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Succession Planning for Next Generation Business Leaders

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Walden University

College of Management and Technology

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Yetta Toliver

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Walden University
2017

Abstract

Succession Planning for Next Generation Business Leaders

by

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MBA, Dallas Baptist University, 2007

BS, Southern University, 1986

Doctoral Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

Walden University

May 2017

Abstract

The ability to backfill leadership positions has become a key focus of business leaders since 2005 when the baby boom workforce started to age. An aging workforce threatens the capability of business leaders to develop leadership pipelines to ensure business success. Grounded by the social exchange theory, the purpose of this qualitative single case study was to explore successful strategies that technology services managers used to align core business objectives to improve succession planning at a technology services organization located in Dallas, Texas. Data collection and triangulation included semistructured telephone interviews with 12 technology services managers, company documents, and archival information. Data analysis included the examination of rich text data, coding, and classification of themes using Yin's 5-step approach. Four themes emerged, revealing that these managers (a) created and sustained a leadership talent pipeline for high potential employees for future leadership roles; (b) sourced internal candidates with core leadership competencies; (c) remediated leadership skills gaps through developed relationships and documented processes; and (d) re-engineered the replacement planning process for the internal leadership talent pipeline. Implications for positive social change include the potential for technology services managers to implement effective succession planning strategies that could increase employee morale, enhance profitability and growth, and promote healthy community partnerships.

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Dedication

I dedicate my doctoral study to my parents, Henry Wells, Jr. and Mattie Givens Wells, who pushed me never to allow anyone or anything to place limits on my abilities, including me. They inspired me to believe in my dreams. I am most grateful to my parents who encouraged me to be supportive of others, always do my best work, value education, and serve God with my whole heart. Thank you, Dad and Mom, for your love and guidance.

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Section 1: Foundation of the Study

Succession planning is a fundamental component of talent management across different types of industry sectors (Church, 2014; Claussen, Grohsjean, Luger, & Probst, 2014; Collins, 2013). Succession planning enables business executives to identify prospective high potential, talented employees who possess the leadership competencies, business acumen, and skills necessary to address the needs of the business plan and long-term strategy for sustainability (Galbraith, Smith, & Walker, 2012). How business leaders respond to succession planning could influence business performance, employees' attitudes toward longevity, and the political climate of the organization. Moreover, deprioritizing succession planning could result in workplace disruption, morale issues, or employee turnover (Bass & Bass, 2008). The business practice of succession planning provides business leaders with the resources for establishing a pipeline of capable employees ready to fill vacant positions.

The intent of this study was to explore the strategies that business leaders use to align core business objectives to improve leadership succession planning. The background of the problem, problem statement, purpose statement, nature of the study and research question are presented in Section 1. This section also includes the conceptual framework followed by the assumptions, limitations, and delimitations of the study. The literature review is the final component of this section.

Background of the Problem

Due to globalization, disruptive technology, demand to diversify offerings, and pressure on financial growth, companies are striving to fill open job positions with the

right talent to meet the competing industry demands (Al Ariss, Cascio, & Paauwe, 2014; Cho & Lewis, 2012). Toossi (2012) indicated that baby boomers, born between 1946 and 1964 and millennials, born after 1980, are beginning to dominate the workplace by representing 68% of the labor force in 2010. By 2021, 78 million baby boomers are expected to be eligible for retirement, while over 100 million millennials and Generation Xers, born between 1965 and 1980, should be ready to backfill the vacant leadership positions (Crowne, 2013; Standifer, Lester, Schultz, & Windsor, 2013). The transformation in the workplace is yet another demand on competing for the right talent. As employees over 55 years of age begin to transition into retirement, business leaders are starting to notice deficiencies in the ability to maintain prior process efficiency levels or effective transfer of tribal knowledge retained by the retired leader (Cho & Lewis, 2012). Not only are business leaders dealing with the challenges of developing employees to fill vacant positions, but they are also struggling with managing the complexity and dynamics of a generationally diverse employee population.

Succession planning strategies should be fundamental components of an organizational framework to accommodate changes in the industry, workforce, workplace culture, and teams (Collins, 2013). When managers fail to focus on succession planning as a function of core management practices, they risk losing the opportunity to build the organization's bench strength to be ready to fill a critical leadership position. Moreover, some organizations lack clarity on how succession planning affects the core business strategic plan.

Problem Statement

Business leaders must shift to a talent management mind-set for succession planning that aligns core business strategies to develop high-potential employees in an aging workforce for the future of the company (Church, 2014). Mid-size companies need effective succession strategies that identify employees to backfill managers and executive positions (Collins, 2013; Eisenhart & Sadjady, 2012). The largest population of workers, baby boomers, represent 45% of the workforce; however, by 2020, a majority of baby boomers will be eligible for retirement, which could create sudden vacancies in leadership positions (Toossi, 2012). The general business problem was that for some business leaders succession strategies were negatively affected by the loss of a talented workforce. The specific business problem was that some technology services managers lacked strategies to align core business objectives to improve leadership succession planning.

Purpose Statement

The purpose of this qualitative single case study was to explore strategies used by technology services managers in mid-size companies to align core business objectives to improve leadership succession planning. The population for this study included 12 technology services managers in Dallas, Texas, who have had success with succession planning in a mid-size technology services company. In a traditional business infrastructure, the managers, who include first-line and mid-level managers and human resources (HR) business professionals, facilitate the talent management processes (Claussen et al., 2014). Working together, managers and HR business professionals

identify, assess, and select high-potential employees during periodic talent reviews. Selecting a successor can influence an organization's reaction to change, value proposition, and performance (Bass & Bass, 2008). The implication for positive social change included the potential managers with an integrated approach to identify and develop candidates for leadership positions.

Nature of the Study

Quantitative, qualitative, and mixed methods are the three methods for conducting research (Maxwell, 2015). Each is used to contribute new knowledge or deepen awareness about a topic through practical or theoretical research. The quantitative approach provides a researcher with a method to test a hypothesis (Smith, 2014). According to Yin (2014), qualitative research provides for the discovery of new ideas through interviews, focus groups, surveys, questionnaires, or observations. Mixed-methods researchers combine qualitative and quantitative methods in a single study (Fielding, 2012). Of the three types of research methods, the qualitative approach supported the exploratory nature of this study.

The four designs for qualitative research that I considered were narrative, phenomenological, ethnographic, and case study. Narrative researchers present a life story told during an interview or literary work (Bansal & Corley, 2012). Fisher and Stenner (2011) argued that a phenomenological research design involves participants sharing their lived experiences related to the study. Ethnographic research is a personalized on-site investigation that addresses human experiences and includes observations of human behavior (Crane & Meyer, 2011). Researchers engage in the

environment of the participants and use three modes of data collection (observations, interviews, and archival importation) to support the data collection. Yin (2014) argued that a case study design allows researchers to observe units composed of individuals, processes, institutions, or programs within a defined event or activity. In the current study, the primary data collection source was organization leaders.

A qualitative case study design enables a researcher to collect relevant sources of evidence, such as documentation, interviews, direct observations, and physical artifacts. Yin (2014) noted that the process of conducting a case study includes a plan to collect data, analyze data, and share findings. Yin further stated that during the data analysis phase of the study, the researcher identifies common themes to validate the findings as well as assist with achieving data saturation. Direct observations made through comparison analysis could serve as another source of data. In addition, a researcher could use a case study inquiry to examine and connect organizational links to a contemporary event (Ramthun & Matkin, 2014).

The risks associated with case studies include the amount of time involved in the process, as well as the potential to produce massive amounts of documentation, which is challenging to read and analyze (Sato, 2014). This research design enables the researcher to explore the phenomenon through historical documents, direct observations, and interviews with the participants in a natural setting (Yin, 2014). Because I explored a social phenomenon related to a business problem, the most appropriate qualitative research design for this study was a case study.

Research Question

The research question for this study was as follows: What strategies do technology services managers use to align core business objectives to improve leadership succession planning?

Interview Questions

The intent of the interview questions was to explore the participants' strategies used for integrating core business objectives with executing leadership succession planning practices. The interview questions were as follows:

1. How do you use leadership succession planning to identify high-potential talent?
2. What role does your manager play in leadership succession planning for your direct reports?
3. What strategies do you use to enable leadership succession planning as an internal focused function to core business objectives?
4. How do you identify your employees as high-potential talent?
5. How do you develop your high-potential talent for leadership positions?
6. To what extent do you focus on core competencies compared to role specific competencies, specifically for leadership succession planning?
7. How do you identify the critical job roles that, if vacated suddenly, would require an urgent replacement?
8. How do you describe the condition of the organization's bench strength, the population of employees in the talent pool?

9. How do you work with other managers on leadership succession planning at your company?
10. What additional insight can you provide to other managers on integrating core business objectives to improve leadership succession planning to identify high-potential talent?

Conceptual Framework

The conceptual framework of this study was social exchange theory. Social exchange theory emerged through Homans in 1958 as a study of social behavior (Emerson, 1976). Blau's contribution in 1964 was the integration of social analysis with technical, economic analysis while in 1976 Emerson expanded the economic analysis of noneconomic social situations (Sahu & Parthardikar, 2014). Cho and Poister (2014) found that social exchange theory provides knowledge management that is economical and sociological in nature. This theory is an approach used to model how relationship building within an organization enables economic value, social change, and stability. Key propositions underlying the theory are (a) success, (b) stimulus, and (c) deprivation-satiation. I used these concepts to explore the perceptions of managers as they pertain to cost and benefit of the alignment of succession planning with core business strategies to identify and develop employees to backfill critical leadership positions.

Operational Definitions

The following terms appear throughout the study. Understanding the terminology and definitions was essential to the study.

Bench strength: Bench strength refers to group of employees who, according to senior managers, are high-potential candidates who have the desired competencies and leadership skills capable of meeting the future needs of the organization (Kaiser & Curphy, 2013).

Disruptive technology: Disruptive technology occurs when an organization adopts new ways to facilitate existing business practices and processes that influence significant organizational change (Dokko, Nigam, & Rosenkopf, 2012).

High-potential: High-potential refers to an employee who exemplifies leadership behavior, characteristics, and skills suitable for advancement into management positions (Al Ariss et al., 2014; Cerdin & Brewster, 2014).

Talent pool (pipeline): Talent pool consists of high-potential employees identified by managers as candidates ready to fill management-level positions (Crossland & Chen, 2013).

Assumptions, Limitations, and Delimitations

Assumptions

The key expectations of this study depended on the availability and accessibility of data sources. Zou, Sunindijo, and Dainty (2014) identified assumptions as situations or conditions that are not under the researcher's control but can influence the results. I made several assumptions this study. First, I assumed I would have full access to archival information, company information, and managers for interviews at a technology services company. I also assumed that the participants would be familiar with the leadership succession planning and core business strategies.

Limitations

Limitations are potential weaknesses in a study that are out of the control of the researcher (Yin, 2014). In this study, there were several limitations. One limitation was the possibility of process inconsistencies between company documents on leadership succession planning, and the managers' perceptions of the process. The company documents relevant to leadership succession planning processes may not have aligned with the participant's description of the strategies. Another limitation was my existing business knowledge and active participation in mid-level management succession planning may have caused researcher bias about an organization's leadership succession planning process. I used an interview protocol guide (Appendix A) to capture the participants' responses, provide consistency throughout the interview process, and reduce bias. Lastly, there was a limitation on time spent for the participants during the interview and transcript review process.

Delimitations

Delimitations are characteristics that enable the researcher to determine the boundaries and scope of the study (Spitzmüller & Warnke, 2011). For this study, delimitations included managers who leveraged strategies that aligned core business objectives with leadership succession planning in Dallas, Texas. Employees who were members of the organization's talent pool were beyond the scope of the study. Finally, onboarding, retention, learning, and development as a function of talent management were beyond the scope for the study of the study.

Significance of the Study

Contribution to Business Practice

Large and small companies deal with internal and external challenges that influence organizational culture such as delivering customer value, executing efficient processes, and managing benchmark performance (Hansen & Leuty, 2012). Factors that are increasing challenges are global market demands, technology advancements, and the threat of an aging workforce. Business leaders have an opportunity to mitigate these threats and reduce complexities by focusing strategies that affect the future of the business.

Business practitioners should recognize interdependencies between managing performance and succession planning. Delbecq, Bryson, and Van de Ven (2013) and Galbraith et al. (2012) observed that organizations with effective succession planning produced positive performance results. Ineffective or dormant succession planning could have an adverse effect on business performance. Crossland and Chen (2013) argued that managers want to be effective at achieving goals and meeting targets. In addition, organizations thrive when they have motivated employees who embrace the company's vision, mission, and successful execution of business goals. However, existing literature indicates that succession planning does not appear to be a broad-level priority for most managers.

