement them.” Coventry and Hays (2020), who assessed the implications of mentorship programs in a multigenerational health care environment, shared the same perspectives. Coventry and Hays found that mentorship programs for nurses in such environments were instrumental in passing down work-related information, including workplace expectations, promoting professional success, fostering staff retention, and ensuring current practice through their impacts on evidence-based care processes among nurses. Recognizing the value of mentorship programs has driven many companies to engage in MTL programs, as reported by Richardson (2023). More than 71% of Fortune 500 organizations and about 50% of all other categories of organizations implement mentorship programs, indicating that these firms understand the benefits of such programs at individual and organizational levels (Evans et al., 2020; Hill et al., 2022; Ortiz, 2021; Richardson, 2023). These organizations span multiple industries, including health care and human resources, where strategic succession planning is necessary. In such organizations, mentorship programs are used to build employees’ skills and competencies, enabling them to assume the role of retiring employees seamlessly.

P2 revealed that “mentorship programs have immense benefits for employees and the organization, despite implementation challenges.” P2 stated the importance of organizational mentorship programs and how they have contributed to knowledge retention, especially from retiring employees. P2 also highlighted the challenges faced in implementing mentorship programs, including resistance from employees and executives, as well as perceptions of increased workload among employees. The success of initial

mentorship programs encouraged more employees to participate, improving their chances of gaining knowledge from potential retirees. P2 added that “to enhance the effectiveness of such mentorship programs, the value of research, peer networking, and organizational conferences to identify new mentorship strategies.” These findings are supported by the literature on the effectiveness and challenges associated with organizational mentorship programs. For instance, Coventry and Hays (2020) reported that mentorship programs are instrumental in enhancing employee retention even among health care professionals. Organizations that implement mentorship programs successfully are more likely to attract more employees to participate in those programs. According to P2,

> The organization has recognized the impact of structured mentorship programs on both the company and its individuals. It has since made efforts to improve these outcomes for the present and the future, aiming to enhance knowledge retention for retiring employees.

P7 noted that “through observation, it was revealed that employees were appreciative of mentorship programs and recognized the value added.” Moreover, P7 highlighted that their organization's use of MTLs “was recognized for its value in standardizing and streamlining processes despite the geographical dispersion of the company’s operations.” According to P7,

> MTLs have played a pivotal role in establishing clear expectations across all locations. Their responsibilities include guiding staff and stakeholders from onboarding through career development, serving as subject matter experts in training design, and addressing performance improvement needs. Additionally,

> MTLs liaise between departments and stakeholders to ensure alignment on required functions, processes, and technologies. Employees have appreciated this commitment to consistency and professional growth, with the added benefit of creating new leadership opportunities within their departments' career ladders, thereby enhancing succession planning strategies to retain knowledge from retiring employees and avoid a negative impact on revenue and organizational survival.

This statement provides a comprehensive description of the benefits the organization gains from using succession planning and MTLs, as well as the professional growth employees obtain through such programs. For instance, the ability to serve as subject matter experts is an indication that, beyond building others, employees who work as mentors also position themselves as the go-to persons in terms of knowledge retention. At the same time, the MTLs provide a reference point for consolidating perspectives across functions and processes, an outcome that has been extensively described in various studies (Hill et al., 2022; Richardson, 2023). P7 highlighted that mentoring and training programs are associated with the organization’s success in promoting knowledge consolidation, as mentors can self-reflect and see how best to improve their protégés’ knowledge across all functions. Similar findings are reported by Richardson (2023), who emphasized the role of such programs in fostering collaboration and promoting unity of purpose in an organization.

The implementation of MTLs and succession planning is associated with many challenges, including employee resistance, which is only reduced through observed

success in the initial stages of the programs. I reviewed P2's and P7's organizational documentation. I found that MTLs are programs used by human resources leaders to bridge the gap between mentoring programs and training initiatives, supporting both mentors and mentees, and thereby enhancing strategies for retaining knowledge from retiring employees.

My review of MTL programs also revealed the value of integrating mentoring into the overall knowledge retention process, resulting in a more effective succession planning strategy that maximizes the impact on employee growth and development. I found through my review of the organizational documents that human resources leaders integrate the MTL process with current internal succession planning and knowledge retention strategies. Human resources would accomplish this goal by aligning a retiring employee as the mentor with a capable incumbent as the mentee to ensure that organizational knowledge is retained through MTL procedures, thus resulting in a structured process to avoid the loss of critical knowledge. I also found through my review of the internal document that when used by human resources leaders in the workplace, MTLs can help facilitate and track the progress of succession planning while simultaneously integrating knowledge retention strategies. The review of the documents led me to the conclusion that human resources leaders' integration of the MTL process enhances the organization's capabilities to ensure a smooth transition and retain critical knowledge, resulting in a robust system for talent development and organizational stability.

Additionally, my review of the MTL process revealed that aligning mentors with incumbents proved to be a winning combination for retaining knowledge from retiring employees, leading to a more efficient succession planning strategy to ensure organizations avoid a loss in revenue and maintain their survival. My review revealed that the MTLs are interconnected with the organization's succession planning and knowledge retention strategies, allowing human resources leaders to identify individuals with the necessary skills and experience to pair with retiring employees. My review would also reveal that the organization's MTL process is aligned with the internal knowledge retention strategies, which consist of pairing retiring employees with a proven incumbent with the requisite skills and experience to ensure that the organization's expertise is preserved. From this discovery, I found that the incorporation of MTLs provided human resources leaders with leverage to bring both knowledge retention and succession planning strategies together in efforts to build upon a robust process to retain critical organizational knowledge. This finding was supported by data from semistructured interviews, where P2 and P7 discussed the effectiveness of MTLs in retaining knowledge from retiring employees. According to P2, "some of the challenges mentioned in implementing structured mentorship programs included retiring employees' concerns about workload and compensation, which led to resistance as the employees felt overburdened." However, such issues were reduced when the employees saw the program's success during the initial stages, which inspired them to participate as mentors to capture knowledge. P4 noted "that the executive team also exhibited strong resistance to the mentorship programs and only supported them after witnessing the positive impact

of the programs on knowledge retention to avoid any negative impact on potential revenue loss." P2, P4, and P7 emphasized the importance of various strategies to ensure the success of the programs. In P2's view, having honest and transparent discussions about organizational commitments and sharing data fostered positive outcomes and supported knowledge retention from retiring employees. This view supports P4's take on the impact of a lack of employee engagement on succession planning. P7 noted "the same thing happened in an organization where succession planning was not valued, and there were no discussions with employees about succession planning, leading to a high employee turnover."

P2's and P4's perspectives reiterate the importance of having in-depth discussions with employees about their perspectives and organizational commitment to career growth and knowledge retention through mentorship programs, as discussed in various studies. Gobena (2023) elucidated that most employees in the education sector developed negative attitudes toward mentorship programs because they had no clear articulation of their career needs, did not take individual responsibility for their professional development, did not establish goals with their mentees, and did not receive constructive feedback about the mentorship process from their mentors. Likewise, other studies, such as Vaiman et al.'s (2022), also highlighted similar issues with employee resistance to mentorship programs in different industries. These findings emphasize the need for deep discussions with employees while implementing mentorship programs to support buy-in and reduce resistance.

My review of P8's organization documentation included a talent assessment form, which highlighted the value of using this tool as an effective measure to gauge the importance of aligning the right incumbent employee with a retiring employee. Human resources leaders use the talent assessment form to evaluate current employees' skills, performance, and potential for future leadership roles. My review of the talent assessment form enhanced my understanding of its significance for human resource managers. I found that the talent assessment form is an essential tool, providing human resources leaders with a metric to assess internal candidates' potential future roles. This tool facilitates the alignment of employees with retiring personnel to maximize knowledge transfer.

