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Transformational Strategic Choice: The Generational Succession Effect on Small Businesses

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This is to certify that the doctoral study by

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Walden University
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Abstract

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Doctoral Study Submitted in Partial Fulfillment

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Abstract

Changing workforce demographics, combined with a gap in knowledge and skills between older and younger generations, threatens small business viability. The presence of four generations in the workforce, where 1 in 5 employees are 55 years and older, presents an unprecedented challenge for small business leaders planning for succession with a multigenerational workforce. The purpose of this case study was to explore the effect of Baby Boomers' presence on small business leaders' ability to retain and transfer knowledge to successive generations. Using snowball and purposeful sampling techniques, 36 small business leaders in the Washington, DC, metropolitan area participated. The conceptual framework included the theories of groupthink, narrative paradigm, collaboration, stakeholder, and the swift theory of trust. Data collection occurred using e-mail to solicit study participants to provide their experiences concerning generational succession via a Web-based, electronic questionnaire. Data analysis entailed using a modified van Kaam method to identify 2 main themes for small business leaders to consider: (a) generational differences reflect small business leaders' challenges and (b) multigenerational succession affects the bottom line. Member checking, transcription review of questionnaire responses, and triangulation of data with existing theories strengthened the validity of study findings and themes. Study recommendations offered strategies for managing knowledge supportive of planned generational succession. This study's findings may contribute to social change by offering small business leaders strategies to facilitate a collaborative, knowledge management culture that may mitigate the effects of changing workforce demographics on small business viability.

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Dedication

I dedicate this doctoral study to my family, friends, colleagues, and extended family members for their patience and support throughout this journey, with special appreciation to my sons Nicholas and Tyler Williams.

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To my committee chair, Dr. Cheryl Lentz and my second committee chair, Dr. Alexander Lazo, without you, I would not be able to complete this journey. Your unrequited, unconditional support without question has been outstanding. I could never repay you for the mentorship and friendship. I will honor you by paying it forward to not only doctoral candidates following my footsteps, but to any young person needing a life example and role model who is committed to excellence in life and in academia. To my university research reviewer, Dr. Anne Davis, and the Walden University methodologists, Dr. Gene Fusch and Dr. James Savard, thanks for your time, patience, support, and professionalism. Completing this journey would not have been possible without your support.

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Section 1: Foundation of the Study

The significance of this study was the adverse effect of an aging, retiring, or retirement-eligible Baby Boomer workforce on the ability of small business leaders to ensure the multigenerational transfer of knowledge, thereby supporting succession or continuity of operations. Examination of four generational cohorts in the United States affecting generational succession among small businesses was the foundation of this research study. The cohorts include Veterans born before 1945, Baby Boomers born between 1946 and 1964, members of Generation X born between 1965 and 1979, and members of Generation Y born between 1980 and 2000 (Angeline, 2011; Coulter & Faulkner, 2013; Gentry, Griggs, Deal, Mondore, & Cox, 2011; Haynes, 2011; Srinivasan, 2012). According to Deyoe and Fox (2012), the Veterans' workforce includes approximately 75 million people, the Baby Boomers workforce nearly 85 million, the Generation X workforce almost 50 million, and Generation Y about 76 million. Of the roughly 312 million members of the U.S. workforce, Veterans and Baby Boomers represent over 50% or approximately 156 million members of the U.S. workforce (Toossi, 2012; U.S. Census Bureau, 2014). The ability of U.S. small business leaders to manage generational succession while managing knowledge became a strategic imperative regardless of the industry, and goods or services sold (Bracci & Vagnoni, 2011). This strategic imperative supported recommendations to provide small business leaders with realistic and pragmatic solutions for instituting generational transfer methods regarding succession planning, mentorship, education, and training in developing personnel to become leaders or managers.

Background of the Problem

The 2007 economic recession fueled a global economic crisis not experienced since the Great Depression of the 1930s and the recession of the 1970s (Kotz, 2010). The U.S. economy, functioning at a slower than average rate, represented the deepest and longest recession since World War II (Byun & Frey, 2012; Chowdhury, 2011). Approximately 10,000 people daily reached the traditional retirement age of 67 years (Gordon, 2014). An unprecedented simultaneous presence of four generations in the workforce that by 2015, 20% or 1 in 5 employees are 55 years and older (Kapoor & Solomon, 2011).

Workforce demographic changes, not technology or economics, is a significant concern of business leaders (Appelbaum, Gunkel, Benyo, Ramadan, & Wolff, 2012; Standifer, Lester, Schultz, & Windsor, 2013). Increased life expectancy and economic necessity involved a Hobson's choice (Champagne, 2015; Lawrence, 2014), with Baby Boomers choosing to retire or continue working past the traditional retirement age of 67 years (Appelbaum et al., 2012). Baby Boomers, the largest among four generational cohorts, compete with younger generations for jobs, resources, benefits, and entitlements (Kapoor & Solomon, 2011). Medical advances contributing to increased life expectancy among Baby Boomers created a multigenerational confluence in the workplace; affecting succession and knowledge transfer (Legas & Sims, 2011). Because generational succession affects 18.5 million small business owners who have no succession plan, knowledge management is critical to company performance (Beesley, 2011; Durst & Wilhelm, 2011).

Problem Statement

Disastrous consequences await companies that cannot transfer knowledge from older to younger generations (Stam, 2010). Businesses losing competitive advantage involves aging and retiring Baby Boomers leading the largest brain drain since World War II (Bragg, 2011; Martins & Martins, 2011). Between 2008 and 2018, 30 million or 20% of the 150.9 million U.S. jobs involve or will involve companies needing skilled, educated, and trained workers to replace aging and retiring Baby Boomers (Rothwell, 2011). The generational knowledge gap, departing expertise, and the limited number of workers to replace aging and retiring Baby Boomers threatens business viability (King, 2012). The general problem is some Baby Boomers continuing to work beyond retirement eligibility affect small business owners' abilities to retain and transfer knowledge to successive generations. The specific problem is some small business owners lack strategies to address the effect of Baby Boomers continuing to work beyond retirement eligibility of 67 years.

Purpose Statement

The purpose of this qualitative case study was to explore the effect of retirement-eligible Baby Boomers on small business leaders' abilities to retain and transfer knowledge to successive generations. U.S. small business owners, owner-managers, and owner-chief executive officers (CEOs) in the Washington, DC metropolitan area were the focus of this study. They represented any of four generational cohorts: Veterans, Baby Boomers, Generation X, and Generation Y. The primary customer base of these small businesses was the U.S. federal government and the U.S. Department of Defense (DOD).

An estimated 27.5 million small businesses account for 59.7 million or 49% of U.S. private sector jobs ("FAQ", 2011). In addition, 51.5 million or 66% of 78 million Baby Boomers commonly hold corporate leadership or management positions in the U.S. (Chavez, 2011). The central problem was aging and retiring Baby Boomers working beyond retirement eligibility while younger generations enter the workforce. With implications for positive social change abound, this phenomenon affects 18.15 million U.S. small businesses that do not have a succession plan (Beesley, 2011). The implications for social change involve offering small business leaders strategies and solutions responsive to changing workforce demographics that affect small business knowledge management and succession planning.

Nature of the Study

A qualitative research methodology with a case study research design is the nature of this study. I used a qualitative research methodology to explore participant experiences holistically. Quantitative research suits the needs of a study when exploring paradigm under a single reality (Castellan, 2010). Mixed methods research is appropriate when using qualitative and quantitative research methods to explore a problem under study (Denzin, 2010). Qualitative research offers a contextualized, holistic understanding of a problem (Frels & Onwuegbuzie, 2012; Khan, 2014). Because qualitative research supports exploring, interpretating, and describing participant experiences to obtain an enriched understanding of a problem, qualitative research methodology suited the needs of this study (Auriacombe & Schurink, 2012; Teddlie & Tashakkori, 2012).

An appropriate research design and methodology offers an opportunity to advance the nature of this study. Ethnographic research is appropriate for investigating a problem through observations and interviews within a historical and cultural setting (Vesa & Vaara, 2014; Walker, 2012). Grounded theory design suits the needs of a study when researchers explore a problem to establish or advance theory (Flint, Gammelgaard, Denk, Kaufmann, & Carter, 2012). Phenomenological design is appropriate when researchers explore participant's lived experiences without abstract generalizations (Finlay, 2012b). Collaborative researcher-participant exploration of a problem to generate knowledge is endemic of participatory action research (PAR) design (Bergold & Thomas, 2012). Using narrative research involves collecting data through observation, documentation, interviews, or artifacts to contextualize participant experiences (Petty, Oliver, Thomson, & Stew, 2012). Exploring participant's experiences into a single problem denotes case study research (Morse & McEvoy, 2014). As a design used to explore one or more cases holistically in real-life settings, case study research suited the needs of this study (Yin, 2013; 2014).

Research Question and Questionnaire

Developing a research question is a reflective and interrogative process (Agee, 2009). Finding the right question begins with identifying a deeply and emotionally felt problem that cannot be ignored (Kenny, 2012). Constructing the right question(s) frames the study of the problem (Sinkovics & Alfoldi, 2012; Tashakkori & Teddlie, 2010). The question chooses the researcher, as opposed to the researcher choosing the question, thereby reflecting an evolutionary development of the human experience (Kenny, 2012).

Researchers use this reflective and interrogative process of qualitative research to develop questions to frame an approach to inquiry and to reveal the lives and perspectives of others (Agee, 2009). To frame an approach to inquiry, Kenny (2012) asserted that finding the right question is just as essential to finding the right answers. Constructing and choosing the right question offered an opportunity to solicit information from small business owner-managers, owner-CEOs, and owner-presidents experiencing the effect of aging or retiring Baby Boomers working beyond retirement eligibility while younger generations enter the workforce. Based on the background, foundation, purpose, and nature of this study, the following research question and questionnaire (see below) offered a guided premise for conducting this study: What strategies do small business leaders use to address generational succession and the effect of Baby Boomers continuing to work beyond traditional retirement eligibility age of 67 years?

Qualitative Case Study Questionnaire

Baby Boomers who keep working, thereby hindering successive generations from assuming roles as leaders or managers is a basis for exploring the problem using the following qualitative questionnaire:

1. What is your title and position in the firm?
2. What is your educational and professional background?
3. What is the year of your birth?
4. When did you establish your firm and how long has your company been in existence?
5. If you have a multigenerational workforce, what is the generational

demographic make-up of your workforce (Veterans born before 1945; Baby Boomers born 1946-1964; Generation X born 1965-1979; and Generation Y born 1980-2000)? If you do not have a multigenerational workforce, go to question number 19.

6. What is the greatest challenge facing small businesses with a multigenerational workforce compared to workforces in the past, present, and future?

7. How do you mitigate the challenges of multigenerational workforce transition between Baby Boomers and successive generations to sustain and prevent the loss of intellectual capital within your firm?

8. What are your thoughts concerning an aging workforce as employees continue working past traditional retirement eligibility?

9. How are you ensuring Baby Boomers prepare successive generations to assume responsibility as leaders or managers?

10. Why do you think firms retain Baby Boomers or choose not to retain Baby Boomers?

11. What is the effect of Baby Boomers continuing to work past normal retirement on the financial performance of your firm?

12. What have you done or are doing to address the loss of intellectual capital from an aging, retiring, or retirement-eligible Baby Boomers?

13. How has the ability to capture, manage, and retain knowledge of retiring or retirement-eligible Baby Boomers affected your firms' organizational and financial performance?

14. How has technology affected your firm's ability to capture, manage, and

retain knowledge with a multigenerational workforce?

15. What are your thoughts concerning the effect of generational differences on succession planning within your firm?

16. How have generational differences affected your ability to trust, communicate, and make decisions regarding succession planning?

17. How would you address multigenerational conflicts and resistance to change within your business between Baby Boomers and successive generations?

18. Does your business have a succession plan? If so, what does your business's succession plan encompass in terms of mentorship, education, and training programs ensuring the next generation is prepared to assume responsibilities as leaders or managers? If your business does not have a succession plan, what is the reason for not having a succession plan?

19. What advice would you share with other small businesses leaders regarding the retention and protection of institutional and multigenerational employee knowledge, skills, and expertise supportive of information sharing and succession planning?

Conceptual Framework

This study connotes a social change advocacy worldview to explore and postulate the effects of an aging workforce and generational differences in succession planning within small businesses. Postulating an advocacy worldview for social change entailed demonstrating the ability to coalesce multiple conceptual frameworks while exploring and discovering new knowledge (Berman, 2013; Knight & Cross, 2012; Trochim,

Donnelly, & Arora, 2015). The application of this conceptual framework under study was multifold.

The swift theory of trust, first examined by Meyerson, Weick, and Kramer (1996), advanced the cognitive aspects of trust with respect to the reciprocal assumption of risks based on individual or collective trustworthiness (Alexopoulos & Buckley, 2013). This theory denoted a normative process guided by a pragmatic set of standards and beliefs affecting individual or organizational performance (Crisp & Jarvenpaa, 2013). Janis (1972, 1982) and later Rose (2011) described the theory of groupthink as a pathological consensus via group pressure on the cohesive interference of examining viable alternatives and risks affecting outcomes. Narrative paradigm theory, first proffered by Fisher (1984, 1985, 1989), indicated storytelling as a basis for imparting information that ensures credibility via shared everyday experiences and views of others (Gill, 2011). This theory, further evidenced and advanced by scholars, offers the coalescing of participant perceptions, motivations, and actions that achieve an in-depth understanding of a problem under study (Beal, 2013).

Graci (2012) described Gray's (1989) theory of collaboration as a multidimensional problem that excludes irrelevant issues while ensuring various stakeholders explore different aspects of a problem collectively in search of solutions. Stakeholder theory, posited by Freeman (1984), denoted stakeholders as interested entities in an organization with no equity or authority to influence the organization (Garvare & Johansson, 2010). The combined use of the theories mentioned above formed the conceptual framework for this research study.

Operational Definitions

Because individuals often interpret terms or acronyms differently, researchers suggest defining unusual, vague, ambiguous, or obscure terms is advisable to avoid misinterpretation (Dolnicar, 2013). Carter (2012) asserted that defining terms offer clarification of a concept or research question in a descriptive, yet in a functionally, comparative approach with examples presented with historical or metaphorical frame of reference. The following is a list of operational definitions of terms repeatedly used throughout this study:

Epoché. Epoché is a Greek word connoting a philosophical process of setting aside individual preconceptions of experiences (Moustakas, 1994).

Generational succession. Generational success is the systemic transition or continual emergence from previous cultural-bearers to new cultural-bearers (V. King, 2010).

Hobson's Choice. Hobson's choice is choosing between two or more untenable propositions (Champagne, 2015; Lawrence, 2014).

Intellectual capital. Intellectual capital is knowledge used to enhance the value of capital, produce wealth, or gain a competitive advantage (Liang, Huang, & Lin, 2011).

Small business. Small businesses are firms with 500 employees or fewer ("FAQ," 2011).

Systems thinking. Systems thinking is a theory where learning organizations examine or address the interrelationship between people, systems, and organizations by creating new knowledge that accelarates the implementation of change (Kim, Akbar,

Tzokas, & Al-Dajani, 2013; Seiler & Kowalsky, 2011; Yawson, 2013).

Tacit knowledge. Tacit knowledge is informal, non-verbalized knowledge derived from and intuitively based on organizational and personal experience not readily transferable to others, but often transferred to others via experience over time or through personal interactions with others (Harvey, 2012).

Transcendental approach. Transcendental approach is a cognitive, yet self-reflective and self-reflexive method of exploring and examining the human experience (Perry, 2013).

Assumptions, Limitations, and Delimitations

Assumptions

This qualitative study focused on the essence and experience of participants that embody the philosophical basis for exploring fresh, in-depth descriptions of the problem as lived (Finlay, 2012a; Kafle, 2013). Qualitative research begins with a philosophical assumption about reality or the current state of existence (ontology) that involves understanding the problem (epistemology), the basis of research (axiology), and the emergent theoretical or conceptual framework (methodology) (Hays & Wood, 2011; Teddlie & Tashakkori, 2012). The following ontological, epistemological, axiological, and methodological approaches to inquiry offered an opportunity to explore assumptions relative to the transformative choices faced by small businesses leaders experiencing changing workforce demographics (Biddle & Schafft, 2014).

The first assumption is that a paradigm change responsive to the central problem concerns the readiness of members of Generations X and Y to assume responsibility as

leaders and managers. The second assumption is that participants agree to participate in the study voluntarily, but also respond in a timely manner. The third assumption is that using computer-assisted, qualitative data analysis software (CAQDAS) versus hand-coding may offer a greater understanding of the current research results visually by creating the unique ability to conduct in-depth data analysis electronically (Rademaker, Grace, & Curda, 2012). Hoover and Koerber (2011) posited that managing an array of data effectively required substantial, robust qualitative analysis. The philosophical premise of identifying themes entailed using CAQDAS such as MAQXDA 11 to collect and analyze data. Leveraging CAQDAS involves analyzing data from vital points of view with solutions and recommendations framed thematically for implementation (Onwuegbuzie et al., 2012).

Approximately 79 million Baby Boomers, born between 1946 and 1964, reached retirement eligibility at age 65 in 2011 (Pruchno, 2012). The fourth assumption is small business leadership will develop and implement strategies to address generational succession and the effect of retiring or retirement-eligible Baby Boomers continuing to work beyond traditional retirement eligibility age of 67 years. Over a 17-year period between 2012 and 2029, an estimated 10,000 people a day will reach age 65 (Cates, 2010; Dannar, 2013; Pruchno, 2012).

Durst and Wilhelm (2011) asserted that business leaders retaining employees could not occur indefinitely. For this reason, a company must plan for staff replacement. Understanding the values of all generations to plan for staff replacement requires addressing the following additional assumptions. The fifth assumption is that

generational characteristics and nuances pertaining to a retirement-eligible workforce hinder generational succession by continuing to work are nonexistent, thereby considered an aberration or rare societal, cultural phenomenon. The sixth assumption is that generational succession is disproportionately unique to small businesses. This unique, disproportional effect of generational succession is the result of small business leaders' dependency on retaining knowledge (and experience) by a select, few employees or managing principles (Durst & Wilhelm, 2011). Consquently, small business leaders recognize the need to implement succession plans to forecast for talent, fill critical leadership vacancies, and manage knowledge in the midst of changing workforce demographics (Kowalewski, Moretti, & McGee, 2011).

Limitations

Access to participants requires negotiating or soliciting permissions from gatekeepers for access within the framework of bureaucratic institutional or organizational rules and regulations rather than driven by the goals or objectives of the current study (Abrams, 2010). The limits of this qualitative study are conditions potentially affecting the scope of the present study. First, some of the target population represented owner-managers, owner-CEOs, and owner-presidents of small businesses supporting the DOD and the U.S. federal government with restricted access (e.g., security clearance). This restriction limited access to personnel and information or restricted access and use of U.S. government facilities and telecommunications networks. Second, contractual obligations, government policy, and nondisclosure agreements limited access to information or sharing of information, requiring permission to solicit participant

support. Third, participant perception or bias concerning small business leaders' abilities respond to generational succession compared to the leaders of large companies. Fourth, participant selection process presented an indistinguishable choice between industry, customer, market, goods, or services. Fifth, Web-based data collection leads to self-selection and undercoverage (Bethlehem, 2010).

Delimitations

The definition of a small business varies by industry, number of employees, and average annual revenues. Hulbert, Gilmore, and Carson (2012) noted small business classification as firms with a workforce of 500 or fewer employees that average fewer than $7 million in revenue annually. Firms with 500 or fewer employees denote a small business ("FAQ", 2011). The delimitation of this study are owners and operators of small businesses within the Washington, DC metropolitan area (a) whose primary customer base is the U.S. federal government and the DOD; (b) who started and owned and operated their business no later than 2007; (c) who had a minimum of 5 and no more than 500 employees; and (d) who employed a multigenerational workforce.

Significance of the Study

Contribution to Business Practice

Generational succession is of paramount importance because the threat of losing corporate knowledge increases as the population ages and there are 76 million aging Baby Boomers (Appelbaum et al., 2012). Because of limited size and scope, small businesses, even those with significant resources, may have difficulty meeting the challenge of managing succession (Durst & Edvardsson, 2012). The challenge of

managing succession represents the hidden costs of employee turnover (Broughan, 2013). These hidden costs range from 30-300% of an employee's annual compensation or approximately $75,000 per employee (Phillips & Addicks, 2010). Small businesses mitigate the hidden cost of employee turnover by employing techniques or strategies to manage the intellectual capital of older workers who continue working past retirement eligibility (Broughan, 2013). The significance of this study is that it is expected to improve understanding of how small business leaders mitigate the drain of critical knowledge (i.e., intellectual capital), manage multigenerational workplace relationships, and maintain skilled, qualified, and experienced talent (Mahon & Millar, 2014). The study's significance reflected the transformational strategic choice small business leaders face if retirement-eligible employees or managing principles hinder generational transition by continuing to work past retirement eligibility or if workers return to the workforce upon retirement.

Implications for Social Change

This qualitative case study contributes to positive social change by identifying ideas or solutions responsive to the vastly changing demographics. These changing demographics affect business leaders' ability to make decisions, protect intellectual capital, source and develop talented human capital, and innovate that ensure sustained competitive advantage (Hagemann & Stroope, 2013; McEntire & Greene-Shortridge, 2011; Ropes, 2014). The problem of an aging workforce in the United States and a draining of intellectual capital disproportionally affect 66% of 28.2 million small business owners who have no exit strategy or succession plan (Beesley, 2011).

The 2012 economic recovery yielded 21 million new jobs with only 11 million new workers entering the workforce (Lockard & Wolf, 2012). The goal of positive social change begins with small business leaders establishing, shaping, synchronizing, and supporting sustainability efforts for which new opportunities emerge (Abdelgawad, Zahra, Svejenova, & Sapienza, 2013). The emergence of new opportunities, supportive of sustainability and social change, exemplify businesses that leverage market forces to create economic value, which achieves a competitive advantage (Husted, Allen, & Kock, 2012). Notwithstanding the 2012 economic expansion, social, political, and societal issues regarding the increasing age of the U.S. workforce, combined with an insufficient number of skilled, qualified younger workers, further exacerbated small business leader's inability to replace an aging workforce (Gordon, 2014).

Because of the global shortage of skilled and talented employees, business leaders acknowledged the implications of social change by facilitating a collaborative, knowledge management culture that embraces varied nuances of a multigenerational workforce (Gordon, 2014). The facilitation of a collaborative, knowledge management culture enables leaders of a learning organization to acknowledge the interrelated social, societal, and financial implications for social change by adopting systems thinking (Kim et al., 2013). This enlightenment in systems thinking resulted in transitioning to a new perspective of organizational adaptive efforts responsive to the complexities of demographic changes in the workplace (Hatfield-Price, 2014). Transitioning to a new perspective encourages business leaders to implement adaptive change through collaborative efforts that support sustainability initiatives (Nicolaides & McCallum,

2013). Implementing adaptive change is the collaborative effort of strategically embracing global, societal calls for sustainability that lead to social change by acknowledging the problem of generational succession and workforce shortage (Smith & Sharicz, 2011). Business leaders respond to this challenge by retaining experienced employees to lower human capital investment costs, increase return on human capital investment, and support sustainability via asynchronous, synergistic transfer of institutional knowledge to younger generations (Cho & Lewis, 2011). Consequently, effective succession planning provides business leaders opportunities to develop employee leadership skills in preparation for current and future positions (Galbraith, Smith, & Walker, 2012).

Applebaum et al. (2012) posited that there are 100 million members of Generation Y in the workforce, but many are too young and inexperienced to assume leadership roles. The shortage of talent, the generational divide, and employee turnover represent a tremendous challenge for organizations (Phillips & Addicks, 2010). Because of a decreasing talent pool and economic uncertainty, older adults often experience pressure to continue working longer than planned (Baltes & Finkelstein, 2011; Luo, 2012). Bal, De Jong, Jansen, and Bakker (2012), affirming research by Wang and Shultz (2010) and Adams and Rau (2011), asserted that employees in relatively good health with a high worth ethic, but poor finances often continue working beyond normal retirement eligibility. Retirement-eligible workers who are foregoing retirement limit promotion opportunities and threaten the ability to retain future generations for leadership pipeline development (Legas & Sims, 2011). Consequently, the implications for social change

begin and end with identifying problems and solutions to events such as disability, retirement, or death that affect the viability of small businesses (Beesley, 2011).

A Review of the Professional and Academic Literature

A philosophical worldview, through the self-reflection of advocacy, created a work-based practitioner framework by moving beyond the linear to the nonlinear aspects of research (Costley & Lester, 2012; Lester, 2012). Advocacy through the self-reflection offered an opportunity to address solutions and seek or generate new knowledge that evokes positive social change relevant to the status quo (Salter, 2013). This worldview challenges conventional wisdom of pragmatically accepting the current situation by identifying a new problem and then proving that a new approach can provide a different solution (Kieser, Nicolai, & Seidl, 2015). Molding of research through an advocacy worldview connotes presenting and accepting research in an innovative and creative manner (Christ, 2013; Cravens, Ulibarri, Cornelius, Royalty, & Nabergoj, 2014; Shaw, Ramatowski, & Ruckdeschel, 2013).

To explore problems regarding the lack of succession planning and the lack of qualified candidates affected by generational transition, I conducted an interpretive inquiry to examine relevant literature that frames and advocates a worldview supportive of investigating demographic workforce changes effecting small businesses. Succession planning and knowledge transfer within the framework of generational transition and organizational change support research suggesting fairness, trust, communication, commitment, and effective leadership (Shin et al., 2012). To identify prospective, peer-reviewed articles and books, the following databases-ABI/INFORM Complete, Business

Source Complete, EBSCO ebooks, EBSCOhost, ERIC, Google Scholar, ProQuest, Central, PubMed, and Sage Premier-were searched for the years 1967-2015 using the following keywords: *succession planning, generational succession, multigenerational succession, intergenerational succession, intergenerational transfer, multigenerational transfer, multigenerational workplace, intergenerational workplace, knowledge transfer, knowledge management, knowledge sharing, change management, trust, communication, organizational culture, collaboration, groupthink, narrative, stakeholder, storytelling, theories, decision-making, Baby Boomers, small business, small and medium enterprises, Generation X, Generation Y, Millennials, brain drain, phenomenology, qualitative,* and *intellectual capital*. I used Boolean operators, including "AND" and "OR," to maximize the results.

A review of relevant literature provides a framework for exploring and evaluating current and prior research concerning the problem under study. This literature review examined 205 peer-reviewed and seminal journal articles, books, and papers. Examining professional and academic literature referenced in this study included 177 (87%) peer-reviewed and seminal journal articles, books, and papers published within 5 years of the chief academic offer's approval. Morris (2011), Research by Sanders (2011), Sopko (2010), and Tomaszewski (2010) combined with examining relevant literature served as a basis for exploring the current problem of generational succession affecting small businesses. Consequently, literature relating to the influence of generational succession on small businesses includes exploring (a) knowledge management; (b) generational transition; (c) succession planning; (d) change management; and (e) trust,

communication, and decision-making.

Literature Review Synopses

Sopko (2010) and Tomaszewski (2010) noted that Baby Boomers are the largest generational cohort in U.S. history, consisting of approximately 76 million people born between 1946 and 1964. The retirement of the majority of Baby Boomers affects the production, performance, and efficiency of businesses because of knowledge loss (Tomaszewski, 2010). Morris (2011) supported research by Sopko and Tomaszewski by positing that retaining institutional knowledge in the face of a Baby Boomer exodus and a generational skills gap is a concern of the business community. This matter requires companies to address the skills gap and develop plans for retaining and developing talent (Morris, 2011). Retaining and developing talent involve providing a basis for creating organizational policy regarding workforce or succession planning (Morris, 2011).

The foundational aspects of succession planning include business leaders managing talent by knowing employees' skills and understanding what motivates employees (Morris, 2011). Consequently, Morris proffered that the workforce is experiencing a transformation, by which technological changes contributes to the generational skills gap. Sopko (2010) explored why there is a lack of understanding about how retiring employees transfer knowledge. This lack of understanding, as noted by Sanders (2011), is a result of firms not having a succession plan. The inability of business leaders to understand knowledge transfer inhibits the ability for successive generations to assume leadership positions and capture the knowledge and experience of current employees (Sanders, 2011). Hence, the implications of positive social change involve

businesses implementing transition or successions plans mitigating the effects of retiring Baby Boomers (Sanders, 2011).

Because of increasing global economic challenges, businesses enhance competitive advantage and organizational performance by leveraging knowledge management and intellectual capital (Seleim & Khalil, 2011). Bracci and Vagnoni (2011) argued that the multiple scholars neglect to posit knowledge as an intangible source of competitive advantage for small businesses. Intellectual capital, considered an intangible strategic organizational asset, is synonymous with knowledge, skill, experience, and intellectual property that contribute to continued knowledge creation, thereby sustaining business performance and competitive advantage (Cricelli, Greco, & Grimaldi, 2014).

Generational transition or succession improves the competitive advantage of small businesses through continuity by preparing successive generations to become leaders or managers (Bracci & Vagnoni, 2011). The lack of succession planning negatively affects a business's bottom line whereas having a succession plan positively affects a business's bottom line (Dunham-Taylor, 2013). The neglectful role of knowledge as an intangible source of competitive advantage results in small businesses losing knowledge because of employees leaving and because of the lack of succession planning (Bracci & Vagnoni, 2011). Small firms face higher risks of failure (70%) because of the lack of or nonexistent succession planning (Bracci & Vagnoni, 2011; Kalra & Gupta, 2014). Small businesses experience a greater risk of losing knowledge than large business because a few individuals primarily hold the key knowledge (Bracci & Vagnoni, 2011).

Peer-reviewed and seminal literature published between 1967 and 2015, authored by scholars who contributed to research concerning knowledge management, knowledge transfer, and multigenerational succession comprise this literature review. The review of the literature conceptually framed current research to address the effects of an aging workforce on small businesses. The conceptual framework of this study was to explore knowledge transfer from Baby Boomers to younger generations and the subsequent loss of intellectual capital because of little or no succession planning. Exploring small business leaders' experiences and perspectives within a framework to explore the effects of an aging workforce and generational differences on succession within a firm conceptually included (a) swift theory of trust (Fukuyama, 1995; Meyerson et al., 1996); (b) theory of groupthink (Hogg, 2013; Janis, 1972, 1982; Rivas, 2012; Rose, 2011; Shirey, 2012); (c) narrative paradigm theory (Fisher, 1984, 1985, 1989; Gill, 2011; Kendall & Kendall, 2012; Volker, Phillips, & Anderson, 2011); (d) theory of collaboration (Graci, 2012; Gray, 1989; Rigg & O'Mahony, 2013); and (e) stakeholder theory (Garvare & Johansson, 2010; Gibson, 2012; Harrison & Wicks, 2013; Jensen & Sandström, 2011).

Swift Theory of Trust

Germain and McGuire (2014) and Zarei, Chaghouee, and Ghapanchi (2014) suggested that consistent communication among team members denoting clear roles, responsibilities, and reporting structures relates significantly and primarily to trust. Individuals and groups require trust to function cohesively and effectively (Mukherjee, Hanlon, Kedia, & Srivastava, 2012). Fulmer and Gelfand (2012) further noted that trust is

both a basis for interpersonal relationships and a source of competitive advantage. In other words, trust is of strategic, relational importance of investing resources or sharing knowledge that ensures business viability and sustainability (Gilbert & Behnam, 2013). Qu, Pinsonneault, Tomiuk, Wang, and Liu (2014) further posited that trust develops over time through personal, cultural, or generational interaction and the actions of the individual. Trust is a set of learned expectations or beliefs that a person, group, or entity will keep commitments (Antonio & Souza, 2013). Most important, trust is essential to the moral or ethical treatment of stakeholders within an organization (Fulmer & Gelfand, 2012). Successful generational succession entails individual or collective actions of trust, whereby assuming risk includes allowing fate to determine the trustworthiness of the trustee to share, transfer, and integrate knowledge (Bachmann & Inkpen, 2011; Dohmen, Falk, Huffman, & Sunde, 2012).

The basic premise of understanding the relevancy of sustaining interpersonal, multicultural, or multigenerational relationships is the swift theory of trust. This theory, first posited conceptually by Fukuyama (1995), suggested that the basis of trust refers to traditional interpersonal relationships (Alexopoulos & Buckley, 2013). Meyerson et al., (1996) later framed the theoretical basis of swift theory as relating categorically to the social structure and actions involving members of an organization (Curnin, Christine, Paton, & Brooks, 2015). Wildman et al. (2012) later proffered the swift theory of trust by positing that the cognitive aspects of trust occurs based on the reciprocal assumption of individual or collective risks and trustworthiness. In addition, Reeskens (2012) asserted that trust arises out of cooperative behavior of shared beliefs or norms leveraging social

capital among members of the community, team, group, or family. Trust and social capital are mutually inclusive propositions in a multicultural and multigenerational environment. Fukuyama also noted that social capital in relation to trust codifies the cultural affiliation of religion, history, and tradition. Wilson (2011) asserted that the social theory of trust, based on cultural and inherited ethical habits includes exclusivity to kinships or associations achieved on a voluntary basis. As a normative process influenced, guided, and reinforced by a pragmatic set of standards and beliefs, the swift theory of trust affects individual, team, or organizational performance (Crisp & Jarvenpaa, 2013).