A multigenerational workforce will have an impact on succession planning. Chaudhuri and Ghosh (2012) indicated that 10,000 baby boomers are eligible to retire every day; for this reason, there is a need to maintain a healthy talent pipeline. Labor

participation trends indicated that the population of workers over 55 years of age might be accelerated between 2020 and 2050, which may cause the talent pipeline to deteriorate (Toossi, 2012). Establishing a cadence for developing internal bench strength to backfill retiring employees should be emphasized by managers as a success measure to achieve performance. Wilson and Doz (2011) argued that business leaders should address the shift in the workforce generational dynamics and address key deliverables by re-engineering succession management strategies that are appropriate for the modern workforce. Executing a viable leadership succession plan is an investment in the future of the organization.

Succession planning is a proactive approach used to identify potential candidates to backfill leadership positions, clarify leadership job roles, establish assessment criteria, and motivate employees to develop in the workplace. Another advantage is that it assists business leaders with identifying emerging talent to fill key leadership positions. The alignment of core business strategies with succession management could be effective and yield a favorable return on investment to the organization. As the aging workforce population increases, managers who have high-potential employees ready to backfill key leadership roles could benefit through cost saving, productivity enablers, tribal knowledge retention, and employee morale. This study contributed to the community of practice of organizations by sharing managers' perceptions of the strengths and opportunities of integrating leadership succession planning strategies into core business practices to build an internal talent pipeline.

Implications for Social Change

Core business processes and practices enable managers to drive performance objectives. The purpose of succession planning is to identify and develop employees to be ready to backfill critical leadership roles. Company presidents, vice presidents, middle managers, and first-line managers primarily focus on performance. Collaborating with HR business professionals, these managers share the responsibility of succession management. The results of this study provided managers with a consistent approach for integrating leadership succession planning with core business processes and influenced managers to shift to a growth mind-set on leadership succession planning. Another contribution to social change was enhancing dialogue about career development planning between employees and managers, particularly vice presidents, middle managers, and HR business professionals. Aligning succession planning with core business strategies to identify talent to backfill leadership positions may increase employee morale and retention.

A Review of the Professional and Academic Literature

An extensive search of the existing literature was conducted to find articles related to the integration of succession planning into the core business strategies within the parallels of organizational and human resource architectures. Retrieved journals, reports, and seminal scholarly books were studied to assess the relevance to this study. Literature related to the core business strategies and succession planning for identifying employees for leadership positions was brought forward for further review. The further content analysis included articles and seminal work related to the business strategy

planning for succession, gauging the workplace climate, and engagement of the organizational resources.

The primary process for organizing the literature review was the conceptual framework and key themes. During the review of the article, notes were written in the margin, and important content highlighted. After completing the review of the retrieved literature, I wrote a brief summary and attached it to the literature for future reference. The final step was to group the articles and notes by common topics that were succession planning, leadership, workplace demographics, talent management, workplace climate, and theory. Through this process, along with the analysis of theories and key themes, the sections of the literature review were established as Political Climate of the Workplace, Succession Planning Strategies, Workforce Demographics, and Managing Emerging Talent.

For this qualitative study, databases included Business Source Complete, ABI/INFORM Complete, Emerald Management Journals, SAGE Premier, and ProQuest Central. I also used Google Scholar search engine. Advanced search fields were used to identify peer-reviewed journals published within the last 5 years. Search field terms such as *succession planning*, *executive leadership*, *workforce demographics*, *talent management*, and *career advancement* were entered to refine the search. In all, there were 797 articles retrieved from the business and management databases and five seminal books referenced for further review. The scholarly peer-reviewed journal articles cited in this section include 90% published within the last 5 years.

This study addressed strategies that business leaders use to align core business objectives to improve leadership succession planning. Bass and Bass (2008) indicated that members of an organization that participates in the transfer of leadership process could shift the organization's direction. This study addressed the practices of managers who drive organizational performance at a technology services company while being responsible for identifying employees to backfill critical leadership positions.

Social Exchange Theory

The conceptual framework for this study drew on Homans, Blau, and Emerson and the idea of social change as a process of negotiated exchanges between parties. The intent of this study was to explore the strategies that technology services managers use to align core business objectives with leadership succession planning. I explored how technology services managers leverage organizational strategies and practices to develop high-potential employees using leadership succession planning. I also explored the social exchange theory aspects of the exchanges among managers who collaborated on enabling core business objectives and leadership succession planning. In addition, I explored the working relationship that managers have with high-potential employees.

The social exchange framework follows the idea of dyadic linkages in human behavior (Sahu & Parthardikar, 2014). The work relationships between members of an organization could have an effect on how an organization functions or performs. Vahlhaus and Simon (2014) argued that social exchange theory has roots in work relationships research. Biron and Boon (2013) understood the behavioral relationships of leaders through social behaviors as exchanges and indicated that the work tasks and

performance are interdependencies for retaining high-potential workers. Social exchange theory supported this study.

Leader-Member Exchange Theory

Leader-member exchange (LMX) theory is grounded in role and exchange theories and focuses on the two-way relationship between leader and follower (Gerstner & Day, 1997). Since the early theoretical approaches of LMX theory by Dansereau, Graen, and Haga, Graen and Cashman, and Graen, the theory has included multiple levels of leadership relationships that influence followers' behaviors (Harris, Li, & Kirkman, 2014). The quality of work relationships between leaders and followers could influence operational mechanics such as performance, behavior, and reputation (Del Brio, Yoshikawa, Connelly, & Tan, 2013; Laird, Zboja, & Ferris, 2012). This conceptual framework follows the linkage between leadership processes and outcomes. Leader and follower interactions align with employee job satisfaction, retention, and linkage between employee behavior and an organization's objectives (Breevaart, Bakker, Demerouti, & van den Heuvel, 2015; Dusterhoff, Cunningham, & MacGregor, 2013; Vidyarthi, Erdogan, Anand, Liden, & Chaudhry, 2014). LMX theory has been given considerable attention in the academic literature while research is scarce on core business strategies with succession leadership activities. There were no studies found for aligning core business objectives with leadership succession planning.

Workplace Political Climate

Chief executive officers (CEO) and managers often face challenges trying to meet the demands of board members, customers, and employees. Doherty (2012) interviewed a

CEO of a Fortune 500 company, who indicated that the political climate for CEOs consists of issues stemming from expanding global markets, disruptive innovation, conflicting business priorities, economic impacts, and the aging workforce. McGraw (2014) indicated that business leaders focus on performance-based practices that drive cost and efficiency to manage a stable environment. Although talent shortages, the need to preserve relationships with clients and losing senior executives to competitors should be valid concerns of senior leaders, these internal and external demands require the attention of business leaders. Traditionally, business leaders appear to direct most of their attention to performance and less towards succession planning.

The rapid growth in global markets has enabled business leaders to restructure core business strategies for expansion and visibility beyond traditional borders. Baran, Shanock, and Miller (2012) and Kashyap, and Rangnekar (2014) agreed that globalization trends influence the occupational landscape and knowledge models of organizations by changing the dynamics of traditional work relationships and views on management strategies. Furthermore, Greenburg (2012) indicated that the expansion of the global market boundaries is positioning business leaders to establish a task force for leadership development and retention across multiple lines of business. Organizational leaders have an opportunity to ensure that global marketplace knowledge is a part of assessing core competencies for talent development.

Disruptive technology occurs when constant transformational technical changes in the marketplace influence organizational leaders to adjust or re-engineer business processes and hardware devices to address business needs. Balancing disruptive

innovation while maintaining a sustainable work environment can be a challenge for business leaders. The use of technology has expanded over the years, challenging organizations to maintain sustainability within the workforce. According to Becker, Fleming and Keijsers (2012), in a diverse workforce, older and younger employees leverage technology for executing tasks, training, and career development. Mencl and Lester (2014) indicated that getting to a consistent level of technology expertise is a challenge due to learning differences, gender diversity, and user adaptability differences between the older workers and young professionals. Rapid and constant change forces adjustments, to not only business practices but also the workforce.

The progression of technology has revolutionized globalization into a 24-hour on-demand availability to do business. Managers depend on technology in multiple facets of the operational infrastructure. As the workplace dynamics with globalization evolve, disruptive innovation could continue to be a challenge for business leaders. The impacts of disruptive technology tend to affect production and employees (Doherty, 2012).

The extraordinary workplace demands involving rapid change, downsizing, and budget cuts add an element of complexity that managers should be able to manage. Mencl and Lester (2014) argued that succession planning for the next generation of leaders should be a business priority, especially during turbulent times. Church and Rotolo (2013) indicated that the war for talent and the need to fill future gaps in the talent pipeline should motivate business leaders to focus on talent management strategies. For some managers, competing for business priorities tends to place identifying high-potential talent for leadership potential at risk.

According to McGraw (2014), the aftermath of the economic crisis increased financial pressure on managers to reduce spending, downsize allocation of resources, and focus more on performance. McCarthy (2014) explored the perceptions of public sector managers and found that they play a critical role in managing through turbulent times. Such turbulence could cause precursor affects on the resources, organizational performance, and managers behaviors that may result in turnover or retention issues in the workforce.

The United States Labor Statistics (as cited in Toossi, 2012) indicated there is greater participation in the workforce by older workers than by their younger cohorts. The growing number of older employees in senior, middle, and supervisory management is impacting the workplace culture on a global scale (Mathew, 2015). Genoe, Liechty, Marston, and Sutherland (2016) stated that employees in the baby boom generation, born 1946 through 1964, are approaching retirement; organizations need to address this future gap in talent pipeline and knowledge management through succession planning (Jain & Jain, 2014). In a cross-sectional study, Palermo, Fuller-Tyszkiewicz, Walker, and Appanah (2013) focused on how to improve the knowledge transfer from aging workers to their successors. Managers' inability to retain tribal knowledge could eventually impact performance, core business strategies, and human resource development planning. Even more concerning is the potential threat of a mass exit by the baby boom generation.

Workforce trends, globalization, and modern business practices influence succession management strategies. Schabel (2012) indicated that senior managers and HR professionals could partner to enable an organization to navigate the turbulent

workplace. Turbulence in the workplace influences the political climate either through the managers' professional accountabilities, performance responsibilities, or enterprise achievabilities (Shrivastava, Ivanaj, & Persson, 2012). Although turbulent times are not always predictable, they could affect current or long-term strategies of an organization and internal career landscape for leadership succession planning. Managers have the opportunity to take a proactive approach to examine the bench strength to determine the organizational talent needs.

Process of Succession Planning

Succession planning is a process that managers use to select and cultivate high-potential employees for key positions within the organization. Gray (2014) indicated that the most popular purposes of succession planning are to increase manager and employee engagements and foster employee retention to support career aspirations and build internal bench strength with employees who are results-driven top performers. Although succession planning is a common human resources development practice, Jain and Jain (2014) identified that some business challenges are due to time constraints, funding issues, the inability to select appropriate candidates, and limited indicators to properly forecast attrition. Over time, the lack of focus on succession planning could have an adverse impact on an organization's talent pipeline for key leadership positions.

The goal of succession planning is to have a positive transition of leadership and management power from the existing leader to the successor. Bass and Bass (2008) indicated that leadership and explicit knowledge transfer with a positive experience can sustain performance while negative transfer could cause performance to deteriorate.

Internal organizational leadership programs need to continue to focus on developing talent with strong business acumen for backfilling leadership positions. Marbury and Mayer (2013) argued that organizations that do not properly plan and execute succession strategies could experience a cost increase in labor and a lapse in performance. Leaders of business organizations should understand that there is potential for synergy between core business strategies, performance, and succession planning. More importantly, managers should monitor the business, know the talent needs and take actions to mitigate the gaps in the talent pipeline.

Succession management strategies are inevitable for developing leadership talent and identifying potential successors. Marbury and Mayer (2013) described the process of succession planning as an exchange period to transfer knowledge that helps to develop skills and advance strategic organization awareness and exposure to the political environment. Many organizations use the strategy of succession planning, dating back to the 1970s, to assist with identifying employees to fill high-profile positions for boards, executives and other key leadership positions within the organization (Bass & Bass, 2008). Managers are responsible for managing the employees, balancing workloads, and assessing skills and competencies to achieve performance goals. Identifying the employees who will be the next leaders within the organization should be apart of the current state process for organizational leaders. This process could facilitate an organization's readiness to prepare for a potential future need that requires the engagement of managers. The role of a manager is important and can be instrumental in identifying and developing his or her successor.

The process leveraged by most managers to identify and develop high-potential talent varies slightly among organizations. Profit and nonprofit organizations alike have an opportunity to leverage the process of succession planning to develop the internal bench strength for leadership positions (Zepeda, Bengtson, & Parylo, 2012). Moradi (2014) identified that it is appropriate to train and develop managers on the succession planning process, know the current state performance requirements, determine the performance capabilities and requirements for the future, be accountable for talent development, conduct talent reviews, and create a healthy talent pipeline of qualified successors. Hanson (2013) indicated that managers should have formal knowledge of the succession planning process, know how to develop talent, have the ability to assess and groom potential leaders, participate in regular talent reviews, set targets, and monitor results. In both observations of succession planning best practices, the managers were actively engaged throughout the process, from the beginning to the end. Besides, the role of the manager serves dual purposes as an advocator for the process and a talent developer to groom the high-potential employee.