Furthermore, I discovered that this specific tool offers value for human resources leaders to align the right qualified incumbent with retiring employees, ensuring the retention of critical organizational knowledge. This finding was supported by data from a semistructured interview, where P8 posited that "this approach was key for human resources leaders to extract institutional knowledge to maintain organizational strength and avoid loss in revenue and organizational survival." Individuals who demonstrate superior performance under first-time assignment conditions and are eager to learn and develop new capabilities that enhance their performance can be good candidates for knowledge retention and succession planning strategies for the organization. When attached to mentors who are retiring employees, such individuals can hone their skills in areas where there are evident gaps to enable them to take up higher positions when employees retire. According to Widodo et al. (2024), indicators of improvement areas for

succession planning include inadequate training opportunities for high-potential employees, a lack of a diverse talent pool among the potential successors, and low performance in various leadership competencies. For an organization to establish the presence of these conditions and subsequently develop effective strategies for succession planning, there must be deliberate tools for measuring employee performance across these areas (Vaiman et al., 2022). Using a structured tool as the talent assessment form provides a good opportunity to apply consistent metrics in organizational knowledge retention evaluations, resulting in reliable results.

Cross-Training and Job Shadowing

In the organizations where P1, P3, P4, P7, and P8 worked, there were structured programs that enabled retired and experienced staff to guide new hires and nonknowledgeable staff in passing down corporate knowledge to others through cross-training and job shadowing. Specifically, P1, P3, P4, P7, and P8 mentioned having used structured forums where knowledge sharing was prevalent. According to P7,

> The organization also promotes knowledge sharing through regular quarterly or annual meetings where staff exchange lessons learned and best practices. To ensure seamless data management and accessibility, specialized software is utilized, allowing staff to access critical information and reference it as needed. This system supports continuity of succession planning and knowledge retention strategies for the company, sustaining long-term effectiveness and viability.

Such programs provide a platform for deliberate and effective knowledge sharing at the organizational level, which helps prepare less experienced employees to take up more

active roles to replace retiring employees. Some structured direct employee knowledge-sharing programs even use proven tools to ensure continuous organizational improvement and sustainment. For instance, P8 discussed the use of the Lean Six Sigma process to engage retiring employees in cross-training efforts. This process ensured that the retiring employees had the intended purpose and passed knowledge to the younger employees through feedback processes. Recognizing the impact of this process in fostering retention of corporate knowledge, P8 postulated “the challenges creating awareness of career pathing and process procedures among employees and subsequently empowering them to perform organizational procedures.” Many organizations face this challenge as employees who do not understand the implications of the knowledge transfer process on career pathing may resist such knowledge-sharing processes (Schulleri & Saleh, 2020). Failure to understand the benefits of cross-training is a common cause of resistance, which is addressed through effective communication of the need for and potential impact of cross-training programs (Schulleri & Saleh, 2020). In the context of resistance, the organization must balance the need to inform employees about their career plans with the desire to lead them through cross-training, even if it means retiring employees.

P1, P3, P4, P6, P7, and P8 also discussed how their organizations implemented the cross-training program with retiring employees in the absence of structured succession planning. P1 mentioned "while the organization does not have an explicit formal job shadowing process, it has instituted the process of a goal in which employees with tenure share knowledge with others.” The management pairs up employees nearing retirement with newer employees to enable cross-training and ensure workforce

continuity. This process is applied to employees who have shown interest in specialized roles. The same trend was observed at P3's company, which has an intentional succession planning plan that identified key knowledge holders in the organization. While the process has been beneficial in identifying probable sources of knowledge in the company, it remains challenging for succession planning due to the organization's difficulty in predicting employee retirements. To address this challenge, P3 mentioned "the importance of keeping up-to-date employment and personal records for employees to enable tracking." P1, P4, P5, and P7 also mentioned various formal and informal strategies for cross-training by retired and knowledgeable employees in their respective organizations.

P8 specifically reiterated "the importance of having succession planning and cross-training them to take control in case of retiring employees." The findings presented in this project mirror those shared by Scutelnicu-Todoran (2023) and Socolowsky (2022) in that informal cross-training and knowledge programs can sometimes be more intensive and more effective than formally structured ones, and the intensity sometimes drives employees to resistance. Thus, organizations that have developed effective cross-training and job shadowing strategies are expected to achieve better results in knowledge retention from retiring employees, thereby avoiding a negative impact on revenue and organizational survival.

P1, P4, P5, and P7 reported that most of their organizations found the cross-training programs effective for transferring sufficient knowledge, especially when there are no opportunities to distinguish whether the knowledge source is from retiring

employees. For instance, P4 emphasized the need for gathering feedback from retiring employees before transitioning roles, while highlighting the candidates' relevant skills and making data-driven decisions. In P4's view, “requests to hold conversations with retiring employees have been mostly successful as such employees show no resistance to the discussions.” The information obtained through succession planning has been critical to creating opportunities for improvement and retaining knowledge from retiring employees, thereby enhancing overall organizational understanding. P7 indicated that their organization “had a similar emphasis on retaining knowledge from all sources that are sufficient for knowledge transfer.”

P4 confirmed the previous statement from P7 that when an organization focuses on cross-training and knowledge transfer, there should be no selectivity in the source of knowledge. Notably, P5 also highlighted the importance of avoiding this selectivity by explaining their organization's structured approach to obtaining knowledge from retiring employees, which involves tagging their replacements for weekly meetings. P5 emphasized that “the strategy has been well-received by both the retiring employee and the replacements, resulting in effective knowledge transfer and subsequent support from the organizational leadership and other managers.” The insights shared by P4 and P5 mirror discussions on exit interviews and their role in knowledge sharing at the organizational level. According to Galan (2023), exit interviews have been continuously refined as a knowledge-retaining tool that leaves organizations and employees in a win-win situation. While the organization retains a portion of knowledge from the retiring employees to share with the rest of the team, the employee gets an opportunity to give

unique contributions, including systemic issues that affect the organization, enabling the firm to put in place strategies for improvement (Galan, 2023). Galan equally emphasized the importance of knowledge retention from retiring employees, stating that collecting information from such employees through practices such as exit interviews can help prevent organizational knowledge loss commonly attributed to the exit of critical retiring employees. Considering retiring employees as a source of knowledge equivalent to regular departing employees builds other employees' knowledge while also enhancing management competence in handling organizational issues (Galan, 2023). Companies that involve regular departing employees in knowledge-sharing, like retiring employees, are likely to gain more value from cross-training (Galan, 2023).

P1, P4, P5, and P7 revealed that despite the effectiveness of cross-training and job shadowing processes, there were implementation challenges, and various strategies had to be implemented to overcome them. The most significant challenge was resistance from employees. P1 shared, "They experienced a specific case in which an employee showed reluctance to share their knowledge." In this case, P1 noted "someone else was hired to sit with the retiring employee while working on accounts at another location . . . which enabled the new employee to learn the organizational processes and people." P1's rationale for this action was based on the importance of cross-training and not having all the knowledge in one spot. Another senior employee, initially resistant to sharing their knowledge, changed their perspective after P1 developed a relationship with them. P7 indicated "similar experiences with employee resistance, where employees naturally

resist process changes due to fear, anxiety, or a preference for existing methods (If it is not broken, why fix it?).” According to P1,

> The importance of organizational leaders lies in their critical role in advocating for change by staying committed, clearly communicating how the change aligns with the organization's mission, offering adequate training, and closely monitoring both successes and challenges. By providing ongoing support and addressing concerns, leaders can help employees adapt to and effectively embrace the new processes.