Despite the cultural common bond with inherited ethical habits, multicultural or multigenerational decision-making affecting low-trust societies embody consummating business via long-term, established relationships (Kuwabara, Vogt, Watabe, & Komiya, 2014). In addition, high-trust societies engage in business relationships based on face value by sometimes placing less emphasis on the role of trust in businesses decisions (Gerbasi & Latusek, 2015; Slater & Robson, 2012). Aritz and Walker (2010) posited that differences in communication attribute to differences in power and language literacy among cultures, thereby identifying only with issues germane to a culture or group. Nevertheless, communication, as a collaborative activity, is essential to conducting business globally (Louhiala-Salminen & Kankaanranta, 2011; Okoro, 2012). By contrast, Dibble and Gibson (2013) proffered that a cross-cultural approach is an important component to organizational behavior. The prism of multiculturalism supports a strategic collaborative effort to balance social, political, financial, cultural, and economic values

with the value of sustainability and social responsibility (Clark & Fuller, 2010).

Culture and language represent subsets of behavior defining nuances and practices similar to words, thereby influencing succession and corporate governance (Benavides-Velasco, Quintana-García, & Guzmán-Parra, 2013). These subsets of behavior with respect to culture collectively represent a mentality distinguishing individuals or cultures from another (Ramthun & Matkin, 2012). The problem affecting organizational decision-making is both multicultural and multilingual (Lauring, 2011). This problem concerns threats of multicultural, multilingual, or multigenerational misinterpretation that may affect both business communication and cost negatively (Kapoor & Solomon, 2011; Podrug, 2011). Multigenerational, multicultural, and multilingual misinterpretations not only affect business communication, but also effect employee professional development, human capital processes (especially succession planning), leadership and managerial styles, and employer-employee expectations negatively (Kapoor & Solomon, 2011).

Nevertheless, language and culture are determinant factors affecting tactical decision-making because linguistic and cultural misinterpretation delays any ability to make short- or long-term strategic decisions. Cultural and environmental factors, along with age, influence individual learning ability that lead to different individual talents (Steers, Sanchez-Runde, & Nardon, 2012). In addition, time, language, and culture affect decision-making because of cultural or generational differences regarding organizational structure and the authority to make decisions (Lewis, 2012; Podrug, 2011). Adherence and deference to authority with little, if any, delegation of authority constitutes the lack of trust between businesses or among team members (Hooker, 2012). This lack of trust

because of the inherent cultural or generational adherence and deference to authority with little, if any, delegation of authority hinders the ability to make decisions (Lewis, 2012).

Trust, as an essential component of economic performance, encompasses relationships which individuals, who initially do not trust each other, eventually work together only within established framework of formal rules and regulations (Bachmann & Inkpen, 2011). Fazio and Lavecchia (2012) posited that trust, with respect to social capital and informal or institutional and cultural beliefs and values, is fundamental to economic development and long-term economic growth. Given the various multicultural or multigenerational nuances in a global business environment, the application of the swift theory of trust requires a diplomatic approach to the decision process. This approach requires all parties to establish rules of engagement regarding decisions affected by the generational makeup of organizations' workforce. These rules of engagement, negotiated in advance, are an acknowledgement by concerned parties of mutually agreed upon practices and beneficial norms of engendering trust through transparency (Boh, Nguyen, & Xu, 2013). Moreover, trust, critical to mitigating risk and minimizing costs, enhances employee commitment and ensures productivity through effective communication and teamwork not only among employees, but also between subordinates and managers (Mansor, Mirahsani, & Saidi, 2012).

With respect to generational succession, the lack of trust among contemporaries arises resulting in conflict derived from the question of leadership competence or the lack of trust arise resultant of multigenerational or multicultural misinterpretation impeding a firms' succession planning process (Filsner, Kraus, & Mark, 2013). For this reason,

negative perceptions are abounded intergenerationally. These perceptions are the result of an economy and the job market of sustained unemployment, postponed retirements, and increased age-discrimination lawsuits where older workers (e.g., Baby Boomers) are perceived as too old, resistant to change, lacking the right skills, or as having health problems despite no change in job performance (Josef & Rene, 2012; Rix, 2011). North and Fiske (2012; 2013b) asserted that younger generations resent older generations and their delayed retirements, which limit opportunities hindering efforts for career advancement.

Despite Janis (1972, 1982) advancing groupthink as a theory, controversy remains concerning the theory of groupthink. Scholars such as Rose (2011) proffered and Hogg (2013) later intimated the theory of groupthink as more anecdotal, thereby lacking an empirical framework or standard research settings. Additional research by Raineri (2011), Rivas (2012), Sahin (2014), and Shirey (2012) explored the role of the theory of groupthink and the influence of groupthink on entrenched organizations' resistance to change and the influence on generational succession.

Theory of Groupthink

Kramer and Dougherty (2013), Minson and Mueller (2012), Rose (2011), and Tsikerdekis (2013) described groupthink as a pathology of consensus via group pressure on cohesion that interferes with decision-making and consideration of viable alternatives and risks affecting outcomes. Sahin (2014) defined groupthink as group-associated behavior of maintaining the status quo and minimizing conflict by avoiding critical assessment, analysis, and evaluation. Janis (1972, 1982), who pioneered the theory of

groupthink, defined groupthink as a psychological approach toward consensus, suppressing dissent, negating alternative outcomes, and inhibiting group albeit, cohesive support of the decision-making process. Janis revealed that change, when not executed properly, fails because the lack of common sense generates inefficiency, ineffectiveness, and chaos. Poorly executed change as posited by Raineri (2011) is the result of groupthink that jeopardizes group or team cohesion or organizational unity.

Groupthink develops through poor judgment, over confidence in capabilities, bias, obstinate or stubborn mentality, blind loyalty, and undue familiarity and influence (Ben-Hur, Kinley, & Jonsen, 2012; Shirey, 2012). As a group-associated behavior, groupthink interferes with critical thinking and contributes to unethical behavior affecting organizational or group decision-making (Rossberger & Krause, 2015; Sahin, 2014; Thiel, Bagdasarov, Harkrider, Johnson, & Mumford, 2012). Groupthink, as asserted by Shirey (2012), becomes a paradoxical impediment to change that results in an entrenched mentality developed through an extreme, often intense effort by organizations or people to maintain the status quo or make ill-advised misguided decisions for fear of violating their comfort zone.

Ahmed and Ahmed (2014) including Apfelbaum, Phillips, and Richeson (2014) proffered homogeneity and heterogeneity as potential, yet opposing antecedents to groupthink in terms of impact on the competitive advantage of businesses. Groupthink as a cohesive act of internal group complicity and homogeneity may affect human capital decisions with respect to succession planning (Collings, 2014; Festing & Schäfer, 2014; Hogg, 2013; Sahin, 2014). With regard to generational succession, heterogeneity may

also affect small business leaders' decisions by enhancing multigenerational knowledge retention and exchange, thereby improving employee decision-making and performance (Kraiczy, Hack, & Kellermanns, 2014). Despite the opposing points of view, an enhanced or hybrid version of groupthink could improve decision-making through the managed collective application of personal knowledge and skills in a collaborative effort that challenges individual perspectives, strategies, or solutions (Pautz & Forrer, 2013).

Narrative Paradigm Theory

The theoretical application of narrative paradigm theory entails ethical, social, multicultural, and multigenerational leadership providing value-laden information in a narrative form to ensure credibility through shared common experiences and views of others (Volker et al., 2011). Fisher (1984, 1985, 1989), while proffering narrative paradigm theory, defined storytelling as a narrative process of imparting information that ensures credibility via shared everyday experiences and views of others (Beal, 2013; Volker et al., 2011). Gill (2011) advanced the theoretical dimension of the narrative paradigm theory by defining storytelling as a medium that transcends generations and cultures dating back to earliest fundamental forms of human communication. Scholars such as Forman (2013), Lukosch, Klebl, and Buttler (2011), Sachs (2012), Smith (2012), and Whyte and Classen (2012) introduced storytelling conceptually as a method business leaders use to manage, control, and transfer knowledge during transformation in learning organizations. Leaders often present stories orally or textually to shape, mold, and frame transformative positive social change endeavors rich in facts (or assertions) but unavailable through other methods (Brown & Thompson, 2013; Von Stackelberg &

Jones, 2014). Dolan and Bao (2012) asserted that storytelling transforms organizational culture by not only allowing for a moral, ethical, spiritual, and emotional connection between management and employees, but also allowing employees to feel a part of a higher purpose.

Storytelling conveys a central understanding that bridges individual, organizational, and generational learning gaps; ensures the collection and integration of knowledge; and provokes organizational social change (Sense, 2011). Dolan and Bao (2012) posited that storytelling sets the empathetic tone for what exists now to what the leader expects in the future. Storytelling presents complex events sequentially and uniformly that reveals significant experiences of an occurrence under study (Gherardi & Perrotta, 2014). Consequently, business leaders often use storytelling to build employee trust and loyalty during times of change and uncertainty, but also make sense of reality (Gill, 2011; Yang, 2013).

Theory of Collaboration

Learning organizations create a competitive advantage by supporting employee collaborative efforts to acquire and transfer knowledge as well as make decisions (Aragón-Correa, Martín-Tapia, & Hurtado-Torres, 2013). Graci (2012) asserted that Gray's (1989) theory of collaboration included relevant, multi-dimensional aspects of a problem that exclude irrelevant issues while exploring different aspects of a problem collaboratively in search of solutions. Bedwell et al. (2012) described collaboration as a flexible, dynamic process involving and enabling multiple stakeholders to address problems or issues mutually across a varied organizational, local, national, and

international levels. In other words, collaboration is an evolving, alliance based process, formed within organizations or among people, of pooling knowledge to share expertise and capital resources mutually (Graci, 2012).

In terms of social change and social responsibility, the theory of collaboration encompasses a stakeholder-based approach that facilitates innovation collaboratively to address complex issues and achieves desired results by sharing, managing, and exchanging resources or capabilities (Woodland & Hutton, 2012). This stakeholder-based approach is a collaborative effort requiring both personal and organizational trust, communication, and leadership incorporating institutionalized norms as a corporate governance framework to achieve success across generations and cultures (Rigg & O'Mahony, 2013). For this reason, successful generational succession entails collaborative dialog and relationships between or among stakeholders through information sharing of unique expertise, knowledge, and resources that mitigate individual or collective weaknesses (Graci, 2012).

Stakeholder Theory

Garvare and Johansson (2010) defined stakeholder theory in terms of stakeholders and interested parties. Stakeholders are entities that organizations depend on for support (Hörisch, Freeman, & Schaltegger, 2014). However, unsatisfied entities could withdraw support, causing failure or damage to organizations (Garvare & Johansson, 2010). Gibson (2012) further defined stakeholders as entities or individuals affected by or who affect the organizational activities. Interested parties are entities with an investment or interest in organizational activities, but who do not have the means or the authority to influence the

organization or stakeholders (Garvare & Johansson, 2010). Conversely, Lahouel, Peretti, and Autissier (2014) later defined stakeholders as entities that exhibit or are capable of exercising power to influence the direction of a firm directly or indirectly.

Stakeholder theory, as noted by Garvare and Johansson (2010), is the fulfillment of stakeholder expectations while not reducing the needs of interested parties and future generations. Stakeholder expectations, based on the moral notion of fairness and reciprocation, are not only symbiotic but exemplify interdependent collaboration, inclusion, and cooperation between and among all entities (Gibson, 2012). The basic premise of stakeholder theory is to explore and manage stakeholder interest through multi-dimensional value creation representing an exchange of tangible or intangible resources or influence (Harrison & Wicks, 2013; Jensen & Sandström, 2011). According to Freeman's (1984) stakeholder theory, organizational and global sustainability efforts balance social change needs and interests of both stakeholders and interested parties (Garvare & Johansson, 2010).

The phenomenon of small businesses affected by generational succession indicates a need to identify and implement succession planning strategies. These strategies may mitigate the drain of intellectual capital and the limited or nonexistent tacit, implicit, or explicit transfer of knowledge affecting stability and growth. Generational succession with regard to succession planning and knowledge transfer supports research that suggest fairness, trust, communication, commitment, and effective leadership are essential antecedents in the commitment to change (Shin, Taylor, & Seo, 2012). Research methods useful in answering the qualitative study questionnaire began

an iterative and interpretive process of leveraging an emergent inquiry to explore the ontological, epistemological, axiological, and methodological basis of a problem (Auriacombe & Schurink, 2012; Hays & Wood, 2011).

Knowledge Management

Knowledge transfer. An important strategic factor associated with a firm's capabilities to achieve and sustain competitive advantage is the ability to acquire, retain, manage, and exchange knowledge (Durst & Edvardsson, 2012; Wang, 2011). Sharing, transferring, and integrating internal knowledge enhances and is essential to developing a competitive advantage (Donate & Sánchez de Pablo, 2015; Mäkeläa, Andersson, & Seppälä, 2012; Wang & Noe, 2010; Xu, Quaddus, & Gao, 2014). The internal transfer of best practices encompasses identifying barriers to knowledge transfer that affect the relationship between individuals or entities (Donate & Sánchez de Pablo, 2015). These barriers, as noted by Mäkeläa et al. (2012), affect the exchange of knowledge internally across different organizations, units, and functions.

Appelbaum et al. (2012) presented a conceptual framework for a corporate post-retirement strategy in response to changing workforce demographics. The conceptual framework proffered by Appelbaum et al., but later advanced by Marcinkus-Murphy (2012) denoted the exploitation of social, reverse mentoring, or corporate alumni or social networks to capture and transfer the knowledge of retiring Baby Boomers. The exploitation of social, reverse mentoring, or corporate alumni networks incorporates mitigating barriers to knowledge transfer (Marcinkus-Murphy, 2012). Appelbaum et al. further posited that creating and facilitating corporate alumni network is an efficient

means of using a mentor-protégé framework to transfer or retain intellectual capital. Developing and implementing post-retirement strategies encompass retaining and transferring knowledge through a social network and alumni programs (Markkula, 2013). Leveraging social, reverse mentoring, or corporate alumni networks by business leaders to transfer or create new knowledge between individuals represents a collaborative knowledge management strategy to sustain a competitive advantage in the global marketplace (Kuyken, 2012; Marcinkus-Murphy, 2012).

Harvey (2012) and Kuyken (2012) explored various strategies, processes, and methods used to enhance intergenerational or multigenerational knowledge transfer. The strategies, processes, and methods incorporate establishing, initiating, and building mentoring programs; team-building sessions; and a culture of sharing knowledge (Kothari, Hovanec, Hastie, & Sibbald, 2011; Kuyken, 2012). Joe, Yoong, and Patel (2013) investigated varied concepts regarding the effect of losing knowledge when an older employee departs a firm. The conceptual emergence of a formal corporate professional and social network leverages the expertise; relationships and associations; intellectual capital; and corporate governance knowledge of retiring, retirement-eligible, or departing older employees (Joe et al., 2013; Pobst, 2014). Appelbaum et al. (2012), Kuyken, and Marcinkus-Murphy (2012) indicated that businesses facilitated intergenerational knowledge transfer by providing leaders with knowledge management methods and strategies that mitigated barriers to knowledge transfer.

Though Appelbaum et al. (2012), Harvey (2012), Mäkeläa et al. (2012), Marcinkus-Murphy (2012), Kothari et al. (2011), and Kuyken (2012) discussed

knowledge transfer from strategic methods and process perspectives, J. S. Thomas (2011) examined knowledge transfer and loss of intellectual capital in terms of effect on organizational productivity and cost. This view constituted examining the transfer of knowledge and the loss of intellectual capital by conducting research that addressed organizational challenges regarding the transfer of tacit knowledge and organizational measures for facilitating the exchange of knowledge (J. S. Thomas, 2011). While addressing the organizational challenges of knowledge transfer or knowledge exchange, J. S. Thomas contended that businesses could not effectively compete, grow, and maintain normal operations without using and managing knowledge or intellectual capital.

Comparatively, Brunold and Durst (2012) noted that businesses experience significant risks by failing to manage intellectual capital, thereby inhibiting potential value-creation. Mäkeläa et al. (2012) further noted that increased knowledge sharing does not translate to improved productivity, but translates to increased cost because valuable resources originally earmarked for other business initiatives that maybe used potentially elsewhere. Durst and Wilhelm (2012) advanced and viewed research correlating knowledge management and succession planning as an acknowledgment by business leaders recognizing knowledge retention and succession planning as a mutually inclusive source of competitive advantage. Despite the potential barriers to knowledge sharing, J. S. Thomas (2011) asserted that losing knowledge or intellectual capital and experience as employees retire negatively affects productivity and the bottom line. Donate and Sánchez de Pablo (2015), Mäkeläa et al., and J. S. Thomas proffered that leveraging best practices,

methods, and strategies not only mitigates the adverse effects of losing productivity and cost to the bottom line, but also enables organizations to maintain a competitive advantage by recovering, retaining, and preserving knowledge.

Knowledge sharing. Wang and Noe (2010) contended that business leaders relying solely on staffing and training to help employees acquire competencies and prepare select employees as a potential pipeline of successors is an insufficient method of achieving a competitive advantage. While examining multigenerational knowledge transfer strategies or techniques, Stevens (2010) asserted that the primary source of a firm's value is knowledge and intellectual capital. Because knowledge and intellectual capital are critical to ensuring a competitive advantage in a global economy, business leaders must learn how to transfer knowledge from experienced employees to inexperienced employees (Wang & Noe, 2010). Christie, Jordan, and Troth (2015) subsequent to Swift and Hwang (2013) explored the willingness of professionals to exchange and use knowledge because of trust among coworkers, colleagues, or associates. The ability to trust influences an employees' willingness to exchange and use knowledge in the decision-making process (Casimir, Lee, & Loon, 2012; Wang, Wang, & Liang, 2014).

Because of multigenerational differences, managers, as noted by Stevens (2010), ignore the importance of or failed to recognize or capitalize on the benefits of intellectual capital. To mitigate the effect of multigenerational differences on knowledge management or knowledge sharing, Stevens asserted that changing the business's culture requires integrating processes supportive of managing, transferring, and sharing

knowledge. Strategic vision is a requisite for managing knowledge (Stevens, 2010).

This vision, with respect to managing intellectual capital, entails decisions regarding assumed risks affecting the allocation of resources that reflect individual commitment to success or organizational beliefs and values (Brunold & Durst, 2012). A firm's leadership allocating resources to share knowledge is a reflection of a commitment to capitalize on knowledge-based resources that reduce cost, improve performance, and leverage innovation, thereby leading to increased growth (Wang & Noe, 2010). Promoting an organizational culture that encourages creating and sharing knowledge enhances coordination, refines decision-making, and improves organizational performance (Lauring & Selmer, 2011). Therefore, a need for additional research emerged regarding the need for knowledge management, the effect of social networking on the knowledge transfer and management process, and the use of mentoring to manage, transfer, and share knowledge across generations.

Knowledge loss. Martins and Martins (2011) and Morris (2011) acknowledged previous research suggesting that losing knowledge affects the production, performance, efficiency, and competitiveness of an organization. Martins and Martins asserted that the loss of knowledge is a challenge to organizational competitiveness. Employee knowledge, as noted by Martins and Martins, is a critical, strategic asset used to maintain the economic viability and competitive advantage of business. As a critical, strategic asset, the meaning of knowledge and the manifestation of organizational knowledge provide a framework for investigating the strategic risks of knowledge loss and human interaction (Martins & Martins, 2011). Martins and Martins presented a theoretical model

identifying factors that enhance knowledge retention. This theoretical model, as shown by Martins and Martins, further indicated additional factors that manifest knowledge-based behavior (learning, knowing, creating, sharing, transferring, and applying knowledge), identify strategic risks of knowledge loss, and enhance individual and group behavior (see Figure 1).

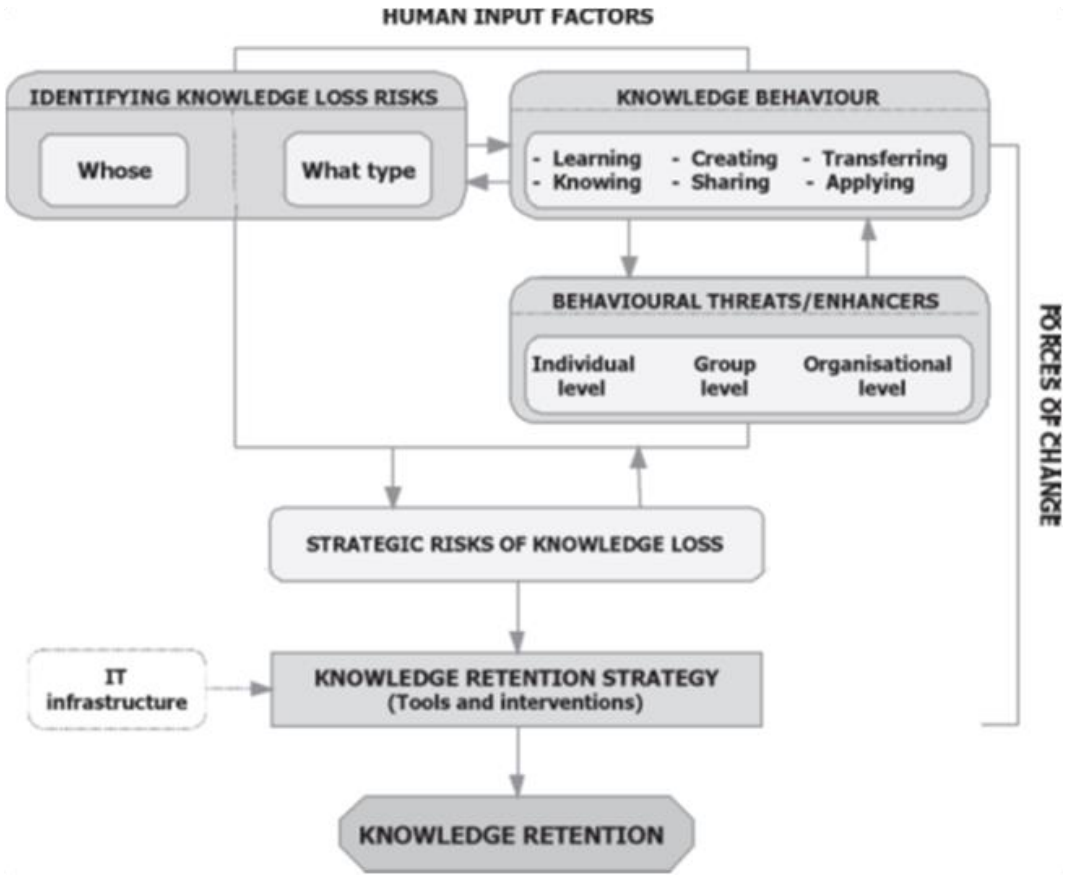

Figure 1. Theoretical model: Identifying the factors that would enhance or impede tacit knowledge retention. Adapted from "The Role of Organizational Factors in Combating Tacit Knowledge Loss in Organizations," by E. C. Martins and N. Martins, 2011, *Southern African Business Review*, 15, p. 63. Reprinted with permission (see Appendix A).

Morris (2011) conducted quantitative research by measuring the attitude, subjective norm, and intention encompassing the sharing of knowledge by retiring Baby

Boomers. Morris advanced Fishbein's (1967) theory of reasoned action as the basis for addressing risk experienced by organizations losing knowledge because of retiring Baby Boomers. This assumption of organizational risks is resultant of an attempt to understand Baby Boomer's beliefs, attitudes, and behaviors to share knowledge with younger generations willingly (Romano, 2015). A business addressing the risk of losing knowledge ensures remaining employees have access to tacit knowledge and instituting training programs avoids loss in production, performance, and efficiency (Morris, 2011). Organizations experiencing knowledge loss incur risks in production, performance, and efficiency as Baby Boomers become eligible to retire (Morris, 2011).

Morris (2011) also asserted that retirement-eligible workers would not share knowledge because of negative attitudes toward sharing knowledge. However, older employees' attitudes toward sharing knowledge improved and increased younger employee access to tacit knowledge (Morris, 2011). S. Durst and Wilhelm (2011) examined how small medium enterprises (SMEs), experiencing executive turnover, might identify and manage knowledge. S. Durst and Wilhelm, Martins and Martins (2011), and Morris research enriched current research in knowledge management by implementing a strategy that enhances the retention of knowledge.

Generational Transition

Generational transition and generational succession noted in this research study are interchangeable. Succession is individually or systemically initiated in a transitional approach and used when potential space or vacancy becomes or is about to become available (Osnes, 2011). With the recession, the limited availability of jobs and

generational conflicts between young and old are at the forefront of government and corporate policy regarding ageism or age discrimination affecting succession (North & Fiske, 2013a). Transitions trigger other transitions that individuals, who exit and enter roles, encompass a new authority structure for the organization (Osnes, 2011). This new authority structure is the result of a transitional conflict between an older generation, at or near traditional retirement age, who is in good health and remains employed, and a younger generation awaiting job opportunities that leads to uncertainty and ambiguity regarding multigenerational succession (North & Fiske, 2013a). Successful organizations that instantly identify differences among generations and learn that each generation has unique attributes, perspectives, and values that attract and retain the highest quality workforce (Zopiatis, Krambia-Kapardis & Varnavas, 2012).

Cardy and Lengnick-Hall (2011), McEvoy and Henderson (2012), and Whelan and Carcary (2011) each offered solutions and factors concerning how researchers mitigate negative nuances of generational transition. The negative nuances of generational transition might affect the loss of intellectual capital, increase employee turnover, and increase recruitment costs, thereby prohibiting firms from achieving competitive advantage (Cardy & Lengnick-Hall, 2011; Deyoe & Fox, 2012; Martins & Martins, 2011; McEvoy & Henderson, 2012; Whelan & Carcary, 2011). A succession-planning framework of mentoring, coaching, educating, and training may serve as methods of developing the next generation of leaders or managers (Titzer, Phillips, Tooley, Hall, & Shirey, 2013; Ulrich & Smallwood, 2012). In the midst of uncertainty during a generational transition, businesses achieve a competitive advantage by creating a

succession-planning framework that reduces employee turnover and recruitment costs and mitigates the loss of intellectual capital (Daghfous, Belkhodja, & Angell, 2013; Martins & Martins, 2011; McEvoy & Henderson, 2012). The synthesis of the collective narratives of McEvoy and Henderson, McNichols (2010), Whelan and Carcary, and Titzer et al. (2013) affirmed that planning and preparation are paramount if leaders and organizations are to manage and leverage successfully a multigenerational workforce.

Deyoe and Fox (2012), Lyons and Kuron (2014), Parry and Urwin (2011), and Salahuddin (2010) asserted that generational values, characteristics, differences, stereotypes, and leadership styles influence behaviors affecting the ability to support transformative generational transition. These behaviors result in the inevitability of succession encompassing the careful planning and managing of a process, which an organization completes under duress or an organization's decision makers has control, and subsequently completes regardless of reason (Lam, 2011). Identifying instituting, and using a process of planned succession entail developing the next generation of leaders to reduce employee turnover and recruitment costs (Enshera & Murphy, 2011; Salahuddin, 2010). Consequently, mitigating the loss of intellectual capital and minimizing organizational cost involves maintaining competitive advantage in the midst of uncertainty during a generational transition by carefully managing succession (Cummings-White & Diala, 2013; D. Durst & Goldenberg, 2010; Linderman, Baker, & Bosacker, 2011; Salahuddin, 2010).

D. Durst and Goldenberg (2010) examined what intangible assets make companies attractive to external successors and provide a holistic perspective of the

intangible external influences that affected business succession. D. Durst and Goldenberg further examined methods that reduce employee turnover and recruitment cost, and that mitigate the loss of intellectual capital to ensure a competitive advantage in the midst of uncertainty during a generational transition. Cameron (2011), D. Durst and Goldenberg, and Salehi and Golafshani (2010) noted that planning and preparation are paramount if leaders and organizations are to manage and leverage a multigenerational workforce successfully.

Succession Planning

Different definitions concerning succession planning exist. Klein and Salk (2013), Rothwell (2010; 2011), and Warrick (2011) proffered Fayol (1841-1925), who posited the administrative management theory, as one of first scholars to posit that leaders are responsible for ensuring the sustainability of an organization through planned succession. Rothwell described succession planning as a systematic process that identifies and prepares potential successors to assume a new role or position with increased levels of responsibility. Froelich, McKee, and Rathge (2011) described succession planning as a structured, planned knowledge retention process that ensures the systematic continuity of key leadership positions within an organization. Florea, Cheung, and Herndon (2013) subsequent to Kowalewski et al. (2011) defined succession planning as identifying and developing potential successors by aligning organizational goals with human capital needs. Duh and Letonja (2013) denoted that succession occurs when a successor replaces the founder or incumbent of an organization. Duh and Letonja, Durst and Wilhelm (2012), Garg and Van Weele (2012), Kowalewski et al., and Rothwell, defined

succession planning as a structured, planned continuity process, aligned with organizational goals that retain and develop intellectual capital by identifying and preparing potential successors for advancement into key leadership positions.

Schulz-Moser (2009) used a phenomenological research design to explore the effects of small business leadership on developing a dynamic succession management system. Creating a succession management system of acquiring, developing, and retaining talent is a challenge for small business leaders (Schulz-Moser, 2009). This challenge, according to Durst and Wilhelm (2012), entails small business leaders' efforts to anticipate skill shortages resultant of demographic changes and the effect of demographic changes on the national economy. Garg and Van Weele (2012) asserted that succession planning is a significant problem for small businesses.

This problem, as noted by Garg and Van Weele (2012), exists because the operations or management mostly conducted by founders of the organization or a small team of individuals, causes failure in implementing a succession plan. Garg and Van Weele explained that succession planning involves developing procedures that ensure a successful transition. In other words, small business leaders implement a succession-planning framework to address leadership development and exit strategies (Garg & Van Weele, 2012). While implementing a succession-planning framework, small business leaders address legal, financial, psychological, and educational considerations that ensure a successful transition (Garg & Van Weele, 2012). Despite the factors mentioned above to ensure a successful transition, small business leaders invest insufficient resources or lack sufficient resources to develop leaders within a succession-planning framework

(McAlearney, 2010).

Haynes (2011) and Ropes (2014) explored the problem regarding increasing generational diversity in the workforce. Kapoor and Solomon (2011) asserted that the workforce is more diverse than ever, spanning four generations and creating challenges and opportunities for companies globally. The consequences of a changing demographic revealed for the first time that four distinct generations would be working alongside each other in the workplace (Haynes, 2011; Sanaei, Javernick-Will, & Chinowsky, 2013). To preclude potential loss of competitive advantage resultant of changing demographics, Ropes asserted that business leaders should develop strategies that enhance or support intergenerational workforce learning and development. Each generation has specific workplace expectations and requirements that require managers to have the right processes and practices in place to meet challenges and to take advantage of opportunities (Haynes, 2011). Kapoor and Solomon proffered that having the right processes and practices is paramount to improving team effectiveness, achieving organizational success, supporting succession planning, and creating sustainable opportunities leading to a competitive advantage. Haynes subsequently proffered the importance of creating a work environment that respects generational differences and recognizes the importance of coexisting with each other. Therefore, learning organizations support diversity by using teamwork, communication, training, and succession planning that leverage generational differences as a competitive advantage (Haynes, 2011; Kapoor & Solomon, 2011).

Cole (2010) asserted that generational differences effect on succession planning is a significant concern for organizations. Comparatively, the prevalence of a diverse

workforce demographic is a concern of small business leaders (Standifer et al., 2013). Cole explored succession-planning efforts denoting five generational cohorts by delving into a debate addressing perceptive differences in recruiting, developing, and retaining employees. Agency, generational, human capital, institutional, and organizational learning theories served as an analytical framework for exploring the effect of generational differences on organizational succession-planning efforts. Cole suggested that businesses should consider generational differences when drafting and implementing succession plans. Despite business leaders' concerns, Standifer et al. (2013) posited that demographical changes have increased educational opportunities and technological innovations for younger generations.

Many organizations with a large Baby Boomer population do not have succession plans (Sanders, 2011). Cho and Lewis (2011) asserted that hiring and retaining new personnel is crucial as Baby Boomers, retirement-eligible employees, or midcareer employees retire. Sanders's (2011) proffered systems theory as a basis for exploring organizational leaders' perceptions and experiences with respect to decisions concerning succession planning. Organizations without a succession plan inhibit business leaders' abilities to prepare younger employees for leadership positions and to capture the knowledge and experience of current employees (Sanders, 2011). Sanders asserted that the implications for positive social change entailed implementing transition plans that mitigate the effect of retiring Baby Boomers on the quality of customer services.