The warning signs of a turbulent workforce are due to the generational trends that could have an impact on succession planning strategies. Cruce and Hillman (2012) indicated that there needs to be a sense of urgency in identifying next generation leaders because of the significant shift in the United States demographic workforce as the baby boomer generation exit to retirement known as the silver tsunami. McCauley-Smith, Williams, Gillon, Braganza, and Ward (2013) argued that managers could need to replace traditional succession planning with robust leadership succession strategies that

aggressively prepares eligible employees for multiple job levels within the organization. Chung and Luo (2013) indicated that traditional succession planning encourages particular relational engagement, although leadership succession focuses on individual achievement and performance. The leadership development programs for succession planning are normally formal with executive coaching, networking, and for high profile job assignments. Workforce trends are influencing the timeliness of succession planning to develop and train high profile talent.

When organizational leaders participate in succession planning, they are contributing to change that could influence the organization's future state (Berendt, Chirstofi, Kasibhatla, Milindretos, & Maruffi, 2012). The FPA Journal (2014) published survey results indicating 61% of the firms that participated in the study had a sound business plan while only 25% had a succession plan in place. Even with the advantages that succession planning offers, active participation to deploy this strategy appears to be low among some business organizations. Greenburg (2012) indicated that leadership opportunities for high-potential employees could be on the rise anywhere in the organization, but there is the lack of formal succession planning integrated into the threads of the business plans to identify or develop them. Succession planning should include a shared goal with a common understanding of the organization (Bush, 2013). Hahm, Jung, and Moon (2013) argued that properly positioning succession planning could enable managers to experience a smooth transition and stable leadership in a public corporation. Although succession planning affords managers the opportunity to engage in

a strategy that could shift the organization's direction, the positioning for continuity and stability in developing the bench strength appear to be weak in most industries.

Taking action and understanding the relevance of succession planning across all industries is not commonly practiced within business organizations (Onatolu, 2013). Jain and Jain (2014) argued that business leaders will focus more on business strategies and less on succession planning Zepeda et al. (2012) identified in the case study on the Georgia School Systems that leaders should embrace succession management strategies for the replacement of principals and central office leaders. MacKenzie, Garavan, and Carbery (2014) agreed that some organizations deprioritize leadership succession planning because the focus is on driving key performance measures. On the contrary, Pitzl (2012) argued that business leaders could be more willing to invest in succession planning when it mirrors their business models. A lack of common alliances, synergistic practices, and integrated strategies could have an impact on an organization's future performance as well as leadership succession planning.

Managers tend to be goal-oriented in freely competitive systems. Jantti and Greenhalgh (2012) interviewed and evaluated executive team members and middle managers on leadership development practices and processes. Their findings provided organizational leaders with a heightened awareness of the leadership profile, an enhanced appreciation of internal talent, and clarity on the definition of leadership.

Transformational leaders provide a global, innovative outlook, and shape business acumen. Onatolu (2013) and Berendt et al. (2012) suggested that business organizations should assess how high-potential employees effectiveness in demonstrating

transformational leadership characteristics. Even with the benefits that succession planning affords an organization, managers struggle with balancing strategy planning, achieving business goals, and finance success measures with evaluating workforce for high-potential talent.

Managers should play a vital role in developing high-potential employees for the talent pipeline. Simoneaux and Stroud (2014) indicated that succession management is a critical business task, and senior leaders are key players in advancing succession planning initiatives. Having proficient employees ready to replace the existing leaders is key for succession planning. More importantly is the interaction between the senior managers and HR professionals for developing emerging talent because of their responsibilities for organizational performance and managerial responsibility for the company's workforce (Eversole, Venneberg, & Crowder, 2012). Succession planning fosters the collaboration and partnership of the managers to create an environment where employees can identify their leadership characteristics and be encouraged to develop as a leader (Parris & Peachey, 2013). Jain and Jain (2014) found that this approach could reduce the vulnerability by saving time and money on sourcing external candidates while strengthening internal employee-employer relationships that could provide a socio-emotional balance to the workplace culture. In addition, this type of organizational change could impact employee morale, linkage to future business success, and organizational stability. A common thread running through studies of succession planning strategies is that fostering the right leadership development culture is the difference between success and failure.

Workforce Demographics

Generation diversity and multigenerational workforce demographics are evolving within organizations. Extensive research and literature exist on the definitions for each of the generation's birth pattern as it relates to the characteristics of workplace values, career motivators, and succession planning strategies. Toossi (2012) analyzed the United States Bureau of Labor Statistics that comprehended data analysis associated with generation cohort labor participation, population size, and future trends. Schoch (2012) argued that managing talent within a multigenerational workforce contributes towards the process of developing leaders in the younger generations. Awareness of the interrelationships among the employees within an organization provides managers with more in-depth knowledge about internal high-potential talent.

A multigenerational workforce plays a key role in understanding workforce demographics and is common in companies within the United States. Singh and Gupta (2015) stated that a generation is a given cohort group of members born in a limited span of consecutive years, whose boundaries identify peer personality. At any given time in the history of the United States, there have been at least two generations working side-by-side. There are four generations in the workplace for the first time in the history of the United States compared to past decades (Toossi, 2012). Scholars have compared the characteristics of multigenerational workforce ethics, technology experience, learning paths, and workplace ethics to workforce demographics.

There are statistical trends about the United States labor force that indicate an aging workforce could have an impact on the future workforce demographics. The United

States Bureau of Labor Statistics (2014) categories the civilian labor force by age group starting with 20 to 24 years, 25 to 54 years, 55 to 64 years, 65 to 74 years, and 75 years and over. Another characteristic used to describe the workforce is by generation names, Traditionalist, baby boom, Generation X, and Millennial when analyzing the occupational employment projections of an aging workforce (Toossi, 2013). A vast majority of the age groups 55 to 64 years, 65 to 74 years and over represent the baby boom and Traditionalist generations or mature workers. The statistics that support workforce demographics provide business practitioners with projections and data sources to understand labor force trends by generation group and age bands.

While managers recruit young professionals, mature workers are delaying decisions to retire, thereby creating competitiveness for career advancement opportunities (Vasconcelos, 2015). Goodwin and O'Conner (2012) indicated that the older generations that are participating in the United States workforce are the Traditionalist (born before 1945) and baby boomers (born 1946 to 1964). Older generation members are working past retirement age to retain their social network, provide value add to the company, and maintain economic resources (Harvey, 2012). Chaudhuri and Ghosh (2012) argued that the retirement of baby boom cohorts over the next decade could cause a gap in intellectual capital as well as leadership roles for many companies. Pritchard and Whiting (2014) stated that this anomaly had influenced attrition and retention behaviors among generational cohorts. Na Ayudhya (2015) found that this behavior change has an effect on how managers manage multigenerational work teams with varying worldviews, business philosophies, workplace values, and career aspirations to deliver common goals

and business results. Wok and Hashim (2013) argued that generational diversity among older and younger workers affects the subculture of some businesses common areas such as communication, cooperation, perception, and knowledge sharing. The existing literature indicated that the interactions among multigenerational employees have an impact on management styles, business practices, workplace culture, and succession planning.

Each generation has lived through a common set of social and historical events that helped shaped their characteristics, value systems, drive, and ambitions. The four generations that are actively participating in the United States workforce are the Traditionalists, baby boomers, Generation X, and millennials (Lyons, Schweitzer, & Ng, 2015). It is beneficial for managers to understand the dynamics associated with each of the generation cohorts as they relate to how they contribute to the workplace culture, business results, and corporate sustainability.

The financial crisis between 2007 and 2009 caused a shift in the United States labor markets that affected traditional organizational structure because high tenure employees in leadership positions delayed retirement decisions (Genoe et al., 2016). The United States Bureau of Labor Statistics (2014) indicated that there are some people in the labor force nearing or beyond the traditional age of retirement, 66, who are delaying retirement. Toossi (2012) analysis of the United States workforce indicated that this extended labor participation is causing a steady increase in the labor participation rates. Some business practitioners are concerned about the impact on business stability and tribal knowledge when the silver tsunami happens, and highly tenured employees retire

(Gray, 2014). Cekada (2012) referred to the Traditionalist as the oldest generation, 70 years or older, in the workforce. The Traditionalist represents the oldest active generation in the workforce.

The Traditionalists' life events include the Great Depression and World Wars that influenced their values of family, patriotism, and economic expansion. In the workplace, members of the oldest generation display characteristics of loyalty to their employers, respect authority, are hard workers, support teamwork, and engage in collaboration (Lyons, Schweitzer, & Ng, 2015). In addition, Schoch (2012) indicated that the cohorts of this generation are more risk averse than the other generations. This generation demonstrates a tight alignment between personal values and work ethics.

Born after World War II, the evolution of women's liberation, the birth of rock music, and space exploration describes the historical impacts of the baby boom generation (Gibaldi, 2014). Murphy (2012) stated that members of the baby boom generation represent 38% of the United States labor force. Not only are the baby boom cohorts members of the largest generation, but they also have the highest labor force participation rate (Toossi, 2012). In addition, Schoch (2012) concluded that the birth rate of the 80 million baby boomers was more than any other generation. Similar to Traditionalists, some baby boomers grew up during economic hardship. Some members of the baby boom generation are working beyond the traditional retirement because of personal desire or recovering financial losses that they could have suffered during the economic downturn (Lytle, Clancy, Foley, & Cotter, 2015). Wyatt-Nichol and Antwi-Boasiako (2012) conducted a study that identified the prolonged participation in the

workforce by the baby boom generation which has affected the standard rate of attrition, employee retention, succession planning, and diversity management practices. By comparison, the baby boomers large participation in the workplace can shift labor trends by their actions similar to the impact that they made when entering the workforce as young professionals.

The next generation members' birth years fall between 1965 and 1980 commonly referred to as Generation X. In the United States. labor force, the Generation X cohorts, 35 to 50 years, represent 32% of the workforce with a total population of 51 million (Murphy, 2012). They are the smallest cohorts group when compared to the baby boomers and millennials. Cekada (2012) stated that members of Generation X grew up as latchkey children because both parents worked causing them to be at home alone after school. In addition, this generation experienced high parental divorce rates. They could have often experienced their parents' careers impacted by the corporate layoffs of the 1980s that influenced their workplace viewpoint and trust in large corporations (Litano & Major, 2016). As a result, these work and life situations could have yielded the effect of Generation X leading the charge for efforts such as work-life balance.

Generation X is the third generation that is participating in the workforce. As members of the workforce, Generation X desire frequent communication and prefer to have work and life flexibility (Lu & Gursoy, 2013). Williams and Turnbull (2015) argued that Generation X cohorts prefer workplaces that provide an environment of collaboration and teamwork. The evolution of technology advanced rapidly with PC usage as a part of everyday life activities for members of this generation. The Generation X cohorts act as

change agents in the advancement of technology, management of chaos, and creative problem resolution (Lyons et al., 2014; O'Connor & Raile, 2015). Rentz (2015) identified Generation X as the generation that vocally questioned authority figures, created work-life balance concepts, maintained highly technical skills, and exhibited more independence than the baby boom generation. Members of Generation X are drivers of change and early adopters to technology advancements.

When compared to baby boomers and millennials, Generation X is the most adaptable to change. Mencl and Lester (2014) stated that cohorts of Generation X are ambitious, self-starters, and driven while striving for work-life balance. Stone-Johnson (2014) argued that members of Generation X seek to integrate work with social or family needs without having to sacrifice their life activities because of work demands. Generation X members value developing skills through continuous learning to maintain resilience at all times, especially during turbulent times in the job market (Rentz, 2015).

The millennials are the youngest members of the workforce. They are resilient leaders for managing disruptive workplace climate and constant change. The technology was a part of everyday life from the beginning for the Millennial generation cohorts born after 1980 (Stratton & Julien, 2014). Other popular names for this generation are Generation Y, Generation www, the Digital Generation, Generation E, Echo Boomers, and N-Gens (Weeks, Rutherford, Boles, & Loe, 2014). Murugami (2012) argued that Generation Y represent 25% of the workforce and is increasing at a rapid pace in the United States and globally. Members of this generation represent the second largest generation in the United States with 75 million members and could yield similar impact

on entering the workforce as the baby boom generation (Toossi, 2012). On the contrary, O'Connor and Raile (2015) argued that millennials may delay entering the labor force to stay in college longer, have differences in job expectations, or unwillingness to participate in traditional company hierarchical politics. The baby boomers mass entrance into the labor force made a significant impact on labor participation rates. Members of the millennial generation appear to demonstrate that they are not as eager or aggressive about entering the workforce as baby boomers were as young professionals.