Comments from P4 and P7 confirmed that resistance is inevitable. Cross-training programs and leaders have the responsibility of guiding retiring employees in the right direction in terms of knowledge sharing. P4 posited that “leaders must be champions of change, effectively communicating the impacts of the change on the organizational mission and offering the relevant information and support to shift employees' perspectives about the necessary change.” P7 formulated that “communication has been used effectively as a tool for driving change.” Also, P7 mentioned "department directors excel at securing buy-in from their lower-level leadership teams when proposing potential changes.” P7 postulated that “once changes are approved, directors communicate them effectively through in-person conferences, meetings, or virtual platforms like Microsoft Teams." Effective communication emphasizes the need for change and ensures that both the retiring and remaining employees understand their roles in the knowledge-sharing process (Roham & Gomes, 2024). P4 also emphasized the importance of effective communication, noting that they had employed a similar strategy

to improve outcomes of cross-training programs through all-hands meetings, monthly team meetings, and succession planning meetings. P4 and P7 shared perspectives regurgitating information that has been extensively shared by Furxhi (2021) on organizational resistance to change and the role of insufficient communication in perpetuating such resistance. Furxhi and Kirk (2022) emphasized the role of organizational leaders in minimizing change resistance through effective communication of the need for change and the strategies for change implementation. In this case, emphasizing the role of cross-training and job shadowing in enhancing succession planning and retaining knowledge from retiring employees can be used as a justifiable rationale for the practice.

My review of P8's organizational documentation, which included the talent review nine-box matrix, highlighted the importance of using the nine-box matrix to assess employees' knowledge and skills. In addition, I found that the added value of the nine-box matrix provides a structured framework to identify employees who are prime candidates for alignment with retaining knowledge from retiring employees, thereby enhancing succession planning and knowledge retention strategies. Additionally, my review revealed that the nine-box matrix adds essential value to organizational strategy by helping identify potential successors who are the right fit to replace a retiring employee. The nine-box matrix is an internal organizational 3x3 form used by human resources to provide organizational leadership with a process to examine employees' performance and potential (Hermawan, 2022). Review of the nine-box matrix revealed that human resources managers use the document to map employees on the performance

and potential axes. The grid has nine categories, and employees are placed based on their performance and future growth potential. Higher performers are put to the right, and higher-potential individuals are placed higher. This finding was supported by a semistructured interview, where P8 reinforced the alignment between this organizational document tool, corroborated alignment with knowledge retention and succession planning strategies to enhance organizational viability.

In addition, P8 postulated that "while the nine-box matrix tool focuses on the positioning of individuals in the professional plane, a similar tool could be developed for positioning employees as high- or low-knowledge to assist managers in designing cross-training programs for retaining knowledge from retiring employees." P8 further elaborated that "those who fall in the high-knowledge region in such a plane would be the cross-trainers for the other employees and would be paired with low-knowledge individuals." Sudibjo and Prameswari (2021) and Mehner et al. (2024) described various strategies for improving cross-training outcomes with the use of knowledge assessment tools mentioned among those approaches. Specifically, Sudibjo and Prameswari stated that pairing employees with high and low-knowledge individuals in cross-training significantly improves work-related outcomes and is a common practice by transformational leaders. Thus, strategies for categorizing employees and effectively pairing them in cross-training programs are essential.

Standard Operating Procedures

P1, P2, P4, P5, and P8 recognized the role of SOPs in fostering knowledge sharing and structured succession planning. In recognizing the value of SOPs, P1, P2, P4,

P5, and P8 highlighted their respective use of SOPs and their impact on succession planning. P8 mentioned that “while SOPs could not contain all the information required for succession planning, there are still active efforts to ensure that there is a sufficiently large knowledge repository in the organization.” P8 postulated that they use organizational SOPs that “contain a comprehensive knowledge repository within each department, encompassing SOPs, training materials, How-To Guides, best practice sharing, and After-Action Reviews.”

However, P8 posited that “these files were not shareable with nonstaff members.” A review of organizational documents from P3 and P6, which included SOPs, revealed data supported by semistructured interviews. I found that human resources leaders' use of SOPs led to a structured process that facilitated a smooth transition of knowledge transfer, maintaining consistency and efficiency. I discovered through my review of a publicly available SOP labeled “identification and development” that showed an in-depth process for identifying and developing talent candidates to align with retiring employees, ensuring critical organizational knowledge was retained, and minimizing disruption. I found that the identification and development SOP enables human resources managers to identify high-potential employees and develop them through training, mentorship, and cross-training. Thus, it allows the organizations to install capable replacements for retiring employees, ensuring institutional knowledge remains. I reviewed a publicly available internal SOP, related to P6 and titled "Transition Management," which shows an increase in organizational knowledge retention when retiring employees are paired with a competent incumbent, ensuring effective knowledge transfer during the transition.

The transition management SOP enabled human resources managers to facilitate a smooth transfer of knowledge from retiring employees to their successors, minimizing disruptions to organizational effectiveness. I gained a deeper understanding of how SOPs, when aligned with succession planning and knowledge retention, can be a powerful tool for human resources leaders. This finding was supported by semistructured interviews with P3 and P6, further describing the impact of SOPs on how an organization operates through a structured process for retaining knowledge from retiring employees. Markedly, training materials, best-practice guidelines, and how-to guides provide basic instructions on handling specific aspects of organizational operations.

After-action reviews allow for continuous improvement, in line with recommendations by Vukanović-Dumanović et al. (2022). After-action reviews present a structured process that team leaders use to reflect on completed projects or activities, highlighting what went well, what failed, and how to improve future performance (Vukanović-Dumanović et al., 2022). Documenting such details ensures that future projects of a similar nature result in continuously improving outcomes. Likewise, each of the other forms of documentation used at the company has a specific purpose in ensuring business continuity, regardless of the context of application.

P2, P4, P5, and P7 also explicitly mentioned their positive perspectives on SOPs. P2, for example, emphasized the importance of SOPs in support of an effective succession plan. P2 mentioned that beyond learning from employees who have been with the organization for a long time through job shadowing programs, creating transitional documents based on the collected knowledge is instrumental for succession planning.

These perspectives were shared by P5, who also mentioned the importance of having working documents and SOPs related to succession planning. From P5's perspective, succession planning is an essential tool for organizations to ensure that the process is well-documented to streamline execution.

The views P2 and P5 shared reiterate information from Chigaga and Mpundu (2024), who discussed the effect of succession planning on knowledge retention. According to Chigaga and Mpundu, succession planning ensures a smooth transition of critical knowledge and leadership upon the exit of retiring employees, minimizing operational disruptions and preventing instability within the organization. The National Institutes of Health (2021) emphasized that having preidentified and documented replacements to step in once retiring employees leave effectively safeguards the long-term sustainability of an organization, and P2 and P5shared the same perspective. Documenting both knowledge retention and succession plans ensures that there are smooth transitions when the time comes to replace retiring employees. P5 stated that "effective leadership and regular assessments are imperative to accomplish such detailed planning." Even those assessments must be documented to provide evidence of progress in employee development.

Beyond emphasizing the importance of succession planning and knowledge retention, P2, P3, P4, and P5 mentioned specific uses of SOPs. My review of P4's organizational documentation, which included a *knowledge-sharing* SOP used to retain knowledge from retiring employees, revealed that the SOP contained detailed guidance for human resource leaders to document, implement, and transfer critical knowledge. The

knowledge sharing SOP was used by the human resources managers to facilitate strategies for sharing knowledge through training, mentorship, and other communication channels, ensuring that important information is readily available, as suggested by Devi (2025).