Kowalewski et al. (2011) explored the importance of businesses incorporating succession planning into their company processes. Succession planning, as defined by

Kowalewski et al., is a process, used by business leaders, to align the personnel needs with organizations goals. Business leaders prepare employees within the succession-planning construct to fill critical middle and senior management vacancies (Kets de Vries & Konstantin, 2010). Succession planning based on mutual respect, trust, and understanding, is essential for transitioning between generations (Cater & Kidwell, 2014; Duh & Letonja, 2013; McMurray et al., 2012). For this reason, firms must consider short- and long-term strategies as well as internal and external or domestic and global forces when planning succession (Kowalewski et al., 2011). In other words, succession planning, as a part of the business's strategic plan, requires forecasting the talent needed to maintain and sustain growth (Harris, Craig, & Light, 2011; Stadler, 2011).

Appelbaum et al. (2012) asserted that the retirement of Baby Boomers is a concern of businesses regarding (a) new employee effectiveness and (b) the effect of retiring Baby Boomers on employee morale regarding the loss of corporate knowledge via succession planning. As the population ages over the next 5 years between 2012 and 2017, Appelbaum et al. noted that the importance of effective succession planning encompasses responding to the impact of losing corporate knowledge between different generations. Appelbaum et al. further indicated that Baby Boomers or senior employees are willing to share and transfer knowledge to younger generations.

Change Management

Learning organizations develop and implement plans improving the chances of successful change by conveying the strategic intent of growth through continuous improvement (Bold, 2011; Grady, Magda, & Grady, 2011). Rafferty, Jimmieson, and

Armenakis (2013) while exploring and proffering the organizational readiness for change theory, noted that preparing for organizational change is a multi-level, multi-functional endeavor. Whelan-Berry and Somerville (2010), Isaksson, Hallencreutz, Turner, and Garvare (2011), Ponti (2011), and Shin et al. (2012) asserted that prior research indicated that a majority of organizational change initiatives fail. Because of a desire for continued control and a desire to ensure the sustainment of the original vision and values created at the founding of the firm, small business leaders fail to plan and implement organizational change or succession initiatives (Carman & Nesbit, 2013; English & Peters, 2011). Many managers or leaders planning and executing change do not know or understand the importance of change (Grady et al., 2011; Rosenberg & Mosca, 2011). Leaders institutionalize and internalize change within an organization by implementing a vision that improves, institutes, and sustains new perspectives, processes, or procedures (McDeavitt, Wade, Smith, & Worsowicz, 2012).

Whelan-Berry and Somerville (2010) identified and delineated steps in the organizational change process by summarizing and clarifying the literature related to change drivers. Whelan-Berry and Somerville explored relationships between change drivers and the change process. Conversely, Malone (2011) addressed the research regarding change differently. Malone described change as an individual, but emotional and rational approach as part of a deliberative but very controlling process. This process, as described by Malone, involves achieving successful change with the drive, motivation, and energy. Rainari (2011) viewed the poor execution of change as jeopardizing group or team cohesion or organizational unity via groupthink. For this reason, and despite the

statistic concerning the failure rate of change, clear direction, motivation, and situational structure of the environment makes successful organizational change easier (Edmonds, 2011; Malone, 2011).

Trust, Communication, and Decision-making

Zarei et al. (2014) noted communication among team members relates significantly and primarily to trust. Zarei et al. further noted that trust is a critical component of organizational culture that builds team effectiveness by enabling business leaders to acknowledge social capital via strong and frequent collaborative communication as a competitive advantage. Trust is a set of learned expectations that people have of each other (Antonio & Souza, 2013). Therefore, a groups' expressed belief or a persons' vulnerableness that an individual, group, or entity will keep its commitments is a core tenant of trust (Fulmer & Gelfand, 2012; Seppälä, Lipponen, & Pirttilä-Backman, 2012). The basic premise of understanding the relevancy of sustaining interpersonal multicultural or generational relationships is the swift theory of trust. The swift theory of trust, first postulated by Fukuyama (1995), suggested examining trust in terms of traditional interpersonal relationships on a reciprocal basis within a categorical social structure in response to the actions of others. Trust evolves over time through the interactions and the actions of an individual or group (Qu et al., 2014). Fukuyama asserted that trust arises out of cooperative behavior of shared beliefs or norms leveraging social capital among members of the community, team, group, or family. Consequently, trust and social capital are mutually inclusive propositions in a multicultural or multigenerational environment. Social capital in relation to trust codifies the bond of

religion, history, and tradition culturally (Fukuyama, 1995).

According to Fukuyama (1995), trust is an essential component of economic performance for which business leaders, who do not trust each other initially, eventually cooperate with each other on the basis of established rules or regulations, but also on the basis of established societal or cultural norms. These rules and regulations are valuable in supporting inter-organizational relationships encompassing the polling of knowledge, the creation of ideas, and controlling of cost (Bachmann & Inkpen, 2011). In addition, this approach entails business leaders or negotiating parties to establish rules of engagement or a set of mutually agreeable protocols regarding multicultural decisions or decisions affecting a multigenerational workforce. These decisions are a part of advance negotiations, which protocols delineate reciprocity or mutually beneficial practices, and norms, thereby establishing transparency that engender good faith among all parties concerned (Steers et al., 2012).

Despite a cultural or multigenerational common bond, there are potential challenges regarding multicultural or multigenerational decision-making as related to the swift theory of trust and affected by time, language, culture, and societal norms. These challenges affect low-trust societies that establish long-term relationships before making decisions or before conducting business (Kuwabara et al., 2014). In other words, high-trust societies engage in business relationships based on face value and, though important, sometimes place less of an emphasis on the role of trust in the businesses decisions (MacDuffie, 2011). Lin, Ho, and Lin (2013), On, Liang, Priem, and Shaffer (2013), and Weck and Ivanova (2013) further asserted that different cultures view trust

differently which may require individuals to learn and adapt culturally to further cultivate business relationships. This view involves organizations leveraging resources supportive of implementing sustainable and socially responsible solutions. Hogg (2013) asserted that research concerning the effect of either generational or organizational culture on trust and decision-making requires further study.

In addition to trust, a challenge affecting decision-making entails multigenerational culture and language. Culture and language are behavioral subsets that define collaborative, trusting business relationships and practices through mutual, yet reciprocal exchange of knowledge and actions (Aritz & Walker, 2010, 2014; Kim & McLean, 2014; Lauring, 2011; Mockaitis, Rose, & Zettinig, 2012). Though culture and language are behavioral subsets, culture is as different as language that may lead to misinterpretation or misunderstanding of individual or group intent on conducting business, thereby affecting trust (Lauring, 2011; Lauring & Selmer, 2012). These differences in culture (and language) require different management or leadership styles that are responsive to understanding cultural (and linguistic) differences instead of market conditions (Podrug, 2011).

Multicultural or intercultural communication is a keyword in the age of globalization (Usakli, 2011). Scholars such as Aritz and Walker (2010; 2014) investigated varied modalities regarding the intercultural aspects of communication and decision-making. Usakli (2011) examined intercultural communication in terms of comprehensibility, intelligibility, and interpretability with respect to language and social psychology. Aritz and Walker asserted that because of globalization, business leaders

acknowledged the need to improve, understand, and respect diverse forms of intercultural or multicultural communication, values, and practices affecting decisions. Consequently, diversity, multicultural identity, and mutually intercultural communications involve questioning or examining issues affected by globalization (Usakli, 2011).

Aritz and Walker (2010; 2014) asserted that multigenerational differences in communication attributes to differences in power and language literacy among cultures. Differences in conversation style attribute to or identify only with issues germane to particular cultures (Aritz & Walker, 2010; 2014). Aritz and Walker indicated that the challenge of decision-making in a multicultural environment affects the ability of business leaders to communicate despite the threat of misinterpretation or misunderstanding regarding cultural norms. Language and culture are determinant factors affecting tactical decision-making because linguistic and cultural misinterpretation potentially delays any ability to make short- or long-term strategic decisions. The ability to communicate by acknowledging generational differences and similarities guide business decisions regarding workforce or succession planning and organizational structure (Morris, 2011). Time, trust, language, culture, and the ability to communicate affect decision-making because of differences among cultures regarding organizational structure and the authority to make decisions.

Summary and Transition

This research study encompassed exploring generational transition and succession among small businesses leaders. The expected beneficiaries of this study are small businesses experiencing generational knowledge transfer because of the little or no

succession planning or continuity of operational planning. Kotz (2010) later Byun and Frey (2012) suggested the existence of a correlation between generational succession, corporate and U.S. federal government downsizing and outsourcing, and an aging workforce.

A global economic crisis, massive unemployment, corporate and government downsizing, and outsourcing with an aging workforce have fueled cognitive dissonance between generations while U.S. business leaders try to maintain a competitive advantage (Byun & Frey, 2012; Kotz, 2010). Maintaining a competitive advantage, through sustained succession in the midst of a generational transition, entails a type of systems thinking by which small business leaders systemically embrace sustainability and social responsibility. This type of systems thinking encompasses small businesses leaders maintaining a competitive advantage by continuously improving processes that embrace change or face cessation of operations (Gibbons, Kennedy, Burgess, & Godfrey 2012). Consequently, the application of systems thinking constitute small businesses responding to current economic conditions by balancing financial performance with corporate sustainability and social responsibility or view corporate sustainability and social responsibility as an additional bottom-line expense or as an opportunity for positive public relations (Busco, Frigo, Leone, & Riccaboni, 2010).

The findings of this research study may provide small businesses a foundation with realistic and pragmatic solutions for instituting a succession-planning framework. These solutions denote a framework supportive of mentoring, educating, training, and developing successive generations to become leaders or managers. Outlined in Section 2

are the purpose, research methodology and design, population and sampling technique, descriptions of instrumentation, data collection and organization technique, data analysis technique, validity, and reliability of the qualitative study questionnaire used in this current study. In Section 3, I present an overview of the pilot and main studies, a detailed presentation of the findings, applications to professional practice, implications for social change, recommendations for action, opportunities for further research, personal reflections of the research experience, and a summary of the study.

Section 2: The Project

Introduction

Business succession is a difficult, but relevant, obstacle to retaining and transferring knowledge from the incumbent to the successor (Bracci & Vagnoni, 2011). The deterioration or loss of knowledge will continue as employees retire, quit, or leave for other opportunities as businesses fail to develop and implement multigenerational knowledge management strategies (J. S. Thomas, 2011). Sanders (2011) asserted that business leaders prevent the failure of succession planning in preparing future leaders by ensuring the sustainable retention or exchange of knowledge (Sanders, 2011). With respect to incumbent-successor employee knowledge exchange, Summers, Humphrey, and Ferris (2012) acknowledged that replacing personnel is one of the most common organizational changes in business. Bennett, Pitt, and Price (2012) contended that companies must avoid employee turnover, job dissatisfaction, alienation, low productivity, low morale, absences, resignations, and, most important, increased competition for talent by managing generational succession. Kapoor and Solomon (2011) warned that generational conflicts reduce profitability, create hiring challenges, increase employee turnover, and decrease employee morale.

Because of potential concerns regarding generational conflicts, organizational leaders may experience a Hobson's choice (Champagne, 2015; Lawrence, 2014). This choice involves business leaders hiring a younger, less costly, and less experienced workforce combined with retiring Baby Boomers often resulting in increased cost and lost intellectual capital while paying higher salaries to retain experience, yet retirement-

eligible workforce (Sanders, 2012). Consequently, generational differences concerning the effect of generational succession on small businesses are the result of a generational and cultural change in how society, companies, and employees view people living and working longer (Garg &Van Weele, 2012; McMurray et al., 2012). Therefore, I explored the problem of generational succession by examining issues concerning an aging workforce and generational succession that influences the ability of small businesses to retain or transfer knowledge.

Purpose Statement

The purpose of this qualitative case study was to explore the effect of retirement-eligible Baby Boomers on small business leaders' abilities to retain and transfer knowledge to successive generations. U.S. small business owners, owner-managers, and owner-CEOs in the Washington, DC metropolitan area were the focus of this study. These small business leaders represented any of four generational cohorts (Veterans, Baby Boomers, Generation X, and Generation Y). The primary customer base of these small businesses was the U.S. federal government and the U.S. Department of Defense (DOD). An estimated 27.5 million small businesses account for 59.7 million or 49% of U.S. private sector jobs ("FAQ," 2011). In addition, 51.5 million or 66% of 78 million Baby Boomers commonly hold leadership or management positions (Chavez, 2011). The central problem was aging Baby Boomers retiring or working beyond retirement eligibility while younger generations enter the workforce. With implications for positive social change abound, this phenomenon affects 18.15 million U.S. small businesses that do not have a succession plan (Beesley, 2011). The implications for positive social

change entail offering small business leaders ideas with recommendations for developing and executing succession plans that mitigate the effects of retiring or retire-eligible Baby Boomers (Sanders, 2011).

Role of the Researcher

The researcher's role in this study was as a significant instrument with respect to experiences, values, beliefs, and biases while exploring the problem under study (Hunt, 2011). I currently have a 7-year professional association with a multinational, Fortune 100 defense contractor serving as a Senior DOD Advisor and Program Manager of a $137M enterprise supporting various DOD programs. The position of a Senior DOD Advisor and Program Manager is to provide functional and technical subject matter expertise that leverages best industry practices of mitigating risks, improving processes, and integrating systems. Additional responsibilities of a Senior DOD Advisor and Program Manager include engaging, managing, and cultivating business relationships that ensure growth and increase market share.

The role of the researcher is to use multiple sources to collect, organize, and interpret data and document data collection across various themes (Quisenberry, 2011). Moustakas (1994) acknowledged a researcher's involvement in qualitative research is a unique embodiment as a qualitative data collection instrument (Kenny, 2012; Pezalla, Pettigrew, & Miller-Day, 2012). Tufford and Newman (2012) posited that, as a qualitative data collection instrument, a researcher would subjectively collect, interpret, and present data based on a set of assumptions, values, interests, emotions, and theories in the conduct of qualitative research. As an instrument in this approach to inquiry, I

designed research questions, validated study questions via a pilot study, solicited study participation via e-mail, collected participant response via SurveyMonkey, and used a modified van-Kaam Method to identify emergent themes.

To preclude potential conflicts of interest, I excluded small business leaders with a contractual relationship with the aforementioned multinational, Fortune 100 defense contractor from participating in this study. Henriques (2014), Miner-Romanoff (2012), and Moustakas (1994) posited that research requires recognizing bias and subjectivity to avoid ignoring perceptions or preconceived notions of the problem. Excluding small business leaders with a perceived or acknowledged relationship with the client or employer mitigates any undue influence that may affect current or future business arrangements.

Mitigating bias and subjectivity encompassed using bracketing or epoché as a part of the data collection, interpretation, and presentation process (Moustakas, 1994). Bracketing, as defined by Tufford and Newman (2012), increases rigor in research by mitigating individual preconceptions while exploring a problem reflectively. Epoché, as a transcendental approach, is a Greek word defined as refraining or systematically setting aside any preconception or prejudgment of experiences, knowledge, beliefs, meanings, or things ensuring unbiased results (Moustakas, 1994; Onwuegbuzie et al., 2012). This transcendental approach involves achieving a cognitive, yet self-reflective and self-reflexive understanding of participant experiences that transcends individual preconceptions by setting aside biases while exploring a problem under study (Perry, 2013).

As a part of the bracketing or epoché process, I used the Internet to collect data as a quick, easy, and less costly data collection method than traditional data collection methods (Luo, 2012). This method of data collection entails using electronic, Web-based qualitative case study questionnaires with open-ended questions as a part of a holistic, interpretive inquiry. Using holistic or interpretivist accounts, derived from well-rounded multiple perspectives, requires research to be contextually viewed through the descriptive events of participants uncovering and preserving real-life human experiences (Leitch, Hill, & Harrison, 2009). Interpretivists' qualitative and naturalistic approaches to research require an inductive and holistic framework analysis to understand the human experience contextually while explaining the occurrence under study (Chowdhury, 2014; Peredaryenko & Krauss, 2013). This inductive data analysis and interpretive inquiry represent an understanding that unfolds from the lives and perspectives of others (Agee, 2009).

Participants

A researcher may use case study research (CSR) to explore existing knowledge of a single or multiple case(s) to advance new knowledge (Damianakis & Woodford, 2012). Marshall, Cardon, Poddar, and Fontenot (2013) suggested interviewing 3 to 5 participants per case study. Exploring knowledge of three to five cases is appropriate for CSR (Roy, Zvonkovic, Goldberg, Sharp, & LaRossa, 2015). A qualitative researcher should interview approximately 10 participants (Binks, Jones, & Knight, 2013; Bolderston, 2012). Harris (2013) contended that a researcher should sample a minimum of 5 to 25 participants. Baškarada (2014) proffered that interviewing less than 15 participants per

case study is neither sufficient nor suitable for qualitative research. Marshall et al. (2013) further argued that conducting a qualitative study with case study design entails eliciting contextualized, enriched human experiences holistically from a minimum of 6 to 10 participants.

Baker and Edwards (2012) and Bryman (2012) posited that a researcher should present research questions to a minimum of 20 to 30 participants while conducting a qualitative study. Dworkin (2012) contended that sampling a minimum of 25 to 30 participants is an adequate sample size to achieve saturation while conducting a qualitative study. I targeted and solicited a geographically dispersed population of 72 small business leaders purposively within the Washington, DC metropolitan area.

Estimating adequate numbers of participants to achieve saturation depends on not only purposively selecting participants that meet the delimiting factors of this study, but also the problem, background of the problem, research method and design, nature of the study, and conceptual framework of the current study (Marshall et al., 2013; Mason, 2010). The sample size in qualitative research should not be too large or too small, thereby wasting time and resources in overcoming the difficulty of achieving saturation while collecting and examining data (Griffith, 2013; Roy et al., 2015). Though the years of experience owning and operating a small business with 500 or fewer employees varied, I sampled participants purposively and used demographic delimiting criteria on the basis that they are the primary source of strategic knowledge and dynamic capabilities of the business (Bracci & Vagnoni, 2011).

The delimitations of this study are owner-managers, owner-CEOs, and owner-

presidents of small businesses located within the Washington, DC metropolitan area (a) whose primary customer base is the U.S. federal government and the U.S. DOD, (b) who started and owned and operated their business since 2007 to the present, (c) who have a minimum of 5 and no more than 500 employees, and (d) who employ a diverse workforce with respect to age. To collect data for this qualitative case study, I solicited participants purposively through referrals from friends, family, colleagues, and associates with small businesses or knowledge of small business leaders that met the delimiting factors for participating in this study. Soliciting study participants encompassed using professional online newsletters or journals, accessing social media outlets from professional Defense and Aerospace trade organizations, and receiving referrals from colleagues or associates who own and operate small businesses. Data collection efforts for this study entailed soliciting participants with a variety of capabilities and skill sets across various industries electronically.

The objective of this study was atarget population of 72 participants with an expected 50% response rate or a sample of 36 participants. Pursuing and advancing research offers in-depth and enriched knowledge that the description of the problem denotes the focus of qualitative research rather than acquiring a defined number of participants (O'Reilly & Parker, 2013). Despite the objective of sampling 36 participants out of a target population of 72 participants, I achieved saturation at 23 participants out of a sample of 36 participants. Achieving and justifying data saturation occurred because participants provided enriched, reliable, valid, and replicable results, where no new themes or ideas emerged (Elo et al., 2014; Francis et al., 2010); further interviews were

then unnecessary.

Techniques to achieve and justify data saturation that entailed analyzing enriched, reliable, valid, and replicable study findings thematically resulted in the emergence of 14 themes (see Section 3). Ando, Cousins, and Young (2014) defined data saturation as a moment in research when exploring a problem under study offers no additional themes. Consequently, achieving saturation occurs when data analysis no longer yields enriched, valid, and replicable findings (Malterud, 2012).

Data collection beyond participant 20 continued until information provided by small business leaders indicated consistent and recurring themes. Achieving saturation involves continual data collection and examination until findings denote redundant, non-emergence of new themes, evidence by repetitive revelations of participant lived experiences (Cleary, Horsfall, & Hayter, 2014; Hikari, Cousins, & Carolyn, 2014; Walker, 2012). For example, results from participant 20 showed recurring, yet similar findings, concepts, or themes supplied by participants 1-19. These participants expressed the importance of a collaborative, organizational culture that embrace change, respects, values, and acknowledges a multigenerational workforces' contribution to assuring financial growth and competitive advantage through succession planning. Consequently, continued data collection past Participant 23 offered no additional benefit to the story, theory, model, or framework, because participant responses yielded recurring concepts or themes that achieved data saturation, where no new themes or ideas emerged (Hanson, Balmer, & Giardino, 2011; Hunt, 2011; Mason, 2010; Morse, Lowery, & Steury, 2014); further interviews were then unnecessary.

On-line, Web-based elicitation of participant responses from a geographically dispersed population while conducting research offers an advantage of mitigating challenges regarding time, distance, access, and cost (Jowett, Peel, & Shaw, 2011; Stacey & Vincent, 2011). Offering a qualitative study questionnaire to participants dispersed geographically throughout the Washington, DC metropolitan area in-person or via telephone was not suitable for this study because of time, distance, access, and cost. I distributed invitations to and provided participants dispersed geographically, access to a Web-based, online open-ended questionnaire link via email (see Appendix E). Collecting data, via electronic Web-based qualitative case study questionnaire, is of higher quality compared to face-to-face or telephonic interviews because participants can revise responses reflectively or reflexively (Stacey & Vincent, 2011).

The low cost of a Web-based, qualitative case study questionnaire offered an enhanced data collection capability compared to questionnaires that require the use of a telephone or in-person interviews, or surveys (Belfo & Sousa, 2011; Lindhjem & Navrud, 2011). Using the Internet to conduct a Web-based, qualitative case study questionnaire offered the advantage of lower cost, administrative ease with the potential of reaching a larger sample (Windle & Rolfe, 2011). Collecting data, via electronic Web-based, qualitative case study questionnaire not only reduces sociability, but leads to less participant inhibition in responding to study questions (Stacey & Vicent, 2011). Additional advantages of a using Web-based, qualitative case study questionnaires includes the ability to mitigate participant nonresponse bias by increasing the breadth and scope of participant response through conveinent, yet enhanced speed of data collection

(Misra, Stokols, & Heberger-Marino, 2012). Leveraging technology to conduct qualitative research also improved the ability to check responses rapidly and adjust or update electronic questionnaire content immediately (Belfo & Sousa, 2011).

Despite the aforementioned advantages of using technology to collect data via electronic Web-based qualitative case study questionnaires, there were some challenges. Using a Web-based questionnaire offered the potential challenge of ensuring participants respond only once to this study (Konstan & West, 2011; Olsen, Keltyka, & Kimmell, 2011). Additional challenges in using a Web-based questionnaire includes (a) managing extensive amounts of data, (b) ensuring compliance with ethical, confidential, and legal requirements to protect study participants, (c) controlling which participants have the technological knowledge or skills to participate in this study, and (d) lacking control over participants completing the questionnaire (Geerts & Waddington, 2011).

Given the aforementioned challenges of using technology to collect data via electronic Web-based qualitative case questionnaires, I used SurveyMonkey.com's encrypted, user-password, authentication capabilities to ensure participant anonymity, response security, and confidentiality to mitigate potential threats to validity concerning multiple participant responses. Additional techniques and strategies to preclude potential threats to validity included scrutinizing participant-provided demographic information, e-mail addresses, computer internet protocol addresses, and participant responses comparatively to mitigate invalid multiple participant responses. Teitcher et al. (2015) advised researchers to use various methods and strategies to detect, prevent, and respond to underlying or questionable ethical concerns that may threaten the validity of a study.

To protect participants' rights and privacy, I requested authorization from each participant via informed consent, and a confidentiality agreement (see Appendix C). Anticipated ethical issues' regarding this study suggested a requirement to protect participant personal identifiable information (PII) or a firm's sensitive proprietary commercial, business information (CBI). Protecting participants PII and confidential CBI entails instituting methods that the researcher and participant develop, build, and maintain trust to safeguard the integrity of the research study (Udo-Akang, 2013). Methods to protect participants' PII, CBI and the names of companies entailed using an on-line pseudonym generator at http://www.namegenerator.biz/pseudonym-generator.php to assign a pseudonym to each participant and an alphanumeric code to each participant business.

The disclosure of participant PII or a firm's sensitive proprietary CBI damages reputations, and could subject the research, the researcher, and the respective educational institution to ethical sanctions including legal action (Bristol & Hicks, 2013; Martin & Inwood, 2012). I requested participants' signature on nondisclosure, consent, or confidentiality agreements to assure participants that any disclosure of information provided by the study does not create an ethical dilemma and ensure the information provided by participants remained confidential. Any unauthorized release of such information jeopardizes the research, study, and perhaps the participant. The issuance of a consent form with a confidentiality agreement offered participants assurances of the confidentially, including protection of PII, CBI, and data collected.

Upon issuing consent forms and confidentiality agreements, I provided

participants information concerning the prohibition against disclosure and protection of participant confidentiality with the option to withdraw from the study at any time. Because of the current study's implications for social change, participants' consent for partial disclosure of PII, CBI, or demographic data involved promising full disclosure without violating participant confidentiality (Won Oak, 2012). Examples of information subject to partial disclosure were age, professional background, education, business location, business type, and industry.

Though incentives or inducements may increase participant response or reduce nonresponse bias, study response depends upon participants believing that the benefits outweigh the cost of nonparticipation in the study (Singer & Ye, 2013). Participation in this study was voluntary. Participants did not receive any incentives or inducements and will have the right to withdraw from the study at any time without reason and negative consequences (Allah, 2011; Kenan-Smalls, 2011; Quisenberry, 2011). With ethical concerns regarding threats to reliability and validity of the study, I excluded data collected from participants who withdraw from the study (Anstadt, Bradley & Burnette, 2013).

To mitigate any misinterpretation or exaggeration of the study before participants volunteer, I ensured consent forms and confidentiality agreements denote the purpose, benefits, risks, and sponsorship of the study for review to assure participant response or reduce nonresponse bias (Won Oak, 2012). Increasing participant response or reducing nonresponse bias is a fundamental aspect of qualitative research which interpersonal reciprocity engendered trust and confidence between researcher and participant (Buckle,

Dwyer, & Jackson, 2010). Reciprocity occurs by ensuring that the researcher and the participant understand that they both should benefit from the research through a collaborative, yet reflective and reflexive effort of sharing and dialoguing in the research process (Ravenek & Rudman, 2013). To provide reciprocal assurances of mutually beneficial results from the study, participants, upon request, can receive a copy of the study for review and comment. An offer to provide a copy of the study occurred while requesting participant consent with assurances of maintaining participant confidentiality(see Appendix C).

Ethical issues abound concerning the effect of technology on securing data with respect to the confidentiality of participants' responses gathered electronically through Web-based questionnaires (Palys & Atchison, 2012). I archived research information and data on encrypted portable hard drives and universal serial bus drives. The protection of hardware and software from intrusion or compromise occurred by using Norton PGP Desktop Home by Symantec to password-protect and encrypt research information and data. Storing and archiving research data securely combined with data retention and disposition procedures is essential to guaranteeing the availability of data for future audits or research (Gibson & Gross, 2013).

Storage of e-mail paper copies, questionnaires, bibliographical references, spreadsheets, PowerPoint presentations, the research prospectus, the dissertation, participant identities, and confidentiality agreements occurred in 2-inch binders and 6-part folders secured in a fire-, water-, and theft-proof safe. The amount of time required to retain research data varies from 3 to 10 years (Goth, 2012; Lin, 2009; Torrance, 2012).

Corti (2012) posited that to ensure the availability of data for future advancement of research or future audits, researchers secure, preserve, archive, and store research data and resources. I will store and archive research data for 5 years to ensure accessibility for future audits or future research.

Long-term storage of research data preserves and protects data from obsolescence, loss, or irreversible damage (Inter-university Consortium for Political and Social Research [ICPSR], 2012). Destruction of inactive, obsolete hard copy files will occur through shredding or incineration. Deletion of inactive, obsolete digitally stored data encompasses degaussing or erasing hard drives using BCWipe Version 6.02 by Jetco, Inc. I will shred or incinerate inactive, obsolete hard copy files and use BCWipe Version 6.02 by Jetco, Inc.to delete inactive, obsolete data from electronic storage media.

Research Method and Design

Exploratory research begins with an integrated qualitative research method and design that maximizes rigor as a criterion for demonstrating trustworthiness aligned with traditional, albeit essential ontological, epistemological, axiological, and methodological elements of qualitative research (Auriacombe & Schurink, 2012; Hays & Wood, 2011; Hunt, 2011; Teddlie & Tashakkori, 2012). Reducing and exploring personal and situational relationships by disclosing the structural essence or meaning of the human experience is a rigorously qualitative descriptive process (Finlay, 2012b). The qualitative approach to inquiry ends with data collection and analysis responding to the central problem. Through self-awareness or personal iterative interpretation of a problem, outlining the essence of participant experiences supported advocating change or reform.

The iterative and interpretive process consisted of exploring, interpreting, and understanding participant experiences in a reflexive and reflective manner (Petty et al., 2012). Understanding the social world denotes researchers interpreting, adopting, and creating knowledge via an interpretive approach (Leitch et al., 2009).

In the business community, the problem of generational succession and transition is significant. As Baby Boomers retire, succession planning has become a challenge for business leaders to sustain growth in a global economy (Garg & Van-Weele, 2012). Shared societal, social, historical, and environmental experiences influence generations (Gursoy, Geng-Qing, & Karadagc, 2013). Differences in values, worldviews, work ethic, language, dress, appearance, and thought created multigenerational or intergenerational workplace conflicts (Angeline, 2011). These multigenerational or intergenerational conflicts suggest that younger generations have aspirations or motivations to succeed older generations (Joshi, Dencker, & Franz, 2011). Successful multigenerational or intergenerational succession or transition is central to leveraging resources that ensure stakeholder and shareholder value resulting in sustained competitive advantage and social change.

Research Method

Though qualitative and quantitative methods entail a divergent philosophical point of view, qualitative methods earned the respect among scholars because qualitative research results indicate meaningfulness or authenticity (Fisher & Stenner, 2011). The qualitative research methodology is an appropriate method for this study because of passion or desire for satisfying a curiosity regarding an understanding a problem (Finlay,

2012a). This research method supports both an advocacy and a social constructivist worldview responsive to multiple points of view that illuminates and addresses a complex problem while advocating awareness and change (Lenzholzer, Duchhart, & Koh, 2013).

In-depth research entails framing the advocation of change or reform by exploring participant experiences descriptively through self-awareness or individual interactive interpretation (Finlay, 2012b; Walker & Taylor, 2014). I used a qualitative research methodology to substantiate an ongoing, reflective process of learning the essence of the human experience by developing an understanding and unfolding of lives through the perspectives of others and oneself (Agee, 2009). Qualitative research methodology is a rigorous description, reduction, and exploration of personal relationships or situational events by disclosing the structural essence and meaning of the human experience (Finlay, 2012b).

Rigorous data collection and examination through replicable well grounded, shared, and peer-reviewed research resulted in deriving and achieving optimum qualitative research findings (Applebaum, 2012). Choosing the qualitative research design entailed coherently reflecting on and providing a logical, systematic analysis and synthesis that essentially and existentially described the human experience (Moustakas, 1994; Sanders, 2011). Agee (2009) noted that the qualitative inquiry's reflective process is the strength of a qualitative approach to inquiry.

Salehi and Golafsahani (2010) asserted that the increased complexity of research problems requires the consideration of alternative methods that not only ensures research is reliable and valid, but also offsets the disadvantages of other research methods. To

justify using a qualitative approach to inquiry, I addressed the central question and qualitative study questionnaire specific to a broad approach to explore the assumed ontological (nature of reality), epistemological (what is known), axiological (inclusion of values), and methodological (emergent research) aspects of the current problem under study (Bansal & Corley, 2011; Biddle & Schafft, 2014). This justification offered an optimum approach to inquiry of choosing comparatively between quantitative research and qualitative research. Comparing research methods entails choosing between the quantitative research methods by objectively seeking a paradigm under a single reality or choosing qualitative research method by subjectively seeking a paradigm under multiple realities (Castellan, 2010).

The basis for exploring and examining the inductive, thematic aspects of qualitative research vice the deductive, generalized aspects of quantitative research involves comparing and contrasting worldviews under multiple realities (Bahari, 2012). Because of documenting, categorizing, and analyzing collected data thematically, the inductive qualitative aspect of this study suggested that the quantitative research method did not suit the needs of this approach to inquiry (Onwuegbuzie et al., 2012; O'Reilly & Parker, 2013). Comparatively, Salehi and Golafsahani (2010) suggested integrating quantitative and qualitative methods, also known as mixed methods research, encompass maximizing the strengths of one research method and minimizing the weaknesses of the other that contributes to the viability of the analysis and comprehensions of a problem. The integration of research methods entailed holistically and concurrently combining data collection and analysis (triangulating, iterating, blending, embedding, and nesting),

sequentially (explanatory and exploratory), or ideologically through a transformative lens (sequential or concurrent; Jogulu & Pansiri, 2011; Salehi & Golafsahani, 2010).

Mixed methods research is used by researchers to address broad, general complex problems (Venkatesh, Brown, & Bala, 2013). The sequential or simultaneous use of qualitative and quantitative research or mixed methods research requires an experienced researcher (Denzin, 2010). Because of the additional cost and skill set needed to complete mixed methods research, the complexity of using both qualitative and quantitative research methods did not suit the needs of this study (Molina-Azorin, 2012; Venkatesh et al., 2013).