The millennials came of age in an era of economic uncertainty and volatility, Columbine, post 9/11, 24-hour media, Internet, and web technology (Schullery, 2013). The Millennial generation is the most technically literate, educated and ethnically diverse generation. Gursoy, Chi, and Karadag (2013) profiled the millennials as technologically savvy, community minded, confident, global and team-centric, and educated and ethnically diverse. Consequently, they clash with older managers because of their tendency to question authority and push back on micro management styles and slowness to adapt to workplace culture norms (Winter & Jackson, 2015).

The workplace dynamics are continuing to evolve with many ages, ethnicities and gender differences. Cekada (2012) stated that the multigenerational workforce consists of four generations that are actively competing for positions in the workplace. Most researchers agree that it is beneficial for organizations to understand generational diversity in the workplace where success derives through the interaction of management and the employees (Hansen & Leuty, 2012; Lester, Standifer, Schultz, & Windsor, 2012; Lyons & Kuron, 2013). Taylor and Stein (2014) stated that managers should educate

themselves and re-engineer business practices to manage multigenerational work teams and individual contributors aspiring for leadership opportunities. Scholars indicated that a multigenerational workforce had an impact on traditional business practices and contributions on performance results.

Technology driven communication plays a key role within an organization. Lester et al. (2012) argued that baby boomers, historically, evolved based on the belief in growth, change, and the quest for expansions and have embraced technology more generally than the misconception made by the other cohorts. Scholars have identified that the continuous advancement of technology has affected the communication vehicles for managing Generation X and Millennial emerging leaders. Existing literature contains information about generational descriptions, characteristics, value systems, drive, and ambitions in the workplace about the groups as cohorts and not by age bands. There are generational differences in workplace values between older professionals, baby boomers and Traditionalists and the younger professionals, Generation X and millennials (Kuron, Lyons, Schweitzer, & Ng, 2015). Tang, Cunningham, Frauman, Ivy, and Perry (2012) found that millennials, who were just entering the workforce, displayed similar social behaviors in the workplace as baby boomers did during their earlier adulthood. Baby boomers and millennials have minimal generational differences but have similar behavior characteristics, workplace values, and ambition when compared based on age when entered the workforce and place in career progression.

Business practitioners and researchers have conducted social behavior studies that explore the differences, similarities, challenges, and benefits of a multigenerational

workforce. There are more research studies on generational differences over generational similarities. Baby boomers, Generation X, and millennials are the most common generations studied. The birth patterns, beliefs, values, the period of age influencers, and worldviews are characteristics that define and classify a generation. Gellert and Schalk (2012) and Kuyken (2012) agreed that generation diversity influences an organization's subculture. The social differences, age spans, and life events are influencers that frame the workplace culture of a multigenerational workforce.

The intergenerational workplace culture consists of varying attitudes, ethics, relationships, and motivation drivers. These attributes transform into workplace values that contribute towards how generation cohorts interact with each other as well as within the organization. More importantly, it is critical for business leaders to focus on understanding employees career development through motivators, drivers, and leadership characteristics of generational diversity rather than focusing on generational differences (Pritchard & Whiting, 2014). The existing literature provided evidence that both the organization and the generation cohorts have a critical role in expanding knowledge about generation diversity in the workplace.

There is an extensive amount of literature available that describes the characteristics and workplace values of the baby boom generation and their workplace interactions with the other generation cohorts. The personality traits of the baby boomers are optimistic, idealistic and driven (Holt, Marques, & Way, 2012). The baby boom generation lives to work. Baby boomers are self-starters and results-driven individuals that want to stay with the organization long term, and they believe in a workplace that

fosters inclusion (Gokuladas, 2013). On the contrary, like generation members prefer frequent communication, motivated by position, power, and prestige and desire a work environment that is fun (Lyons, Schweitzer, Ng, & Kuron, 2012). Kuyken (2012) noted that younger workers indicate that their baby boom cohorts are reliable, loyal, dependable and, yet, inflexible. The risk for many managers is the inability to predict the impact that these tenured workers have the industry knowledge, business processes, and talent development for meeting sustainability and corporate social responsibilities requirements (Cochran, Crowne, & Carpenter, 2012). A general assumption is that the baby boom generation could have the same impact or similar impact on exiting the workplace, mass exodus, as they did when they entered it.

Managers are sitting on the bubble of a mass exit of baby boomers who are getting ready to retire. Lyons, et al. (2014) identified that generation diversity in the workplace represents challenges to business leaders, especially managing the talent of an aging population concurrent with a shrinking talent pool. The work value differences among baby boom, Generation X, and Generation Y cohorts affect the business environment (Bennett, Pitt, & Price, 2012; Green & Roberts, 2012). Festing and Schäfer (2014) argued that managers have an opportunity to bridge the gap in generational differences by effectively managing talent. Similarly, Ohlrich (2015) indicated that postmodernism leadership practices provide strategic value alignment, effective communication, and knowledge management strategies that assist managers with addressing subculture conflicts among multigenerational work teams. Managers should

consider early engagement of such processes and practices as succession planning to capture cross-functional tacit knowledge of generational cohorts in key leadership roles.

Some corporations leaders in the United States may be unclear how an aging workforce and the lack of participation of emerging employees in the talent pool may impact their leadership succession planning (Cekada, 2012). Even though employment retention is costly to business organizations, the loss of tacit knowledge due to turnover impacts productivity and cost (Fibuch & Van Way, 2012; Peet, 2012). Schweer, Assimakopoulos, Cross, and Thomas (2012) argued that managers at high-performance companies understand the correlation between the organizations' need to excel and effectively manage intergenerational talent to drive performance. Existing literature presented pros and cons about leveraging existing organizational practices to address the dynamics of each the generational cohorts. Leading a multigenerational workforce in the United States could require business leaders to understand that there are enablers in leveraging generation diversity that provides internal and external value (Pritchard & Whiting, 2014; Tang et al., 2012). Managers have an opportunity to leverage intergenerational talent to mitigate gaps in generational diversity.

Managers are dealing with an intergenerational workforce that is maturing aggressively and presenting new challenges in the traditional leadership and management practices for developing leaders for management positions. With one-third of the United States workforce aged 49 to 65 years, some organizations ability to retain knowledge may be at risk (Rothe, Lindholm, Hyvönen, & Nenonen, 2012). Managers who are cohorts of the baby boom generation appear to have the longest service tenure with the most

business knowledge. While the younger managers appear to be ambitious, they have the least experience, yet desire to move into management positions at a rapid pace. Despite the different workplace perspectives, both Generation X and Millennial managers strive for work-life balance in the workplace (Winter & Jackson, 2015). Dries (2012) stated that successful business leaders utilize the diversity of talent and skills of a mixed generational workforce to assist in achieving organizational goals while developing the next generation of leaders. Further studies have identified that companies leverage the knowledge of experienced workers with that of younger colleagues to understand workplace values, individualism, communication styles, as well as consumer behaviors (Hansen & Leuty, 2012).

With the growing population of millennials entering the workplace, the multigenerational culture is transforming. Cottingham, Erickson, Diefendorff, and Bromley (2013) conducted a quantitative study that concluded management inclusion could influence the multigenerational conflict in the work environment and address the slightly higher turnover rate of employees ranging in 25 to 54 years. This age range comprises three generations, Millennials, Generation X, and baby boomers. While Schullery (2013) argued that business practitioners profit from having a workplace that encourages the participation of multigenerational cohorts, and business leaders should value the diversity of all generations. In addition, when employees in a mixed generation workplace are active participants in business initiatives, they typically have a higher satisfaction rating and longer retention. These types of positive indicators translate into value to the company's bottom line. The portrait of a multigenerational workplace depicts

the workplace culture along with impacts on the organization's business model, performance, and succession planning strategies.

Managing Emerging Talent

Business practitioners and scholars have studied succession planning processes at an organizational and individual level to gain further insight on managing emerging talent in the United States workforce. The future growth of businesses could depend on succession planning through sourcing internal or external talent for leadership positions; however, filling the talent pipeline with internal talent could not be an easy task in a multigenerational workforce. If organizations want to continue performing, it is vital to keep the high-potential employees engaged in succession planning activities while driving business deliverables for stability and growth. Researchers and practitioners, Montague, van der Lee, and Masson (2014) identified that managers need to build global talent pipelines based on the principles of sustainable business models and corporate social responsibility. Furthermore, traditional succession planning processes and mentoring programs could require modification to address the career development needs of employees ages 24 to 34 for entry to mid level management positions and 35 to 54 for upper management and executive level roles.

Most United States based businesses studied in existing literature utilized talent management strategies that included recruitment, succession planning, human resource development, and retention practices for battling the on-going war for talent and hiring the best talent. Green and Roberts (2012) argued that the Generation X and Millennial management candidates could not be ready or adequately skilled to take the leadership

positions of retiring baby boomers. Researchers identified that the high-potential talent of younger generations should reflect the business practices and knowledge management based on how their professional and technical skills fit within the organization (Dries, 2012). Crowne (2013) and Sherman, Patterson, Avitable, and Dahle (2014) agreed that the managers with an eroding tenure base of employees aged 50 or older should address succession planning strategies sooner instead of later. Once baby boomers in upper management and executive level positions retire, organizations with inadequate backfills could have a void in operational effectiveness.

To develop emerging high-potential talent depends on the strength of two-way relationships between the manager and the employee, manager to leader, and manager to manager through succession management strategies and mentorship programs. Human capital resources provide managers with a competitive advantage even though the organization does not have full control of the employee's knowledge (Birasnav & Rangnekar, 2012). Organizationally driven mentoring programs provide the participants with an opportunity to share business knowledge through social exchanges within the constructs of the mentor and mentee relationship. Mentoring is a professional development strategy that helps to build professional relationships while exchanging or cultivating tribal knowledge. In addition to traditional mentoring, there are reverse and blended mentoring processes.

The traditional mentoring relationship is comprised of a more experienced high tenure person with a low tenure less experienced resource to transfer knowledge from one to the other about work, culture, or career advancement opportunities. Chaudhuri and

Ghosh (2012) indicated that a traditional mentor and mentee rapport models that social exchange theory because of the leader and subordinate relationship. Gee and Gee (2011) stated that baby boom cohorts welcome the opportunity to share their knowledge with young professionals while millennials embrace reverse mentoring to support technology learning strategies.

Reverse mentoring is different from the traditional mentoring because it leverages the highest source of intellectual capital through knowledge sharing and direct observations by both the mentor and mentee. Chaudhuri and Ghosh (2012) argued that reverse mentoring has no relevance to seniority but considers who has the most knowledge about the subject. For example, Millennial employees are normally the most technological savvy of all of the intergenerational cohorts indicating that they have more experience than employees from older generations. Moon (2014) focused on the traditional mentoring model along with reverse mentoring as an opportunity to build relationships through sharing knowledge and fostering creativity between Millennial mentees and baby boom mentors. This type of knowledge exchange strengthens relationships, creates collaboration, and stimulates workplace culture change (Powell, 2013).

The advancement in technology along with globalization enables a modern approach to cross-learning and demographic diversity known as blended mentoring. Similar to reverse mentoring, blended mentoring expands the ability for developing high-potential employees based more on the mentor's level of tacit knowledge on the subject rather than concentrating on her or his tenure in the organization. Leidenfrost, Strassnig,

Schütz, Carbon, and Schabmann (2014) conducted a quantitative peer mentoring study where participants, regardless of the type of mentoring program, advanced more than the participants that did not have a mentoring experience. Mentoring programs and succession planning play a vital role in developing next generational leaders in a multigenerational organization.

Succession strategies remain relevant in modern career development within the traditional business practice. Succession planning is a proactive strategy that contributes towards the organization's vision, business purpose, goals, and leadership staffing (Sherman et al., 2014). Schullery (2013) identified that when employees, regardless of generation group, understand the company vision, purpose, and goals, the individual could identify the value that he or she contributes to the organization. Festing and Schäfer (2014) indicated that managers developing emerging talent should clearly state organizational goals and individual value to influence cohesiveness and knowledge sharing among multigenerational cohorts.

There are challenges that impact traditional succession planning practices for developing emerging talent among the Generation X and Millennial cohorts (Murphy, 2012). Fibuch and Van Way (2012) found that the opportunities among the cohorts are differences in communication methods and styles, technology proficiency levels, and knowledge management practices. Fibuch and Van Way argued that organizations that continue to use traditional communication methods need to shift to multiple mediums such as social media and interactive learning and development programs to engage all employees. In general, effective communication is essential for all professionals

including cohorts in baby boom, Generation X, and millennials generations. Regardless of generation, the United States labor force's ability to utilize technology for communication and performance is a critical element of managing business deliverables.