This process provides incumbents with essential steps to retain knowledge from retiring employees, ensuring a smooth transition. Furthermore, I found that the knowledge sharing SOP allowed human resources leaders to document procedures key to capturing institutional knowledge, thereby enhancing employee engagement and maintaining organizational continuity. My review revealed that the knowledge sharing SOP outlined in-depth steps for human resources managers to ensure retiring employees are aligned with capable replacements, safeguarding organizational knowledge to prevent loss of revenue and maintain survival. This led me to discover that this structured process supports organizational continuity and helps maintain operational effectiveness. Furthermore, I uncovered that the SOPs prevent loss of critical organizational knowledge, minimize disruption, and maintain operational efficiency. This finding was consistent with the data gathered from semistructured interviews, where P4 highlighted the effectiveness of SOPs in helping human resource leaders formulate an effective strategy to retain knowledge from retiring employees to aid a robust succession plan, which is critical to avoid a negative impact on revenue and organizational survival. A succession plan for retaining knowledge from retiring employees is an essential process for all organizations, as it covers critical elements and action plans to ensure continued business operations in case of emergencies (Barton, 2019). Such a process can include strategic

succession planning for implementation when necessary. Similarly, P3 discussed that "the existing succession plan provides guidelines on identifying the knowledge holders in the organization and is updated annually." Through the information presented in the succession plan, managers can know the specific employees to whom they can delegate responsibilities and/or assign leadership roles if there is an urgent need.

Likewise, P4 underscored the importance of creating SOPs to ensure organizational operations continue when retiring employees depart. Regarding improving the effectiveness of the succession planning process, P4 mentioned, "the constant need for tweaking and refining approaches to succession planning to ensure that whatever processes the company creates can reflect its updated needs." Barton (2019) suggested that improving business succession plans and SOPs is vital in developing a robust talent pipeline through employee development processes. Through regular reviews and updates to organizational succession plans and documents, organizations ensure comprehensive documentation of methods and key knowledge, actively communicate changes in the plans to relevant stakeholders, and eventually implement only updated versions of such documents that have significant potential for positive organizational outcomes (Barton, 2019).

For organizations with clear review timelines, maintaining updated SOP processes is expected to be easy. P1, P4, and P7 also discussed the importance of employee engagement in the succession planning process. P4 specifically emphasized the need for SOPs for succession planning. In the context of preparing succession planning SOPs, this process would entail involving employees in the discussions to refine and tweak the

policies related to succession planning. Notably, P1 shared the same view, emphasizing the importance of capturing institutional knowledge and documenting it to ensure knowledge retention from retiring employees. According to P1, “having direct and upfront conversations with employees can help them better understand their roles and responsibilities.” P1 posited that “reports and suggestions indicate the need for organizational management to reflect on the aspects of employee engagement when developing relevant documents for succession planning and capturing knowledge from retiring employees.”

The practice of employee involvement in succession planning and SOP documentation has been discussed in various studies. According to R. George and Krishnakumar (2023), engaging employees in succession planning entails involving them in the process of identifying future leaders in an organization. This involvement can be through providing feedback on their own and others’ performance and potential and identifying other highly knowledgeable employees who can support growth in organizational knowledge sharing (R. George & Krishnakumar, 2023). Distinctly, employees need to know that the succession planning process is fair and equitable. As P7 indicated, “all our positions are filled through a competitive selection process; therefore . . . there is no opportunity for left seat/right seat observations or transfer of knowledge.” This statement confirms the fairness of the succession planning process, ensuring all employees are aware of the internal selection procedures and have equal opportunities for inclusion based on their level of activity. Involving employees in the succession planning process enhances their willingness to self-reflect, engage in

professional development initiatives, and participate in structured knowledge retention and cross-training processes (Barton, 2019; National Institutes of Health, 2021). Thus, collaborating with employees provides an opportunity to ensure that the structured succession planning process achieves its goal while also creating intrinsic motivation in the employees to perform better.

My review of P2 organizational documents included an internal organizational SOP specific to the talent pipeline, which revealed insights from corroborated data in a semistructured interview and showed detailed processes to assess personnel for upward mobility positions to replace retiring employees. I found that the talent pipeline SOP process enabled human resources leaders to identify high-potential employees, address skill gaps, and make informed decisions critical to retaining knowledge from skilled employees. Talent pipeline SOPs are used to outline the process of building a talent pool, identifying successors, and assessing their readiness for future roles, most notably for aligning incumbents with retiring employees (Ingale, 2024). The talent pipeline SOP shared by P2 revealed a detailed process used as a human resources tool that documented steps to actively develop potential capable incumbents to align with retiring employees to create a robust framework for knowledge transfer and retention, leading to a trusted process to avoid the loss of organizational knowledge and maintain operational stability. I learned that the importance of SOPs provides value as a strategic tool for aligning the right talent at the right time, which is crucial for retaining knowledge from retiring employees. This finding was supported by data from semistructured interviews, where P2 discussed the need for human resources leaders to take an aggressive approach to their

succession planning and knowledge retention processes. Such a detailed process ensures that the organization's succession planning procedures can always be executed at the right time, regardless of when a position becomes available. Even in an emergent situation, the task can be delegated to any other official and executed successfully, as the knowledge required is already passed on through the documented succession planning process. As such, having a standard SOP on how to implement a succession planning hiring process is something that every executive would require.

Training leaders on such processes can be time-consuming; hence, the SOP is a good reference tool. Runkel (2024) posited that such SOPs constitute an essential tool in organizational knowledge sharing as they ensure ease of task transfer, enhance employee productivity due to the structured work process, help maintain quality control, and reduce the training time for incumbents replacing retiring employees. A well-designed SOP can ensure that employees complete their tasks consistently and error-free while lowering training costs. Such documents function as detailed training resources that enable new employees to complete tasks quickly and more effectively (Chandeliya, 2023). Having a clearly defined succession planning process to retain knowledge from retiring employees can provide all these benefits to the organization, fostering knowledge transfer without the need for overlapping roles or time wastage.

Correlation to the Conceptual Framework

Theme 1 relates to Rothwell's (2005) 7-step model for succession planning theory due to its emphasis on the importance of each of the 7 steps of succession planning. The model's first step of succession planning focuses on executive buy-in. In the model,

Rothwell emphasized that the executives must be on board with any structured succession plans for the strategy to succeed. In the discussion of structured approaches to succession planning in Theme 1, there is a lack of evidence indicating the challenges of executive resistance and how the management buy-in eventually contributed to even better outcomes. P1, P2, and P7 highlighted the role that their leaders ' support has played in fostering overall employee acceptance of structured programs, including MTLs and cross-training, as well as their subsequent success. In each case, P1, P2, and P7 mentioned that management had to see the value of the programs before supporting them, corroborating evidence from Al Suwaidi et al. (2020), who stated that organizational leadership has to be aware and also convinced of the value of succession planning strategies before they can support them.

Theme 1 further highlights the importance of mapping the current talent inventory, as discussed under cross-training and job shadowing. Markedly, P1, P2, and P7 recognized the importance of pairing high-knowledge employees with low-knowledge employees in a bid to support knowledge transfer from retiring employees. These practices are aligned with the second step of Rothwell's (2005) 7-step model, emphasizing the position shared by Nazer and Llorca-Jana (2022) that mapping the current talent landscape enables organizations to develop a comprehensive view of the workplace. In this way, employees can be paired effectively to foster knowledge sharing.

Theme 1 also elaborates on the role of regular and periodic employee performance reviews, as well as the evaluation of prospective work requirements. The documents shared as part of the discussions on mentorship and cross-training confirmed

the organization's emphasis on periodic performance reviews. These documents emphasize leadership performance and talent positioning for employees, supporting the view that such appraisals are critical to understanding individual strengths and weaknesses, as well as prospects for taking on higher positions (Chukwuma et al., 2021). In contrast, Neves (2024) posited that evaluating prospective work requirements is an endemic practice in most organizations' commitments to understanding the current work environment through various strategies, including tools like the nine-box matrix and exit interviews for employees. The analysis is instrumental in shaping organizational decisions regarding future employee prospects and positions.