Research Design

Based on participant perspectives, beliefs, values, and motivations, the rationale for using a qualitative research design was to elicit an insightful understanding of an event, occurrence, or problem in an inductive vice deductive manner (Curry, Nembhard, & Bradley, 2009). Efforts to choose the ideal research design reflected a choice between ethnographic, grounded theory, case study, phenomenological, participatory, and narrative designs (Onwuegbuzie et al., 2012). This choice encompassed recognizing the relationship between researcher and participants as embodying reflective and recursive institutional, personal, and political factors that may influence the selection of a research design and research method (Michailova et al., 2014). Mahadevan (2011) noted the reflexive and reflective aspects of choosing a research design. Reflexivity increases accountability, not only among intellectuals, scholars, and research practitioners, but also to anyone who may apply research findings to the lives of humans (Costa & Kiss, 2011).

Reflectivity affords a researcher the existential and relational opportunity for in-depth, self-awareness that may reveal underlying values and beliefs as a part of an approach to inquiry (Clarkeburn & Kettula, 2012).

Ethnographic researchers explore and analyze a problem, contextualized through observations and interviews within a historical and cultural setting (Vesa & Vaara, 2014; Walker, 2012). Lichterman and Reed (2014) further described ethnography as process of investigating causality of an event, occurrence, or problem via interviews and observations by comparing and contrasting the plausible with the possible and actual within a research site or setting. Ethnography is an extensive, often prolonged field research design through which researchers may obtain the values, language, and beliefs of a culture, group, or individual through interviews and observations (Curry et al., 2009; Moustakas, 1994; S. G. Robinson, 2013). This type of research design is a naturalistic approach where a researcher negotiates access to the research site for observing, understanding, and exploring the lived experience or culture of participants as related to a problem under study (Paechter, 2012). As an extraordinarily expensive research design that often requires extensive, yet prolonged negotiated access to a research site or setting and participants, ethnographic research did not suit the needs for this study (Curry et al., 2009; Moustakas, 1994; Quisenberry, 2011).

Grounded theory researchers employ a systematic exploratory approach to establish or advance theory through comparative and interpretive analysis (Flint et al., 2012; Manuj & Pohlen, 2012; Randall & Mello, 2012; Walker, 2012). This theory, first posited by Glaser and Strauss (1967), denotes grounded theory method (GTM) design as

the theoretical sampling of data via participant interviews and observations to create, induce, and advance theory while exploring and examining a problem (Bulawa, 2014; Tweed & Charmaz, 2012). The basis of theoretical sampling data, based on different participant experiences, entails exploring and examining the multi-dimensional aspects of the problem under study (Cutcliffe & Harder, 2012). The theoretical basis of grounded theory is to examine a problem reflexively through behavioral and environmental observation based on the participant perspectives (Bluhm, Harman, Lee, & Mitchell, 2011; Onwuegbuzie et al., 2012). As a complex, iterative form of qualitative research, GTM did not suit the needs for this study because of the lengthy period required to collect and analyze data to challenge or confirm an emerging theory (Boet, Sharma, Goldman, & Reeves, 2012; Quisenberry, 2011).

Researchers use phenomenological design to explore the essence of participant's knowledge and lived experiences (Kafle, 2013; Pringle, Hendry, & McLafferty, 2011; Searle & Hanrahan, 2011). Phenomenology, introduced by German philosopher Husserl (1859-1938), embodied a philosophical approach to inquiry known for strong traditions, methods, and practices in the social sciences to pursue and describe the essence of the human experience (Behnke, 2011; Chan, Fung, & Chien, 2013; Gill, 2014; Giorgi, 2010). German philosopher Heidegger (1889 -1976) advanced Husserl's phenomenology as an existential, interpretive, or hermeneutical approach to inquiry in search of exploring meaning within human experiences (Perry, 2013). Davidsen (2013) and Perry (2013) posited that 20th-century European philosophy, grounded in phenomenology, provided an in-depth understanding and meaning of lived participants' experiences by exposing,

describing, exploring, examining, and allaying individual unconscious and conscious perceptions of the world.

Phenomenological research commences with participants describing personal lived experiences, perspectives, or knowledge of a problem concretely without abstract generalizations (Finlay, 2012b; Walker, 2012). Cutcliffe and Harder (2012) described phenomenology as a transcendent, interpretive approach with in-depth descriptions and analysis embodying participant knowledge and lived experiences. Interpretively embracing the complex, but dynamic aspects of a problem holistically while learning, interpreting, and preserving participant descriptive perceptions and realities of events connotes an understanding of knowledge (Leitch et al., 2009). Bahari (2012) and Lee (2012) further posited that phenomenology is supportive of a social constructivist worldview or the participant's perspective of a problem responsive to multiple points of view or realities addressing a complex problem. Phenomenology encompasses interviewing including observing participants in person or by other interactive methods of exploring the essence of participant's knowledge and lived experiences (Kafle, 2013; Pringle et al., 2011; Searle & Hanrahan, 2011). Because I used an electronic, Web-based qualitative case study questionnaire to explore the problem under study, phenomenological design was not appropriate for this study.

Participatory action research (PAR) design involves researcher and participant exploring a problem collaboratively to generate knowledge (Bergold & Thomas, 2012). Lushey and Munro (2014) proffered that PAR may reduce bias and enhance data collection by giving participants a voice of inclusion through reciprocal rapport and

mutual respect. This research design supports the premise of researcher and participant as co-researchers to share analysis and solutions via exploring a problem through collaborative research (Belone et al., 2014; Littlechild, Tanner, & Hall, 2015).

Bergold and Thomas (2012) further posited that PAR democratizes the researcher-participant relationship by offering a collaborative, exploratory framework that empowers participants as stakeholders in the production of knowledge. Despite the attributes of PAR, some scholars expressed concerns regarding potential ethical challenges and limitations with respect to participatory action research. Cross, Pickering, and Hickey (2014) noted the existence of potential conflicts with ethical procedures and protocols regarding informed consent weighed against co-researcher collaborative efforts to generate knowledge.

Academic rigor with undue familiarity between researcher and participants denotes concerns of credibility, auditability, conformability, validity, and reliability of research (McCartan, Schubotz, & Murphy, 2012; Prion & Adamson, 2014; White, Oelke, & Friesen, 2012). In addition, potential unintended consequences resultant of ethical research procedures and protocols may burnish participant's reluctance to explore a problem collaboratively with a researcher (Burns, Hyde, Killett, Poland, & Gray, 2014). Because of potential ethical challenges combined with questions of academic rigor, PAR did not suit the needs of this study.

Spector-Mersel (2011) later B. Green (2013) advanced narrative research as a design used to investigate who, what, when, and how of the human experience through the paradigmatic lens of participants. Using a narrative research design may entail

collecting data via observation, documentation, questionnaires, interviews, photos, or artifacts that contextualize participant experiences (Petty et al., 2012). Ihantola and Kihn (2011), Loh (2013), and Suárez-Ortega (2013) contended that the idiosyncratic or discursive, often unpredictable interaction between the participant and researcher engenders negative perceptions of untrustworthiness in the quality, validity, reliability, and transferability of narrative research. Conversely, B. Green, Petty et al. (2012), Venkatesh et al. (2013), and Wong, Hogg, and Vanharanta (2012) countered that narrative research design involves delving deeper into participant life experiences by penetrating cultural barriers that provide an enriched, contextualized understanding of the problem. This understanding entailed exploring, interpreting, and understanding value-laden participant experiences in a reflexive and reflective manner orally or textually (Beal, 2013; McAlpine & Amundsen, 2014; Petty et al., 2012). Although the articulation and narration of participants' perspectives or experiences may occur verbally or textually in the exploration, examination, and illumination a problem under study, a narrative research design did not suit the needs of this study (Brown & Thompson, 2013; B. Green, 2013; Leonga & Tana, 2013; Spector-Mersel, 2011).

Case study design researchers explore, examine, and contextualize varied participant's knowledge and experiences into a single problem (Morse & McEvoy, 2014). Yin (2011; 2014) defined CSR as a designed used to frame and debate one or more cases in real-life settings, which a problem is holistically and deeply explored or examined. Hoon (2013) further clarified the definition of CSR as a research design that enables the in-depth, holistic study of a problem in a realistic setting. As an application for exploring

the human experience bounded and contextualized holistically into a single problem under study (Ates, 2013; Boblin, Ireland, Kirkpatrick, & Robertson, 2013), I used a case study design to explore the specific problem that some small business owners lack strategies to address the effect of Baby Boomers continuing to work well beyond retirement eligibility.

Easton (2010) and Walshe (2011) defined the criterion for generalized statistical CSR representation as a single case or sample that offers a comprehensive, in-depth understanding of a problem. The criterion for CSR representation is a biased sampling approach that compares and contrasts results, selected for theoretical reasons (Barratt, Choi, & Li, 2011). CSR involves exploring unique, in-depth, complex situations from multiple perspectives or experiences of participants (Simons, 2009; G. Thomas, 2011). Barratt et al. (2011) and Duxbury (2012) asserted further that an optimum sample for exploring unique in-depth, complex situations is four, but no more than eight, perhaps 10 cases maximum to preclude concerns of threats to validity and issues of bias. Because CSR offers a contextualized, multi-dimensional ontological, epistemological, and methodological that encompasses an exploration of a problem under study, CSR did suit the needs for this study (Järvensivu & Törnroos, 2010).

Because of the the reflective and reflexive aspects of CSR (Houghton, Casey, Shaw, & Murphy, 2013), I bracketed personal views and reflected upon personal perceptions, beliefs, or biases to understand participants' lived experiences. Bracketing is a method of setting aside personal biases, knowledge, beliefs, values, and experiences concerning a problem under study (Anosike, Ehrich, & Ahmed, 2012; Chan et al., 2013;

Hamill & Sinclair, 2010; Henriques, 2014; Onwuegbuzie et al., 2012; Roberts, 2013). Moustakas (1994) posited that German philosopher Husserl (1859-1938) advanced bracketing or the Greek word epoché as a transcendental approach to hold in abeyance any preconception of experiences, knowledge, or perspectives ensuring unbiased results.

Bracketing personal views entailed offering a qualitative study questionnaire to outside sources or pilot study participants to illuminate and mitigate individual perceptions, beliefs, or biases (Tufford & Newman, 2012). Soliciting outside sources or pilot study participants involved bracketing or identifying, acknowledging, and minimizing personal presuppositions prior to and while exploring the problem under study (Anosike et al., 2012; Chan et al., 2013; Larkin, Eatough, & Osborn, 2011). Tufford and Newman (2012) posited that bracketing increases rigor in research by mitigating individual preconceptions while exploring a problem reflectively. Consequently, I used bracketing to burnish the validity and credibility of data collection and analysis while conducting CSR.

Population and Sampling

CSR design is endemic of a single case that involves exploring a problem by sampling a target population that offers descriptive, yet enriched experiences under study (Jansen, 2010). I purposively selected samples based on an assumption that the target population may provide an insightful perspective or have knowledge of the problem. Using a purposive sampling technique in qualitative research to solicit or elicit participant responses is dependent upon having knowledge of and rapport with the target population (Barratt, Ferris, & Lenton, 2014). Mason (2010) asserted the number of interviews serves

as the basis to determine data quality and usability. The process of ensuring research design, method, and questions align with the objectives of the current study involves selecting a quality sample, collecting credible and reliable data, and achieving saturation through a comparative analytical convergence which themes emerge (Reiter, Stewart, & Bruce, 2011). Cavaleri, Green, Onwuegbuzie, and Wisdom (2012) posited that describing procedures for selecting a sample, sampling a target population, and collecting data is essential to exploring and interpreting contextualized study findings. When researchers contextualize knowledge conceptually, they achieve saturation through an in-depth understanding of the problem by exploring the ontological, epistemological, axiological, and methodological premise of a study (Auriacombe & Schurink, 2012).

The concept of saturation is a guiding principle used to determine sample size (Mason, 2010). Saturation occurs when research reaches a point at which additional data collection offers no benefit to the story, theory, model, or framework (Dworkin, 2012; Hanson et al., 2011; Henriques, 2014; Thomson, 2011). Francis et al. (2010) posited that researchers justify reaching data saturation based on the number of participants' responses. Onwuegbuzie and Leech (2010) asserted that data extraction becomes problematic because the sample size is too large or that data saturation or informational redundancy becomes difficult to achieve because the size of the sample is too small.

O'Reilly and Parker (2013) noted that sampling should reflect a pragmatic or flexible process of choosing a sufficient sample size in response to the research question. Barratt et al. (2011) and Duxbury (2012) proffered that an optimum sample for exploring unique in-depth, complex situations in conducting CSR is 4 to 10 cases maximum.

Bolderston (2012) suggested qualitative study sample sizes consist of 5 to 10 participants. Marshall et al. (2013) proffered that a range of 6 to10 participants is a sufficient sample size for conducting a qualitative study. Binks et al. (2013) reported the purpose of a well-constructed qualitative study is to interview up to 10 participants resulting in the identification, transcription, examination, and synthesis of relevant data across common themes of shared experiences.

Allah (2011) and Mason (2010) suggested sampling 5 to 25 participants in a qualitative study. Baker and Edwards (2012) including Bryman (2012) noted subsequently that a qualitative study should result in a minimum of 20 to 30 interviews. Views regarding sample size vary among Allah (2011), Binks et al. (2013), Bolderston (2012), and Marshall et al. (2013) because no systemic qualitatively or quantitatively correct method exists that guarantees sample size legitimacy (Hikari et al., 2014).

Convenience and purposeful sampling techniques are more about the quality than quantity (Koerber & McMichael, 2008). Roy et al. (2015) asserted that sampling or a researchers' effort to determine sample size is often a formidable, yet debatable aspect of qualitative research. The number of participant responses serves as the basis for determining the quality and usability of the data obtained by the researcher (Mason, 2010). As long as a sample is large enough to guarantee the quality needed to support the purpose of a study, then a researcher can justify leveraging resources to determine sample size (Koerber & McMichael, 2008).

The potential for nonresponse bias as a threat to the reliability and validity of this study exist. Participant computer literacy may engender nonresponse bias that could

affect participant response rates (Belfo & Sousa, 2011; Hunter, 2012; Hunter, Corcoran, Leeder, & Phelps, 2012; Ihantola & Kihn, 2011). Using technology to collect data may affect participant responses negatively, thereby threatening the generality and validity of this study's findings (Belfo & Sousa, 2011).

Because unsuccessful efforts to minimize nonresponse bias may lead to obtaining incorrect or unwarranted research study results, additional threats to reliability and validity of this study exist (Chen, 2011; Groves et al., 2012; Lewis, Hardy, & Snaith, 2013; Massey & Tourangeau, 2013). To mitigate threats to reliability and validity resultant of nonresponse bias, Israel (2009) suggested increasing the number of participants by a minimum 10% and maximum of 30%. For this reason, I increased the sample size for this study by 40% from 25 to 36 participants.

The qualitative research design and methodology of this study encompassed a questionnaire with 19 open-ended questions presented electronically to owner-managers, owner-CEOs, and owner-presidents of small businesses. Participant selection and study participation, contingent upon individual knowledge of the problem, entailed meeting eligibility with an interest in or understanding of the nature and benefit of the current study (Moustakas, 1994). These purposively selected participants consisted of 36 owner-managers, owner-CEOs, and owner-presidents of small businesses with 500 or fewer employees.

Selected study participants represented individuals who have been in their present position for a minimum of 5 years. Purposive sampling is a strategy of exercising personal judgment in identifying and selecting participants who provide the best

perspective concerning a problem of interest (Abrams, 2010). Purposively sampling 36 owner-managers, owner-CEOs, and owner-presidents of small businesses throughout the Washington, DC metropolitan area provided diverse responses to the questionnaire.

Moustakas (1994) posited that the eligibility criteria for identifying, locating, and selecting participants for research are non-existent. Cilesiz (2011) later noted that developing a criterion for selecting participants with significant, although meaningful general or demographic factors, is an appropriate method for conducting a qualitative study. Participant eligibility criteria consisted of U.S. small business owners in Washington, DC metropolitan area (a) whose primary customer base is the U.S. federal government and the U.S. DOD; (b) who started, owned, and operated their firm since 2007 to the present; (c) who had 500 or fewer employees; (d) who served in their current position for a minimum of 5 years; and (e) who employ a multigenerational workforce. A general, albeit demographic criteria, ensures a diverse, holistic response by participants (Moustakas, 1994).

Compared to the original proposed 25 participants, inviting 36 participants represented a 40% increase in the initial number of participants. Increasing the number of participants by 40% compensated for participant nonresponse as an effort of addressing potential threats to reliability and validity of the study (Lewis, Hardy, & Snaith, 2013). Based on referrals from friends, colleagues, and associates, I distributed invitations purposively via e-mail to the owner-managers, owner-CEOs, and owner-presidents of small businesses. E-mail invitations included a study synopsis (see Appendix E), a rationale for participant selection, and the purpose of research including a Web-based

open-ended questionnaire link, consent and confidentiality agreements, and a brief instruction on how to access the survey questionnaire, web portal. These referrals included the name, phone, number, and e-mail addresses of potential candidates for this study.

Response rates for Web-based surveys vary from 7% to 52.5% (De Bernardo & Curtis, 2012; Hardré, Crowson, & Xie, 2012; Lindhjem & Navrud, 2011; Saunders, 2012). To achieve the objective of purposively selecting a sample of 36 participants for this study, I distributed invitations to a target population of 72 participants with an expected response rate of 50%. Distributing invitations to 72 participants occurred purposively via email and professional on-line newsletters or journals and social media outlets from professional Defense and Aerospace trade organizations (see Appendices E and G).

As a qualitative research approach to inquiry, I collected participants' perspectives, thoughts, and experiences via a Web-based, opened-ended questionnaire within the delimiting criteria of this study. Delimiting factors provided in this study were the basis for ensuring participant eligibility and a diverse sample in this study. Based on the delimiting factors of this study, a diverse representative sample with knowledge of the current research topic best represented and further enriched the approach to inquiry.

A snowball sampling technique entails respondents who refer additional respondents that ensure saturation for enriched reliable, valid, and replicable results (Elo et al., 2014; Shorten & Moorley, 2014; Thomson, 2011). The target population for this study included owner-managers, owner-CEOs, and owner-presidents of small businesses

in the Washington, DC metropolitan area. Restrictions with respect to distance geographically, personal security clearance access, contractual obligations, government policy, nondisclosure agreements, and facility clearance limited access to personnel, U.S. government facilities, and telecommunications networks in support of this study. I used a snowball sampling technique to supplement a purposive sampling method to access hard to reach, geographically dispersed population located throughout the Washington, DC metropolitan area or a population reluctant to participate in this study.

Snowball sampling technique, also known as network sampling, is a strategy of requesting purposively selected participants to refer individuals who may offer additional experiences relevant to the study (Agrawal, 2012; Omona, 2013; Oppong, 2013). I used this sampling technique with a purposive sampling technique to solicit participant's recommendations for additional study participants who may contribute to exploring the problem and may meet the delimiting eligibility criteria of this study. Executing these techniques allowed for the complete saturation and verification of a quality sample to achieve data reliability, validity, and transferability, thereby establishing trustworthiness and ensuring rigor in research (Ali & Yusof, 2011; Ihantola & Kihn, 2011; Kisely & Kendall, 2011; O'Reilly & Parker, 2013; Sousa, 2014).

Barusch, Gringeri, and George (2011) noted the strength of research credibility and quality is the reliability, validity, confirmability, and transferability of research through rigor. The process of verifying sample quality includes ensuring research credibility and reliability. I verified the quality of the sample by ensuring participants meet the delimiting criteria. Verifying sample quality is a continuous process of ensuring

a sample meets the delimiting criteria of this study (Mason, 2010).

An implication for social change in this study involved a participant selection process that is not distinguishable from industry, customer or market base, or goods or services. The under coverage of the target population represents a bias against the portion of the population that does not have Internet access (Bethlehem, 2010; Fan & Yan, 2010). .Using the Web-based method of data collection, as noted by Bethlehem (2010), leads to self-selection, and under coverage. Because of potential threats to the validity and reliability of research, Khazaal et al. (2014) proffered coverage and selection bias is of particular concern for researchers conducting Internet-based approach to inquiry. According to Bethlehem, self-selection or under coverage bias occurs without the control of the researcher that an individual has the option of participating or responding to an electronic questionnaire or Web-based survey.

Though Rowley (2012) asserted that using questionnaires offers the advantageous ability to receive responses, gather data from large samples, and generalizable findings, Bethlehem (2010) asserted that using a Web-based survey instrument effects targeted populations that do not have Internet access via other means of communications such as a landline phone, mobile smartphone, or tablet computer. For this reason, I provided participants the opportunity to reflect and edit responses as well as use a weighted criteria technique to mitigate participant nonresponse.

Ethical Research

Voluntary participant consent is an essential principle of ethical research (Won Oak, 2012). Institutional Review Board's (IRB) examination is an imperative for

approved research involving human participants (Tsan & Tsan, 2015). Prior to submitting this proposal and beginning research, I completed the National Institutes of Health (NIH) Protecting Human Research Participants course (Certification Number: 1763097).

The purpose of an IRB is to (a) mitigate potential risks to or protect the safety of participants, (b) ensure equitable participant selection, (c) codify documented receipt of participants' informed consent, (d) protect participant privacy, (e) protect data confidentiality, and (f) preserve potential knowledge gained in research (Anderson & DuBois, 2012; Lunstroth, 2011). The objective of requesting and receiving Walden University's IRB approval was to affirm the protection of study participants. I requested and received approval from Walden University's IRB to guarantee the protection of participant rights, especially privacy (see Appendix H).

Candidates received a website address to a Web-based questionnaire survey portal upon accepting an study invitation via email (see Appendix E). This e-mail included (a) an invitation to participate in this study denoting the purpose of the study with assurances of confidentiality (see Appendix C), (b) an offer of informed consent with sample qualitative study questionnaire, the right to refuse participation, and the option to withdraw from the study that delineates the purpose of research the participants' rights to privacy, and my and the educational institutions' contact information, and (c) research questions (see Appendix B). I protected participant identity and confidentiality along with protecting the integrity of the research by assigning pseudonyms and alphanumeric codes to participants. Protecting participant identity and confidentiality develops, builds, and offers the participant assurances of trust in the research study process (Udo-Akang,

2013).

Procedures for securing, preserving, and archiving data vary among research facilities or academic institutions. Corti (2012) defined data archiving as a process of securing, preserving, and storing research data and resources for future audits to verify research findings or future exploitation to advance research. Lin (2009) later Torrance (2012) argued that researchers should store data for either 3-10 years or 8-10 years. Goth (2012) contended that researchers should retain research data for 10 years. Because of the differing views regarding the lengths of time to archive research data, I will secure, preserve, and archive research files in a fire-, water-, and theft-proof safe for 5 years. The ability to store and archive data over the long-term ensures the preservation and protection of data from obsolescence, loss, theft, or irreversible damage (ICPSR, 2012).

Data Collection

Instrument

Data collection commenced by soliciting prospective participants with a brief background of the study, a copy of the confidentiality agreement, a copy of the qualitative study questionnaire, and the researcher's contact information (phone number and e-mail address) (Bolderston, 2012; Clausen, 2012). I solicited study participation and offered access to a self-administered, secure Web-based, electronic questionnaire instrument located at http://www.SurveyMonkey.com via e-mail based on referrals from friends, relatives, colleagues, associates, and participants. Though convenient, questioning participants electronically supported an ability to collect participant responses and provide current study findings asynchronously (Burns, 2010). Collecting

data asynchronously involved exploring the problem holistically and contextually while triangulating current study findings with previous study findings, peer-reviewed journals, and seminal literature.

Asynchronous data collection supported efforts to affirm the validity of the data collection instrument by triangulating this study's findings with published findings posited in previous studies framed conceptually within this study. I validated the data collection instrument by converging or triangulating multiple posits of Morris (2011), Sanders (2011), Sopko (2010), and Tomaszewski (2010) comparatively with the research design, methods, and findings of this study. Additional validation of this study's data collection instrument included a comparative convergence of multiple perspectives framed and triangulated conceptually in this study with (a) swift theory of trust (Fukuyama, 1995); (b) theory of groupthink (Janis, 1972, 1982); (c) narrative paradigm theory (Fisher, 1984, 1985, 1989); (d) theory of collaboration (Gray, 1989); and (e) stakeholder theory (Garvare & Johansson, 2010). Varaki, Floden, and Kalatehjafarabadi (2015) proffered that investigating a problem while triangulating multiple sources and methods concurrently offers a researcher an enhanced understanding of the problem under study.

Cultural and generational differences in using email presented a challenge regarding participants' perception of the questionnaire or participant's reception of responding electronically via email (Burns, 2010). An industrialized or industrializing society experiencing changing demographics denotes an ageing population endemic of a cultural, social, and generational digital divide (Sackmann & Winkler, 2013). Given the

cultural and generational differences or challenges regarding technology, I assisted older generations of participants to adapt quickly to communicating electronically by transmitting and presenting the research background, purpose of the questionnaire, the risks and benefits of participation, and the website address of the electronic, Web-based questionnaire via an e-mail format similar to a written letter. Sackmann and Winkler (2013) asserted that because some Internet applications such as email or search engines resemble traditional forms of communication, questions remain concerning the existence of a generational digital divide. Despite the perceived differences, challenges, and obstacles regarding culture, generation, language, location, time, affiliation, and distance, the differences communicating electronically were nonexistent because of virtuality (Dixon & Panteli, 2010).

Multiple cultural and generational differences within virtual organizations lead to various points of view or perspectives regarding technology's role in a virtual, collaborative continuum (Dumitrescu-Popa & Gabriela-Beatrice, 2010). Berry (2011) asserted that virtual communications differ from in-person communication because communication occurs asynchronously instead of synchronously. Virtual communications offers advantages in a knowledge-based society by allowing interaction and collaboration across time, space, and organization (Dumitrescu-Popa & Gabriel-Beatrice, 2010). These differences or challenges reflect the asynchronous aspects of virtual communications as independent, thereby affecting individual and interpersonal work patterns, decision-making, relationships, and understanding about work (Berry, 2011).

To elicit responses from 36 purposively selected participants, I used http://www.SurveyMonkey.com as a self-administered, secure Web-based, electronic questionnaire instrument. Self-administration of the research instrument entailed the electronic dissemination of open-ended questionnaires to purposively selected participants who are owner-managers, owner-CEOs, owner-managers, and owner-presidents of small businesses spanning a variety of industries. Because of differences in the attitude, knowledge, or technical ability, participants responding to Web-based questionnaires might increase participant nonresponse (Lindhjem & Navrud, 2011). Conversely, participant response, derived from electronic questionnaires, may result in lower nonresponses and complete answers to open-ended questions than mailed questionnaires because using technology to collect data reduces participant inhibition in responding to study questions (Stacey & Vincent, 2011).

Despite the opposing views of Lindhjem and Navrud (2011) and Stacey and Vincent (2011), Web-based, electronic qualitative case study questionnaire via the Internet offered cutting-edge opportunities that provide the disenfranchised a voice to reflect, modify, clarify or provide in-depth responses (Benton, Androff, Barr, & Taylor, 2012; Hardré et al., 2012; Holloway & Biley, 2011). Using a Web-based, electronic qualitative case study questionnaire via the Internet offered an advantage of precluding the time-consuming, costly exchange of picking up or delivering the questionnaire (Seibert-Couch, 2011). Because of a desire to preclude this time-consuming, costly exchange of picking up or delivering the questionnaire, I used a Web-based, electronic qualitative case study questionnaire to leverage the advantage of rapid data collection

over mailed or in-person administered questionnaires.

An electronic questionnaire offers an opportunity to reach a large participant pool quickly, thereby reducing the amount of resources leveraged while conducting a phone and face-to-face interviews (Quisenberry, 2011). In addition, using an electronic, Web-based qualitative study questionnaire with open-ended questions (see Appendix B), provided an additional opportunity to explore the emergence of themes across the sample exploring a problem that advocates social change (Sanders, 2011). In other words, using electronic questionnaires to conduct a study offered an improved economy of scale in collecting participant experiences from research questions.

Sandelowski, Voils, Leeman, and Crandell (2012) asserted that, in qualitative research, the relevance of sample size pertained to the source of information, participant experience, or the problem under study than the number of participants. Comparatively, confirmed consensus and systematic variation occurred through qualitative sampling, whereas the identification of the distribution of variables across a population occurred through quantitative sampling (Trotter, 2012). Qualitative researchers, such as Onwuegbuzie and Leech (2010), agreed that interpretivist researchers do not make statistical generalizations but interpret and obtain generalized qualitative insights of a problem in their natural environments. Scholars conducting qualitative research pursue an in-depth, emergent cultural description within well-defined cohorts, engendering an analysis of small, consensus-oriented populations compared to an analysis of a consensus based on probability (Trotter, 2012). Collecting participant responses via questionnaire entails reflexively gathering, reviewing, interpreting, and reflecting the enriched meaning

of the problem as described by the participants (Cachia & Millward, 2011).

To explore existing knowledge of a single or multiple case(s) while advancing new knowledge, a researcher may use CSR (Damianakis & Woodford, 2012). Interviewing 3 to 5 participants per case study is suitable for CSR (Marshall et al., 2013). Roy et al. (2015) asserted that CSR involves exploring knowledge of 3 to 5 cases. When conducting a qualitative study, Binks et al. (2013) and Bolderston (2012) asserted that a researcher should interview at least 10 participants. Allah (2011), Harris (2013), and Mason (2010) suggested that when conducting a qualitative study, a researcher should sample 5 to 25 participants.

Baker and Edwards (2012) and Bryman (2012) asserted that while conducting a qualitative study, a researcher should interview or sample 5 to 30 participants. Dworkin (2012) suggested sampling 5 to 50 participants as adequate for conducting a qualitative study. Because 18 million or 64% of 28.2 million small businesses do not have succession plans (Beesely, 2011; Sanders, 2011), I selected purposively 36 leaders of small businesses to participate in this study with knowledge and expertise concerning retirement-eligible employee's effect on the ability to plan succession, protect intellectual capital, and manage knowledge between older and younger generations.

Participant selection in this study commenced with executing a three-phased approach by eliciting participation via email with access to the website address of a Web-based, electronic questionnaire portal. I performed this three-phased approach first by using a purposive and snowball or network sampling technique to obtain the names, phone numbers, and e-mail addresses of potential participants. Second, e-mailing

potential participants to elicit study participation and present the background, purpose of the questionnaire, the risks and benefits of participation, and the website address of the electronic questionnaire with assurances of privacy and confidentiality (Cook & Hoas, 2013). Third, re-eliciting participation in the study from nonresponsive participants by sending a personal blind courtesy copy email to encourage participation while protecting the identity of participants (Bethlehem, 2010; Buckle et al., 2010; Holloway, 2012; Singer & Ye, 2013; Stacey & Vincent, 2011; Won Oak, 2012).

Pilot Study

A pilot study is an examination of research methods and data collection processes prior to commencing the main study (Conn, Algase, Rawl, Zerwic, & Wyman, 2010; Secomb & Smith, 2011). Examining research methods and data collection via a pilot study improves the validity of the research questions and improves accuracy and reliability of data collection methods (Quisenberry, 2011; Yin, 2011). Improving and validating data collection methods by conducting a pilot study allows for a deliberative, transparent process entailing a public acknowledgment of the research study's intent (Frolic & Chidwick, 2010).

Both the pilot and main studies denoted identical delimiting criteria to determine participant eligibility and homogeneity (Burmeister & Aitken, 2012; Thabane et al., 2010). Pilot study participation was delimited to a small business leader located within the Washington, DC metropolitan area (a) who is the primary source of strategic knowledge and dynamic capabilities of their company (Bracci & Vagnoni, 2011); (b) whose primary customer base is the U.S. federal government and the U.S. DOD; (c) who

started and owned and operated their business since 2007 to the present; (d) who has a minimum of 5 and no more than 500 employees; and (e) who employ a diverse workforce with respect to age. Chenail (2011) posited that a researcher should evaluate and validate interview questions by using delimiting criteria identical to that of main study. I conducted a pilot study to evaluate and validate interview questions presented to a small sample of participants using the same delimitation criteria of the current study to ensure feasibility. Because the number of eligible participants may vary, using the pilot study to estimate the proportion of eligible candidates aided the refinement of the delimitation criteria for recruiting participants (Conn et al., 2010).

With a main study sample size of 36 participants, demonstrating the validity, reliability, feasibility, confirmability, and transferability of the main study research design and data collection instrument was the rationale for selecting a small sample of the pilot study participants (Ihantola & Kihn, 2011; Moore, Carter, Nietert, & Stewart, 2011; Seibert-Couch, 2011). Based upon similar delimitation factors as the main study, a pilot study sample must represent a homogeneous, target population, that is sufficient to determine the validity, reliability, feasibility, confirmability, and transferability of this study (Burmeister & Aitken, 2012; Ihantola & Kihn, 2011; Johanson & Brooks, 2010; Thabane et al., 2010). Johanson and Brooks (2010) recommended that sampling 10% of the main study sample is reasonable for a pilot study. I invited 10% of the main study sample or four small business leaders to participate in this pilot study by offering access to the website of a Web-based, electronic questionnaire portal via email (see Appendices D and F).