As baby boomers in leadership positions retire, companies are experiencing some deterioration in the existing working knowledge due to the lack of exchange of tribal knowledge with potential successors (Chaudhuri & Ghosh, 2012). Baby boomers acquired extensive functional knowledge about their employer's business partly due to their loyalty and low turnover rates (Crowne, 2013; Gursoy et al., 2013). Gokuladas (2013) stated that younger generation cohorts tend to have a higher turnover rate than baby boomers because of different career aspirations, attitudes towards longevity, and retention motivators. The inability for managers to retain the emerging high-potential talent is a growing business issue that impacts social network within the organization and influences business continuity, cost, productivity, and longevity (Macaux, 2012). Turnover impacts the ability for managers to stabilize the development of their organizational knowledge base. Dewah and Mutula (2014) conducted a study about retaining organizational knowledge that indicated that business leaders should develop modern approaches that capture business critical tacit knowledge to enhance the effectiveness and efficiencies within the organization. The ability to retain tacit knowledge within an organization is beneficial for equipping the next generation of leaders to grow the business (Cappelli, 2015).

Multigenerational work team dynamics can affect the career motivators of leaders and employees. Standifer et al. (2013) indicated that managers face challenges with

integrating employees from different generations into the workplace environment from small to large companies. Leveraging the similarities and understanding the differences of a multigenerational work team includes identifying the motivators for all of the generation cohorts (Festing & Schäfer, 2014; Lyons & Kuron, 2013). Alexander and Sysko (2012) found that it is critical for business leaders to understand the career motivators and work ethics of Generation X and Millennial high-potential talent. The Millennial generation cohorts view their relationship with an organization like it is a corporate social responsibility, whereas members of baby boom and Generation X are not as critical of corporate ethics and values (Holt et al., 2012). Managers should comprehend the drivers and motivators of their employees individually as well as for their teams.

Having a healthy pipeline of emerging leaders could benefit managers and impact employee morale. Cho and Lewis (2012) argued that managers should be aware of the talents, skills, and intellectual capital of the high-potential employees to enable collaboration, motivation, development, and retention. Buch, Martinsen, and Kuvass (2014) and Sheer (2015) described the leadership theory, Leader – Member Exchange as the interaction between leaders and followers to support organizational goals, work performance, employee attitudes and behaviors, and career aspirations. This theory provides a different perspective on the development of leaders through social exchange within the business organization.

It is not uncommon for business organizations to have talent management programs in place that develop high-potential employees through leveraging succession planning strategies, mentoring programs, and development planning initiatives. The need

for managers to develop candidates for the talent pipeline is becoming increasingly urgent as aging senior managers begin to retire. Murphy (2012) argued that companies need qualified young talent to bolster the ranks and skilled, mature employees in key senior leader positions to drive business results. When managers combine the skills and talents of a diverse generation workforce, companies can drive results and grow market share (Montague et al., 2014; Murphy, 2012). This ability to leverage internal talents and generation diversity could provide companies with a competitive advantage in developing employees.

Increasing awareness of generation diversity could influence organizations to develop talent management strategies that address gaps in the workplace. More importantly, Taylor and Stein (2014) argued that organizations should provide clear communications and set expectations upfront for managerial talent to minimize conflict. As aging executives and senior managers start to retire, some organizations are experiencing the inability to find a successor due to a shrinking talent pool or the successor lacks the tribal knowledge to effectively manage the work processes and practices (Cappelli, 2015). Likewise, developing emerging talent from within an organization could be both a benefit and risk for some managers.

Limited literature is available on identifying the business organizations that re-engineered succession planning practices to tackle the war for talent in a multigenerational workforce or preparing for the baby boomers mass exit. Even though the competition for skilled talent is intense, the need for a strong talent pipeline is increasing as baby boomers in managerial roles prepare to exit into retirement (Cochran

et al., 2012; Crowne, 2013; Montague et al., 2014). Lacy, Haines, and Hayward (2012) stated that business leaders should solicit the help of Business Schools in understanding the modern career process gaps in managing and retaining employees ages 24 to 54. This age group is the talent population that managers need to cultivate to be the next generation of leaders. Researchers agreed that in addition to succession planning, mentorship programs have a key role in developing the next generation leaders (Chaudhuri & Ghosh, 2012).

Transition

The substance of this qualitative case study is to explore strategies technology services managers use to align core business objectives with leadership succession planning. This section provided an alignment of the business problem, purpose statement to the research question assist with the development of the interview questions. An extensive review of existing literature on the participation labor trends indicated that disruption in the workplace climate and workforce demographics will continue to be business challenges for grooming potential high-potential talent for leadership positions through succession planning. Succession planning plays a vital role within an organization; however, it is not a consistent business priority like achieving performance. Managers need qualified management and executive level emerging talent within the organizations that can drive business results and retain tacit knowledge. Managers need to build bench strength to maintain stability for middle management and upper executive positions. Cultivating high-potential employees to fill the talent pipeline provides some

assurance that internal candidates will be ready to fill vacant positions in the event there is a surge of a mass exit by baby boomer leaders.

Section 2 describes the role of the researcher, participants eligibility criteria, expands on the qualitative research method, and case study design for this study. The specifics include the efforts of the methodology to gather and analyze the data collection associated with understanding strategies used to align core business objectives with for leadership succession planning by managers at a technology services company.

The final section, Section 3, of this qualitative study, presents the findings, describes ways to the findings that either confirms, disconfirms, or extends the knowledge, and ties to the conceptual framework. There are details on the relevance of the findings to business practices. The final section describes how the findings affect social change. Before the conclusion, there are recommendations for action and further research to support the improvement of business practices.

Section 2: The Project

The current addressed succession planning for the next generation of leaders. To assist with the qualitative inquiry, I deployed a case study design to explore how managers at a technology services company use existing core business practices to incorporate leadership succession planning. This section includes the purpose statement, role of the researcher, participants, research method and design, population and sampling, ethics, data collection instruments, data collection techniques, data organization techniques, and data analysis procedures.

Purpose Statement

The purpose of this qualitative single case study was to explore strategies used by technology services managers in mid-size companies to align core business objectives to improve leadership succession planning. The population for this study included 12 technology services managers in Dallas, Texas, who have had success with succession planning in a mid-size technology services company. In a traditional business infrastructure, the first-line and mid-level managers and human resources (HR) business professionals, facilitate the talent management processes (Claussen et al., 2014). Working together, managers and HR business professionals identify, assess, and select high-potential employees during periodic talent reviews. Selecting a successor can influence an organization's reaction to change, value proposition, and performance (Bass & Bass, 2008). The implication for positive social change included the potential managers with an integrated approach to identify and develop candidates for leadership positions.

Role of the Researcher

During the data collection process, it was my goal to comply the guidelines outlined for the role of the researcher. Frels and Onwuegbuzie, (2013) stated that the role of the researcher is to use proper research skills and techniques during the data collection process. I conducted the study in the Dallas metropolitan area where I live and have an established network and relationships with company executives and senior managers. I am familiar with succession planning strategies because I participate in annual talent reviews in my role as a business leader.

I complied with the ethical standards outlined in the Belmont Report by treating each participant and all company documents with respect by not exploiting information shared during confidential sessions. Qualitative researchers incorporate credibility, transferability, and trustworthiness along with moral and ethical considerations as standard elements during all phases of the research inquiry (Wahyuni, 2012). Chenail (2011) stated that a researcher should be unbiased, ethical and trustworthy. During the review of company documents collected for research purposes, it was my responsibility to protect the participants and remain ethical.

Open-ended interviews with managers were a part of the data collection. I also acknowledged the time and efforts contributed by each participant towards the data collection process. Sinkovics and Penz (2011) stated that the interview inquiry process is one of the basic ways to collect, organize, and analyze data. Yin (2014) indicated that an interview protocol guide is a template that contains the purpose of the study, interview

questions, and closure statement for the participant to use during the interview. I used an interview protocol guide to mitigate bias and ensure to compliance with ethical practice.

Participants

The targeted population for the study was managers working at a mid-size technology services company in the metropolitan area of Dallas, Texas. Yin (2014) indicated that a single unit that consists of multiple participants is a general approach for a research inquiry. No limitations were set on the hierarchal levels of the managers to support a wider range of participation. In this study, the participants must have had knowledge of organizational strategies that align core business objectives with leadership succession planning. Cronin (2014) noted that the participants' selection criteria should align with the research question because their voice and perceptions are critical to the study. Mouncey (2012) and Fisher and Stenner (2011) argued that in a qualitative research study participants should be able to relate to the problem statement and comprehend the purpose of this study. The managers who met the criteria were eligible to participate in the study. Dworkin (2012) and Marshall, Cardon, Poddar, and Fontenot (2013) indicated that a standard sample size for a qualitative study ranges from five to 50 participants. Having the appropriate number of participants from the target population is essential for justifying the findings of the study. For this single unit case study, I recruited for 12 participants.

In the Dallas area, there are public and private technology services companies. For this study, I targeted a mid-size private company to conduct the single unit case study. In some qualitative studies, researchers struggle with gaining access to participants

because of participants' lack of availability or willingness to participate (Wilkerson, Iantaffi, Grey, Bockting, & Simon Rosser, 2014). Lang, Martin, Sharples, Crowe, and Murphy (2014) argued that following proper protocols for engaging prospective participants is not only ethical but also can enhance the working relationship between researcher and participants. As a business leader in the Dallas area for more than 25 years, I have extensive networks established through professional affiliations, corporate connections, nonprofit organizations, community organizations, and regional alumni associations. In addition, I leveraged existing networks and connections through local professional forums, symposiums, and conferences to solicit executives and senior leaders to participate in the study. When I received a request for additional information or an expression of interest in the study, I asked the prospective participant for his or her contact information including e-mail address and telephone number.

When I received approval from Walden University's Institution Review Board (IRB) (approval number 03-31-16-0291182) and permission to conduct research from the appropriate company authorities, I sent each prospective technology services managers on the contact list an invitation via e-mail to participate in the study. Once I had the agreement to cooperate with a mid-size technology services company, I submitted a request to gain access to the potential participants and documentation. In an effort to gain appropriate representation of the population for this study, I contacted the company's appointee to discuss the study and seek access to prospective participants by requesting a list of names, email addresses, and phone numbers. Next, I sent an e-mail interview

invitation to all of the prospective participants. The invitation had a brief description of the study, a list of the interview questions, and a request to participate in an interview.

Having a working relationship is important in qualitative research because it helps the researcher gain access to the participant's knowledge about the topic (Wolgemuth et al., 2015). Dubois et al. (2012) argued that the researcher should have a genuine concern about maintaining an ethical working relationship with participants. Cronin (2014) indicated that when a researcher establishes a working relationship with participants, it could enable clear communication, timely responses, open and honest feedback, and mutual respect between the parties. I established a working relationship with the participants by protecting their personal information, providing open lines of communications, being sensitive to their perspectives, and establishing an environment built on respect and trust. The eligibility criteria, solicitation process, and working relationship helped to validate the participants' alignment with the research question.

Research Method and Design

The researcher determines the research method and design to support a study (McCusker & Gunaydin, 2014). Fisher and Stenner (2011) stated that a qualitative researcher seeks to gain insight into a problem, provides a recommendation for additional analysis, and recognizes trends of subjective input. The focus of this qualitative single case study was to explore the strategies that technology services managers use to align core business objectives to improve leadership succession planning. Onatolu (2013) argued that there is a need for synergy in core business objectives and succession

planning in technology services organizations. To explore this alignment, I used a qualitative single case study design.

Method

The methodologies for social research are quantitative, qualitative, or mixed-methods, which is a combination of quantitative and qualitative (McCusker & Gunaydin, 2014). Research methods provide researchers with structured, unstructured, and semistructured data collection techniques that enhance the validity and accuracy of the findings (Fielding, 2012). Each of these methods consists of various procedures for data collection, analysis, and interpretation that assist researchers with examining the problem and answering the research question.

Qualitative research enables researchers to explore a phenomenon through the lived experiences of the participant (Becker & Burke, 2012; Maxwell, 2015). Case study research enables a researcher to do an in-depth investigation of individual or organizational interventions, relationships, or programs through the collection of multiple sources of data (Yin, 2014; Unluer, 2012). Qualitative case study research enables the exploration of a study topic through a variety of data sources. Denzin and Lincoln (2013) stated that the qualitative research inquiry provides the researcher with the ability to understand practices and seek new knowledge. Through qualitative research, new findings can emerge along with potential solutions to mitigate challenges. Quantitative research enables researchers to use numerical data to examine the frequency of various views or opinions from a chosen sample population (Sato, 2014). The statistical style of quantitative research is empirical to prove or disprove a hypothesis (Smith, 2014).

Mixed-methods research is the integration of qualitative and quantitative methods and data (Maxwell, 2015). Guest (2012) argued the strength in mixed-methods is the data mixing and integration to support findings. Researchers use mixed-methods when a qualitative or quantitative approach is insufficient.