The steps of assessing future individual potential, developing personal development plans, and regularly evaluating the plans for success are all reflected in the discussion with participants as described in Theme 1. Notably, the theme expressly documents the use of the various assessment tools, including SOPs, which can be instrumental in identifying employees with the right mix of skills and potential for future leadership. At the same time, different participants, including P5, P6, P7, and P8, mentioned the implementation of specific strategies, including mentorship and liaison programs and cross-training opportunities to enhance individual professional capabilities. The programs are designed to overcome organizational knowledge deficiencies and fill the knowledge gap between retiring employees and the remaining employees, as suggested by Abdellah (2021). Finally, Theme 1 emphasizes continuous improvement. The discussion by P1, P2, P3, P4, P5, P6, P7, and P8 revealed that their organizations had structured strategies for continuously improving their succession plans and knowledge

retention. Theme 1 thus successfully underscores the importance of each of the seven steps in succession planning, aligning within the context of Rothwell's (2005) model.

Theme 2: Strategies to Address Employee Resistance to Knowledge Transfer

The second theme that emerged from the analyzed data is strategies to address employee resistance to knowledge transfer. My analysis of interviews with P1, P2, P3, P4, P5, and P7 identified two strategies they used to overcome employee resistance to knowledge transfer, including (a) effective communication and (b) leadership support. P1, P2, P3, P4, P5, and P7 repeatedly mention employee resistance as a significant challenge to retaining knowledge from retiring employees. The intent of Theme 2 is to showcase strategies used by human resources managers to combat employees' resistance to knowledge transfer. P2 highlighted that having effective communication was an intricate method for addressing the resistance issue and improving process effectiveness. The first sub-strategy, effective communication, has led to the success of knowledge transfer processes in succession planning, despite a broad range of challenges.

Effective Communication

My analysis of the data collected from interviews with P1, P2, P3, P4, P5, and P7 revealed that effective communication emerged as a strong strategy for enhancing the outcomes of knowledge retention initiatives, particularly when there were indications of employee or management resistance to knowledge transfer. P1 emphasized the importance of communicating and clarifying expectations to employees regarding knowledge transfer when a retiring employee and the designated incumbent are involved. P1's position reiterated the importance of goal setting and ensuring that knowledge

transfer goals are known to all employees in the organization. My review of P1's organizational documentation, titled *Organizational Communication Plan*, detailed an effective communication strategy to ensure the successful transfer of organizational knowledge from retiring employees. The plan provided a five-point strategy for human resources managers to ensure that communication is effectively articulated between the designated incumbent and the retiring employee, thereby enhancing the success of knowledge transfer efforts. The organizational communication plan included five distinct points of emphasis that lay out a strategy to ensure communication channels are an effective tool within the organization, including (a) active listening, (b) regular feedback, (c) transparency, (d) inclusivity, and (e) follow-up. My review of the organizational communication plan enhanced my understanding of its significance for human resources managers. I found that the organizational communication plan is a complex tool, providing human resources managers with a strategy to mitigate challenges associated with employees' resistance to knowledge transfer.

Additionally, in my review, I found that the plan enables the human resources manager and employee to communicate openly about the expectations of the knowledge transfer process between the designated incumbent and the retiring employee. This finding was supported by data collected from semistructured interviews, where P1 stressed that "effective communication is key to improving knowledge sharing, thereby maintaining organizational stability and avoiding loss in revenue and sustaining organizational survival." P5 implied, "one of the goals of knowledge sharing is to support transitioning roles based on candidates' relevant skills." Lartey et al. (2022) emphasized

that employees' knowledge is the most difficult to transfer, as it is challenging to communicate and requires practice and experience to share. Likewise, Valtonen and Holopainen (2025) linked employee resistance to change initiatives to employee well-being, stating that implementing new practices in the workplace commonly results in stress among employees, leading to a decline in employee well-being. Notably, these studies also recognize the importance of effective communication with employees, emphasizing the value of planned initiatives and encouraging employee participation (Rehman et al., 2021; Valtonen & Holopainen, 2025). Evidence from these studies confirms that effective communication motivates employees to support the knowledge-sharing process in an organization.

Leadership Support

P1, P2, P3, P4, P6, and P7 noted that effective knowledge transfer programs require proactive leadership and a cultural shift towards valuing knowledge sharing. P2 mentioned that "organizational success is attributable to executive leadership buy-in, amidst some resistance from employees." P4 and P7 highlighted the continued communication that leaders support. P7 noted, "leaders play a crucial role in championing change by remaining committed, clearly communicating how the change supports the organization's mission, providing appropriate training, and closely monitoring both successes and challenges." This statement outlines how leaders can provide ongoing support and address employees' concerns to help them navigate the challenges of adapting to the process. Through adequate leadership support, leaders understand team challenges and establish the responses (Kabanda & Barrena-Martinez,

2025). My review of P4's organizational documents included an internal SOP focused on leadership engagement, which outlined a process and provided a guide for human resources managers and department leaders to offer leadership support in addressing employee concerns. Akande et al. (2025) postulated that organizational leadership engagement equips leaders with the ability to meet challenges through meaningful conversations, personalized support, and a framework for connection.

I found that the leadership engagement SOP enabled leadership to address employees' concerns, particularly those related to knowledge transfer and management. My review of the leadership engagement SOP revealed three guidelines specific to internal leadership engagement, providing leadership support to employees, encompassing (a) regular reviews of the organization's programs to ensure employees are aware and included in changes to organizational programs and operational expectations; (b) contingency planning that ensures managers provide leadership support to employees to address expectations for identifying potential incumbents and retiring employees for the effective knowledge transfer process; and (c) communication and transparency, which maintains open communication between leadership and potential stakeholders and current stakeholders, specifically addressing employees' resistance to knowledge transfer. I learned that the leadership engagement SOP offers a strategic tool for human resources leaders and the executive team to maintain effective communication, transparency, and provide proactive leadership support to employees, thereby preventing the loss of organizational knowledge due to retiring employees. This finding was supported by data from semistructured interviews, where P4 noted that "leadership involvement is

imperative in any strategy to succeed." Similarly, P7 explained the leader's role in giving feedback and supporting employees in areas of challenge. P7 stated,

> Employees naturally resist process changes due to fear, anxiety, or a preference for existing methods. However, leaders play a crucial role in championing change by remaining committed, clearly communicating how the change supports the organization's mission, providing appropriate training, and closely monitoring successes and challenges. By offering ongoing support and addressing concerns, leaders can help employees adapt to and effectively embrace the new processes.

P7's statement reinforces the perspective that leadership support serves as a key tool for addressing resistance to knowledge transfer, highlighting the specific support that leaders are expected to provide in this process. The same perspective is shared by P6, who stated, "As a human resources manager, you should brief your leaders on the importance of holding one-on-ones with their teams. In these one-on-ones, leaders should discuss any issues or concerns they have, as well as their career path and progression." P2 underscored that effective knowledge transfer programs depend on proactive leadership support that values and promotes knowledge sharing. Al-Zoubi et al. (2025) asserted that effective knowledge transfer begins with backing from higher management. Once executive buy-in is established, it becomes easy to persuade lower-level supervisors and employees regarding the significance of the change process. Executive leadership typically understands the organizational mission and vision well, closely monitoring training while applying lessons learned to inform decision making. Furxhi (2021) and Almatrodi et al. (2023) suggested that employees may resist organizational changes due

to fear of unexpected consequences and a preference for existing methods. Hence, every organizational change, including those necessitating knowledge transfer, generates new challenges (Khaw et al., 2022). In this project, I found that with the leaders on board and consistently assuring employees of their support, employees experience fewer difficulties moving out of their comfort zone and adopting new practices, including retaining knowledge from retiring employees to avoid revenue loss and ensure sustainability.