Pilot study invitations denoted the purpose and focus of the pilot study (see Appendices D and F). This invitation encompassed a request for participants to answer the pilot study questionnaire including provide feedback concerning the validity and reliability of the questionnaire instrument. The questionnaire instrument validity and reliability was affirmed by using a pilot study to evaluate the feasibility and applicability of the main study design and methodology (Whitehead, Sully, & Campbell, 2014). Pior to executing the main study, affirming the questionnaire instrument validity and reliability involved conducting a pilot study to ensure reseach questions, instructions, and statements are not ambiguous, misleading, or bias (Seibert-Couch, 2011). Upon receiving participant feedback, I refined, revised, or developed research questions to establish the validity, reliability, feasibility, confirmability, and transferability of this study's research design and data collection instrument. Researchers conduct a pilot study to evaluate the feasibility and applicability of the main study design and methodology (Whitehead, Sully, & Campbell, 2014).

Leaders of small businesses receiving a pilot study invitation via email offered prospective participants access to the self-administered secure Web-based electronic questionnaire survey portal at http://www.SurveyMonkey.com. I solicited pilot study participants via email using a purposive and snowball or network sampling technique to obtain the names, phone numbers, and e-mail addresses of potential participants from friends, relative colleagues, and associates. The pilot study e-mail solicitation (see Appendix D) denoted (a) the background, purpose of the questionnaire, the risks and benefits of participation, assurances of privacy and confidentiality (Cook & Hoas, 2013;

see Appendix C); (b) an offer of informed consent with sample research questions; (c) a right to refuse participation; (d) an option to withdraw from the study; (d) the educational institution and my contact information for participating in this study; and (e) qualitative study questionnaire (see Appendix B).

Researchers codify the integrity of research with an ethical and legal obligation to protect participant identity and confidentiality (Beskow et al., 2012). The ethical and legal obligation preserves the integrity of research by protecting participant identity and confidentiality that develops, builds, and maintains trust between research and participants (Udo-Akang, 2013). I assigned pseudonyms and alphanumeric codes to protect participant identity and confidentiality.

To collect and analyze pilot study data, I used the modified van Kaam Method and the MAXQDA11 software in the same manner as the main study with participant comments or recommendations for improvement and development of the instrument if needed. Researchers conduct a pilot study as a small-scale version of the main study to evaluate the feasability of an approach to inquiry (Leon, Davis, & Kraemer, 2011; Shanyinde, Pickering, & Weatherall, 2011). Conducting a pilot study included exploring and examing CAQDAS techniques to affirm the feasibility of the data collection, management, and analysis process identical to the main study (Shanyinde et al., 2011). Pilot study results entailed coding and analyzing themes using a modified van Kaam method (Moustakas, 1994) with the MAXQDA11 software. The modified van Kaam method encompassed (a) transcribing the essence of participant experiences or expressions; (b) grouping expressions through horizontalization and reducing and

eliminating repetitive, vague, or overlapping experiences or expressions; (c) clustering experiences or expressions thematically; (d) identifying relevant experiences or expressions matched with relevant themes for validity; and (e) ensuring participants provide the meaning or essence of enriched descriptions involving their experiences or expressions (Moustakas, 1994).

Efforts to determine the appropriate computer-assisted qualitative data analysis software (CAQDAS) for both the pilot study and the current study began with the reviewing of various software packages used by researchers. An increasing number of CAQDAS packages with a variety of sophisticated functionalities improved the ability of researchers to conduct qualitative analysis (Wiedemann, 2013). Researchers used software packages such as Atlas.Ti, HyperRESEARCH V.2.06, MAXQDA, NVivo, Qualrus, QDA Miner, and Transana to collect and analyze qualitative data (Silver & Lewins, 2014). Choosing among which CAQDAS was appropriate for use in qualitative research was more subjective than objective depends on the intent, purpose, or direction of research (Saillard, 2011). Though the aforementioned types of CAQDAS exist, scholars such as Leach and Onwuegbuzie (2011), and Rademaker et al. (2012), and Tummons (2014) asserted that Atlas-Ti, MAXQDA, and NVivo were three popular forms of CAQDAS used in educational research.

Because each software package is different visually, yet similar functionally, Humble (2012) asserted that no discernable criteria for choosing the right CAQDAS for qualitative research analysis exist. Using a particular CAQDAS reflected a personal preference not to examine generalized data results, but become immersed in the data at a

granular level (A. King, 2010). I chose MAXQDA11 based primarily on value and cost with minimum time to learn how to use the software.

Before creating the pilot study and soliciting study participants, I requested approval to execute the pilot study as a part of the Walden University's IRB process. Access to participants occurred through emails, creating a pilot study group in the discussion area of the Walden University Doctoral Study group within the LinkedIn professional networking website (see Appendices D and F). Upon accessing or solicitation of participants, the current study entailed an announcement to potential participants, a synopsis of the research project inclusive of the Qualitative Study Questionnaire (Appendix B), an informed consent request, confidentiality agreements (Appendix C), and the website address to the questionnaire.

Data Collection Technique

The transformational strategic choices are facing small business leaders in determining if retirement-eligible workforce hinders generational transition merits further research and debate. Exploring rich, in-depth participants' points of view and experiences is the objective of this current study (Dangal, 2012). Rich, in-depth, and valid data collected electronically helped allay concerns regarding the time, expense, and logistics of soliciting a wide variety of participants throughout a large geographic area (Stacey & Vincent, 2011). I used a Web-based electronic, qualitative study questionnaire to collect and analyze data by describing, classifying, interpreting, translating, and coding results in this qualitative research study. Efforts to collect data via electronic, Web-based questionnaire offered participants the opportunity to mull over and explore questions at

their own pace and a convenient time, thereby engendering enriched responses from participants (Stacey & Vincent, 2011).

An enriched approach to inquiry not only allowed participants to ponder and explore questions, but also offered insight into the concepts, principles, and application of effective management and leadership in the midst of generational transition. The concepts, principles, and application of this study included selecting participants using both snowball and purposeful sampling techniques. A purposeful sampling is a sampling technique that enriches the understanding of the problem because of participant knowledge or experience (Omona, 2013). Snowball sampling is another sampling technique used by qualitative researchers to sample difficult-to-reach participants spread across a large geographical area (Baltar & Ignasi, 2012). Both the snowball (or chain) and purposeful sampling techniques contributed to the search for information from participants and provided insight into understanding the problem under study. Despite the potential threat of expert bias, using a snowball sampling technique supplemented by purposeful sampling technique enriched and increased the credibility of this study (Suri, 2011).

To ensure access the qualitative study questionnaires with open-ended questions, data collection commenced by offering participants access to a Web-based survey portal. The qualitative study questionnaire guided participants to reflect on their experiences or current situations (Miner-Romanoff, 2012). I presented qualitative case study questionnaires to potential study participants electronically via email and social media such as LinkedIn with an invitation requesting participant consent accompanied by an

assurance to maintain and protect participant confidentiality through a confidentiality agreement (see Appendices D, E, F, and G).

Web-based, electronic data collection via qualitative case study questionnaire allowed for the visualization of data by facilitating the recursive relationship between research methods, data collection techniques, data analysis, and data interpretation using computer-aided qualitative data analysis software (CAQDAS) such as MAXQDA11 (Bendassolli, 2013; Onwuegbuzie, Frels, Collins, & Leech, 2013; Schönfelder 2011). By using CAQDAS, the collection and analysis of data presents a visual narrative of the participant lived experiences (Mennis, Mason, & Cao, 2012). Reliable and valid data are a part of an approach to inquiry that ensured the creditability of research methodology and data collection techniques (Ali & Yusof, 2011). The focus of the study engendered a credible, purposeful, yet recursive process of choosing participants interested in offering experiences in a holistic manner with verve and vigor (Vealé, 2009). Participants holistically offered experiences that led to increased understanding of the problem, increased trustworthiness between the researcher and the participant, and solidified the balance between participant subjectivity and researcher reflexivity (Gough & Madill, 2012; Hanson et al., 2011; Hays & Wood, 2011).

The participants' relationship with the researcher involved a Web-based, on-line holistic narrative account of contextualized participant experiences framed categorically and thematically within the analytical interpretative context of qualitative research (Beal, 2013; West, 2013). These holistic accounts consist of data derived and collected from a Web-based qualitative study questionnaire with 19 open-ended questions. This Web-

based qualitative study questionnaire encompassed a process of delineating the purpose, background, intent, and anticipated benefit of the study, as well as a disclaimer that both participant identity and all data provided remained confidential.

Participant anonymity entailed using anonymous usernames known as pseudonyms that protects participant identity and data confidentiality (Williams, Giatsi-Clausen, Robertson, Peacock, & McPherson, 2012). When the participants completed the questionnaire, I thanked the participants for participating in the study with an offer to request for follow-up information in the event further clarification or information to complete the study was necessary. Conducting a follow-up inquiry offered an opportunity to establish the validity and reliability of this study. Eliciting participants' clarifying thoughts, observations, and experiences is affirmed by researchers documenting, organizing, and triangulating study findings to establish the validity and reliability of research (Rowley, 2012; S. G. Robinson, 2013).

Study invitations entailed offering participants an opportunity to provide additional clarifying thoughts, observations, and experiences. I informed participants in writing that study participation was voluntary with the opportunity to withdraw or refuse to participate in this study at any time without penalty (see Appendices D, E, F, and G). The written request for clarifying information included advising participants that consent forms and confidentiality agreements previously signed remained in effect unless rescinded by both parties. Soliciting responses electronically via questionnaire enabled each participant to receive the same questions via the same medium that allowed for an enriched approach to inquiry than an in-person interview (Stacey & Vincent, 2011). This

technique offered an opportunity to examine diverse points of view, beliefs, values, perspectives, or experiences of the problem from a representative sample of the target population (Jansen, 2010).

Efforts to clarify participant thoughts, observations, and experiences involved confirming the accuracy, credibility, and validity of this qualitative case study findings and participant responses through member checking. Harper and Cole (2012) described member checking as a quality control technique used to enhance the accuracy, credibility, and validity of qualitative research. I conducted member checking to confirm the accuracy of participant questionnaire responses while affirming study findings. Crowe et al. (2011) including Harvey (2015) posited that member checking affords a researcher the opportunity to confirm the accuracy data collected or affirm the accuracy of study findings through participant feedback. Despite receiving an opportunity to confirm or clarify questionnaire responses or affirm study findings accuracy, participants confirmed the accuracy of questionnaire responses while affirming study findings.

Data collection via questionnaire encompassed collecting, organizing, examining, and illustrating data topically, conceptually, and thematically (Goldberg & Allen, 2015). Galasiński and Kozłowska (2010) argued that questionnaires reflect a researcher's worldview often resulting in participant responses lacking depth and context, thereby suggesting a potential threat to validity and reliability of this study. Conversely, Bird (2009) asserted that questionnaires with open-ended questions in social science research include valid tools for exploring, examining, and discerning a problem under study. Despite the aforementioned views expressed by Galasiński and Kozłowska, a qualitative

study questionnaire with open-ended questions did meet the needs of this study.

Data Collection Instrument and Measures Feasibility Technique

A pilot study entails enhancing rigor of research by validating the reliability or the trustworthiness of the questionnaire using identical delimitation criteria of the current main study (Ali & Yusof, 2011; Chenail, 2011; Secomb & Smith, 2011; White et al., 2012; Yin, 2011). Upon receiving the IRB approval, I disseminated invitations to and collected data from a select group of experts using a purposive and snowball or network sampling technique via email. Based on identical delimitation criteria of the main study, these experts represented a diverse sample with knowledge of the current research topic under study. This pilot study invitation included (a) a request for informed consent, (b) confidentiality agreement (see Appendix C), and (c) instructions for accessing a self-administered, secure 19 open-ended question, Web-based electronic questionnaire (see Appendix B) at http://www.SurveyMonkey.com.

Additional dissemination of pilot study invitations transpired via professional on-line newsletters or journals and social media outlets from professional Defense and Aerospace trade organizations (see Appendix F). The invitation denoted a brief background of the pilot study; purpose and context of the questionnaire; the risks and benefits of participation; a request for informed consent; and a copy of the questions. This invitation also included a request for participants to answer a 19 open-ended question questionnaire (see Appendix B) and provide feedback to ensure the removal of ambiguous, misleading, or biased questions, instructions, and statements.

The main study sample size was 36 participants. Demonstrating the validity,

reliability, feasibility, confirmability, and transferability of the main study research design and data collection instrument was the rationale for selecting a small pilot study sample (Ihantola & Kihn, 2011; Moore et al., 2011; Seibert-Couch, 2011). I conducted a pilot study to not only evaluate and validate interview questions, but also evaluate the feasibility of data collection techniques based upon identical delimitation criteria as the main study. Conn et al. (2010) posited that pilot studies offer researchers an opportunity to explore the delimitation criteria of a study that may affect the ability to collect confirmable and reliable data. Using similar delimitation factors as the main study, researchers conducting a pilot study must sample representative homogeneous, target population, that is sufficient to determine the validity, reliability, feasibility, confirmability, and transferability of this study (Burmeister & Aitken, 2012; Ihantola & Kihn, 2011; Johanson & Brooks, 2010; Thabane et al., 2010).

To determine a reasonable sample for a pilot study, Johanson and Brooks (2010) suggested that sampling 10% of the main study sample. I invited and received responses from 10% of the main study sample or four small business leaders to participate in this pilot study (see Appendix D). Because the number of eligible participants may vary, using the pilot study to estimate an eligible portion of study participants may guide efforts to affirm feasibility of the data collection techniques and measures (Conn et al., 2010; Leon et al., 2011; Shanyinde et al., 2011).

Data Organization Technique

Watkins (2012) noted that data organization is unique to qualitative research for which developing a system or process of organization and managing large amounts of

data could be overwhelming. Ensuring the safety, security, and confidentiality of information from questionnaires entailed storing electronically collected data on encrypted portable hard drives and universal serial bus drives. Paper copies of emails, questionnaires, bibliographical references, spreadsheets, PowerPoint presentations, the research prospectus, the dissertation, participant identities, and confidentiality agreements remain in 2-inch binders and 6-part folders secured in a fire-, water-, and theft-proof safe in my home office. Researchers ensure data availability for future audits or research by storing and archiving research data securely as prescribed per data academic or research facility institutional retention and disposition procedures (Gibson & Gross, 2013).

The length of time to store research data or records varies among research facilities or agencies. Corti (2012) proffered data archiving as a process of ensuring the availability of data and resources for future exploitation by researchers. Lin (2009) asserted that research facilities or agencies should store and maintain research data for 3 to 10 years. Torrance (2012) contended that researchers should store data for either 3-10 years or 8-10 years. Goth (2012) advocated retaining research data for 10 years. Because of the varied lengths of time to archive and preserve research data, I will store research files for 5 years and change the safe combination annually to ensure data access for future audits or future research. The ability to store and archive data over the long-term ensures data preservation and protection from obsolescence, loss, or irreversible damage (ICPSR, 2012).

EndNote, RefWorks, Mendeley, and Zotero are examples of commercial off-the-shelf or free Web-based bibliographical reference systems (Emanuel, 2013; Marino,

2012). Each system, though different as stand-alone software or Web-based system, has identical functions managing bibliographical references (Bouyukliev & Georgieva-Trifonova, 2013; Emanuel, 2013). Using a particular bibliographical reference system reflected a personal preference based not only on the recommendations of colleagues and Walden University faculty, but also based on a systems' unique features. I chose EndNoteX5 to create library files of citations and full-text scholarly articles for export into a bibliography with the additional capability to cite while writing. EndNoteX5, known as a hybrid citation management tool, offered the best of Web-based browser and stand-alone computer software desktop-based citation management tools by offering on and off-line access to citations and scholarly articles (Marino, 2012).

Data Analysis

To explore and understand the unique personal experiences, judgments, perceptions, and emotions of participants, I collected data from the study participants who completed the Web-based interview questionnaire. This Web-based,qualitative case study questionnaire contained 19 open-ended questions that addressed the research question and focus of the literature review (see Appendix B). Given the approach of this qualitative case study, using a Web-based, qualitative case study questionnaire to elicit participants' responses and to collect documents for analysis was a process of gathering, reviewing, winnowing, categorizing, organizing, interpreting, and writing of data across various themes. Marshall and Friedman (2012) noted this intricate process as transparent during the presentation of research findings which researchers learn to trust the methodology and the data analysis process while exploring a problem (Marshall &

Friedman, 2012). Analyzing data qualitatively connotes a process of coding data thematically within a conceptual frame of reference that describes and explains a problem under study (Schönfelder, 2011).

The comparative convergence of multiple conceptual frameworks with prior research while exploring new knowledge denotes a multi-fold premise of an advocacy worldview for social change (Berman, 2013; Knight & Cross, 2012; Trochim, Donnelly, & Arora, 2015). The research question and the focus of the literature review aligned with the conceptual framework of this study which encompassed narrative paradigm theory (Gill, 2011; Kendall & Kendall, 2012); swift theory of trust (Fukuyama, 1995); collaboration theory (Graci, 2012; Rigg & O'Mahony, 2013); and stakeholder theory (Garvare & Johansson, 2010; Gibson, 2012; Harrison & Wicks, 2013). The aforementioned conceptual framework synthesized qualitatively with the literature review, research design and methods, and the findings of this study (Borrego, Foster, & Froyd, 2014; Thomas, 2015).

Multiple participant responses were organized, coded, and analyzed across various themes using computer-aided qualitative data analysis software (CAQDAS). CAQDAS was part of an explicit analytical process that ensured research credibility and validity through a transparent audit trail for external review (Fassler & Naleppa, 2011; Marshall & Friedman, 2012; White et al., 2012). Using CAQDAS offers the ability to elicit and illuminate research findings with enhanced data reliability and validity, thereby legitimizing qualitative research (Fielding, 2012; Sinkovics & Alfoldi, 2012).

The significance of the current study involved analyzing data results of the current

study to frame the research question broadly while using the interview questions to narrow the focus of the study (Chenail, 2011; Connelly, 2010; Goldberg & Allen, 2015; Petty et al., 2012). As a part of an iterative, analytical process, I coded and analyzed data categorically using MAXQDA11 software. Employing MAXQDA11 to synthesize emergent data into and across themes supported the research framework by melding participant experiences into holistic accounts (Gale, Heath, Cameron, Rashid, & Redwood, 2013). Similar to other types of CAQDAS, MAXQDA11 supported a trustworthy, qualitative research methodology through transparency without sacrificing the richness of the interpretive process (Odena, 2013; Rademaker et al., 2012).

MAXQDA11 offered a multidisciplinary analysis of data, ensuring transparency by demonstrating an effort to derive research conclusions and by integrating data qualitatively and quantitatively (Fielding, 2012). I used MAXQDA11 to analyze this study's findings to provide a well-rounded approach from multiple perspectives of participant holistic accounts. Analyzing participant holistic accounts entailed coding, classifying, categorizing and validating data into descriptive themes or dimensions of information (Bendassolli, 2013). These interpretive, holistic accounts offered an emergent design of multiple participant perspectives or experiences by combining inductive data analysis and interpretive inquiry in a natural setting (Becker & Burke, 2012).

Because of techniques used to analyze data qualitatively, 14 themes emerged from research findings (see Section 3). Baškarada (2014) proffered comparative data analysis as a technique used by researchers to identify similarities and differences of participants'

responses interpretively, conceptually, and categorically into themes. The emergence of 14 themes involved triangulating multiple data sources consisting of (a) current and previous study findings, (b) peer-reviewed journal articles, (c) seminal literature, and (d) theoretical paradigms noted comparatively within a single conceptual framework. Yazan (2015) advanced Stake's (1995) and Yin's (2011; 2013; 2014) definition of data triangulation as a comparative convergence of multiple findings that not only guides, but also strengthens the validity and reliability of data analysis and collection. Following Merriam's (1998) constant comparative method, I analyzed study findings comparatively and simultaneously to affirm participant responses and themes accurately by reviewing, consolidating, reducing, triangulating, and interpreting multiple data sources and theoretical paradigms. Researchers conduct systematic, constant comparative analysis to ensure the mutual inclusivity or exclusivity of potential, albeit emerging concepts, themes, and codes within each individual case (Fram, 2013).

Reliability and Validity

Reliability

The appropriate use of a research methodology ensured the quality of the data interpretation was not only reliable, but also consistent with the intent of the current study (Åkerlind, 2012). Assessing the reliability and integrity of research findings denotes a basis for validating the credibility of a study's research design and methodology (Noble & Smith, 2015). Comparing this study's premise to the questionnaire, previous research, and participant responses supported the validity of data quality and reliability that ensured alignment among the research methodology, design, conceptual or theoretical

framework, instrumentation, and questions of the current study (Newman, Lim, & Pineda, 2013).

To validate the reliability and quality of the data and the research instrument, I conducted a pilot study by soliciting participant responses to validate the reliability, quality, validity, comfirmability, and transferability of the qualitative case study questionnaire and research process prior to beginning the main study. Researchers conduct a pilot study to ensure the reliability and validity of the main study research method, design, and instrument (Secomb & Smith, 2011). The objective of this pilot study was to ensure the reliability of the research question and data analysis that provides useful, positive consequences when applied to the business community supportive of social change. Addressing potential bias with respect to the reliability and validity of the research instrument was the rationale for conducting a pilot study (Chenail, 2011).

The pilot study is a technique for calibrating questions and refining data collection with a select group of participants deemed experts in the problem under study (Belfo & Sousa, 2011). Using a select group of experts who examine the trustworthiness of data by calibrating and refining data collection ensures qualitative research produces reliable results (Ali & Yusof, 2011; White et al., 2012). The examination of trustworthiness, based on pilot study findings, helps achieve or enhance rigor in research (Secomb & Smith, 2011). Prion and Adamson (2014) defined rigor in terms of trustworthiness with respect to credibility, transferability, dependability, and conformability of research. To achieve rigor in research, I collected, audited, coded, categorized, corroborated, and confirmed data to ensure the study's credibility, transferability, dependability, and

conformability via participant responses, peer-review feedback by the doctoral committee, and literature review and analysis of bibliographical references.

Validity

Validity of research depends on the integrity of data collected and analyzed used to derive valid findings or conclusions from research (Oleinik, 2011). Readers validate the applicability and transferability of a study by replicating research in a similar context as related to or aligned with other studies or with other participants. Crowe, Inder, and Porter (2015) posited transferability as a technique of offering readers sufficient data to analyze and validate research comparatively in a similar context or with other participants. Affirming the transferability of research occurs by validating the applicability and feasibility of a research design or method in a similar context or with other participants to ascertain the possibility of subsequent studies yielding identical results (Thomas & Magilvy, 2011).

Potential threats to validity and transferability included (a) the researcher bias, (b) undue researcher-participant familiarity, (c) inaccurate or unsystematic research questions presented to participants (i.e., order bias), (c) nonresponse bias, (d) self-confirmation bias, and (e) confirmation bias (Ihantola & Kihn, 2011; Metzger & Flanagin, 2013). Given the potential multiple threats to the validity and transferability of this study delineated above, researcher bias was an acknowledged, albeit significant concern. Lumsden (2013) contended that neutrality in research is a myth that a researcher eventually will exhibit bias or will not admit to doing so.

To avoid researcher bias, the research design, method, data analysis, and findings

must not only be reasonable, but also valid and reliable (Poortman & Schildkamp, 2012). Chenail (2011) identified the pilot study process as a viable technique for identifying and mitigating potential research bias. Metcalfe and Sastrowardoyo (2013) asserted that presenting public, yet balanced and reasoned debate rather than an advocacy point of view might offer an opportunity to identify and mitigate bias by demonstrating an objective point of view. Further demonstrating the validity of the data collection and analysis process involves a researcher identifying, acknowledging, and mitigating bias by holding in abeyance or bracketing personnel beliefs of the problem under study (Chan et al., 2013).

Additional understanding of the problem to test and validate the instrument necessitated bracketing preconceptions to clarify questions deemed biased (Tufford & Newman, 2012). Anosike et al. (2012) and Larkin et al. (2011) described bracketing or reduction as a process of identifying, acknowledging, and minimizing personal presuppositions prior to and while exploring the problem under study. Chan et al. (2013) posited that researchers substantiate the validity of data collection and analysis process by bracketing personal presuppositions or preconceptions. Tufford and Newman (2012) affirmed that researchers increase rigor in research by bracketing individual preconceptions while exploring an occurrence reflectively.

While conducting the pilot study, I bracketed preconceptions by administrating the questionnaire in the same manner as the current study. Efforts to bracket preconceptions include offering the qualitative study questionnaire to outside sources (e.g., friends, associates, and colleagues) and pilot study participants to illuminate and

mitigate individual perceptions, beliefs, or biases (Tufford & Newman, 2012). Consequently, understanding of the problem through the intial lense of a pilot study and later the main study encompassed validating the creditibility, integrity, and consistency of research across different participants (Metzger & Flanagin, 2013).

Carcary (2011) contended that using CAQDAS such as MAXQDA11 may not only improve, but also enhance the validity of research by offering a consistent method of reviewing, comparing, and contrasting theme based participant questionnaire responses. I used MAXQDA11 software to improve the validity of data quality by evaluating, reviewing, comparing, and contrasting theme based participant questionnaire responses. Using MAXQDA11 software legitimizes the emergence of an enriched understanding of participant experiences by interpreting, translating, and validating participant responses through the development of codes and themes (Buchbinder, 2011). Accuracy and clarity of questionnaire responses, through analyzing themes and codes, engendered enlightened or enhanced knowledge that resulted in self-reflection, thereby leading to acquiring an enriched understanding of participants' experiences and the problem (Combs, Bustamante, & Onwuegbuzie, 2010).

The legitimization of research commences with demonstrating rigor or trustworthiness through transparency, integrity, and competency (Goldberg & Allen, 2015). Barusch et al. (2011) noted prolonged, engaged observation, external, reflexivity, peer debriefing, negative case analysis, thick description, member checking, and triangulation, as strategies used by researchers to demonstrate rigor or trustworthiness in research. Cope (2014) defined prolonged engagement with persistent observation as an

exploratory approach to inquiry used by researchers to build participant trust to collect enriched responses.

Research validity and confirmability involves ensuring correct data management through rigorous, external audit of study findings (White et al., 2012). Berger (2013) and Houghton et al. (2013) asserted that credibility or rigor of research rests on the reflexive role of the researcher as a research instrument in exploring and generating knowledge. Peer debriefing involves an interpretive examination and evaluation of research by a disinterested, independent peer offering feedback concerning an approach to inquiry (Barusch et al., 2011). Kolb (2012) and Petty et al. (2012) described negative case analysis as an investigative process of collecting existential data sources to explore alternative or competing explanations that contextually enriches study findings.

The confirmation of data transferability entails using thick description as a data analysis technique to offer in-depth, contextualized interpretive description of study findings (Houghton et al., 2013). Harper and Cole (2012) posited member checking as a quality control process whereby a researcher solicit and elicit participant review research to affirm or confirm the accuracy, credibility and validity of study findings. Triangulation refers to collecting, exploring, and examining multiple perspectives, data sources, theoretical frameworks, and methodological paradigms comparatively to develop an affirmed or confirmed understanding of study findings (Azulai & Rankin, 2012). Because the benefit of member checking is to decrease the chance of incorrect data interpretation through participant verification and the benefit of triangulation is the use of multiple data sources to enhance accuracy, validity and confirmability of study findings, member

checking and triangulation did suit the needs of instilling and ensuring rigor in exploring the problem under study.

The accuracy, credibility, and validity of this qualitative case study transpired through member checking. Researchers posit member checking as a quality control technique used to enhance the accuracy, credibility, and validity of participant responses and qualitative research study findings (Harper & Cole, 2012). Upon receiving participant responses to this qualitative case study, I employed member checking as a technique to confirm the accuracy of individual questionnaire responses and study findings.

Thomas and Magilvy (2011) posited that member checking encompasses an interpretive process, whereby researchers reflectively and reflexively coordinate with participants to confirm the accuracy and validity of questionnaire responses. To achieve an emergent understanding of participant responses, researchers use member checking to afford participants an opportunity to clarify responses or provide additional data to confirm the accuracy data collected or affirm the accuracy of study findings (Crowe et al., 2011; J. Green, 2015; Harvey, 2015). I conducted additional member checking to confirm an interpretive, yet reflexive and reflective understanding of coded responses and themed-based findings with participants.

Barusch et al. (2011) asserted that member checking involves soliciting study participants to review, affirm, and confirm the accuracy and validity of questionnaire responses. Assuring research creditability and dependability occurs by offering participants an opportunity to confirm the validity of codes, themes, and study findings

interpretively through member checking (Cope, 2014). If a participant revised questionnaire responses, I kept questionnaire responses as received originally from the participant, but noted revisions on the questionnaire with an attached memorandum for record to accommodate additional participant feedback or comments. Despite extending an opportunity to confirm (or clarify) questionnaire responses and affirm the accuracy of questionnaire responses and study findings through using transcription review, few if any participants replied to the opportunity to review the findings of this study.

In addition to member checking, researchers may triangulate multiple data sources to establish research validity and reliability of qualitative CSR (Amerson, 2011). Correctly measuring data, as intended, achieves data validity, reliability, objectivity, and transferability (Ihantola & Kihn, 2011; Peck, Kim, & Lucio, 2012). Boblin et al. (2013) described the purpose of triangulating multiple data sources as a technique used by researchers to identify the confluence or difference of study findings. Because of and contingent upon minimal response to member checking, I triangulated multiple data sources by cross-checking, comparing, and contrasting current research results with previous study findings of scholars such as Morris (2011), Sanders (2011), Sopko (2010), and Tomaszewski (2010) and using those studies as the basis for this study.

Data analysis involved triangulating multiple data sources that leads to consistent, yet enhanced and enriched research findings (Wahyuni, 2012). Emrich (2015) and Shoup (2015) posited that triangulating and analyzing multiple sources enhances the validity of research, thereby burnishing the breadth and scope of research findings. Triangulation entailed exploring and examining multiple sources comparatively that included

leveraging previous study findings, peer-reviewed journal articles, and seminal literature to frame the research question broadly while using the transcripted, coded interview questionnaire response to narrow the focus of the study (Chenail, 2011; Connelly, 2010; Goldberg & Allen, 2015; Petty et al., 2012). I used member checking, questionnaire transciption review, and triangulation of participant questionnaire responses of previous published study findings from Allah (2011), Bragg (2011), and Sanders (2011), peer-reviewed journal articles, seminal literature, and current study findings to affirm the validity and credibility of emerging themes and study findings. Using member checking, transciption review of questionnaire responses, and triangulation of multiple sources derived from previous published study findings, peer-reviewed journal articles, seminal literature, and current study findings indicated the emergence of 14 themes (see Section 3).

The results of member checking, transciption review of questionnaire responses, and triangulation of multiple sources confirmed and validated the theme alignment with this study's finding including published findings posited in previous studies such as Allah, (2011), Bragg (2011), Cole, (2010), Gudewich (2012), King (2012), Miles (2011), Morris (2011), Sanders (2011), Schultz-Moser (2009), Sopko (2010), Thomas (2015), and Tomaszewski (2010). Denzin (2011) posited that researchers use triangulation as a technique to achieve an enhanced and enriched understanding of a problem under study. For example, triangulating published findings from Allah (2011), Bragg (2011), and Sanders (2011) aligned with and confirmed the following emergent themes noted in this study. These themes are Theme 3 (Storytelling as a collaborative knowledge management

technique), Theme 5 (Collaborative organizational culture as an empowering force for developing leaders), Theme 10 (Succession planning as a bridge to building trust through collaboration), Theme 11 (Communication and trust as a decision-making nexus affecting succession planning), and Theme 14 (Organizational culture as an information sharing and succession planning framework). Allah (2011), Bragg (2011), and Sanders (2011) with data derived from findings of this study confirmed the importance of organizational leaders with a multigenerational workforce facilitating a collaborative, organizational culture that supports knowledge sharing, trust, and succession planning through transparent, open communication.

To determine which type of triangulation suited the needs of this study, I explored four different types of triangulation. Yin (2011; 2013) posited (a) investigator triangulation, (b) method triangulation, (c) data triangulation, and (d) theoretical triangulation as four different types of triangulation used by researchers to strengthen the validity of case study research. Investigator triangulation is a collaborative process of using multiple researchers to validate study findings (Archibald, 2015). Ponnam and Dawra (2013) posited that researchers use investigator triangulation to reduce bias through the convergence of study findings examined by multiple investigators. Because of time, distance, access, and cost of using multiple researchers to examine and validate study findings, investigator triangulation did not suit the needs of this study.

Methodological triangulation refers to a confirmatory process of using multiple methods to increase the validity of research by enhancing the understanding of a problem under study through the comprehensive exploration and examination of study findings

(Bekhet & Zauszniewski, 2012). Junk (2011) classified two methodological triangulation subtypes as within- and between-method triangulation. Within-method triangulation consists of using the same method to examine different data sets during various instances of research while exploring a problem under study (Hantrais, 2014).