The scope of this study was to explore strategies technology services managers in mid-size companies use to align core business objectives to improve leadership succession planning. The quantitative or a mixed-methods approach was not appropriate for this study because of the exploratory nature of the problem statement and research question. Cocklin and Wilkinson (2011) conducted a qualitative study to explore how an aging workforce, internal changes, and future staff reductions affected an organization's leadership succession planning. Given this precedent, I chose qualitative methodology to understand how business leaders align succession planning with core business strategies to identify employees to backfill key leadership positions.

Research Design

The research design for this study was a case study. Taylor (2013) argued that the research design should not be predetermined. Instead, it should align with the research questions and purpose of the study (Taylor, 2013). A case study design provides an in-depth understanding of a significant issue where there is no stated conclusion (Yin, 2013). Yin (2012) argued that case studies could be useful to answer exploratory or descriptive research questions such as how or what. The case study design enables researchers to capture non-numerical information about a process or program through in-depth interviews, direct observations, or written documents to analyze a research topic

through the lived experiences of the participants (Yin, 2014). Case studies research designs enable researchers to investigate complex issues with minimal dependencies on previous investigations (Unluer, 2012). The case study is a common research design and standard industry practice among business practitioners (Yin, 2013). Collins (2013) indicated that the case study involves developing a plan, collecting data, analyzing data, and sharing findings. Johnson and Campbell-Stephens (2012) and Ramthun and Matkin (2014) used a case study design to support their studies on succession planning for leadership talent. These applications supported the case study design for this study.

Narrative research is another qualitative design. The purpose of this design is to explore the life of an individual (Denzin & Lincoln, 2013). Narrative research occurs when a person is telling his or her life story about the phenomenon (Yin, 2014). With narrative interviews, the participant acts as a narrator through the process of verbalizing the details of his or her experience regarding a social issue or problem (Wolgemuth et al., 2015). This research design consists of one participant or a very small group of participants leaving the voice of the researcher limited and narrow. For this reason, the narrative design was not appropriate for this study.

Understanding the lived experiences of several individuals affected by a social phenomenon is the purpose of the phenomenological design (Yin, 2012). Koch, Niesz, and McCarthy (2014), indicated that the phenomenological design enable participants to provide their perceptions and lived experiences regarding the study topic. Qualitative researchers conduct interviews to understand the experiences of the participants (McCusker & Gunaydin, 2014). I gave some consideration to the phenomenological

design but did not select it due to the inability to ensure the number of interviews to achieve data saturation.

The ethnography design describes and interprets the lived experiences of a cultural group (Denzin & Lincoln, 2013). Ethnography enables the researcher to become an active participant in the group to understand cultural perceptions of a social phenomenon (Opsal et al., 2015; Sato, 2014). Ethnography was not appropriate design for this study.

This study sought to explore the strategies that technology services managers use to align core business objectives to improve leadership succession planning. After a review of the five empirical qualitative research designs, the case study design was the most appropriate because of the nature of the study.

There are no preset limits on observation methods and no definite ending point for data saturation (Yin, 2012). Data saturation occurs when the researcher collects sources of evidence for the study that represents both quality and quantity data (Fusch & Ness, 2015). Taylor (2013) argued that the collection of multiple sources of evidence in a case study design help to validate data saturation. I continued to collect data through the open-ended interviews until no new information appeared in the data, coding, or themes. This data collection technique assisted with achieving data saturation for this study.

Population and Sampling

The sampling method selected for this study was purposeful. Sampling reflects a proportion of the size of the population represented in the research study (O'Reilly & Parker, 2012). Mouncey (2012) indicated that using the appropriate sample size for an exploratory

qualitative study is one that adequately addresses the research question. Purposeful, convenience, and theoretical are sample methodologies that assist a researcher with the execution of a qualitative study (Robinson, 2014). Reybold, Lammert, and Stribling (2012) indicated that the technique of purposeful sampling provides the researcher with participants who fully understand the research question. Purposeful sampling supported the selection of the participants, managers, because of their active roles in leading strategies for core business objectives and executing succession planning for the line manager, mid-level manager, and upper executive positions. By using this sampling method, the participants in this study related to the research question and shared their personal experiences.

The population selected for a study defines the people or group that represents the culture and values of the environment that are relevant to the research study (Reybold, et al., 2012). For this qualitative case study, the population consisted of managers within a mid-size technology services organization located in Dallas, Texas. Managers drive the core business strategies, oversee operations, manage performance metrics, and support succession planning. Identifying the sample size for this study depends on how adequately the population aligns to the research question. In a qualitative study, the sample size medium range for interviews could be 20 more or less; however, O'Reilly and Parker (2012) indicated that the actual size is dependent on sampling adequacy. Dworkin (2012) argued that a sample size for qualitative research may be small and achieving saturation may have multiple dependencies that are outside the researcher's control. The stratification hierarchy of a mid-size technology services company could reflect relatively few managers thereby limiting the number of participants for this study. The relative sample size for this case study was small

with 12 participants. I sought to gain access to as many managers that aligned to the research question and met the criteria.

Achieving data saturation is the primary indicator to end for data collection in the qualitative study (O'Reilly & Parker, 2012). Elo et al. (2014) argued that concept of data saturation occurs when no new data comes from the sample population. Reybold et al. (2012) conducted a participant selection qualitative research study and indicated that after no new categories, themes, or explanations emerged, the information collected was repeatable in the study. For this study, I continued to interview managers until redundancy appeared in the data indicating that the data set was complete.

The criteria for selecting participants was that they were managers with leadership succession planning experience in a technology services company. I solicited feedback from technology services managers that used strategies for leadership succession planning with core objectives through purposeful sampling. The traditional job titles of managers at a technology and service company are a corporate officer, senior vice president, vice president, director, operation leader, or HR professional. Another selection criterion was that the managers had experience with managing direct reports and be knowledgeable of strategies that aligned core business objectives with leadership succession planning. Prospective participants who did not meet the criterion were not eligible to participate in this study.

Qualitative interviews are becoming more popular and mobile or telephone interviews are more desirable and convenient than face-to-face interviews (Irvine, Drew, & Sainsbury, 2012; Wiederhold, 2015). Whether an interview is by telephone or face-to-face, the researcher should create an interview environment that makes the participant feel

comfortable, safe, and confident (Roulston, 2014). McLachlan and Garcia (2015) argued that the reality of an interview setting could cause an interviewee to feel uncomfortable. When I contacted a prospective participant to schedule an interview, I asked him or her to select a location and time for the telephone interview that was comfortable and convenient for him or her. In addition, I asked the prospective participant to make certain that the location was quiet, free from distractions, and had minimal interruptions. During the interview, I confirmed with the participant periodically that he or she felt comfortable with the interview process and wanted to continue.

Ethical Research

The Informed Consent Form is a full disclosure document that overviews the purpose of the study, interview procedure, confidential clause, and statement of consent for participants. The form indicated that his or her participation was voluntary, and he or she could withdraw at any time before or during the interview. In addition, the form stated that there were no incentives for participating in the study. Each potential participant on the contact list received an invitation to participate. The invitation included the informed consent form as an attachment to the e-mail. There was a requirement for each participant to read and acknowledge the informed consent before the interview. If a participant agreed to the requirements and decided to move forward with participating in the study, the electronic acknowledgment served as consent to participate. The participant retained the electronic copy of the informed consent form for his or her records.

The ethical protection in studies involving human participants must comply with national laws and the requirements set forth by the IRB (Harriss & Atkinson, 2013).

Dubois et al. (2012) indicated that research poses a minimal risk when the protection of the participants' rights and proper protocol is in place. For safety purposes, each participant took the call for the interview from a location such as work or home, where he or she felt safe. Participants had a choice to use a landline or mobile phone, informed to be free of any distractions and in a conducive environment suitable for conducting an interview and audio recording the dialogue.

This study complied with IRB guidelines for proper security, retention, and destruction of consent forms, and research information. The IRB approval number issued was 03-31-16-0291182. There were controls in place for the electronic retention acknowledgments of the Informed Consent Form, hard copy interviewer's notes, documentation, interview recordings, and transcripts for 5 years. There were controls in place to retain electronic notes, audio recordings, and transcripts on a password protected secure USB flash drive. The USB flash drive and hard copy information and forms are in a secure file cabinet for 5 years. After the end of the retention period, the proper destruction of hard copy documents and burning of the USB flash drive will occur.

Protecting the confidentiality and privacy of the company and participants are equally important. Having autonomy is as important as ensuring that participants volunteer to participate in the research study (Dubois et al., 2012). The redacted of confidential information was done before publishing this study. Each participant had a unique participant identification number such as DBASPS001 and DBASPS002 in place of the participant's name. The intent of this identification process was to protect the confidentiality of the participant's interview responses.

Data Collection Instruments

I served as the primary data collection instrument for this study. Frels and Onwuegbuzie (2013) and Cleary, Horsfall, and Hayter (2014) identified that the interview process is one of the primary methods used to collect rich text data for qualitative research. Roulston (2014) indicated that researchers with little experience in interviewing might serve as inadequate data collection instruments. The data collection process for this study consisted of asking the questions, moderating through the responses, and capturing the participants' responses through handwritten notes and audio recording. Open-ended interview questions encourage the participants to explain their experiences with relevance to the study (Sato, 2014). In this study, open-ended interviews with managers helped to gain insight into their perceptions of the research question.

The data collection process for this study consisted of three sources of open-ended data interviews, company documents, and archival information. Yin (2014) mentioned that the process of conducting interviews could be expensive and time-consuming. To assist with the open-ended interviews, I adhered to an interview protocol. Chetty, Partanen, Rasmussen, and Servais (2014) and Schwab and Syed (2015) indicated that an interview protocol serves as a guide to assist with administering the interview in a fair and equitable manner and to render reliability and validity. Chen et al. (2014) argued that a protocol enhances consistency and provides standardization to the interview process. The Interview Protocol Guide in Appendix A served as a reminder of the interview flow, participant's rights, interviewer guidelines, and interview timeline. The Interview Protocol Guide functioned as the process for implementing the open-ended interviews as

well as an interview guide. The key areas of the Interview Protocol Guide are the purpose of the study, the interview questions, the audio recording prompts, and post interview expectations used to validate the interview transcript. The transcript review is another process that is beneficial for the reliability and validity of a qualitative study (Denzin & Lincoln, 2013; Kiyimba & O'Reilly, 2015; MacPhail, Khoza, Abler, & Ranganathan, 2015). After each interview, I transcribed the recorded interview and sent a transcript to the participant for review and accuracy validation.

Data Collection Techniques

There were multiple sources of evidence for this study. The sources included open-ended interviews, company documents, and archival information. I contacted each participant to schedule the telephone interview, requested documentation relevant to the research study, addressed any questions about the process, reminded participant to read and acknowledge the consent form and confirm consent to record the interview. Following the pre-interview contact, the participant received an e-mail confirmation containing the interview questions, date and time of the interview, a reminder to submit the consent form before the interview, and the interview questions.

I used the Interview Protocol Guide in Appendix A as the process for implementing the interview as well as a guide during the interview. Denzin and Lincoln (2013) identified that an Interview Protocol Guide serves as a reminder for the interviewer of the flow, participants' rights, interview guidelines, and interview timeline. Researchers utilize protocol templates to provide an overview of the study, monitor field procedures, and reference research questions and data collection forms (Chetty et al.,

2014; Yin, 2014). The Interview Protocol Guide included instructions that I followed on what to say when I welcomed the participant at the beginning of the interview. Captured on the guide was information about the consent to participate, the confidentiality agreement, consent to record, and the request to review and confirm the interview transcript. There were prompts in the guide on what to do during the interview and the interview questions. At the end of the 60-minute interview, I gave the participant my expression of gratitude for participating and a reminder that he or she would receive a transcript of the interview for review and approval.

When the interview was ready to commence, I used the Interview Protocol Guide in Appendix A. During an interview, I recorded the participant's responses to capture the interview data with a Livescribe smart pen. A smart pen simultaneously records the words spoken while capturing the written notes, thereby, creating a digital file of the audio and visual information. I asked questions so that the participant understood and could respond. Each interview followed the same process steps for collecting the interview responses, recording the sessions, and transcript validation by the participant.

Additional data collected were archival information and company documents. Yin (2014) indicated that archival information presents fragmentary evidence of public and private business network history. Public records, statistical records, and survey archives are examples of archival information (Livingood, et al., 2013; Unluer, 2012). Company documents may include internal reports, documented projects, presentations, and business processes or procedures (De Massis & Kotlar, 2014). In addition to the e-mail confirmation for the interview with each participant, I included a request for sourcing

company documents. The documentation appeared in various formats such as proposals, documented procedures, presentations, communication letters, formal studies, or written reports. I also searched business files, records, databases, and websites sourcing for archival information.

Upon receipt of the archival information and company documents, the next step was to review the collected data and provide a synopsis of the findings. I analyzed the content searching for patterns, emerging issues, and performance progress. The notes and findings on the company documents were a part of the data analysis along with the interview notes. I conducted a similar analysis of the archival information.