Correlation to the Conceptual Framework

Theme 2 is closely linked to Rothwell's (2005) 7-step succession planning model. The model's first two steps involve leadership commitment to prioritize succession planning and assessing current roles and responsibilities to determine the required skills (Rothwell, 2005). P3 and P4 emphasized that their programs achieved significant success due to executive support. In instances like that of P2, where the executive was initially resistant to change, their eventual buy-in contributed to enhancing program success. P1, P4, and P5, along with the analyzed documents, indicated some form of initial assessment in the succession planning process. In steps 3, 4, and 5 of Rothwell's (2005) model, the focus is on analyzing individual performance, assessing future work, and evaluating future individual potential, respectively. Although P1, P4, and P5's descriptions of employee resistance to knowledge transfer do not directly mention these steps, organizational documents that assess effective communication and leadership support strategies serve as useful metrics for addressing employee resistance and evaluating future individual potential. When resistant individuals are paired with others to facilitate knowledge transfer, this indicates the presence of assessment steps. P4 and P5's views on

employee resistance centered around closing the development gap, as highlighted by P7's emphasis on leaders' roles in securing middle-management buy-in for knowledge transfer, and P1's relationship-focused strategy to support knowledge transfer from resistant individuals. Overall, P2 and P4 noted program success as a motivator for employee participation, suggesting an evaluation process aligned with Rothwell's seventh step of succession planning. Thus, Theme 2 addresses employee resistance to knowledge transfer and provides a solid framework for evaluating the effects of employee resistance in the succession planning process.

Theme 3: Strategies to Obtain Executive Buy-in and Stakeholder Engagement

The third theme that emerged from the analyzed data is strategies for obtaining executive buy-in and stakeholder engagement. Seven out of the eight participants (i.e., P1, P2, P3, P4, P5, P7, and P8) identified strategies to obtain executive buy-in and stakeholder engagement. P1, P2, P3, P4, P5, P7, and P8 emphasized approaches for addressing executive buy-in and stakeholder engagement, particularly other employees. P4 emphasized that obtaining executive buy-in is crucial, as it is a prerequisite for gaining buy-in from various stakeholders. P1 stated that "organizational buy-in ensures that there are resources and employee support for structured succession planning programs." My analysis of the interviews with P1, P2, P3, P4, P5, P7, and P8 reveals that continuous communication and constant employee involvement are extensively employed to gain executive buy-in and stakeholder engagement.

Obtaining Executive Buy-in

P1, P3, and P4 highlighted various strategies for addressing executive buy-in, the first of which is ensuring that executives constantly have in mind that some employees are likely to retire soon. Achieving executive buy-in has a significant influence on the company's progress, including employee numbers. Specifically, executives are concerned about the capacity of their employees. P1 noted that "to earn their buy-in and support for the succession planning program, the plans should be at the forefront of the highest level of management." P1 highlighted that "human resource professionals should make sure to keep an active list of upcoming retirements in mind. That way, we are not caught off guard by someone retiring next month, you know. It's too late then." Regarding the same communication approach to obtaining executive buy-in, P3 emphasized the importance of highlighting specific functional areas with retiring employees and tentative incumbents who should be considered for succession roles. These considerations should be communicated to executives by human resources managers. P3 stated,

> Human resources managers must provide detailed information related to each functional area, ensuring that retiring employees and their tentative replacements are identified for all critical succession roles. This process is inherently positive as it reflects proactive planning and services as a collaborative effort across the entire executive team to ensure continuity and strategic alignment. Regular updates are crucial to maintaining the relevance and effectiveness of succession planning.

The statements underscore the significance of early communication with executives. To plan effectively, executives should be aware of the need for succession planning from the onset by being informed of the planned changes in staffing (Rothwell, 2005). Rothwell (2005) postulated that with clear and early communication, executives are expected to support the succession planning process. According to Siambi (2022), leadership knowledge and awareness have implications for seamless employee transition and talent retention in organizations. Thus, the strategy of ensuring leaders are constantly informed is effective in addressing organizational executive buy-in.

My review of P3's organizational documents revealed an internal human resources manager's guide focused on gaining executive buy-in for succession planning. The guide outlined four specific steps for human resources managers to ensure measures are in place to achieve executive buy-in. I found that the succession planning guide included four strategic steps emphasizing the importance of early communication of benefits and alignment with the organization's long-term goals. P3 stressed that "without organizational buy-in, the guide may face resistance and fail to deliver its intended impact." The guide included the following components: (a) communicating the purpose of succession planning, which helps human resources managers secure executive buy-in by clearly explaining how succession planning ensures continuity, minimizes key position gaps, and promotes employee growth; (b) involving key stakeholders early, enabling human resources managers to engage executives consistently to align succession planning with organizational goals; (c) aligning with organizational goals, meaning human resources efforts to ensure succession planning supports the organization's

strategic objectives; and (d) providing ongoing support and feedback, which involves regular updates on training, mentoring, and stakeholder involvement.

My analysis of the guide revealed that these steps promote executive buy-in by fostering flexibility and adaptation to changing needs, thereby building a diverse and inclusive talent pipeline that aligns with organizational values. Securing this buy-in enables managers to cultivate a culture of effective succession planning, thereby ensuring a robust pipeline of capable employees for the future and sustaining success (Atwood, 2020). I found that this guide enhances human resources managers' ability to obtain executive buy-in, leading to broad support and commitment to the organization's sustainability and viability. This finding was supported by data from a semistructured interview, where P3 highlighted active executive involvement in succession planning from the outset as a strategy for effective succession planning.

Active participation from executives and human resources managers, as emphasized by P1, P3, and P4, is critical for developing strong organizational buy-in and ensuring success in succession planning. According to Kendall (2024), collaboration from human resources managers and department leaders in succession planning programs is particularly vital for executives in achieving organizational buy-in. Similarly, Thariq and Sushandoyo (2025) posited that collaboration is essential for managers in formulating strategic alignment, allocating resources, and developing an organizational culture that supports succession planning. By involving their executives actively from the program's onset, P3 and P4 ensured that their leaders were not only aware of the initiatives but also directly involved in the process, thereby assuring other stakeholders of

organizational buy-in. This finding aligns with other studies, such as Kendall's (2024) and the Chartered Institute of Personnel and Development's [CIPD] (2024), which reported that breaking down the succession planning processes into manageable phases that demonstrate value at each stage and then communicating progress transparently can help earn overall organizational buy-in and build confidence in the process. Evidence from P3 confirms that inclusiveness with human resources managers and executives, when implementing a structured plan to address organizational buy-in, is inevitable, because executives recognize the value of the process.

Stakeholder Engagement

P1, P2, P3, P4, P5, P6, and P7 emphasized stakeholder engagement in the succession planning process, focusing on various stakeholders, from the board to general employees, to achieve organizational buy-in. According to Bano et al. (2022a), boards and other external stakeholders play a crucial role in mentoring success, particularly when there are visible outcomes. As reported by seven participants (P1, P2, P3, P4, P5, P7, and P8), stakeholder engagement in support of organizational buy-in is not immediate in most cases. Instead, success must be proven to earn organizational buy-in from some stakeholders. One strategy P1 used to foster stakeholder engagement was to hold active conversations with interested parties regarding their roles in succession planning to promote organizational buy-in. Employees constitute a vital stakeholder category, as they have both interest and influence on the possible success of any structured succession planning process (Pandey & Kumar, 2023). Therefore, actively engaging stakeholders in the succession planning process is crucial for securing organizational buy-in. According

to P1, some of the conversations focused on having a clear understanding of their roles and responsibilities. P1 mentioned that one method to gain employees' organizational buy-in is:

> You start by saying, 'I would like you to make a list of everything that includes your role in succession planning.' This results in the employees' motivation and enthusiasm for teaching others. So, the person leaving becomes excited, which is good. They do not see it as a bad thing. Sometimes, as I mentioned, we will test drive it for a little while to ensure it is suitable for everyone.