Azulai and Rankin (2012) described between-method or across-method triangulation as a comparative, analytical convergence technique of exploring the problem under study to increase the reliability, validity, and accuracy of study findings across multiple data collection methods. Gatt, Grech, and Dodd (2014) asserted that researchers use methodological triangulation to enhance objectivity by collecting data from multiple sources. Because I used a single research design and method employing a single data collection technique to explore the problem under study, methodological triangulation did not suit the needs of this study.

Denzin and Lincoln (2011) described data triangulation as a comparative, in-depth analysis of examing data collected during different occasions from multiple, participants dispersed geographically. Triangulating data occurred by comparatively cross-checking transcripted, coded participant questionnaire responses with findings from previous studies, peer-reviewed journal articles, and seminal literature referenced in this study. To obtain a comprehensive understanding of the problem while affirming the validity and reliabilty of this study's findings, I triangulated multiple data sources. Data triangulation entails using multiple techniques to enhance validity and creditability of a problem under study by comparatively exploring and analyzing research findings with data from other sources (Kaczynski, Salmona, & Smith, 2013). Because data

triangulation encompasses using multiple data sources to enhance validity and creditability of a study, data triangulation suited the needs of this study.

Researchers triangulate multiple data sources or multiple theoretical frameworks within a single conceptual pardigm for a more grounded study (Denzin, 2012; J. Green, 2015). As a compliment to data triangulation, I conducted theoretical triangulation by exploring the application of five theories concurrently and comparatively aligned with the conceptual framework and research problem under study. These theories are (a) swift theory of trust (Fukuyama, 1995); (b) theory of groupthink (Janis, 1972, 1982); (c) narrative paradigm theory (Fisher, 1984, 1985, 1989); (d) theory of collaboration (Gray, 1989); and (e) stakeholder theory (Garvare & Johansson, 2010). Researchers use theoretical triangulation as a technique to examine various theoretical paradigms concurrently and comparatively in relation to the research problem, method, and design under study (Hoque, Covaleski, & Gooneratne, 2013). This form of triangulation involves a comparative, analytical convergence of multiple participant perspectives with theoretical constructs as means of validating study findings (Wijnhoven, 2012).

Through theoretical triangulation, the validation and confirmation of 14 themes emerged (see Section 3) and aligned with the conceptual framework and study findings. For example, study findings included a validated and confirmed alignment among Theme 10 (Succession planning as a bridge to building trust through collaboration), Question 15, theory of collaboration (Graci, 2012; Gray, 1989), stakeholder theory (Garvare & Johansson, 2010), and swift theory of trust (Fukuyama, 1995). Managing, exchanging, and integrating knowledge and resources collaboratively to build trust involves balancing

the social change needs and the interest of stakeholders with organizational sustainability (Bachmann & Inkpen, 2011; Garvare & Johansson, 2010; Graci, 2012; Harrison & Wicks, 2013; Jensen & Sandström, 2011). Mansor et al. (2012) proffered that effective, yet collaborative communication between or among managers, subordinates, and employees builds trust, enhances employee commitment, and ensures productivity as a critical component of mitigating risk and minimizing costs.

Additional example of confirming the emergence of 14 themes encompassed triangulating participant responses with Theme 3 (Storytelling as a collaborative knowledge management technique) and the conceptual framework of this study. This triangulation included a validated alignment among study findings, participant responses, Theme 3, and the conceptual framework of this study that entailed the narrative paradigm theory (Gill, 2011; Kendall & Kendall, 2012); swift theory of trust (Fukuyama, 1995); collaboration theory (Graci, 2012; Rigg & O'Mahony, 2013); and stakeholder theory (Garvare & Johansson, 2010; Gibson, 2012; Harrison & Wicks, 2013). Triangulating participant responses with Theme 3 and the aforementioned respective theories confirmed that participants, as stakeholders in their respective firms' success, often told stories or create narratives to share knowledge and mitigate generational differences through employee mentoring, group meetings, and education and training sessions.

Storytelling is critical to the sharing of knowledge and expertise between generations (Gill, 2011). Beal (2013) asserted that presenting a narrative or telling a story to share experiences and perspectives leads to enhanced understanding of a complex problem. A cohesive and effective workforce requires trust as a basis for interpersonal

relationships and a source of sustained competitive advantage (Fulmer & Gelfand, 2012; Gilbert & Behnam, 2013; Mukherjee et al., 2012). Knowledge sharing through storytelling enhances the sense of community through the stabilization of intergenerational and multigenerational cultural knowledge within an organization and (Yang, 2013). Triangulating the findings, themes, and theories framed conceptually in this study validated and confirmed that these small business leaders often told stories or offered a narrative to instill trust through transparency and empathy across generations by sharing expertise and providing lessons learned collaboratively.

Additional comparative, analytical convergence or triangulation of multiple sources indicated that I assumed incorrectly with respect to the theory of the groupthink's applicability in improving decision-making supportive of generational succession. Using theoretical triangulation involves the convergence of multiple perspectives to conduct an in-depth, exploratory examination that grounds a problem under study analytically (Drie & Dekker, 2013). Increased knowledge sharing enhances decision-making and problem solving because of group heterogeneity whereas group homogeneity may inhibit knowledge-sharing, decision-making, and problem solving resulting potentially in groupthink (Hollenbeck, DeRue, & Nahrgang, 2014).

Because generational or cultural homogeneity may inhibit knowledge-sharing, decision-making, and problem-solving within a group, team, or organization, theoretically triangulating study findings, themes, and the conceptual framework of this study indicated no applicability to the theory of groupthink with respect to the problem under study. Hoque et al. (2013) asserted that obstacles or conflicts might exist when

researchers attempt to choose a theory that best aligns with an approach to inquiry while exploring a problem under study. For this study, using data triangulation, complemented with theoretical triangulation, suited the needs of this approach to inquiry by offering an enriched, valid understanding the problem under study.

The basis for coding involves collecting, analyzing, and interpreting data until achieving saturation derives enriched reliable and creditable themes and research findings (Onwuegbuzie et al., 2012). O'Reilly and Parker (2012) denoted that an adequate sample is confirmation of achieving data saturation through enriched, yet reliable and credit research findings. Roy et al. (2015) asserted that the quality or depth of data reflecting saturation might preclude the need for justifying a large sample size.

Based upon the epistemological premise of the problem under study, a study's sample size is justifiable by achieving data saturation (Goldberg & Allen, 2015). Complete saturation and verification of the sample occurred by using snowball and purposive sampling techniques to solicit, elicit, and collect participants responses (Agrawal, 2012; Elo et al., 2014; Omona, 2013; Oppong, 2013; Thomson, 2011). To establish trustworthiness and ensure rigor in research, I used snowball and purposive sampling techniques to achieve data saturation and verification, but also achieve data reliability, validity, confirmability, and transferability by delineating and describing the meaning of themes concerning the problem under study.

Summary and Transition

Sections 1 and 2 of this study denoted exploring retirement-eligible workforce's potential hindrance to the generational transition by working well beyond normal

retirement age. A challenge to small businesses in a competitive global economy involves retaining, then transferring knowledge from the incumbent to a successor (Bracci & Vagnoni, 2011). This problem of retaining, then transferring knowledge from the incumbent to a successor is exacerbated because of an aging workforce combined with increased unemployment, economic uncertainty, and competition for jobs between older and younger employees. Exploring the problem of Baby Boomers hindering generational succession by working beyond retirement eligibility holistically was the purpose of this current study. The focus of this study was to identify, select, and solicit 36 owner-managers, owner-CEOs, and owner-presidents of small businesses throughout the Washington, DC metropolitan area as study participants who may have the contextual ability to reflect on their experiences. Researchers use qualitative research methods and designs to explore individual perspectives, experiences, and reflections concerning a problem under study (Miner-Romanoff, 2012).

Prior to conducting research, assurance of reliability, validity, and transferability of the current study entailed calibrating and refining the research instrument and data collection with a select group of experts via a pilot study to examine the trustworthiness and enhance rigor in research. Secomb and Smith (2011) posited that using pilot studies to improve trustworthiness is central to enhancing rigor of the research design, method, and instrument. In both instances of the pilot and main studies, participants received a request for informed consent, confidentiality agreement (see Appendix C) and qualitative study questionnaire with open-ended questions (see Appendix B) via a Web-based survey portal to participate in this study. The protection of participant identity and

confidentiality along with protecting the integrity of the research occurred via issuance of pseudonyms and alphanumeric codes while offering the option to withdraw from the study, thereby allowing for developing, building, and maintaining participant-researcher trust (Udo-Akang, 2013).

The next section is an analytical summary interpretation of data and study findings in the context of the conceptual framework, a review of the literature, and advocacy worldview. Beginning with an overview of the study, this section comprised of both the pilot study and the present study findings with interpretations, reflections, and conclusions applicable to professional, business practices. Finally, this section denoted an advocacy worldview derived from implications for social change. The current study findings, bound by the reflective insights and experiences of participants, offered an application to professional practice with recommendations for further study.

Section 3: Application to Professional Practice and Implications for Change

Introduction and Brief Summary of Findings

The purpose of this qualitative case study was to explore the effect of generational transition and succession on small businesses. The competitive advantage of a business is affected by retirements, midcareer changes, reorganizations, the effectiveness and efficiency of decision-making, productivity, innovation, technological innovations, and workforce demographic changes (Johnson, Schnatterly & Hill, 2013; Rothwell, 2011). The primary concern of business leaders is not technology or economics but changing workforce demographics (Aggarwal, 2011; Brody and Rubin, 2011; Lyons, Ng, and Schweitzer, 2014).

Because of changing workforce demographics, limited promotion opportunities for successive generations created friction between generations (Legas & Sims, 2011). Consequently, effective succession planning provides opportunities for businesses to develop employee leadership skills for use in current and future positions (Galbraith, Smith, & Walker, 2012). Section 3 covers the following topics: (a) an overview of the pilot and main studies, (b) a detailed presentation of the findings, (c) applications to professional practice, (d) implications for social change, (e) recommendations for action, (f) opportunities for further research, and (g) personal reflections of the research experience. This section concludes with a summary of the qualitative case study.

Themes emerged resultant of data analysis. I achieved an enhanced understanding of the implications of social change by exploring relevant literature concerning the problem under study. Based on interpretive research of relevant literature by Morris

(2011), Sanders (2011), Sopko (2010), and Tomaszewski (2010), this study's findings supported the influential aspects of organizational culture as an overarching theme concerning the effects of retirement-eligible workers in small businesses. Current study analysis of findings indicated the emergence of the following codes: (a) storytelling, (b) mentoring, (c) education and training, (d) different generational ethics and values, (e) increase costs of salary and benefits (e.g., The Affordable Care Act), (f) experience, (g) skills gap, (h) trust, and (i) communication. This analysis resulted in the emergence of multiple themes that aligned with the theory of collaboration, narrative paradigm theory, stakeholder theory, and swift theory of trust.

Data analysis indicated the application of the narrative paradigm theory by business leaders of learning organizations. These leaders manage, control, and transfer value-laden knowledge narratively or verbally during organizational transformation (Beal, 2013; Fisher, 1984, 1985, 1989; Forman, 2013; Lukosch et al., 2011; Sachs, 2012; Smith, 2012; Whyte & Classen, 2012). Study findings and emerging themes indicated alignment with the theory of collaboration (Graci, 2012; Gray, 1989; Rigg & O'Mahony, 2013), swift theory of trust (Fukuyama, 1995; Meyerson et al., 1996), and stakeholder theory (Garvare & Johansson, 2010; Gibson, 2012; Harrison & Wicks, 2013; Jensen & Sandström, 2011). Business leaders dialogue collaboratively to facilitate or sustain relationships on the basis of trust with stakeholders through knowledge and resource sharing (Fukuyama, 1995; Graci, 2012; Meyerson et al., 1996; Rigg & O'Mahony, 2013).

Overview of Study

To obtain a perspective regarding the effects of an aging workforce and

generational differences in succession planning, I solicited and elicited small business leader study response by used an electronic, Web-based qualitative case study questionnaires with open-ended questions Small business leaders, geographically dispersed throughout the Washington, DC metropolitan area, offered limited opportunities to conduct interviews in-person or via telephone because of time, distance, access, and cost (Jowett et al., 2011; Stacey & Vincent, 2011). Small business owners, owner-managers, and owner-CEOs, as the primary source of strategic knowledge and dynamic capabilities about their firms, provided expert insight into the research question (Bracci & Vagnoni, 2011; Elo et al., 2014). Because small business leaders represent the source for strategic knowledge and direction of a firm, the focus of this qualitative case study was to explore the experiences and perspective of a target population responsible for creating a succession-planning framework that (a) addresses leadership development and exit strategies; (b) forecasts talent needed to maintain and sustain growth; and (c) leverages employee skills that support organizational goals and objectives encompassing legal, financial, psychological, and educational considerations that ensure a successful transition (Garg & Van Weele, 2012; Kowalewski et al., 2011).

Qualitative case study invitations were distributed by providing small business leaders access to a Web-based, open-ended questionnaire link via e-mail (see Appendix E). Lower cost, administrative ease, and the potential of reaching a larger sample are advantages of using the Internet to conduct Web-based interviews (Hunter, 2012; Misra et al., 2012; Windle & Rolfe, 2011). The small cost of a Web-based questionnaire offered enhanced data collection capability compared to collecting data via in-person, telephone,

or mail (Belfo & Sousa, 2011; Lindhjem & Navrud, 2011). To frame the approach to inquiry, I presented 19 open-ended questions delineated in Appendix B to a target population of 72 participants. The following central research question guided this qualitative case study: What strategies do small business leaders use to address generational succession and the effect of Baby Boomers continuing to work well beyond traditional retirement eligibility age of 67 years?

Pilot Study

To validate questionnaire instrument trustworthiness, I conducted a pilot study using identical delimitation criteria of the current main study (Ali & Yusof, 2011; Chenail, 2011; Secomb & Smith, 2011; White et al., 2012; Yin, 2011). Upon receiving the IRB approval, pilot study participant selection occurred using a purposive and snowball or network sampling technique. A select group of experts received a pilot study invitation via email. These experts were offered access to a self-administered secure Web-based electronic questionnaire survey portal at http://www.SurveyMonkey.com.

Additional techniques of disseminating pilot study invitations entailed using social media outlets of small business and professional defense and aerospace trade organizations listed in LinkedIn and Google+ (see Appendices D and F). These invitations included (a) access to self-administered secure Web-based electronic questionnaire survey portal at http://www.SurveyMonkey.com to answer a 19-question questionnaire; (b) brief background of the pilot study, (c) purpose and context of the questionnaire, (d) the risks and benefits of participation; (d) request for acknowledged and informed consent; (e) confidentiality agreement (see Appendix C); (f) offer of

voluntary study participation; and (g) a request to provide feedback to ensure the removal of ambiguous, misleading, or biased questions, instructions, and statements.

With a main study sample size of 36 participants, the pilot study invitation consisted of soliciting responses from 10% of the main study sample or four small business leaders (see Appendices D and F). Johanson and Brooks (2010) posited that sampling 10% of the main study sample meets reasonable standards for a pilot study. While exploring the effect of generational transition and succession on small businesses, I solicited responses from 30 small business leaders. This solicitation resulted in receiving and accepting 4 responses or 10% of the main study sample. Responses received from participants encompassed refining, revising, or developing questions, instructions, and statements to establish the validity, reliability, and feasibility of this study's research design and data collection instrument.

A review of the pilot study indicated that participants answered all questions completely or skipped some of the 19 questions. Participant feedback indicated that questions 9 and 10 were duplicate questions. Consequently, I revised the questionnaire by removing and replacing the duplicate question with a question that aligned with the primary objective of exploring the effect of generational transition and succession on small businesses. In this study, the next segment denoted a delineation of research questions including recommendations to revise the pilot study invitations or the questionnaire based on the analyzed and interpreted findings with conclusions.

Main Study

The main study sample size included 36 participants. Upon receiving IRB

approval, I conducted the main study to explore the effect of changing workforce demographics on small businesses. Similar to the pilot study, the main study denoted identical delimiting criteria to determine participant eligibility and homogeneity for participating in this study (Burmeister & Aitken, 2012; Thabane et al., 2010). Using a purposive and snowball or network sampling technique, the main study via email included an invitation for small business leaders to access the self-administered secure, Web-based electronic questionnaire survey portal at http://www.SurveyMonkey.com. This invitation included a request for participants to refer small business leaders that meet the study's delimiting factors (O. C. Robinson, 2014).

Web-based survey response rates vary from 7-52.5% (De Bernardo & Curtis, 2012; Hardré et al., 2012; Lindhjem & Navrud, 2011; Saunders, 2012). To identify, select, solicit, and invite 36 participants, I distributed invitations to 72 participants purposively with an expected response rate of 50%. The distribution of invitations occurred via email, SurveyMonkey, and social media outlets of professional defense and aerospace trade organizations listed in LinkedIn and Google+ (see Appendices E and G).

To solicit additional small business leaders based on referrals from friends, colleagues, and or individuals, I used a snowball sampling or network sampling technique. Using purposive sampling and the snowball or network sampling techniques resulted in a complete saturation and verification of sample quality (Agrawal, 2012; Omona, 2013; Oppong, 2013). This technique not only assured data reliability, validity, and transferability but also established trustworthiness and ensured rigor in research (Ali & Yusof, 2011; Elo et al., 2014; Ihantola & Kihn, 2011; Kisely & Kendall, 2011;

O'Reilly & Parker, 2013; Sousa, 2014). The data collection results yielded responses from 7 out of 36 participants initially over the first 2 weeks of data collection.

Slow participant response engendered the implementation of the following contingencies to increase participant response by (a) sending reminder emails to prospective participants via SurveyMonkey; (b) making a personal plea by telephone and email directly to potential participants; (c) soliciting Walden University students, faculty, and colleagues for support; (d) inviting participants via social media websites such as LinkedIn and Google+; and (e) requesting information from SurveyMonkey on methods to improve participant's response. Consequently, an additional six participants or 13 out of 36 participants responded to the study over an additional 4-week period. In addition, I also contacted the Washington, DC Chamber of Commerce for advice and guidance on eliciting other methods of soliciting potential study participants. After sending two emails followed by four telephone calls to the Washington, DC Chamber of Commerce, my effort to obtain advice and guidance regarding other methods of soliciting potential study participants did not yield favorable results.

Because of low participant response, I consulted with a few colleagues and the committee chair for advice on devising other techniques to improve participant response. Colleagues and the committee chair advised that mailing additional paper copies of the main study invitation to prospective participants may increase research participation and assist efforts to achieve data saturation (see Appendices E and G). Fifty participants received via U.S. mail paper copies of the main study invitations. Mailing invitations to potential study participants is an effective technique for improving participant response

compared to soliciting participant response via the Internet (Cho, Johnson, & VanGeest, 2013). Participants receiving an invitation to participate in a study via mail vice email may view exploring an approach to inquiry as legitimate thereby, trusting the seriousness and importance of the study (Dykema, Stevenson, Klein, Kim, & Day, 2013). Consequently, sending invitations via mail yielded responses from an additional 10 participants or 23 out of a 36 participants over an additional 6-week period.

The pursuit and advancement of research that yields in-depth and enriched knowledge of a problem descriptively denotes the focus of qualitative research rather than acquiring a defined number of participants (O'Reilly & Parker, 2013). I achieved saturation at 23 versus 36 participants. Reaching and justifying data saturation occurred because participants provided enriched, reliable, valid, and replicable results (Elo et al., 2014; Francis et al., 2010).

Analyzing enriched, reliable, valid, and replicable study findings thematically resulted in the emergence of 14 themes (see Section 3). Data saturation occurs when exploring a problem under study offers no additional findings, concepts, or themes (Ando et al., 2014). Achieving and justifying saturation transpires when data analysis no longer yields enriched, valid, and replicable findings (Malterud, 2012).

Data collection after participant 20 continued until information provided by small business leaders indicated consistent and recurring themes. Cleary et al. (2014) including Hikari et al. (2014) and Walker (2012) posted that achieving saturation involves continual data collection and examination until findings denote redundant, non-emergence of new themes, evidence by repetitive revelations of participant lived

experiences. For example, results from participants 20 showed recurring, yet similar findings, concepts, or themes supplied by participants 1-19. These small business leaders expressed the importance of a collaborative, organizational culture that embrace change, respects, values, and acknowledges a multigenerational workforces' contribution to assuring the growth of the firm through succession planning. Consequently, continued data collection past participant 23 offered no additional benefit to the story, theory, model, or framework, because participant responses yielded recurring concepts or themes that engendered data saturation (Hanson et al., 2011; Hunt, 2011; Mason, 2010; Morse et al., 2014).

Presentation of the Findings

To protect the integrity of the research, I used alphanumeric pseudonyms to mask participants' personal identifying information (PII) and commercial business information (CBI) as a method of protecting participants' and business' identity (Udo-Akang, 2013). This procedure entailed referring to small business leaders as *Participant* followed by an assigned number ranging from 1-23. Protecting participants' rights and privacy transpired by requesting authorization from each participant via informed consent with a confidentiality agreement (see Appendix C).

Collecting demographic data provided an opportunity to understand the experiences or perspectives of a diverse sample that enriches this approach to inquiry (Baker & Edwards, 2012; Norlyk & Harder, 2010; Suri, 2011). The first five questions of the questionnaire sought to elicit participant demographic information. This information included the following: (a) the title and position, (b) year of birth, (c) education, (d)

professional experience, (e) the generational make-up of the workforce within the firm, (f) the year of the company's creation, and (g) the length of the company's existence. Participant responses describing participant experience and the geographical boundaries of this research offered assurances of credibility, transferability, dependability, and conformability via participant responses (Buchbinder, 2011; Prion & Adamson, 2014; Thomas & Magilvy, 2011). Codes and themes emerged resultant of findings derived from analyzing the participant questionnaire responses to 19 open-ended questions related to the current research question: What strategies small business leaders use to address generational succession and the effect of Baby Boomers continuing to work well beyond traditional retirement eligibility age of 67 years? The following subsections denote demographic and thematic qualitative case study questionnaire analysis and findings.

Demographics

Exploring the effect of generational transition and succession on small businesses began with the elicitation of participants' title, position, education, and professional background. Questions 1 and 2 aligned with the purpose statement and focus of this study to elicit information from participants who, as small business leaders (a) determine the strategic imperative of addressing generational succession planning; (b) determine the methods used to mitigate the drain in intellectual capital resulting from generational succession; (c) create a culture that embrace change and establish a sense of urgency regarding generational succession planning; (d) offer an enriched perspective on affect Baby Boomers, who continue working beyond societal accepted retirement age, have on small businesses; and (e) offer enriched, yet insightful, nuanced perspective concerning

the challenges experienced by small businesses with a multigenerational workforce. Data collected from Questions 1 and 2 indicated that 100% of all participants are small business owners.

With respect to education, 83% or 19 of 23 participants hold post-graduate degrees. Participant title and positions ranged from owner-president or chief executive officer (CEO) to a consultant, administrator, founder, cofounder, partner, and business developer. Additional review of data indicated anecdotally and with respect to participants' positions or titles suggested that small business leaders represented or performed various functions with their firms.

For example, Participants1 and 2 referred themselves often with multiple titles as an owner, owner-president, consultant, business developer and president, CEO, cofounder, and director of sales. Conversely, Participants 4, 7, 12, and 14 or 4 of 23 (17%) of the small business leaders noted themselves respectively as administrator, owner, partner and cofounder, and adjunct instructor and tutor. Participants (18 of 23 or 78%) identified themselves respectively as CEO, president, and chairman of the board. Consequently, data suggested that the participant position title was a personal decision determined perhaps by the participant. This decision, based on Maslow's (1943) hierarchy of needs, included defining position title on the basis of a need for (a) physiological; (b) safety and security; (c) love and belonging; (d) self-esteem, self-respect, self-confidence, and achievement; and (e) self-actualization and not by an external person or entity.

The answers to Question 3 regarding each participant's year of birth ranged from

1934 to 1983 with 1957 as the median year of birth. Question 3 aligned with the purpose of this study because 51.5 million or 66% of 78 million Baby Boomers commonly hold executive, leadership, or management positions (Chavez, 2011; "FAQ," 2011; "2013 small business profiles," 2014). Retirement-eligible Baby Boomers' ability to retain and transfer knowledge to successive generations further aligned Question 3 with the problem statement of this study. Table 1 represents demographic information of each generational cohort that participated in this study. Data indicated that Veterans and Baby Boomers represented the largest of the generational cohorts (70% or 16 of 23 participants) responding to this study, followed by Generation X (26% or 6 of 23 participants) and Y (4% or 1 of 23 participants) respectively.

Table 1

Generational Cohort Demographic Information

Generation	Number of participants	%
Veterans	3	13
Baby Boomers	13	57
Generation X	6	26
Generation Y	1	4
Totals	23	13

Table 2 below represents additional demographic information regarding responses to Question 3 in this study. Participant age ranged from 31 to 80 years. The median age of participants was 57 years, and the mean was 55 years. Consequently, the results from the data suggested and confirmed that Baby Boomers were the predominant generational cohort responding to this study.

Table 2

Participant Year of Birth and Age

Participant	Year of birth	Age
1	1955	55
2	1969	45
3	1966	48
4	1957	57
5	1954	54
6	1942	72
7	1962	52
8	1963	51
9	1963	51
10	1957	57
11	1966	48
12	1962	52
13	1946	68
14	1963	51
15	1941	73
16	1972	42
17	1957	57
18	1946	68
19	1967	47
20	1956	56
21	1970	44
22	1983	31
23	1934	80

Note: Participants median age = 57 years. Participant mean age = 55 years.

An estimated 28.2 million small businesses exist in the United States ("2013 small business profiles", 2014). In Question 4, I requested participants identify when they established their businesses and how long their businesses had been in existence. Data showed 2004 as the median year participants established their respective businesses. Additional data obtained from Question 4 indicated that the mean of 19.65 years or the median of 10 years in business by participants. Research by the Small Business

Administration [SBA] (2011; 2014) showed that 13.5 million or 49% of small businesses continued operating for 5 years or longer; 9.4 million or 34% of small businesses continued operating 10 years or longer; and 7.2 million or 26% of small businesses continued operating 15 years or longer ("FAQ," 2011; "2013 small business profiles," 2014). Consequently, data collected in Question 4 confirmed research by the SBA indicated that 9.4 million or 34% of small businesses continue operating 10 years or longer.

Because of changing demographics, scholars indicated the presence of four distinct generations in the workplace for the first time in U.S. history (Haynes, 2011; Kapoor & Solomon, 2011). The changing workforce demographics offer small business leaders a variety of challenges, rewards, and perspectives often influenced by different styles of leadership, management, and communication (Coulter & Faulkner, 2013). Consequently, I explored the generational demographic make-up of the participants' workforce.

To understand the context of Question 5 responses, I requested participants identify the demographic make-up of their respective workforce categorically (Veterans born before 1945; Baby Boomers born 1946-1964; Generation X born 1965-1979; and Generation Y born 1980-2000). Data suggested that 78% or 18 of 23 small business leaders had a multigenerational workforce. Conversely, data also indicated that 22% or 5 of 23 small business leaders do not have a multigenerational workforce currently.

Participation in this study was voluntary for which participants may withdraw or refuse to participate in this study at any time without penalty. While participating in this

study, participants may also skip questions deemed too personal. If participants noted on the questionnaire as not having a multigenerational workforce currently or employed a multigenerational workforce previously, questionnaire instructions offered participants the opportunity to skip Questions 6-18 and answer Question 19.

Bracci and Vagnoni (2011) posited that small business owners, owner-managers, and owner-CEOs are the predominant source of strategic knowledge and foresight of their firms. The participants proffered additional information that provided in-depth, albeit holistic understanding of the problem that contextualized experiences of a small business leader addressing generational succession. Consequently, I reviewed the data collected and determined that the information offered by the participants provided expertise relevant to the problem under study

Coding and analyzing data collected from questions 6-18 began by using MAQXDA 11 software. This technique enabled the development of coding categories to understand the meaning of the data by developing emergent themes, as related to the conceptual framework and research questions of this study (Carcary, 2011; Kwan, 2013). Because of limited experience and despite taking tutorials, using MAQXDA 11 to code, categorize, and analyze data proved challenging and time-consuming. As a contingency, I used SurveyMonkey's integrated coding and analysis capabilities to code, analyze, and categorize responses by participant and question into a Microsoft Excel spreadsheet. Coding, analyzing, and categorizing responses resulted in the discovery of emergent themes while validating some of the existing themes.

Themes

A comparative, thematic analysis of reliable, justifiable, and replicable study findings yielded in the emergence of 14 themes. The frequency of these themes aligned with the conceptual framework of this study. This alignment occurred by comparatively analyzing this study's findings with published findings posited in previous studies such as those of Allah, (2011), Bragg (2011), Cole, (2010), Gudewich (2012), King (2012), Miles (2011), Morris (2011), Sanders (2011), Schultz-Moser (2009), Sopko (2010), Thomas (2015), and Tomaszewski (2010). For example, published findings from Allah (2011), Bragg (2011), and Sanders (2011) confirmed the significance of the following emergent themes aligned with various theories comprised within the conceptual framework noted in this study. These themes are Theme 3 (Storytelling as a collaborative knowledge management technique), Theme 5 (Collaborative organizational culture as an empowering force for developing leaders), Theme 10 (Succession planning as a bridge to building trust through collaboration), Theme 11 (Communication and trust as a decision-making nexus affecting succession planning), and Theme 14 (Organizational culture as an information sharing and succession planning framework). Allah (2011), Bragg (2011), and Sanders (2011) with data derived from findings of this study aligned elements of the conceptual framework of this study. This alignment affirmed the importance of organizational leaders with a multigenerational workforce facilitating a collaborative, organizational culture that supports knowledge sharing, trust, and succession planning through transparent, open communication.

Theme 1: Generational differences reflect small business leaders' challenges.

Shared or collective understanding of responsibilities between older and younger generations also includes understanding similarities and differences in values and work ethics between older and younger generations (Gursoy et al., 2013). I solicited participants to identify the challenges facing small businesses with a multigenerational workforce compared to workforces in the past, present, and future. The majority of the participants or 19 of 23 participants responding to Question 6 indicated that differences in work ethic, values, expectations, and culture are one of the many challenges facing small businesses. For example, Participant 3 noted that older generations are more traditional and prefer a regular 5-day, 8-hour work schedule with clear roles, responsibilities, and reporting structure. Participant 3 also asserted that younger generations prefer flexible work schedules and telecommute as opposed to working at a fixed office location.

Diverse perspectives concerning authority, management, position, and title among respective generational cohorts exist in the workplace (Kapoor & Solomon, 2011). Participant 10 expressed that small businesses experienced problems of retaining younger employees because of the younger generation's desire for more money. In other words, this small business leader viewed younger generations' as lacking loyalty. Comparatively, small business leaders (Participants 3, 11, 18, 20, 21, and 23) perceived older generations as stable, loyal, dependable, reliable, and knowledgeable. Angeline (2011) posited that business leaders who do not acknowledge diverse expectations or perspectives of a multigenerational workforce effects productivity and competitive advantage negatively. Using Maslow's (1943) hierarchy of needs, I assert that individual

members of a particular generational cohort assert their interest on the basis of (a) physiological; (b) safety and security; (c) love and belonging; (d) self-esteem, self-respect, self-confidence, and achievement; and (e) self-actualization needs.

Participants responding to Question 6 asserted that the affordable health care is an additional challenge for small businesses with a multigenerational workforce. Jacobe (2013), noting an April 2013 Gallop survey, asserted that because of uncertainty regarding the implementation of the 2010 Affordable Care Act (ACA), 41% or 247 out of 603 business leaders polled delayed hiring new employees and 38% or 229 out of 603 business leaders polled curtailed plans to expand competitive growth efforts. Comparatively, a U.S. Chamber of Commerce commissioned 2013 Harris Interactive poll reaffirmed that 50% of small business would reduce employee hours or hire additional part-time employees to avoid 2010 ACA compliance (Lahm, 2013). Participant findings indicated that employee healthcare costs associated with the implementation of the 2010 ACA affected business leaders' decisions to hire or retain younger generations over Baby Boomers.

Theme 2: Multigenerational succession affects the bottom line. Study findings indicated an unusual response from Participants 5, 9, and 13 who noted affordable health care vice changing workforce demographics as the greatest challenge facing small business. Questions 6 and 8 aligned with the qualitative study questionnaire (see Appendix B) and the following main study research question: What strategies do small business leaders use to address generational succession and the effect of Baby Boomers continuing to work well beyond traditional retirement eligibility age of 67 years?

Research questions offered to participants aligned and framed this researcher's approach to inquiry regarding the effect of Baby Boomers who continue working or delay retirement for health, social, lifestyle, or standard-of-living reasons (McMurray et al., 2012).