An advantage to using multiple data collection methods is that methodological triangulation provides a better opportunity for achieving data saturation (Hlady-Rispa & Jouison-Laffitte, 2014). The sources of evidence included interviews, archival information, and company documents. Yin (2014) stated that a case study should have a minimum of two sources of evidence for data collection. In addition, having multiple sources of evidence helped to expand the knowledge about the study. The use of telephone interview is a less costly approach than face-to-face interviews for a qualitative research study, better checks for accuracy, and shorter duration than face-to-face interviews (Irvine et al., 2012; Sinkovics & Penz, 2011; Wiederhold, 2015). While a potential disadvantage to this data collection technique may be the large volumes of verbal data to analyze from the sources of evidence which is time-consuming and challenging to manage (Chetty et al., 2014; Yin, 2012). Gaining access to the internal documentation repository may be a risk due to privacy scrutiny, company security, or

proprietary limitations (Lomborg & Bechmann, 2014). I treated the collected company documents as private and confidential data. There were advantages and disadvantages for using these data collection techniques.

I used transcript review to support the validation of the interview content by the participant. After an interview, I uploaded the audio and my notes from the smart pen to the Livescribe desktop application. I used my notes and audio responses for transcribing the interview transcript into a Microsoft Word document. After completing the transcript, the participant received an electronic copy for review and approval.

Data Organization Technique

The systems to track the emerging of collected data for this study consisted of manual and automated methods. Maintaining confidentiality and providing protections for research participants is a standard ethical requirement and standard (Campbell, Quincy, Osserman, & Pedersen, 2013; MacPhail et al., 2015). Each of the participants had a unique alphanumeric code assigned during the interview. This unique alphanumeric code help to maintain confidentiality, and identity protection for each participant. Harriss & Atkinson (2013) identified that to comply with IRB confidentiality guidelines and privacy, the identities of the participants should not appear in the study. The unique alphanumeric code appeared in the participant's Interview Protocol Guide in Appendix A. The first five characters of the Interview Protocol Guide form were DBASPS, which is an acronym for Doctor of Business Administration Succession Planning Study. The seventh, eighth, and ninth characters were the numbering convention starting with 001. As a result, the unique

alphanumeric code appeared as DBASPS001. Another purpose of the unique alphanumeric code was to assist with organizing the open-ended interview data information.

Recording the open-ended interviews assisted me in capturing the responses and confirmed that the interviewer followed the protocol, and transcription (Cheraghi, Manookian, & Nasrabadi, 2014; Cridland, Jones, Caputi, & Magee, 2015). Chen et al. (2014) used audio recording while conducting open-ended telephone interviews. The Livescribe technology recorded the open-ended interview responses, captured my written notes taken during the interview, stored data files, and provided quick access to information. The smart pen technology kept a separate electronic file of each interview. After an interview, I synchronized the smart pen with the desktop application. A transfer of the interview data file moved it to my desktop file. I saved the file on the desktop using the participant's code. When the file successfully completed the data transfer to the desktop application, the deletion of the data file from the smart pen occurred.

The interview data files stored on the desktop from Livescribe assisted me with preparing the interview transcripts. Transcribing of the word for word interview dialogue into a transcript is a part of the data collection process (Campbell, et al., 2013; Kiyimba & O'Reilly, 2015; Traube, Kerkorian, Cederbaum, Bhupali, & McKay, 2013). Microsoft Word assisted me with creating the transcripts from the audio recordings. In addition, I used Microsoft Word to create a control log to monitor and tracked the revisions to the interview transcripts during the validation by the participants. An upload of the approved transcript rich text to NVivo transpired to support further analysis.

The use of encryption technology and a secured logon and password to my desktop assisted with protecting the collection of data for this study. A secured USB flash drive served as a backup for the electronic files. I converted the documents collected including acknowledgments, interviewer's notes, and non-disclosure forms into PDF files for online storage. Collected documentation and hardcopy files retention are in a secure fireproof file cabinet for a period not to exceed 5 years. At the end of the 5-year period, on-site document management shredding by a local confidential paper-based document shredding company will support the destruction of documents. The electronic data stored on the personal computer is on a secure USB flash drive. The USB flash drive is in a secure file cabinet for 5 years. After 5 years, the destruction of the USB flash drive will occur.

Data Analysis

The use of triangulation assisted with the crosschecking and validation of the data collection for this study. The value of conducting data analysis in qualitative research is that it establishes credibility and reliability (Elo et al., 2014). Denzin and Lincoln (2013) and Hlady-Rispal and Jouison-Laffitte (2014) indicated that methodological triangulation is appropriate when using more than one method to collect data to check results on the same subject. The data analysis from the relevant archival information, company documents, and open-ended interviews provided insight into the study.

For qualitative research, after the researcher collects non-numerical, rich text simplification of the information data follows next before determining further analysis (Becker & Burke, 2012; Koch et al., 2014). Sangasubana (2011) argued that the data analysis and representation process give the researcher the ability to organize, index,

identify common themes, and recode the dataset. The initial process steps to analyze data for the study was to review all company documents, archival information, and interviews responses. Next, reviewed all the responses from the interview transcripts, company documents including processes, presentations and templates, and archival information such as competency guides and reference materials. I reviewed the journal notes that I took. I then organized rich text data, coded information, and labeled all of the responses from all of the sources of evidence. There was a search done for strong interactions between the research study topic and the collected data. The final step was to classify and sort relevant content into common themes.

As stated in Section 2, the NVivo version 11 software supported the organization of the confidential interview transcripts collected for coding and identifying new converging themes. In addition, I conducted a methodological triangulation that included the review of company documents (see Appendix B) regarding core business objectives and succession planning strategies.

I used qualitative analysis software to validate the results of the data I analyzed. Sinkovics and Penz (2011) suggested that qualitative researchers use computer qualitative data analysis software (CAQDAS) such as NVivo and Microsoft Excel to assist with filtering the textual data to make it more manageable and meaningful. Using non-numeric data such as interview responses and field notes, the software convergences the collection of words to show common themes, providing the researcher with query results, models, and charts.

The NVivo 11 software program was appropriate to support the content analysis technique for this qualitative research study (Cater & Kidwell, 2014). The qualitative software NVivo 11 for computers assisted with storing and consolidating in addition to retrieving the qualitative data from the interview transcripts in a secure location. Plamondon, Bottorff, and Cole (2015) indicated that the software supports a researcher with a manageable method for organizing verbal data and uncovering connections beneficial for data analysis. I used the NVivo software to assist me with reviewing the rich text from the interview transcripts, interview responses, company documents, archival information and journal notes that I took to find a systematic way to identify common themes and coding.

Aligning the research question, sources of evidence with the conceptual framework helped with drawing on the analysis of this study. The collection of data from this study had a direct connection with the social exchange theory by drawing on the conceptual framework of the research question. Cho and Poister (2014) argued that social exchange encourages the development of human talents and skills for professional advancement. The value of conducting data analysis in qualitative research is that it establishes credibility and reliability (Sangasubana, 2011). Elo et al. (2014) argued that the content analysis methodology enables a researcher to analyze the mass volume of words generated from the participant's responses to the open-ended interview questions. Although there was a large volume of rich text, I focused on simplifying it during the analyzing phase. The open-ended interviews with technology services managers served as

one source of collected data to understand the meaning of the study. Additional sources of data were the company documents and archival information.

Reliability and Validity

Reliability

Reliability, conformability, internal validity, and construct validity are the approaches to achieve integrity for qualitative case study research (Yin, 2012). Smith (2014) indicated that the concept of reliability influences the testing and evaluation, and it measures consistency across all methods. Reliability ensures that the data collection procedure remains constant over various variables including time, settings, and conditions to establish trust and credibility in the findings (Denzin & Lincoln, 2013). There was a transcript review of each manager's interview for dependability. Hlady-Rispal and Jouison-Laffitte (2014) and Lloyd (2011) described the process of triangulation as a tool for combining data from different sources to strengthen the findings, reduce bias, and improve reliability. I used methodological triangulation to collect multiple sources of data for this study. After analyzing the data, I documented the findings by using two data collection techniques. I analyzed data to ensure the research procedures were within compliance. Another way I addressed conformability was to store the text base information in the NVivo 11 database for further review.

A case study design is a technique that a researcher can leverage to increase reliability in the data collection process (Yin, 2014). Following an interview protocol will provide consistency and increase reliability (Chen et al., 2014; Chetty et al., 2014; Schwab & Syed, 2015). It was important to have controls for collecting the

documentation and interview sources of evidence for the study. There was a process in place to support the use an interview protocol guide.

Validity

To ensure creditability, the participants received the interview transcript for review and validation. The validation of the interview transcript happens before analyzing the responses (Kiyimba & O'Reilly, 2015; MacPhail, et al., 2015; Traube, et al., 2013). Integrating validity into data collection, data analysis, and research design phases of qualitative research enables a researcher to establish credibility (Yin, 2014). I analyzed the transcript transcribed interviews by searching for common points of agreements among the managers for validation purposes.

Transferability occurs when there is the ability to replicate the research findings beyond the existing research study (Traube, et al., 2013, Yin 2014). Yin (2012) found that the use procedures for coding and themes during the analysis phase provide a researcher with the analytical generalization of the evidence for the case study research. For this reason, I utilized NVivo 11 database to support the analysis as well as produce the templates to support the validity in the findings. I presented the findings from the study allowing the transferability to occur as prescribed.

Company documents and archival information are additional sources for gathering data to support the methodological triangulation for this study. Leveraging methodological triangulation strategy to validate evidence is useful for qualitative studies (Lloyd, 2011). Qualitative case study research can achieve validity with multiple sources of evidence (Sangasubana, 2011; Wahyuni, 2012). Whereas the measurement technique

for validity is the ability to replicate the study and achieve the same results (Yin, 2013). Moreover, in this study, multiple sources of evidence assisted with achieving data saturation.

Transition and Summary

The purpose of this qualitative research study was to explore the strategies that technology services managers used to align core business objectives to improve leadership succession planning. The sources of evidence for this case study included open-ended interviews, archival information, and company documents. The case study design consisted of using an interview protocol guide to track and monitor key elements of the interview process. The transcription review process was a part of data collection to enhance the validity and reliability of the research study. Leveraging methodological triangulation assists with the validation of the sources of evidence. For data analysis, the Livescribe application and NVivo database supported the capturing, storing, and analyzing of all text base information. My principal role was to serve as the data collection instrument for this case study. I complied with all of the requirements set forth by IRB for ethical research. Section 3 is the presentation and findings for this study, applications to professional practice, the implication of social change, recommendations for action, and recommendations for future research, reflections, and conclusion.

Section 3: Application to Professional Practice and Implications for Change

This study addressed strategies managers use to align core business objectives to improve leadership planning strategies. This section includes an overview of the case study design, presentation of findings, applications to professional practice of business, implications for social change, and recommendations for actions. This section concludes with recommendations for further studies, a reflection of my doctoral journey, and a conclusion.

Introduction

The purpose of this qualitative single case study was to explore the strategies technology services managers use to align core business objectives to improve leadership succession planning for high-potential employees. I collected data from interviews with from 12 technology services managers and from company documents including talent assessment processes, development-planning presentations, management development guides, candidate development forms, and competencies reference lists. I used my journal notes as a reference when analyzing the data. The themes that emerged from the analysis of data were meeting organizational needs, sourcing strategies for internal candidates, addressing leadership skills gaps, and strengthening replacement planning. Participants reported internal leadership succession strategies that support organizational performance while identifying high-potential employees. The next section contains the findings related to each theme along with data summaries for each theme.

Presentation of the Findings

The research question for this study was as follows: What strategies do technology services managers use to align core business objectives to improve leadership succession planning? Through the data analysis process, four major themes emerged: (a) meeting organizational needs, (b) sourcing strategies for internal candidates, (c) addressing leadership skills gaps, and (d) strengthening replacement planning. The following section include descriptions and interpretation of the themes in the context of the previous studies.

Meeting Organizational Needs

The first theme that emerged was the need to improve leadership succession planning for meeting organizational needs. Alban-Metcalf and Alimo-Metcalf (2013) indicated that leaders strive to achieve organizational goals and targets. The findings from this study indicated that technology services managers drive business performance, business continuity, and people-development strategies. Participants discussed four main topics related to Theme 1, which are shown in Table 1.

Table 1

Nodes Related to Theme 1: Meeting Organizational Needs

Theme 1 nodes	Sources	References
Leadership pipeline	18	20
Business strategies	7	13
Business goals	6	8
External influencers	3	3
Total references Theme 1		44

All participants supported the strategy of creating and sustaining a leadership pipeline for high-potential employees. Ten participants described the organization's

current leadership pipeline as *lean* or *weak* due to various business decisions, normal attrition, and reduction in workforce actions. Participant DBASPS012 cited that the organization's bench strength was *thin*. Participants DBASPS003 and DBASPS005 agreed that economic climate changes and industry issues influenced the behavior of senior leaders in the organization to lean the talent pipeline. Participant DBASPS007 had observed an ongoing debate addressing the need to fill the leadership talent pool with high-potential employees versus the limited available leadership positions for potential successors to fill. Two additional participants agreed that an effective leadership succession planning strategy should include the current business priorities, the company's strategic initiatives, and a talent development strategy.