P4 also reiterated the need for stakeholder engagement from the outset of the succession planning process, through in-depth conversations about their roles and responsibilities. To initiate employee engagement in the succession planning process, P4 stated that "we had to ask tougher questions, you know. Is there someone that you think might be swain? You know, they do not know if they will be here. Talk to them and see." Toni et al. (2025) postulated that asking questions that require employees to reflect on their roles and recommending individuals for succession is an engagement strategy that fosters deep conversations. To make such conversations even more impactful, P4 stated,

> We emphasized the importance of involving the stakeholders in the succession planning process. We suggested not only engaging the directors but also having stakeholders participate by attending meetings and listening in. We have been implementing this approach, particularly for initiatives such as succession planning.

As part of the conversations with employees as stakeholders in the succession planning process to obtain organizational buy-in, P2 and P5 emphasized the use of data and structured participation, respectively. P2 mentioned that “many people move based on statistics and facts.” Thus, showing stakeholders the relevant statistics can encourage their organizational buy-in for the succession planning process. P2 stated that “stakeholders’ organizational buy-in can be gained, once you can show them, okay, we have completed the first and second round of this program. Let us show you how successful this has been.” P2 noted that “when the program is implemented over multiple rounds or steps, the success of the initial rounds encourages organizational buy-in from other stakeholders within the organization.” Similarly, P5 stated that “even when the program has been implemented correctly, there is still a need for ongoing conversations to clarify what employees should do.” In line with this suggestion, P5 stated,

> I believe that having upfront and honest conversations with stakeholders and communicating expectations for their roles can be beneficial. You are going to do this. We're going to document everything in an SOP. I need to understand how you are doing things.

P2 also recommended using data and statistics to earn stakeholder engagement in support of organizational buy-in. Regarding the board, P2 emphasized how data and information on the early stages helped address issues of organizational buy-in from the board. By observing the program's performance and success, especially through meetings with the mentees, the board realized that the participants were genuinely invested in the program. Specifically, P2 stated,

> Regarding our stakeholders, I would like to mention our executives specifically. They were very proud of the program we implemented, having the opportunity to meet our mentees and see the diversity among them, as well as the mentors, and how people were dedicating their time to support and develop them. So, our stakeholders were immediately on board and thankful for it.

My analysis of P5's internal organization's SOP for addressing stakeholder engagement highlights the importance for human resources managers to have meaningful conversations and the need for a structured, documented approach to action to gain organizational buy-in. I found that the SOP is a detailed 4-step process that serves as a systematic and easy-to-follow guideline. My analysis revealed that the SOP includes (a) identifying stakeholders, who possess the necessary skills and abilities to fill key positions within the organization, including retiring employees; (b) communicating effectively, which involves sharing the succession plan to promote transparency and understanding; (c) involving stakeholders in decision making, which fosters a sense of ownership and shared responsibility; and (d) monitoring and evaluating, which includes conducting regular assessments of the effectiveness of the succession plan and providing constructive feedback to ensure stakeholders stay on track.

The SOP shared by P5 revealed a thorough process used as an effective human resources tool, documenting steps to enhance stakeholder engagement and achieve organizational buy-in. I learned that SOPs offer a strategic tool for human resources managers to align the company's vision with actions for succession planning. This finding was supported by data from a semistructured interview, where P2 emphasized

that such a guideline encourages ongoing stakeholder engagement by promoting work that aligns with current strategies and plans. According to Partida (2025), an SOP helps gain stakeholder buy-in for succession planning by demonstrating its value and revealing potential concerns. Therefore, developing an SOP as P5 recommended would enable structured workflows and motivate employees and other stakeholders who might not initially see the value of stakeholder organizational buy-in for succession planning.

Similarly, the National Institutes of Health (2021) noted that SOPs provide a solid foundation for identifying critical roles, assessing current talent gaps, and tracking progress in succession plans. Through SOPs, stakeholders can recognize the potential impacts of succession planning on the workforce, thereby supporting organizational buy-in. The findings corroborate evidence from Adkins et al. (2024) and Pandey and Kumar (2023), reiterating the need to involve the management in collecting employee feedback for organizational buy-in during succession planning.

Correlation to the Conceptual Framework

Theme 3 aligns with Rothwell's (2005) 7-step model for succession planning theory. In the first and second steps of the model, emphasis is on leadership commitment to prioritizing succession planning and then assessing current roles and mapping responsibilities, respectively. Theme 3 reflects these aspects in stakeholder engagement, particularly through conversations, especially about individual roles and responsibilities. Obtaining executive buy-in is critical in effective succession planning. Likewise, Theme 3 aligns with the third and fourth steps of Rothwell's 7-step model, which involve analyzing individual performance and assessing future work, respectively. Participants P1

and P4 emphasized discussing individual roles in alignment with the third step, whereas P2 and P5 focused on using data and developing structured action plans for employee activity during succession planning as approaches to employee engagement. Both approaches exemplify the assessment of future work. Subsequent steps of Rothwell's model are considered outcomes of effective communication, employee engagement, and senior leadership buy-in for the succession planning process. Thus, Theme 3 effectively reflects coverage of all seven steps.

Business Contributions and Recommendations for Professional Practice

This project's findings may offer significant contributions to the professional practice of business, particularly in the areas of succession planning, knowledge transfer, and organizational continuity. Several actionable strategies emerged from this project that business leaders can adopt to ensure long-term organizational sustainability. Theme 1 emphasized structured succession planning processes, reinforcing the perspectives shared by the Chartered Institute of Personnel and Development [CIPD] (2024). This finding has implications for the implementation of practical succession strategies across various organizations, with a specific emphasis on the effective identification of potential successors and the development of clearly documented plans that can reduce disruptions caused by retirements and employee turnover. Human resource leaders in various companies can apply these findings to the design of succession planning strategies, thereby retaining knowledge from retiring employees and avoiding revenue loss, which is crucial for ensuring long-term survival.

This project has implications for business and professional practice. Using Theme 2 as a source, I confirmed the importance of communication and leadership support in overcoming employee resistance to knowledge transfer, reflecting the perspectives of Valtonen and Holopainen (2025). Proactive engagement through transparent conversations, training, and leadership modeling fosters a collaborative environment whereby employees are willing to share critical knowledge. Based on Theme 3, I found that executive buy-in and stakeholder engagement are prerequisites for successful succession initiatives. These findings support the existing literature on the importance of leadership alignment with organizational goals concerning knowledge transfer (Ingale, 2024). Making consistent updates, using structured SOPs, and reporting data-driven efforts to executives are crucial in securing executive support for succession planning programs. Human resources leaders in business and professional practice can mirror these recommendations once results have been disseminated through literature reviews and publications.

Based on these findings, recommendations are provided for human resources managers, executive leaders, and organizational leaders. For human resources managers and department leaders, these results point to the need to implement SOPs that formalize succession planning and knowledge-sharing expectations. Executive leaders should also be actively involved in succession planning initiatives from the outset, providing support through visible endorsement and resource allocation. Additionally, organizations should disseminate findings via professional development sessions, leadership conferences, and human resources workshops to ensure wider adoption. Institutionalizing cross-

departmental training and mentorship programs can also promote knowledge continuity and reduce resistance to change. This project addresses practical gaps by providing an empirically grounded, systematic approach to succession planning. Broad dissemination and application of these strategies can improve workforce readiness and enhance long-term business sustainability.