An April 2013 Gallop survey suggested that because of uncertainty regarding the implementation of the 2010 Affordable Care Act (ACA), 41% or 247 out of 603 business leaders polled delayed hiring new employees and 38% or 229 out of 603 business leaders polled curtailed plans to expand competitive growth efforts (Jacobe, 2013). In addition, a 2013 Harris Interactive poll commissioned by the U.S. Chamber of Commerce reaffirmed concerns that 50% of small business would reduce employee hours or hire additional part-time employees to avoid 2010 ACA compliance (Lahm, 2013). Since the implementation of The 2010 ACA, small business leaders experienced an 18% increase in health insurance premiums compared to their large business contemporaries (Blumenthal & Collins, 2014; Miller, 2011). This health insurance premiums increase affected personnel decisions of small business leaders regarding delayed employee hiring, reduced work hours, reduced compensation and benefits, or limited employee retention (Lowry & Gravelle, 2013).

Participant 9 and 13 responses indicated a consensus with an April 2013 Gallop survey and 2013 Harris Interactive poll. These participants contended that employee healthcare costs associated with the implementation of the 2010 ACA affected business leaders' decisions to hire or retain younger generations over Baby Boomers. With respect to Question 8, several participants offered and supported views by expressing a

consensus that changing demographics does affect business and personal financial decisions. Study participants noted the importance of health including economic or financial necessity as factors affecting Baby Boomers' decision to continue working beyond traditional retirement age. Because of the economic pressures of sustaining a competitive advantage, Participants 3 and 4 stressed the importance of retaining knowledge over retaining an aging workforce with healthcare issues.

The rationale for exploring the impact of Baby Boomers continuing to work past normal retirement on a firms' financial performance was to examine the central question of this study. Question 11 aligned with the problem and purpose statements of this study. The alignment of Question 11 with the problem and purpose statement of this study was three-fold. First, aging Baby Boomers retiring or working beyond retirement eligibility while younger generations enter the workforce is the central problem of this study. Second, the effect of retirement-eligible Baby Boomers on the ability of small businesses' to retain and transfer knowledge to successive generations was the general problem of this study. Third, the specific problem was some small business owners lack strategies to address the effect of Baby Boomers continuing to work well beyond societal accepted retirement eligibility.

Participants 4, 5, 8, 9, and 23 or 5 of 23 (22%) small business leaders responding to Question 11 indicated that Baby Boomers continuing to work past normal retirement affected the economic performance of small businesses negatively. These small business leaders argued that higher compensation and benefits (e.g., health care cost) attributed to the employment of Baby Boomers affected profits negatively. Participant 9 contended

that increasing cost resultant of the 2010 ACA combined with changes in the competitive market affects small businesses' financial performance negatively. Participant 23 further asserted that though Baby Boomers working longer may influence the financial performance of a company negatively, a Baby Boomers' work ethic combined with knowledge and experience negates a firm's higher costs. Participants 11, 18, and 22 or 3 of 23 (13%) small business leaders further reported that Baby Boomers continuing to work past normal retirement affected the economic performance of small businesses positively. Conversely, Participants 1, 17, 19, and 20 suggested that Baby Boomers continuing to work past normal retirement had a negligible effect on the financial performance of small business.

The remaining participants either skipped Question 11 or offered a negligible or indistinguishable response to the research question. Small business leaders experiencing multigenerational conflicts among their workforce may experience reduced profitability because of hiring challenges, increasing employee turnover, and decreasing employee morale (Kapoor & Solomon, 2011). Conversely, small business leaders hiring younger, less costly and less experienced workers to replace retiring Baby Boomers may experience increased cost and lose intellectual capital while paying higher salaries to retain experienced, yet retirement-eligible workforce to maintain a competitive advantage (Sanders, 2012).

Skill shortages and employee turnover noted by participants offered an opportunity to elicit enriched or emergent perspectives regarding the organizational and financial influence of capturing, managing, and retaining knowledge of retiring or

retirement-eligible Baby Boomers. Question 13 aligned with the significance of this study. A multigenerational workforce combined with skill shortages and employee turnover are tremendous challenges affecting the viability of small businesses (Beesley, 2011; Phillips & Addicks, 2010). Multiple participants or 11 of 23 (48%) small business leaders responding to Question 13 contended that retiring or retirement-eligible Baby Boomers did not affect the organizational and financial performance of their firms.

The remaining participants (5 of 23 or 22%) argued that retiring or retirement-eligible Baby Boomers affected the organizational and financial performance of their firms positively. Participant 20 asserted that retiring or retirement-eligible Baby Boomers affected organizational and financial performance positively because they are well dressed, professional, dependable, reliable, and loyal. Participant 20 also asserted that recruiting, hiring, and retaining Baby Boomers translated into valuable experience resulting in reducing costs.

Valuing multigenerational differences by retaining experienced employees represent a small business leaders' strategic imperative that (a) lowers human capital investment costs, (b) increases return on human capital investment, and (c) supports sustainability through institutional knowledge exchange between generations to achieve a competitive advantage (Cho & Lewis, 2011; Gursoy et al., 2013; Harvey, 2012; Kuyken, 2012; McEvoy & Henderson, 2012; Whelan & Carcary, 2011). Coincidently, Participant 22's sentiments aligned with the view above expressed by Participant 20, but only in terms of an organizational culture that attracts and values Baby Boomers as helping vice hindering generational succession. Translating Baby Boomer experience that affects

organizational and financial performance positively represents a small business leaders' strategic vision to retain experienced employees.

Theme 3: Storytelling as a collaborative knowledge management technique. Particants responding to Question 7 involved exploring how small business leaders mitigate the challenges of a multigenerational workforce transition between Baby Boomers, and successive generations were. This question aligned with the problem statement because of retirement-eligible Baby Boomers affecting the ability of small business leaders to retain and transfer knowledge to successive generations. Examining study findings indicated that though fewer than 22% or 5 of 23 small business leaders (Participants 2, 7, 13, 14, and 15) skipped Question 7 but answered Question 19, I determined that these small businesses leaders have knowledge of and can offer additional insight into the problem that further enriches this approach to inquiry.

Wang and Noe (2010) asserted that successful knowledge-management initiatives are critical to sustaining a competitive advantage. The majority of participants or 18 of 23 (78%) small business leaders responding to Question 7 reflected a commitment of supporting and implementing knowledge-management initiatives of collaboration through knowledge sharing that reduce costs, improve performance, leverage innovation, and increase growth. The aforementioned participants noted respective strategies, processes, and methods of using storytelling to create, initiate, incorporate, and implement mentoring programs; collaborative, team-building sessions; and a culture of sharing knowledge. An organizational culture supportive of knowledge-sharing through storytelling denotes a colloborative, albeit mentor-protégé environment of team-work,

respect, trust, and communication (McNichols, 2010).

Based on participant responses, Theme 3 aligned with narrative paradigm theory (Gill, 2011; Kendall & Kendall, 2012); swift theory of trust (Fukuyama, 1995); collaboration theory (Graci, 2012; Rigg & O'Mahony, 2013); and stakeholder theory (Garvare & Johansson, 2010; Gibson, 2012; Harrison & Wicks, 2013). Participant responses indicated small business leaders commitment to use storytelling as a collaborative knowledge management technique of allocating resources to transfer, share, and manage knowledge. Theme 3, participant responses, and the aforementioned respective theories affirmed and validated that participants who, as stakeholders in their respective firms, conducted or facilitated periodic employee interviews, group meetings, and education and training sessions which employees mentored each other often telling stories or creating a narrative that mitigates generational differences. Findings, themes, and theories framed conceptually in this study validated and confirmed that small business leaders often told stories or offered a narrative to instill trust through transparency and empathy across generations by sharing expertise and providing lessons learned collaboratively.

For example, participants who, as stakeholders in their respective firms, mentored employees by facilitating periodic interviews, group meetings, and education and training sessions through storytelling or creating a narrative that mitigates generational differences. Gill (2011) posited that storytelling is critical to the sharing of knowledge and expertise between generations. Presenting a narrative or telling a story to share experiences and perspectives leads to enhanced understanding of a problem under study

(Beal, 2013).

The cohesive and effective functionality of a workforce requires trust as a basis for interpersonal relationships and a source of sustained competitive advantage (Fulmer & Gelfand, 2012; Gilbert & Behnam, 2013; Mukherjee et al., 2012). Study findings indicated that small business leaders often told stories or offered a narrative to instill trust through transparency and empathy across generations by sharing expertise and providing lessons learned collaboratively. Sharing knowledge through storytelling enhances the sense of commuity by stabalizing intergenerational and multigenerational cultural knowledge within an organization and (Yang, 2013). A leader's commitment to utilize knowledge-based resources innovatively reduces cost, improves performance, and supports a culture of trust through transparency (Mansor et al., 2012; Stevens, 2010). Promoting a culture of transparency between generations invokes transformative organizational social change that increases growth and creates a competitive advantage in the global marketplace (Sense, 2011; Wang & Noe, 2010).

Theme 4: Merit-based not age-based organizational culture as a basis for leadership pipeline development. In responding to Question 8, Participants 5, 8, 12, and 19 did not view an aging workforce continuing to work past traditional retirement age an issue. These participants emphasized that merit not age is the basis for recruiting, hiring, and retaining employees. In addition, Participants 5, 8, 12, and 19 asserted that the preference for a productive or experienced, skilled, and educated and trained workforce is paramount to maintaining a competitive advantage. Consequently, small business leaders create and sustain a culture that leverages best succession strategies within a

multigenerational construct. These best succession strategies mitigate the adverse effects of losing productivity and increasing cost by enabling organizations to retain and preserve knowledge (Donate & Sánchez de Pablo, 2015; Mäkeläa et al., 2012; McNichols, 2010; J. S. Thomas, 2011).

Theme 5: Collaborative organizational culture as an empowering force for developing leaders. Social change begins and ends with identifying problems and solutions to recognize talent shortage, generational divide, and employee turnover as challenges affecting the viability of small businesses (Beesley, 2011; Phillips & Addicks, 2010). I explored how small business leaders ensure Baby Boomers prepare successive generations to assume responsibility as leaders or managers. Participant responses to Question 9 aligned with the foundation of this study to provide small businesses with realistic and pragmatic solutions for instituting methods to develop or prepare personnel to become leaders. Several small business leaders suggested actions to prepare successive generations as leaders via a reciprocal mentor-protégé framework that share expertise collaboratively. In other words, these participants supported a knowledge sharing culture through collaboration. Participants 21 and 22 noted that succession-planning efforts to develop a pipeline of talent occurred through informal alliances by pairing Baby Boomers with younger generations. Study findings indicated that these participants leveraged informal multigenerational alliances to develop a pipeline of talent by conducting periodic mentoring, education and training, and coaching sessions.

Conversely, data showed that Participants 6 and 23 did not prepare successive

generations to lead or manage. Both participants reported assimilating to the varied cultural or behavioral modalities, characteristics, and norms of successive generations as a method of managing and sharing knowledge. Participant 18, however, empowered employees to prepare successive generations by bestowing younger generations with the responsibility and accountability for results.

Theme 6: Knowledge and skills gap threatens business viability and sustainability. The existence of a gap in research concerning possible knowledge or skills gap is the rationale for exploring why small business leaders choose or not choose to retain Baby Boomers**.** Question 10 aligned with the problem statement of this study because the knowledge or skills gap, departing expertise, and limited number of workers to replace ageing Baby Boomers threatens the viability and sustainability of businesses (King, 2012). Additional interpretive examination of the literature posited by Morris (2011), Sanders (2011), Sopko (2010), and Tomaszewski (2010) aligned not only with Question 10 of this study, but offered the framework to explore the implications of social change.

Organizational leaders with a multigenerational workforce require employees to acknowledge that older and younger generations have different values and work ethics (Gursoy et al., 2013). Several small business leaders (Participants 1, 3, 4, 5, 6, 8, 9, 10, 11, 12, 16, 21, and 23) or 13 of 23 (57%) responding to Question 10 provided both points of view to retaining or not retaining Baby Boomers. These participants indicated that small business leaders retain Baby Boomers because of loyalty, maturity, reliability, dependability, and productivity. For example, Participant 23 retained Baby Boomers

because of a loyal, strong work ethic combined their knowledge and experience. Participants 3, 17, 18, 19, 20, and 21, however, also provided different, yet surprising perspectives regarding small business leader's choice to retain or not retain Baby Boomers.

Small business leaders (Participants 3 and 21) responding to Question 10 viewed technology as a factor affecting their decision to retain or not retain Baby Boomers. Participant 3 contended that expertise and access in gathering information via the Internet is a significant component within the culture of today's "high-tech, information-centric firms". Tensions often, as argued by Participant 3, occur between younger and older generations because of earlier generations' inability to exhibit agility and flexibility to function in a high-tech, information-centric environment.

Participant 21 further supported Participant 3's assertion that small business leaders choose not to retain Baby Boomers because of the perception that older generations lack the aptitude and attitude to embrace technology. Consequently, negative perceptions exist multigenerationally concerning the effect of technology on a small business leaders' decision to retain or not retain Baby Boomers. Because some business leaders perceive older workers (e.g., Baby Boomers) as too old, resistant to change, lacking the right skills, or as having health problems despite no change in job performance, negative perceptions about older workers are often resultant of an economy and the job market of sustained unemployment, postponed retirements, and increased age-discrimination lawsuits (Rix, 2011).

Theme 7: Age and experience as a competitive advantage. Participant 17 responding to Question 10 suggested that because of the competitive marketplace; Baby Boomers are less costly and more productive, thereby translating to a better return on investment (ROI) compared to younger generations. Participant 18 considered decisions to retain or not to retain Baby Boomers as a nonissue but offered an example of a colleague and CEO's dilemma to hire or not hire someone older instead of someone younger. Consequently, this small business leader (Participant 18) advised that though some business leaders may perceive a person as too old, the CEO should hire the older person because they are experienced, qualified, and a proven commodity.

Participants 19 and 20 contended that that age is not an issue, provided slightly different, yet complementary points of view. Participant 19 argued that the current generation of workers is far different from previous generations in terms of loyalty to employers. This small business leader perceived that the loyalty between employee and employer is an anachronism of an age different from the present era. Despite this perception, Participant 19 asserted that the company recruits, hires, or retains employees because of the skills, qualifications, and contributions that an employee offers a business. Participant 20 reiterated that an employee's age is not an issue but noted that small business leaders recruit, hire, and retain the best-qualified candidate because of knowledge, skills, and abilities.

Theme 8: Mentor-protégé network as a knowledge management paradigm. Aging, retiring, or retirement-eligible Baby Boomers is the rationale for exploring small business leaders' efforts of addressing the loss of intellectual capital. Question 12 aligned

with the problem statement and the implications of social change of this study. Aging and retiring Baby Boomers lead the largest brain drain and loss of competitive advantage since World War II (Bragg, 2011; Martins & Martins, 2011). U.S. businesses lose intellectual capital and competitive advantage because of an aging, retiring, and shrinking workforce (Pobst, 2014; Stam, 2010).

Out of the 23 participants, 8 or 35% of the small business leaders responding to Question 12 addressed the loss of intellectual capital from aging, retiring, or retirement-eligible Baby Boomers by noting efforts that promote collaborative knowledge sharing among employees via informal training and education. Data indicated that these small business leaders facilitate the multigenerational exchange of knowledge informally to mitigate barriers to knowledge transfer by supporting knowledge management methods and strategies (McNichols, 2010). Interestingly, Participant 20 reported using a strategy to retain retiring or retired Baby Boomers as independent consultants to mentor younger generations. Data indicated that business leaders exploit social, corporate alumni network of retired or retiring Baby Boomers that mitigate barriers to knowledge transfer by retaining, managing, and exchanging knowledge collaboratively.

Conversely, Participant 3 responding to Question 12 noted that recruiting, hiring, and retaining a multigenerational workforce mitigates the loss of intellectual capital from aging, retiring, or retirement-eligible Baby Boomers. Participants 9, 16, and 19 indicated that they addressed the loss of intellectual capital from an aging, retiring, or retirement-eligible Baby Boomers instituting the collaborative, albeit systemic and systematic knowledge management practices. These methods, noted by Participants 9, 16, and 19,

consisted of documenting organizational policies, procedures, and processes; documenting employee duties and responsibilities; and maintaining a knowledge management database supportive of succession planning. Consequently, knowledge of small business often rests on a single individual, group, or position for which systemic and systematic knowledge management differentiates a firm from its competitors (Durst & Wilhelm, 2011).

The remaining participants responding to Question 11 asserted that small business leaders do not view losing intellectual capital from an aging, retiring or retirement-eligible Baby Boomers an issue. Some small business leaders responding to Question 11 noted intent to plan succession despite employing non-retirement, eligible multigenerational employees. In other words, implementing a succession-planning framework that addresses leadership development and exit strategies entailed developing procedures that ensures a successful transition (Garg & Van Weele, 2012). Consequently, capitalizing on knowledge-based resources reduces cost, improves performance, and leverages innovation that reflects a small business leadership's commitment to increase growth and enhance competitive advantage by allocating resources to share knowledge (Wang & Noe, 2010).

Theme 9: Technology as a collaborative knowledge management tool. Several participants or 13 of 23 (57%) responding to Question 14 asserted that technology affects their ability to capture, manage, and retain knowledge with a multigenerational workforce positively. These participants contended that technology enhanced or improved the ability to capture, manage, and retain knowledge collaboratively within a knowledge

management framework, thereby saving costs through improved economies of scale and economies of efficiencies. Data collected from 4 of 23 (17%) participants offered mixed views regarding technology's effect on a small business leader's knowledge management framework. The participants offered mixed views by comparing and contrasting the positive and negative effects of technology on small business leaders' ability to capture, manage, and retain knowledge. These diverse views suggested that the effect of technology on small business leaders' abilities to manage knowledge with a multigenerational workforce is generational and dependent on the individual's technological knowledge or skills (Millar & Lockett, 2014).

Question 14 aligned with the theory of collaboration (Gray, 1989); stakeholder theory (Garvare & Johansson, 2010); and narrative paradigm theory (Fisher, 1984, 1985, 1989). Participants responding to Question 14 viewed using technology as a collaborative tool to capture, manage, and retain knowledge with a multigenerational workforce. These participants asserted that small business leaders often tell, share, or present stories in a collaborative setting between or among stakeholders to shape, mold, and frame transformative social change endeavors rich in experience, but unavailable through other methods (Brown & Thompson, 2013; Von Stackelberg & Jones, 2014). Sharing experiences, knowledge, and resources encompass a collaborative, yet reciprocal dialog and relationship between or among stakeholders (Gibson, 2012; Graci, 2012).

Theme 10: Succession planning as a bridge to building trust through collaboration. The effect of generational differences in succession planning is the rationale for examining small business leaders' thoughts and implications for social

change. Question 15 aligned with the theory of collaboration (Graci, 2012; Gray, 1989); stakeholder theory (Garvare & Johansson, 2010); and swift theory of trust (Fukuyama, 1995). Small business leaders manage, exchange, and integrate knowledge and resources collaboratively to build trust that balances the social change needs and interests of stakeholders and entities vested with organizational sustainability (Bachmann & Inkpen, 2011; Garvare & Johansson, 2010; Graci, 2012; Harrison & Wicks, 2013; Jensen & Sandström, 2011). Effective, yet collaborative communication between or among managers, subordinates, and employees builds trust, enhances employee commitment, and ensures productivity as a critical component of mitigating risk and minimizing costs (Mansor et al., 2012).

Data collected from Question 15 indicated that 2 of 23 (9%) small business leaders or Participants 6 and 12 viewed the effect of generational differences on succession planning as a nonissue. Participants 1, 10, and 22 or 3 of 23 (17%) small business leaders responding to Question 15 expressed having no thoughts concerning the effects of generational differences on succession planning. Surprisingly, Participant 11 admitted to not having a succession plan.

Conversely, Participants 3, 8, 9, 17, 20, and 23 or 6 of 23 (26%) small business leaders responding to Question 15 viewed the effect of generational differences on succession planning positively. These small business leaders asserted that succession planning is critical to a firm's success. This assertion by the participants showed a cultural philosophy of sustainability that older generations mentor and prepare younger generations to assume new roles in leading or managing the business. The cultural view

of sustainability, as expressed by small business leaders, indicated the adoption of a systems thinking approach (Seiler & Kowalsky, 2011). Adopting systems thinking involves creating or implementing processes and practices that improve team effectiveness, achieve organizational success, support succession planning, and create sustainable opportunities responsive to workforce demographic changes (Kapoor & Solomon, 2011).

Data collected from Participants 18 and 19 or 2 of 23 (8%) small business leaders responding to Question 15 offered mixed views concerning the effect of generational differences on succession planning within their respective companies. The diverse views provided by these small business leaders reported a negligible effect of generational differences in succession planning. Participant 18 viewed the impact of generational differences in succession planning with nuance. This small business leader asserted that sharing knowledge is an individualistic effort dependent upon not only the willingness, but also the attitude and aptitude of employees to participate in the succession process. In other words, Participant 18 argued that obtaining knowledge and experience is a self-reliant individual or collaborative trial and error process.

Participant 19 denoted employee age as a factor when deciding to mentor someone to assume a new role or succeed someone within the firm. This small business leader expressed employee loyalty and trust as a concern once an employee transitions to a new role or retires. Often upon retiring or transitioning to a new role, Participant 19 noted that an employee might depart from another firm, thereby resulting in the loss of intellectual capital and trust. The lack of trust often arises from the question of leadership

competence or multigenerational or multicultural misinterpretation impeding succession planning (Filsner et al., 2013). Consequently, failing to manage intellectual capital inhibits value-creation and affects the bottom line negatively (Brunold & Durst, 2012; J. S. Thomas, 2011).

Theme 11: Communication and trust as a decision-making nexus affecting succession planning. The opportunity to explore how generational differences affect succession planning entailed examing a small leader's ability to trust, communicate, and make decisions. Participant responses to Question 16 aligned with the relevant literature on this study concerning trust, communication, and decision-making (Aritz & Walker, 2010; Fazio & Lavecchia, 2012; Fukuyama, 1995; Fulmer & Gelfand, 2012; Mansor et al., 2012; Zarei et al., 2014). Small business leaders, who acknowledge generational differences and similarities, guide and communicate business decisions by ensuring succession planning strategies, align successor decision-making authority with the structure of the organization (Morris, 2011).

Several small business leaders (8 of 23 or 35%) asserted that generational differences do affect small business leaders' abilities to trust, communicate, and make decisions regarding succession planning. Small business leaders viewed trust and communication as an integral, yet effectual aspect of decision-making when planning succession. The participants contended that experience and knowledge represent essential components that mitigate generational differences affecting a small leaders' ability to plan succession.

Multiple small business leaders (8 of 23 or 35%) expressed negligible thoughts

concerning the effect of generational differences in their ability to plan succession successfully. Participants viewed the effect of generational differences concerning succession planning including the ability to trust, communicate, and make decisions as nongenerational. In other words, small business leaders planned succession by mentoring qualified and experienced successors regardless of age.

Theme 12: Managing change to mollify multigenerational conflict in succession planning. Stakeholders contribution to a firm's success served as a nexus for examining how small business leaders address multigenerational conflicts and resistance to change by acknowledge, embracing, and supporting continious improvement. Participant responses to Question 17 aligned with the relevant literature of this study regarding change management and multigenerational or intergenerational conflict (Bold, 2011; Carman & Nesbit, 2013; Filsner et al, 2013; Grady et al., 2011; Joshi et al., 2011; Kapoor & Solomon, 2011; Malone, 2011; North & Fiske, 2013a; Rosenberg & Mosca, 2011; Whelan-Berry & Somerville, 2010). Additional examination of Question 17 indicated the possibility of a potential alignment with the theory of groupthink concerning multigenerational or intergenerational conflict and resistance to change. Generational conflict or resistance to change arises potentially when an entrenched mentality develops via groupthink because of an extreme, albeit intense effort to maintain the status quo (Shirey, 2012).

The majority of small business leaders or 15 of 23 (65%) participants noted the nonexistence of multigenerational conflicts and resistance to change within their respective firms. Data indicated that small business leaders nurtured and facilitated an

organizational culture that embraces change, encourages continuous improvement, and acknowledges employees as stakeholders who contribute to organizational success. An additional analysis of data suggested that communicating, educating, training, mentoring, and respectfully treating employees mitigate potential conflicts and resistance within an organization. Leaders of learning organizations embrace change by conveying a strategic intent of growth through continuous improvement (Bold, 2011; Grady et al., 2011). This strategic intent mollifies multigenerational conflict by offering employees clear direction, motivation, and situational structure of the environment that supports continuous improvement (Malone, 2011).

Theme 13: Developing the next generation of leaders or managers for planned succession. Small business leaders preparing the next generation to assume responsibilities as leaders or managers served as the impetus to explore the rationale for having or not having a succession plan. The lack of succession planning affects a business's bottom line negatively whereas having a succession plan affects a business's bottom line positively (Bracci & Vagnoni, 2011; Dunham-Taylor, 2013). Participant responses to Question 18 aligned with the relevant literature of this study regarding generational transition and succession planning (Appelbaum et al., 2012; Cole, 2010; Duh & Letonja, 2013; Dunham-Taylor, 2013; Garg & Van Weele, 2012; Kowalewski et al., 2011; McEvoy & Henderson, 2012; McNicholas, 2010; Osnes, 2011; Parry & Urwin, 2011; Salahuddin, 2010; Sanders, 2011; Schulz-Moser, 2009; Whelan & Carcary, 2011).

Study findings indicated that 9 of 23 (39%) small business leaders have a succession plan. These findings further showed that the majority of participants used

mentoring, coaching, educating, and training to develop the next generation of leaders or managers. Surprisingly, Participant 19 noted the creation of an employee succession-planning framework, but also admitted to not having a succession plan that addresses transition of ownership in the event of disability, retirement, or tragic death. Though Participant 19 implemented an employee succession-planning framework, study findings include the suggestion that the risks of business failure increase because of a nonexistent succession plan that transitions ownership in the event of disability, retirement, or tragic death (Beesley, 2011; Bracci & Vagnoni, 2011; Garg & Van Weele, 2012).

Study findings indicated that 26% (6 of 23) of small business leaders do not have a succession plan. Interestingly, Participant 11 posited the nonexistence of a succession plan but intimated the existence of a mentoring program. Despite the nonexistence of a succession plan, study findings include the suggestion that an informal succession-planning framework exists. Participant 11 affirmed an organizational culture that encompasses mentoring, coaching, educating, and training employees to develop the next generation of leaders or managers

Theme 14: Organizational culture as an information sharing and succession planning framework. Institutional and multigenerational retention and protection of employee knowledge, skills, and expertise supports an information sharing and succession planning organizational culture. Participant responses to Question 19 aligned with the foundation of this study to advocate and provide solutions for instituting methods regarding succession planning, mentorship, education, and training in developing personnel to become leaders or managers. Study findings indicated that

organizational culture and environmental factors including age influence individual learning ability, but also affect individual talents and decision-making differently.

Data confirmed that retaining intellectual capital in the midst of generational exodus and skills gap is a concern of the business community (Morris, 2011; Sopko, 2010; Tomaszewski, 2010). The data indicated the importance of cultivating a collaborative culture that respects multigenerational differences and recognizes intergenerational coexistence as an essential, yet fundamental contributor to the financial development and long-term growth of the firm (Haynes, 2012). Participants affirmed the necessity for small business leaders to develop strategies, processes, policies, and procedures encompassing a knowledge sharing culture that facilitates and supports employee mentoring and team-building programs. Planned leadership succession begins with developing, codifying, implementing, and aligning organizational processes, policies, and procedures with organizational strategic imperatives to not only preserve and protect intellectual capital, but to prepare for organizational change (Perlman, 2010).

Applications to Professional Practice

The applicability of study findings indicated the necessity of a succession-planning framework. This necessity entailed small business leaders allocating resources to share knowledge-based resources that reduce cost, improve performance, and influence and increase growth (Wang & Noe, 2010). The expected beneficiaries of this study are small businesses leaders searching for realistic and pragmatic solutions for instituting a succession-planning framework.

The simultaneous presence of four generations indicated unprecedented

challenges and opportunities for small business leaders affecting employee turnover, productivity, and morale (Haynes, 2011; Legas & Sims, 2011; Mencl & Lester, 2014; Kapoor & Solomon, 2011). Because of advances in medicine and out of economic necessity, older generations compete against younger generations for jobs, resources, and benefits and entitlements (Kapoor & Solomon, 2011; Legas & Sims, 2011). This study's findings illuminated talent shortages, generational conflict, and employee turnover as challenges to growth and innovative, competitive advantage (Phillips & Addicks, 2010).

Study findings elucidated the impact of changing demographics on small business leaders' ability to make decisions, protect intellectual capital, recruit and develop human capital, and innovate that ensures sustained competitive advantage (Cocklin & Wilkinson, 2011; Rothwell, 2011). Because of changing demographics, small business leaders mentor, educate, train, and develop the next generation of leaders or managers to reduce employee turnover and recruitment costs (Parry & Urwin, 2011; Salahuddin, 2010). Data indicated that small business leaders retain experienced employees to lower the cost of human capital, increase return on human capital investment, and support a collaborative, asynchronous and synchronous exchange of institutional knowledge between generations (Cho & Lewis, 2011).

Implications for Social Change

Social change begins and ends with identifying problems and offering solutions responsive to workforce demographic challenges affecting small businesses (Beesley, 2011; Phillips & Addicks, 2010). Reviewing peer-reviewed and seminal literature referenced and cited in Bragg (2011), Cole (2010), Corwin (2015), Gudewich (2012),

King (2012), Rothwell (2011), Sanders (2011), and Schulz-Moser (2009) affirmed implications for social change. This affirmation entailed exploring techniques for enhancing small business leaders' abilities to develop, plan, and implement a well-designed succession plan while experiencing changing workforce demographics. Planning and implementing change deliberately through a well-designed succession plan denotes a significant challenge for small business leaders' abilities to meet strategic imperatives while sustaining a competitive advantage (Ganu & Boateng, 2012). Changing demographics in the United States disproportionally affects 66% of 28.2 million small business owners who have no succession plan (Beesley, 2011). The implications for social change encompassed an opportunity for small business leaders to identify ideas or solutions responsive to changing workforce demographics.

Intergenerational conflicts arising because of changing demographics result in an insufficient number of skilled, qualified younger workers to fill jobs once held by older, qualified experienced workers (Applebaum et al., 2012; Gordon, 2014). Uncertainty and ambiguity regarding multigenerational succession occurs because of changing demographics. The change in demographics engenders conflict between retirement-eligible or retiring older generations, who are in good health and remain employed, and younger generations awaiting job opportunities (North & Fiske, 2013a).

Because a significant concern of small business leaders is changing workforce demographics, not technology or economics, implications for social change yielded unintended consequences of the 2010 ACA (Aggarwal, 2011; Brody & Rubin, 2011; Lyons et al., 2014). Study findings include the suggestion that an implication for social

change resulted in the unintended consequence of the 2010 ACA affecting small business leaders' personnel decisions and succession planning initiatives. Many small business leaders experienced an 18% increase in health insurance premiums compared to large business contemporaries (Blumenthal & Collins, 2014; Miller, 2011). These unintended consequences resulted in small business leaders' delaying employee hiring, reducing work hours, reducing compensation and benefits, or limiting employee retention (Lowry & Gravelle, 2013). Despite the aforementioned unintended consequences, social change implications of the 2010 ACA offer small business leaders an opportunity to identify problems and solutions responsive to disability, retirement, or death that affect the viability of businesses (Beesley, 2011).

The implications for social change may evoke an opportunity for small business leaders to implement a succession-planning framework responsive to changing workforce demographics (Sanders, 2011). Applying a succession-planning framework indicates an adaptive change to dispel assumptions and biases by creating innovative methods that leverage resources to support sustainability initiatives (Nicolaides & McCallum, 2013). This adaptive change offers small business leaders an opportunity to collaborate strategically with employees and stakeholders.

Acknowledging the challenges of changing workforce demographics may entail small business leaders addressing the skills gap by developing plans to recruit, hire, train, and retain talent (Morris, 2011). Small business leaders failing to acknowledge the challenges of retired or retiring Baby Boomers continuing to work beyond retirement eligibility may lose intellectual capital, inhibit the successful exchange of knowledge,

hinder successive generations from assuming responsibilities as leaders, and lose growth and innovative competitive advantage. Because of changing workforce demographics, small business leaders may embrace an advocacy worldview of sustainability and social responsibility (Smith & Sharicz, 2011).

Recommendations for Action

The target population and the expected advocacy of this study are participants who own small businesses. The findings of this study offer small business leaders an opportunity to consider the following recommendations for instituting practices regarding succession planning, mentorship, education, and training in developing personnel to become leaders or managers. These recommendations include: (a) creating and supporting a collaborative culture of sharing knowledge to establish, initiate, and build mentoring programs and team-building sessions; (b) creating and implementing succession planning policies, procedures, and processes to retain, educate, train, develop, and mentor talent supportive of succession planning; (c) designing and implementing a post retirement network strategy to retain retiring or retired employees as consultants or advisors to not only mentor employees, but also create, transfer, retain, or exchange knowledge in a collaborative environment; (d) employing knowledge management techniques or strategies to manage the intellectual capital; (e) leveraging technology using knowledge management collaborative software tools to collect, retain, manage, share, and exchange intellectual capital synchronously and asynchronously; and (f) including succession planning with resources as a part of a strategic plan.

There are a couple methods of disseminating this study's findings. Persons,

organizations, or entities may request and receive an approved abstract or copy of this current study by accessing the ProQuest Dissertations and Theses Database. Additional methods of disseminating this study's conclusions include offering scholars, business leaders, or interested entities authorized copies of this study via mail or email directly. Scholars or business leaders may use this current study's findings to identify ideas and implement social change solutions responsive to the vastly changing demographics affecting small businesses.

Recommendations for Further Research

This research may provide a foundation for further study of small business leaders' views, perspectives, or experience regarding the lack of succession planning and the lack of qualified candidates affected by generational transition. The geographic region of this study is the Washington, DC metropolitan area. Additional study could replicate this study throughout the United States or internationally. Generating insightful, yet valid and reliable knowledge systematically is central to the epistemological framework of research (Lenzholzer et al., 2013). I conducted this study within an advocacy and a social constructivist worldview based on multiple participant perspectives and experiences to illuminate and address a complex problem while advocating awareness and change.

Study findings confirmed that though small business leaders' acknowledged the critical role of succession planning, some small business leaders do not have policies, procedures, and plans in place to implement a succession plan (Abdullah, Azmi, Zin, Chee, & Yusoff, 2014; Gothard & Michael, 2013). Because of the combined global economic crisis and an aging workforce, a gap in research exists regarding why small

business leaders do not plan and implement succession. To address this gap in research, small business leaders may need to acknowledge and understand the benefit of succession planning. Additional suggestions for further research include examining the following: (a) the 2010 ACA's impact on personnel succession decisions of small business leaders with a multigenerational workforce, (b) the theory of groupthink and the groupthinks' effect on small business succession planning with a multigenerational workforce, (c) the relationship between multigenerational succession planning and organizational financial performance, and (d) the effect of language and culture on organizational succession planning decisions relative to generational differences.

In addition to the aforementioned study findings, I recommend the application of mixed methods research methodology to explore the problem of a multigenerational workforce effect on small businesses. Given the potential complexity of this problem, mixed methods research methodology may offer comprehensive, detailed techniques that elicit emergent, albeit enriched knowledge of small business leaders' perspectives and experiences with a multigenerational workforce (Jogulu & Pansiri, 2011). This research methodology includes the integration of data thematically and statistically while addressing assumptions concerning ontology (nature of reality), epistemology (what is known), axiology (inclusion of values), and methodology (emergent approach to inquiry) (Auriacombe & Schurink, 2012; Hays & Wood, 2011; Teddlie & Tashakkori, 2012). I offer the recommendations above for further research with an alternative research method to improve small business succession planning that incorporates lessons learned from best business practices.

Reflections

Domestic and global social, political, financial, cultural, and economic issues affect the sustainability of businesses and societies as a whole (Clark & Fuller, 2010). Because of fear and uncertainty resultant of global economic conditions, small business leaders execute change by redesigning processes, restructuring organizations, merging or acquiring additional capabilities, and implementing total quality management programs (Raineri, 2011). As a complex challenge for companies, change reflects a permanent, yet embedded cultural lexicon of learning organizations (Whelan-Berry & Somerville, 2010).

Data collection commenced by offering 72 small business leaders access to a qualitative study questionnaire with 19 open-ended questions via a Web-based survey portal. To preclude any perceived or preconceived potential conflicts of interest or bias, I excluded study participants whose businesses may have a contractual relationship with clients or business associates. Undue influence or conflicts of interest not only affects the integrity of research, but also undermines trust in research findings (Mecca et al., 2014). Acknowledging potential conflicts of interest or undue influence of this study exemplified ethical self-awareness to preclude any perceived or preconceived potential conflicts of interest or bias.

The conceptual framing of this study materialized through the problem statement. Exploring the human experience verbally or textually (i.e., narratively) through the paradigmatic lens of study participants justified using a qualitative research method (B. Green, 2013; Spector-Mersel, 2011). This approach to inquiry supported an emergent, albeit iterative and interpretive process to explore who, what, why, and how (Bansal &

Corley, 2011). The reflexive or reflective techniques of addressing any potential biases, assumptions, and attitudes of exploring small business leaders' perspectives or experiences evoked a response to social change. The perspectives or experiences of small business leaders pertain to an aging workforce phenomenon affecting 18.15 million U.S. small businesses that do not have a succession plan (Beesley, 2011).

The collective application of personal knowledge and skills often challenges individual perspectives, strategies, or solutions (Pautz & Forrer, 2013). Upon additional examination of participant responses, I incorrectly assumed that groupthink could improve decision-making supportive of generational succession. Hollenbeck et al. (2014) posited that increase knowledge sharing including enhanced decision-making and problem solving occurs because of group heterogeneity vice group homogeneity that may inhibit knowledge sharing, decision-making, and problem solving resulting in groupthink. Consequently, the applicability of the theory of groupthink as posited by Hogg (2013), Janis (1972, 1982), Rivas (2012), Rose (2011), and Shirey (2012) with respect to generational succession did not align with the conceptual framework of this study.

This research study represented an effort for social change to satisfy an inquisitive, albeit, eclectic taste and passion for knowledge. In many respects, pursuing knowledge through social change is renaissance in nature because of a desire to maintain an open mind, challenge conventional wisdom, and not develop myopic points of view. Prior to data collection, the review of literature relevant to this study offered varied philosophical assumptions, perceptions, or preconceived notions. Reviewing professional and academic literature reinforced, confirmed, or discounted philosophical assumptions

based on potential biases or preconceived ideas and values. For example, the first assumption concerned the readiness of younger generations to assume responsibility as leaders and managers from older generations. Study findings reinforced and confirmed small business leaders' perceptions that many of the younger generation are eager, but not prepared to assume responsibility as leaders. Research by Angeline (2011) and DeZure, Shaw, and Rojewski (2014) including Kapoor and Solomon (2011) reiterated the premise that intergenerational and multigenerational negative perceptions, albeit misunderstandings regarding knowledge sharing and leadership succession or transition remain.

The second assumption was that small business leaders agree to participate in the study, but also respond to the study in a voluntary and timely manner. Slow participant response or nonparticipant response to the study discounted this assumption. Roberts, Vandenplas, and Ernst-Sthaeli (2014) asserted that participants' response rates are critical to successful research. The initial study invitation yielded several responses over a 2-week period resulting in receiving far fewer responses than anticipated. Nonresponse bias exists when there are fewer participants responding to a study compared to invited participants not responding to a study (Parsons & Manierre, 2013). Implementing contingencies to increase participant response realized additional responses over an additional 4-week period as a technique to mitigate threats to reliability and validity of the current study with respect to nonresponse bias. Parker, Manan, and Urbanski (2012) asserted that a researcher should use all reasonable, ethical, and legal techniques to increase participant response to a study.

The third assumption was that using computer-assisted, qualitative data analysis software (CAQDAS) versus hand-coding offered enhanced visual understanding of the current study results by creating the ability to conduct in-depth data analysis electronically (Rademaker et al., 2012). Using CAQDAS to analyze data proved challenging, time-consuming, and frustrating. Though I took the tutorials, negative experience with CAQDAS discounted this assumption.

The fourth assumption was that generational succession is unique to small businesses disproportionately. Study findings reinforced and confirmed that generational succession does affect small business leaders disproportionately. Because of limits on organizational size, structure, or resources, a select few employees or managing principles often retain intellectual capital within a small business (Durst & Wilhelm, 2011). Small business, even those with significant resources, may experience problems managing succession (Bracci & Vagnoni, 2011; Schulz-Moser, 2009). Because of existential assumptions and basis for exploring the problem, study findings include the suggestion that participants' responses aligned with the conclusions drawn from the interpretive research of relevant literature posited in this study.

Summary and Study Conclusions

The purpose of this study was to explore the experiences of small business leaders as to how Baby Boomers hinder generational succession. Given the complexities of change, the demands of managing change within an organization require visionary leaders that encompass the versatility and strategy to manage change effectively (Van Velsor & Turregano, 2011). Learning organizations led by visionary leaders facilitate a

boundary-less and fearless, transformative culture that revitalizes, adapts, embraces, and institutionalizes organizational change without equivocation (Ring, Brown, Howard, & Van Ness, 2014; Warrick, 2011). These leaders execute versatile, strategic visionary leadership that conveys an organizational culture of transparent, open communication (Van Velsor & Turregano, 2011). Consequently, open, transparent communication ensures small business leaders navigate various nuances and stressors of change by acknowledging that all stakeholders are partners and participants of successful change (Edmonds, 2011).

An implication of positive social change engendered a sense of urgency to implement transition or succession plans that mollify the effects of retiring Baby Boomers (Sanders, 2011). Study findings include the suggestion that small business leaders of boundary-less and fearless, transformative organizations portray a sense of urgency by understanding the importance of supporting successful change through planned succession. Because of this sense of urgency, business leaders of small companies implement leadership succession-planning programs to mentor and develop a pipeline of the next generation of leaders or managers (Kets de Vries & Konstantin, 2010; Zopiatis et al., 2012).

Small business leaders mitigating risk and leveraging opportunities in the midst of changing workforce demographics combined with the knowledge and skills gap is an acknowledgement that the risks are too great to ignore corporate social responsibility and sustainability supportive of cultural and social change (Scheffer & Kaeb, 2011). Understanding and implementing measures to mitigate risk and leverage opportunities

may allow small business leaders, stakeholders, and interested parties to recognize the benefits of embracing changing demographics as a competitive advantage rather than competitive disadvantage. The future direction of a successful succession-planning program involves small business leaders developing and implementing a mentor protégé network of retiring or retired employees as consultants or advisors (Kuyken, 2012; Marcinkus-Murphy, 2012; Markkula, 2013; Reeves, 2010). This network of consultants or advisors not only mentor employees but also facilitates a collaborative, systemic and systematic knowledge management and succession-planning framework (Appelbaum et al., 2012; Durst & Wilhelm, 2011). Understanding the benefits of succession planning aligned with organizational goals and objectives is not an option, but an imperative that supports both cultural and social change while ensuring sustainable competitive advantage.

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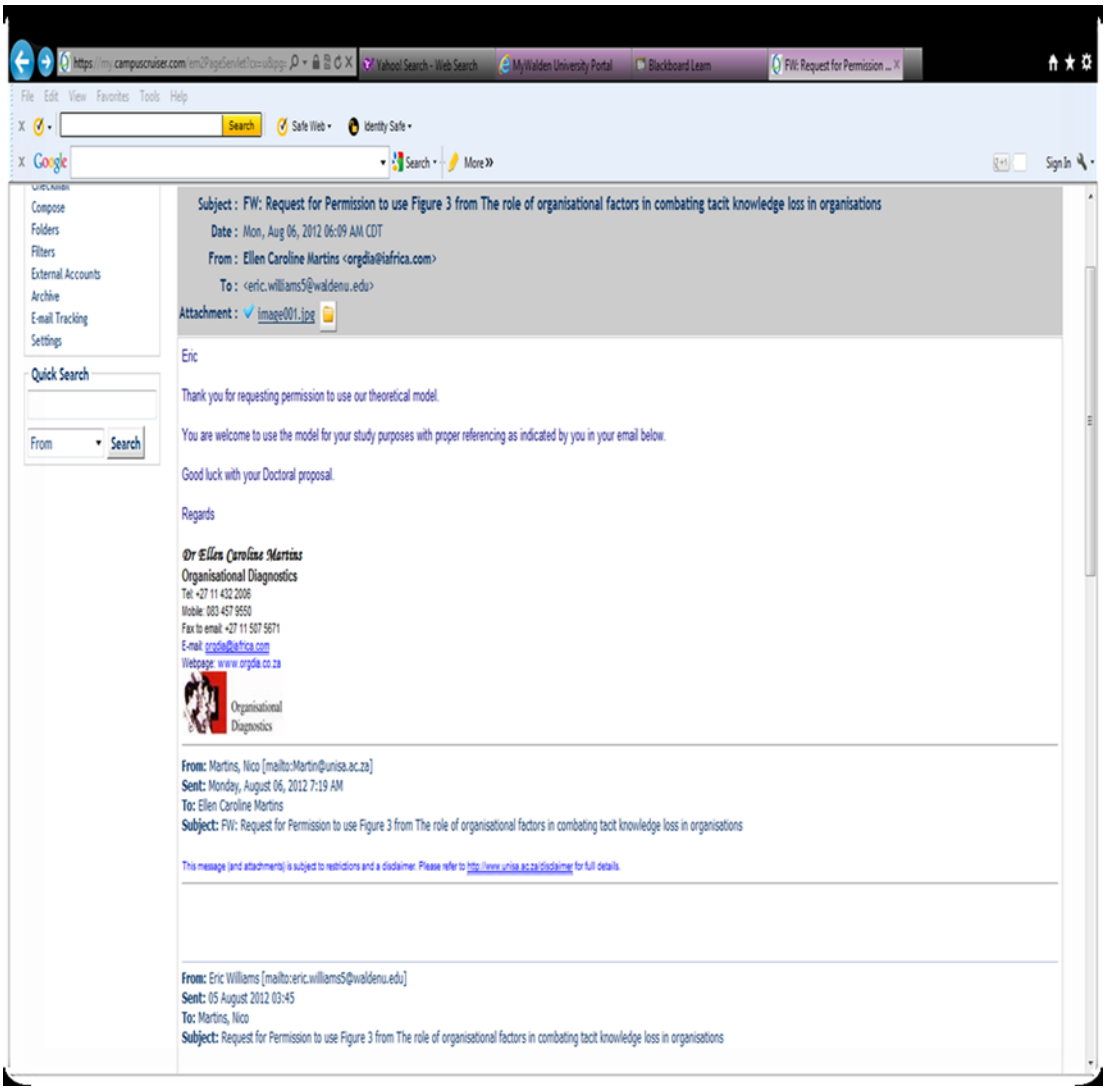
Appendix A: Request for Permission

The following screen shot includes Dr. Ellen Caroline Martins' permission to use Figure 1 from *The Role of Organizational Factors in Combating Tacit Knowledge Loss in Organizations*.



Appendix B: Qualitative Case Study Questionnaire

1. What is your title and position in the firm?
2. What is your educational and professional background?
3. What is the year of your birth?
4. When did you establish your firm and how long has your company been in existence?
5. If you have a multigenerational workforce, what is the generational demographic make-up of your work force (Veterans also referred to as "Seniors or Traditionalists born before 1945; Baby Boomers born 1946 –1964; Generation X born 1965–1979; and Generation Y born 1980–2000)? If you do not have a multigenerational workforce, go to question number 19.
6. What is the greatest challenge facing small businesses with a multigenerational workforce compared to workforces in the past, present, and future?
7. How do you mitigate the challenges of multigenerational workforce transition between Baby Boomers and successive generations to sustain and prevent the loss of intellectual capital within your firm?
8. What are your thoughts concerning an aging workforce as employees continue working past traditional retirement eligibility?
9. How are you ensuring Baby Boomers prepare successive generations to assume

responsibility as leaders or managers?

10. Why do you think firms retain Baby Boomers or choose not to retain Baby Boomers?

11. What is the effect of Baby Boomers continuing to work past normal retirement on the financial performance of your firm?

12. What have you done or are doing to address the loss of intellectual capital from an aging, retiring, or retirement-eligible Baby Boomers?

13. How has the ability to capture, manage, and retain knowledge of retiring or retirement-eligible Baby Boomers affected your firms' organizational and financial performance?

14. How has technology affected your firm's ability to capture, manage, and retain knowledge with a multigenerational workforce?

15. What are your thoughts concerning the effect of generational differences on succession planning within your firm?

16. How have generational differences affected your ability to trust, communicate, and make decisions regarding succession planning?

17. How would you address multigenerational conflicts and resistance to change within your business between Baby Boomers and successive generations?

18. Does your business have a succession plan? If so, what does your business's

succession plan encompass in terms of mentorship, education, and training programs ensuring the next generation is prepared to assume responsibilities as leaders or managers? If your business does not have a succession plan, what is the reason for not having a succession plan?

19. What advice would you share with other small businesses leaders regarding the retention and protection of institutional and multigenerational employee knowledge, skills, and expertise supportive of information sharing and succession planning?

Appendix C: Confidentiality Agreement

Name of Signer:

During the course of my activity in collecting data for this research: Transformational Strategic Choice: The Generational Succession Effect on Small Businesses, I will have access to information, which is confidential and shall not be disclosed. I acknowledge that the information must remain confidential and that improper disclosure of confidential information can be damaging to the participant.

By signing this Confidentiality Agreement, I acknowledge and agree that:

1. I will not disclose or discuss any confidential information with others, including friends or family.

2. I will not in any way divulge, copy, release, sell, loan, alter or destroy any confidential information except as properly authorized.

3. I will not discuss confidential information where others can overhear the conversation. I understand that it is not acceptable to discuss confidential information even if the participant's name is not used.

4. I will not make any unauthorized transmissions, inquiries, modification or purging of confidential information.

5. I agree that my obligations under this agreement will continue after termination of the job that I will perform.

6. I understand that violation of this agreement will have legal implications.

7. I will only access or use systems or devices I'm officially authorized to access and I will not demonstrate the operation or function of systems or devices to unauthorized

individuals.

Signing this document, I acknowledge that I have read the agreement and I agree to comply with all terms and conditions stated above.

Signature: **Date:**

Appendix D: E-mail Invitation to Participate in the Pilot Study

To Whom It May Concern:

My name is Eric D. Williams, a doctoral candidate at Walden University. I am inviting you to participate in a pilot study to explore the effects of retiring or retirement-eligible Baby Boomers on small businesses. This study is a Web-based, electronic questionnaire consisting of 19 open-ended questions. If you participate in the study, it should take approximately 45 minutes to complete the questionnaire. However, an additional 15 minutes will be needed for feedback to determine if a need exist to refine or revise questions and statements deemed ambiguous, misleading, or bias. There is no compensation for participating in the study. This study, supervised by my committee chair, Dr. Cheryl Lentz, will fulfill my academic requirements for this program.

For my study, I want to explore the effects of retiring or retirement-eligible Baby Boomers on small businesses. More specifically, I want to explore the increasing age of the U.S. workforce who forgo retirement and decide to continue working, thereby potentially hindering successive generations from assuming responsibilities as leaders or managers. Your participation in this study will help contribute to the body of knowledge to improve succession planning within small businesses, prevent or mitigate the loss of intellectual capital within small businesses, and identify, develop, or improve strategies to prepare or cultivate the next generation of leaders.

If you agree to participate in this study, the attached consent form is provided for your review. Your participation in this study is voluntary which you may withdraw at any time without any penalty. If you decide not to participate in this study, but know of

individuals who might meet the criteria for study participation and be interested in participating in this study, please share this announcement with them. All information, including your identity and respective business commercial business information, collected from the study will remain confidential. Upon completing the pilot study, I invite you to provide additional thoughts, observations, and experiences you feel need further clarification including any need to refine or revise questions and statements deemed ambiguous, misleading, or bias. Please provide your feedback via email to eric.williams5@waldenu.edu. Any feedback received will improve the application and execution of the questionnaire. Please direct any questions or concerns about this study to me directly by email at eric.williams5@waldenu.edu or telephone at 202-271-6166.

Sincerely,

Eric D. Williams

Eric D. Williams
Walden University

Attachment:
Consent Form

Appendix E: E-mail Invitation to Participate in the Main Study

To Whom It May Concern:

My name is Eric D. Williams, a doctoral candidate at Walden University. I am inviting you to participate in a study to explore the effects of retiring or retirement-eligible Baby Boomers on small businesses. This study is a Web-based, electronic questionnaire consisting of 19 open-ended questions. If you participate in the study, it should take approximately 45 minutes to complete the questionnaire. There is no compensation for participating in the study. This study, supervised by my committee chair, Dr. Cheryl Lentz, will fulfill my academic requirements for this program.

For my study, I want to explore the effects of retiring or retirement-eligible Baby Boomers on small businesses. More specifically, I want to explore the increasing age of the U.S. workforce who forgo retirement and decide to continue working, thereby potentially hindering successive generations from assuming responsibilities as leaders or managers. Your participation in this study will help contribute to the body of knowledge to improve succession planning within small businesses, prevent or mitigate the loss of intellectual capital within small businesses, and identify, develop, or improve strategies to prepare or cultivate the next generation of leaders.

To preclude the unintended disclosure of confidential information (identification and socio-economic business status) and conflicts of interest as well as protecting your anonymity, I have instituted measures as prescribed per Walden University Institutional Review Boards' policies and procedures. If a conflict of interest arises or an unintended violation of a participants' anonymity occurs, I will immediately withdraw the participant

from the study. Risks in conducting this study are minimized through compliance with the Walden University Institutional Review Boards' policies and procedures governing confidentiality, privacy, ethics, and conflicts of interest.

To participate in this study, you must be an owner-manager, owner-CEO, and owner-president of small businesses located within the Washington, D.C. metropolitan area (a) who is the primary source of strategic knowledge and dynamic capabilities of their company (Bracci & Vagnoni, 2011); (b) who is an adult age 18 or older; (c) who must be able to read and understand English; (d) whose primary customer base is the U.S. federal government and the U.S. Department of Defense; (e) who started and owned and operated a business since 2007 to the present; (f) who has a minimum of 5 and no more than 500 employees; and (g) who employ a diverse workforce with respect to age (i.e., generational cohort). Consequently, meeting aforementioned criteria makes you an excellent participant in this study, thereby adding to the body of knowledge available to other small business leaders. The data collected from this study will be used solely for the purpose of completing my doctoral study. If you know of others who meet the aforementioned criteria and otherwise might qualify to participate in this study, please share this announcement with them.

If you agree to participate in my study, please click on the website address or copy and paste http://SurveyMonkey.com into your web browser to access the self-administered secure, Web-based electronic questionnaire. Your participation in this study is voluntary which you may withdraw at any time without any penalty. Accessing the self-administered secure, Web-based electronic questionnaire serves as a testament that

you understand and consent to voluntarily participate in this research study. If you decide not to participate in this study, but know of individuals who might meet the criteria for study participation and be interested in participating in this study, please share this announcement with them. All information, including your identity and respective business commercial business information, collected from the study will remain confidential.

Again, your participation in this study is voluntary and you may withdraw or refuse to participate at any time without any penalty. If you feel stressed during the study, you may stop at any time. You may skip any questions that you feel are too personal. Please direct any questions or concerns about this study to me directly by email at eric.williams5@waldenu.edu or telephone at 202-271-6166. If you want to talk privately about your rights as a participant, you can call Dr. Leilani Endicott. She is the Walden University representative who can discuss this with you. Her phone number is 1-800-925-3368, extension 3121210. Walden University's IRB approval number for this study is _____ with an expiration date of _____. In advance and always, thanks for your time and support. In advance and always, thanks for your time and support.

Sincerely,

Eric D. Williams

Eric D. Williams
Student ID: A00276571
Walden University
202-271-6166 (Personal)
240-993-9743 (Work)
202-534-0068 (Business)

Appendix F: LinkedIn or Trade Publication Pilot Study Invitation

Hello friends and colleagues, my name is Eric D. Williams, a doctoral candidate at Walden University. I am inviting you to participate in my study. This study is a Web-based, electronic questionnaire consisting of 19 open-ended questions. If you participate in the study, it should take approximately 45 minutes to complete the questionnaire. However, an additional 15 minutes will be needed for feedback to determine if a need exist to refine or revise questions and statements deemed ambiguous, misleading, or bias. There is no compensation for participating in the study. This study, supervised by my committee chair, Dr. Cheryl Lentz, will fulfill my academic requirements for this program. In advance, thanks for supporting my study!

For my study, I want to explore the effects of retiring or retirement-eligible Baby Boomers on small businesses. More specifically, I want to explore the increasing age of the U.S. workforce who forgo retirement and decide to continue working, thereby potentially hindering successive generations from assuming responsibilities as leaders or managers. Your participation in this study will help contribute to the body of knowledge to improve succession planning within small businesses, prevent or mitigate the loss of intellectual capital within small businesses, and identify, develop, or improve strategies to prepare or cultivate the next generation of leaders.

To preclude the unintended disclosure of confidential information (identification and socio-economic business status) and conflicts of interest as well as protecting your anonymity, I have instituted measures as prescribed per Walden University Institutional

Review Boards' policies and procedures. If a conflict of interest arises or an unintended violation of a participants' anonymity occurs, I will immediately withdraw the participant from the study. Risks in conducting this study are minimized through compliance with the Walden University Institutional Review Boards' policies and procedures governing confidentiality, privacy, ethics, and conflicts of interest.

To participate in this study, you must be an owner-manager, owner-CEO, and owner-president of small businesses located within the Washington, D.C. metropolitan area (a) who is an adult age 18 or older; (b) who must be able to read and understand English; (c) whose primary customer base is the U.S. federal government and the U.S. Department of Defense; (d) who started and owned and operated a business since 2007 to the present; (e) who has a minimum of 5 and no more than 500 employees; and (f) who employ a diverse workforce with respect to age (i.e., generational cohort). Consequently, meeting aforementioned criteria makes you an excellent participant in this study, thereby adding to the body of knowledge available to other small business leaders. The data collected from this study will be used solely for the purpose of completing my doctoral study. If you know of others who meet the aforementioned criteria and otherwise might qualify to participate in this study, please share this announcement with them.

If you agree to participate in my study, please click on the website address or copy and paste http://SurveyMonkey.com into your web browser to access the self-administered secure, Web-based electronic questionnaire. Your participation in this study is voluntary which you may withdraw at any time without any penalty. Accessing the

self-administered secure, Web-based electronic questionnaire serves as a testament that you understand and consent to voluntarily participate in this research study. If you decide not to participate in this study, but know of individuals who might meet the criteria for study participation and be interested in participating in this study, please share this announcement with them. All information, including your identity and respective business commercial business information, collected from the study will remain confidential.

Again, your participation in this study is voluntary, and you may withdraw or refuse to participate at any time without any penalty. If you feel stressed during the study, you may stop at any time. You may skip any questions that you feel are too personal. Please direct any questions or concerns about this study to me directly by email at eric.williams5@waldenu.edu or telephone at 202-271-6166. If you want to talk privately about your rights as a participant, you can call Dr. Leilani Endicott. She is the Walden University representative who can discuss this with you. Her phone number is 1-800-925-3368, extension 3121210. Walden University's IRB approval number for this study is _____ with an expiration date of _____. In advance and always, thanks for your time and support. In advance and always, thanks for your time and support.

Sincerely,

Eric D. Williams

Eric D. Williams
Student ID: A00276571
Walden University
202-271-6166 (Personal)

240-993-9743 (Work)
202-534-0068 (Business)

Appendix G: LinkedIn or Trade Publication Main Study Invitation

Hello friends and colleagues, my name is Eric D. Williams, a doctoral candidate at Walden University. I am inviting you to participate in my study. This study is a Web-based, electronic questionnaire consisting of 19 open-ended questions. If you participate in the study, it should take approximately 45 minutes to complete the questionnaire. There is no compensation for participating in the study. This study, supervised by my committee chair, Dr. Cheryl Lentz, will fulfill my academic requirements for this program. In advance, thanks for supporting my study!

For my study, I want to explore the effects of retiring or retirement-eligible Baby Boomers on small businesses. More specifically, I want to explore the increasing age of the U.S. workforce who forgo retirement and decide to continue working, thereby potentially hindering successive generations from assuming responsibilities as leaders or managers. Your participation in this study will help contribute to the body of knowledge to improve succession planning within small businesses, prevent or mitigate the loss of intellectual capital within small businesses, and identify, develop, or improve strategies to prepare or cultivate the next generation of leaders.

To preclude the unintended disclosure of confidential information (identification and socio-economic business status) and conflicts of interest as well as protecting your anonymity, I have instituted measures as prescribed per Walden University Institutional Review Boards' policies and procedures. If a conflict of interest arises or an unintended violation of a participants' anonymity occurs, I will immediately withdraw the participant

from the study. Risks in conducting this study are minimized through compliance with the Walden University Institutional Review Boards' policies and procedures governing confidentiality, privacy, ethics, and conflicts of interest.

To participate in this study, you must be an owner-manager, owner-CEO, and owner-president of small businesses located within the Washington, D.C. metropolitan area (a) who is an adult age 18 or older; (b) who must be able to read and understand English; (c) whose primary customer base is the U.S. federal government and the U.S. Department of Defense; (d) who started and owned and operated a business since 2007 to the present; (e) who has a minimum of 5 and no more than 500 employees; and (f) who employ a diverse workforce with respect to age (i.e., generational cohort). Consequently, meeting aforementioned criteria makes you an excellent participant in this study, thereby adding to the body of knowledge available to other small business leaders. The data collected from this study will be used solely for the purpose of completing my doctoral study. If you know of others who meet the aforementioned criteria and otherwise might qualify to participate in this study, please share this announcement with them.

If you agree to participate in my study, please click on the website address or copy and paste http://SurveyMonkey.com into your web browser to access the self-administered secure, Web-based electronic questionnaire. Your participation in this study is voluntary which you may withdraw at any time without any penalty. Accessing the self-administered secure, Web-based electronic questionnaire serves as a testament that you understand and consent to voluntarily participate in this research study. If you decide

not to participate in this study, but know of individuals who might meet the criteria for study participation and be interested in participating in this study, please share this announcement with them. All information, including your identity and respective business commercial business information, collected from the study will remain confidential.

Again, your participation in this study is voluntary and you may withdraw or refuse to participate at any time without any penalty. If you feel stressed during the study, you may stop at any time. You may skip any questions that you feel are too personal. Please direct any questions or concerns about this study to me directly by email at eric.williams5@waldenu.edu or telephone at 202-271-6166. If you want to talk privately about your rights as a participant, you can call Dr. Leilani Endicott. She is the Walden University representative who can discuss this with you. Her phone number is 1-800-925-3368, extension 3121210. Walden University's IRB approval number for this study is _____ with an expiration date of _____. In advance and always, thanks for your time and support. In advance and always, thanks for your time and support.

Sincerely,

Eric D. Williams

Eric D. Williams
Student ID: A00276571
Walden University
202-271-6166 (Personal)
240-993-9743 (Work)
202-534-0068 (Business)

Appendix H: Institutional Review Board Materials Approval

From: **IRB** <IRB@waldenu.edu>
Date: Tue, Apr 15, 2014 at 4:54 PM
Subject: IRB Materials Approved-Eric Williams
To: "eric.williams5@waldenu.edu" <eric.williams5@waldenu.edu>
Cc: DBA Docstudy <DBA.Docstudy@waldenu.edu>, "cheryl.lentz@waldenu.edu" <cheryl.lentz@waldenu.edu>

Dear Mr. Williams,

This email is to notify you that the Institutional Review Board (IRB) has approved your application for the study entitled, "Transformational Strategic Choice: The Generational Succession Effect on Small Businesses."

Your approval # is 04-14-14-0276571. You will need to reference this number in your doctoral study and in any future funding or publication submissions. Also attached to this e-mail is the IRB approved consent form. Please note, if this is already in an on-line format, you will need to update that consent document to include the IRB approval number and expiration date.

Your IRB approval expires on April 13, 2015. One month before this expiration date, you will be sent a Continuing Review Form, which must be submitted if you wish to collect data beyond the approval expiration date.

Your IRB approval is contingent upon your adherence to the exact procedures described in the final version of the IRB application document that has been submitted as of this date. This includes maintaining your current status with the university. Your IRB approval is only valid while you are an actively enrolled student at Walden University. If you need to take a leave of absence or are otherwise unable to remain actively enrolled, your IRB approval is suspended. Absolutely NO participant recruitment or data collection may occur while a student is not actively enrolled.

If you need to make any changes to your research staff or procedures, you must obtain IRB approval by submitting the IRB Request for Change in Procedures Form. You will receive confirmation with a status update of the request within 1 week of submitting the change request form and are not permitted to implement changes prior to receiving approval. Please note that Walden University does not accept responsibility or liability for research activities conducted without the IRB's approval, and the University will not accept or grant credit for student work that fails to comply with the policies and procedures related to ethical standards in research.

When you submitted your IRB application, you made a commitment to communicate both discrete adverse events and general problems to the IRB within 1 week of their occurrence/realization. Failure to do so may result in invalidation of data, loss of academic credit, and/or loss of legal protections otherwise available to the researcher.

Both the Adverse Event Reporting form and Request for Change in Procedures form can be obtained at the IRB section of the Walden web site or by emailing irb@waldenu.edu:

http://researchcenter.waldenu.edu/Application-and-General-Materials.htm

Researchers are expected to keep detailed records of their research activities (i.e., participant log sheets, completed consent forms, etc.) for the same period of time they retain the original data. If, in the future, you require copies of the originally submitted IRB materials, you may request them from Institutional Review Board.

Please note that this letter indicates that the IRB has approved your research. You may not begin the research phase of your doctoral study, however, until you have received the **Notification of Approval to Conduct Research** email. Once you have received this notification by email, you may begin your data collection.

Both students and faculty are invited to provide feedback on this IRB experience at the link below:

http://www.surveymonkey.com/s.aspx?sm=qHBJzkJMUx43pZegKlmdiQ_3d_3d