Implications for Social Change

Effective succession planning strategies have the potential to drive positive social change at multiple levels by ensuring organizational stability and empowering individuals to thrive. This project's findings, reflected in Themes 1, 2, and 3, underscore how structured succession planning, employee engagement, and leadership alignment can foster sustainable workforce development and economic continuity. In this project, I found that proactive succession planning safeguards institutional knowledge, prevents operational disruptions, promotes internal promotions, and uplifts employees' career trajectories (i.e., Theme 1). These outcomes enhance job satisfaction, especially in communities where businesses are major employers (Pandey & Kumar, 2023). Theme 2 addresses the challenge of employee resistance to knowledge transfer. By prioritizing open communication and leadership support, organizations can foster cultures of trust, inclusivity, and collaboration. These cultures encourage individuals to contribute meaningfully, increasing their sense of purpose and belonging in the workplace. Empowered employees often translate their positive experiences into community involvement and family stability, reinforcing broader social cohesion (Valtonen & Holopainen, 2025). Theme 3 emphasizes the importance of executive buy-in and

stakeholder engagement. By involving all organizational levels in succession and knowledge transfer processes, businesses model democratic leadership and shared accountability. These practices promote equity in decision making and career development opportunities, particularly for historically underrepresented groups (Bano et al., 2022b; Danko & Crhová, 2024). The findings illustrate positive social change as an impact of structured and systematic succession planning.

The project's findings highlight broader social implications of succession planning. Organizations whose leaders practice inclusive and well-structured succession planning contribute to community welfare through economic stability, increased tax contributions, and reinvestment in social infrastructure, such as schools, parks, and public services. Additionally, effective succession planning enables organizations to save money, which can be reinvested in the local economy. When a business organization experiences an increase in profit, the taxes it pays to the government also increase, allowing the government to use these funds to develop parks and other community benefits. Thus, this project's findings may enable businesses and readers to understand how they can improve business practices, leading to increased productivity and enhanced organizational competitiveness, with social implications that can result in cost savings, which can be reinvested in the local economy. This project could promote individuals' worth and dignity by advocating for transparent, future-focused organizational practices that strengthen internal culture and external community resilience.

Recommendations for Further Research

While the project's findings offer valuable insights, the limitations highlight opportunities for further research, particularly in terms of methodological constraints. In this project, I examined strategies for effective succession planning through the perspectives of a small sample of organizational human resources leaders. The small sample size constitutes a primary limitation for the project. Future research should expand the sample to include a more diverse range of industries, organizational sizes, and geographic locations. This broader approach can enhance generalizability and help determine whether the identified strategies are equally effective across varying organizational contexts (Montgomery, 2023).

Additionally, future studies could adopt a mixed-methods approach that combines qualitative interviews with quantitative data, such as employee retention rates, productivity metrics, and financial performance postsuccession. This approach may enable researchers to triangulate findings and strengthen the empirical evidence supporting specific succession planning strategies (Dawadi et al., 2021). Improvements in research methods/design could enhance the overall research outcomes, thereby improving their credibility and trustworthiness.

One area for further exploration is the long-term impact of leadership support and stakeholder engagement on the success of succession planning. Longitudinal studies could track organizations over several years to assess how initial buy-in translates into sustained improvements in knowledge retention, employee development, and organizational resilience (Adkins et al., 2024). Future research could also explore

generational differences in attitudes toward succession planning and knowledge transfer, as younger employees may have different expectations and levels of engagement in these processes. Addressing these aspects may expand the scope of research on succession planning, particularly in midsized organizations.

As digital transformation increasingly influences business operations, further research should investigate the role of technology, such as artificial intelligence-driven knowledge management systems and virtual mentoring platforms, in supporting succession planning and mitigating employee resistance. By addressing the limitations and exploring new dimensions of succession planning, future research can contribute to the development of more inclusive, data-driven, and scalable strategies that enhance business continuity and organizational sustainability through effective succession planning.

Conclusion

In this qualitative pragmatic inquiry project, I explored the question: What effective succession planning strategies do organizational leaders use to retain knowledge from retiring employees to avoid a negative impact on organizational revenue and survival? I conducted semistructured interviews with eight human resources leaders from Virginia-based companies and analyzed publicly available organizational documentation. Three major themes emerged: (a) succession planning strategies to retain knowledge from retiring employees, (b) strategies to address employee resistance to knowledge transfer, and (c) strategies to obtain executive buy-in and stakeholder engagement. I used Rothwell's (2005) 7-step model for succession planning as the conceptual framework for

this project. In this project, I found that using structured succession planning programs, mentorship, and SOPs are key strategies for transferring critical knowledge from retiring employees to their successors. Participants emphasized that clearly defined programs and knowledge documentation play a crucial role in maintaining operational continuity, as reflected in studies such as Kendall's (2024).

I also found that effective communication and leadership support are critical tools for reducing employee resistance. Human resources leaders noted that trust-building, clarity in roles, and transparent communication helped facilitate smooth transitions and reduced fears surrounding change, which aligned with the work of Partida (2025). I found that obtaining executive buy-in and engaging stakeholders throughout the succession planning process is essential for program success. Participants confirmed that early communication, alignment with strategic goals, and data-driven reporting encouraged leadership support and increased stakeholder participation, as highlighted by Siambi (2022). These themes highlight the interconnection between planning and engagement in effective succession management. The results may address a gap in the literature by providing detailed, practical approaches that human resources managers can use to strengthen continuity and sustain organizational competitiveness.

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Appendix A: Interview Protocol

Introduction of the Interview

Introduce yourself as the interviewer. Explain the purpose of the research. Show appreciation for participation. Provide the information letter and ask the participants to sign the letter. Provide a brief outline of the interview topics and indicate the time involved. Clarify the roles and expectations of both interviewer and interviewee. Ask permission to record and manually document the interview. Remind participants that participation is voluntary; ask if there are any remaining questions.

Body of the Interview

The following interview questions will be asked of all participants.

1. What succession planning strategies did you use to retain knowledge from retiring employees to avoid a negative impact on organizational revenue and survival?
2. How did your employees respond to those strategies?
3. How were effective strategies to retain knowledge from retiring employees communicated throughout the organizational ranks and among stakeholders?
4. What modifications did you apply, if any, to any strategy to improve its effectiveness in retaining knowledge from retiring employees?
5. What policies and processes have you used to retain knowledge from retiring employees?
6. What were the key barriers to implementing strategies to retain knowledge from retiring employees?

7. How did you overcome the key barriers to implementing strategies to retain knowledge from retiring employees?
8. What else would you like to add about effective strategies to retain knowledge from retiring employees?

Conclusion of the Interview

Indicate the end of the interview; summarize the main points. Thank the interviewee for the valuable contribution. Reiterate how the data will be used, schedule a second interview for member checking, which allows participants to validate responses to the initial interview, and ask if there are any questions or comments.

Appendix B: Interview Questions

1. What succession planning strategies did you use to retain knowledge from retiring employees to avoid a negative impact on organizational revenue and survival?
2. How did your employees respond to those strategies?
3. How were effective strategies to retain knowledge from retiring employees communicated throughout the organizational ranks and among stakeholders?
4. What modifications did you apply, if any, to any strategy to improve its effectiveness in retaining knowledge from retiring employees?
5. What policies and processes have you used to retain knowledge from retiring employees?
6. What were the key barriers to implementing strategies to retain knowledge from retiring employees?
7. How did you overcome the key barriers to implementing strategies to retain knowledge from retiring employees?
8. What else would you like to add about effective strategies to retain knowledge from retiring employees?