The participants' responses were consistent with Marbury and Mayer's (2013) findings about how the lack of focus on managing a leadership talent pipeline could cause an adverse effect on an organization's labor cost and performance. Results from the study indicated that by running a business too lean, an organization could risk productivity and growth over time. Caplan (2014) argued that developing high-potential employees for future leadership roles in a low-cost, post-recession business environment has its challenges. When leaders have an overwhelming desire to drive performance and reduce cost, and focus less on developing the future leaders, an operating culture that devalues the need for a leadership talent pipeline could emerge.

Participants used the word *organization* 152 times and *business* 116 times when discussing internal strategies to meet organizational priorities and goals. This signified that one of the crucial roles they have as technology services managers is driving the

business needs of the organization. All participants emphasized the importance of aligning business strategies with leadership succession planning in their day-to-day managerial role to achieve business deliverables and coach and develop high-potential employees. According to Blattner and Walter (2015), the development interactions between a manager and high-potential employee linked to business needs affect the efficiencies and effectiveness of the organization. Four participants indicated that they expect high-potential employees to perform above or beyond set goals and targets. The analysis indicated that the performance rating was a common assessment criterion across all of the company documented processes and practices related to talent development. This finding supported McGraw's (2014) findings that performance based practices to drive cost and manage organizational efficiencies are a common practice among managers for meeting organizational needs. In this study, analysis of company documents and interview responses from the participants on management development processes helped to achieve data saturation by identifying performance and accountability of high-potential employees as capabilities along with the observation of other leadership skills, training, and education attributes.

Participants agreed that collaboration between managers and high-potential employees to achieve business results was healthy for the organizational climate. Quintana, Ruiz, and Vila (2014) stated that leadership behavior influences the critical elements of production, employees, and change-centered dimensions of interactions within the business environment to drive efficiencies. Seven participants indicated that integrating core business objectives to improve leadership succession planning

strengthens the professional development of high-potential employees' while providing a positive impact on business performance. This type of leadership behavior influences a win-win workplace climate. Stumpf, Tymon, Ehr, and van Dam (2014) argued that fostering a workplace climate that encourages high-potential employees and their direct managers to collaborate on achieving organizational needs contributes to leadership development and self-actualization. Positive leadership behavior inspires and motivates high-potential employees to increase performance, improve collaboration among organization resources, build a relationship of trust, and drive results. When managers and high-potential employees work together to meet the critical needs of the business, it provides value to the organization, manager, and employee. This finding on how positive leadership behaviors and relationships affect organization performance aligns with Del Brio et al.'s (2013) study on the quality of work relationships and organizational benefits.

The participants referenced coaching as a leadership management style for motivating and developing high-potential employees. Coaching was the most frequent leadership management style referenced by the participants. Data analysis mentioned that the participants cited *coach* or *coaching* 38 times when discussing strategies for succession planning. Chung and Luo's (2013) findings aligned with the participants' perspectives that it is important to leverage coaching style to motivate and develop future leaders. Executive coaching is an effective leadership style for developing high-potential employees for multiple job levels and promotions within the organization.

Participants mentioned the need for flexibility in building relationships while developing high-potential employees within the organization. As the external climate

changes, business leaders need to be ready to react to the change. Nold and Michel (2016) argued that technology disruption, globalization, and complexity in the workforce contribute to the rate of change affecting organizations. External influencers and rate of change are pushing the need for organizational agility that is consistent with workplace disruptions described by Bass and Bass (2008) and Al Ariss et al. (2014). Eight participants described informal techniques that they leverage to build relationships with high-potential employees for flexibility and ease of execution. The findings in this study aligned with previous studies that indicated that external drivers influence an organization's ability to grow and promote high-potential employees for leadership positions (Jantti & Greenhalgh, 2012; Schabel, 2012). Informal leadership succession planning strategies may offer flexibility, speed, and productivity for managers and high-potential employees.

All of the participants in the study noted the importance of developing high-potential employees as successors, although there were no internal operational metrics focused on leadership succession planning in the company documents or participant responses. The finding aligns with the cross sectional study on identifying successors for an aging workforce conducted by Palermo, et al. (2013). Participant DBASPS007 stated that having a successor is "like keeping one eye on the current performance and the other eye on the future strategy." This type of visionary leadership enables the development of emerging leaders to fill potential leadership positions rather than trying to develop a candidate after the position opens. Jing and Avery's (2016) research on the effects of management on organizational effectiveness, and employee performance indicated the

importance of understanding workplace behaviors. Jing and Avery's analysis showed that there was a weak link between operational performance and leadership succession planning strategies.

Homans's idea of social exchange conceptualizes the relational interactions within a business environment of integrating organizational behavior, social change, and stability as a process that provides economic value. Findings from the current study indicated that technology services managers exhibit behaviors that align the business needs with the internal strategy for leadership succession planning. The relationship between technology services managers and high-potential employees within the workplace drives business needs. Documented practices and processes of the technology services company addressed day-to-day business matters with some references to succession planning but not the future strategies or path forward for productivity or development of the organization's future leaders.

Sourcing Strategies for Internal Candidates

The next theme that emerged was sourcing strategies for internal candidates that align core business objectives with leadership succession management. Risher (2015) and Yamkovenko and Hatala (2015) indicated that identifying and developing high-potential employees is an integral function of performance management as well as organizational planning. Participants discussed five main topics related to Theme 2, as shown in Table 2.

Table 2

Nodes Related to Theme 2: Sourcing Strategies for Internal Candidates

Theme 2 nodes	Sources	References
Leadership competencies	13	18
Identify high-potential employees	12	41
Observation strategy	10	24
Talent discussions	9	18
Embedded knowledge	7	14
Total references Theme 2		115

All participants stated that identifying core role-specific leadership competencies is critical for leadership succession planning. Analysis of participant responses, talent management processes and archival information revealed a high-frequency use of the term *competencies* when assessing the capabilities of a high-potential employee. Participants used the word *competencies* 89 times to describe development techniques and assessment practices for high-potential employees. Seven participants stated that they focus on core competencies for leadership succession planning compared to role specific competencies to evaluate the proficiency levels of high-potential employees. Furthermore, two participants indicated the use of Lominger Standard Competencies as an assessment guide for evaluating leadership competencies and skills of high-potential employees. Participants also used *skills* 98 times when referring to leadership development and career progression strategies and assessment practices of the organization. The high-frequency use of the terms *competencies* and *skills* aligned with Hanson's (2013) findings that assessing the competencies and skills of high-potential employees are critical components of the succession planning process. Moradi (2014)

also reported that managers assess talent capabilities when evaluating leadership competencies and skills as part of the succession planning process.

All of the participants in the current study referenced the importance of competencies and skills when sourcing for internal candidates. Participants shared knowledge about the use of internal leadership development strategies for identifying high-potential employees. According to participants, the internal sourcing of high-potential employees for leadership succession planning management promotes business performance, manage continuity, and leadership competencies. Belasen and Belasen (2016) indicated that identifying new leaders for the talent pipeline makes good business sense. Eight participants stated that they leverage personal strategies to identify potential employees. Two participants indicated, they use the structured annual performance review process to identify employees who stand out as high-potential.

Four participants referenced that they frequently use an observation strategy to identify high-potential employees. This strategy allows the manager to observe the employee's performance during the execution of critical tasks or projects in the business. Saratun (2015) argued that managers value building relationships with high-potential employees who demonstrate visionary leadership. Participant DBASPS004 stated that observing a high-potential employee helps to detect participation skills, willingness to learn, and willingness to act. Participant DBASPS003 leverages the same strategy to observe the high-potential employee's ability interaction with clients, leadership presence, work ethics, skills, and creativity. Observation of leadership attributes provides a manager a view of how the potential leader links with organizational goals, values, and

competencies. Chaudhuri and Ghosh (2012) and Moon (2014) referenced observation as a practice for mentoring verses a strategy to identify or develop high-potential employees. Findings from the current study align with Pitzl's (2012) study that focused on managers' willingness to invest in synergistic and systematic practices for sourcing high-potential talent through succession planning.

All of the participants indicated that they advocate for employees with potential leadership competencies with their peers, direct manager, other organizational managers, and senior leaders. The participants agreed that their direct managers interact with them on leadership succession planning and were supportive, engaged, and provided guidance throughout the development process. Risher (2015) stated that periodic talks with high-potential employees help their development and performance improvement. Furthermore, four participants stated that they have manager-to-manager dialogue about development opportunities for their high-potential employees. Participants used the phrase *talent discussions* 62 times in the collected data. This frequency signifies that talent discussion is a mutual practice among the participants. Participants stated that talent discussions occur in various forums such as *one on one* sessions, monthly planning meetings, or annual reviews. Bi-directional relationships mature over time and develop through the exchange of information process. Frequent and consistent communication between the manager and high-potential employee and managers to managers about developing high-potential employees are fundamental leadership characteristics in an ideal culture. Finding in the current study aligns with Cho and Poister (2014) argument that social

exchange encourages managers to develop high-potential employees for future leadership roles.

Participants in the current study agreed that embedded knowledge about organizational processes, business plans, and company strategies are relevant for sourcing internal candidates. Yamkovenko and Hatala (2015) argued that knowledge management efforts become problematic when there is disruption in the flow of communication and information exchange process during the development process of high-potential employees. In addition, participants indicated the importance of sharing knowledge the job profile for critical leadership positions. Critical job roles may require organizational leaders to have a contingency plan that consists of the explicit knowledge about the role. Nine participants indicated that they have a backup plan in place that profiles the key leader roles within their operations. Participant DBASPS005 uses a standard operating procedure is to capture knowledge about the job role and train resource. Internal management development guides and participant responses indicated that succession management is a proactive approach for transferring embedded knowledge.

Findings from the current study indicated that technology services managers concur that relational behaviors such as talent discussions with other managers, senior leaders, and high-potential employees are essential for sourcing and developing internal candidates. Bi-directional relationships serve as exchanges of information regarding competency, performance, and capability of an internal candidate. Furthermore, the findings supported that sourcing strategies for internal candidates provide organizational

leaders with proactive approaches that identify future leaders and strengthens the talent pipeline for business continuity, performance, and culture stability.

Addressing Gaps in Leadership Skills

The third theme that emerged focused on strategies that address the leadership skills gaps of high-potential employees. Development of leadership competencies and skills deficiencies prepare high-potential employees for future leadership opportunities. Saratun (2016) argued that high-potential employees engaged in an active development planning process are typically motivated and trust their direct managers as well as mentors with their career progression. The findings from this study indicated that technology services managers leverage various leadership styles, internal development guides, and training programs to address the deficiencies in the competencies and skills of their high-potential employees. The participants discussed five main topics related to Theme 3, which are shown in Table 3.

Table 3

Nodes Related to Theme 3: Addressing Gaps in Leadership Skills

Theme 3 nodes	Sources	References
Ongoing dialogue	16	30
Showcase talent	10	15
Nurture	8	9
Training and development	8	18
Build relationships	6	7
Total references Theme 3		79

Formal coaching, mentoring, executive interviews, leadership training, executive courses, and promotions are leadership development strategies leveraged by managers, mentors, and coaches to address leadership skills gaps (Stewart, 2016). Participants used

the phrase *one on one sessions* 114 times when referring to strategies for having ongoing dialogues with high-potential employees. Ten participants stated *one on one* sessions as the preferred practice for conducting development discussions, documenting the action plan, and collaborating with high-potential employees on career progression strategies. The number of occurrences indicates that *one on one sessions* was the most common practice used for communicating with high-potential employees shared by the participants. Allio (2012) described the *one on one* session as a transactional exchange of information between a manager and high-potential employee that fosters relationship building while addressing development gaps and strengthening connections between performance and potential. Analysis of the company documents and participants responses indicated that the workplace culture encourages this strategy for identifying and remediating leadership skills gaps.

Assigning high-potential employees to special projects was another strategy that the participants discussed for addressing leadership skill gaps. Ten participants indicated that they assign high-potential employees to special projects to demonstrate their leadership capability and skills to other managers and senior leaders. Quintana et al. (2014) stated that in a multigenerational workforce high-potential employees embrace the opportunity to take on special assignments to develop skills and gain exposure. Participant DBASPS006 indicated that assigning high-potential employees to special projects supports the observation of leadership competencies, skills, and performance. Likewise, participants shared that exposing the talent of high-potential employees provides other managers with the opportunity to observe the knowledge, skills, and

competencies of their high-potential employees. Participant DBASPS012 stated, “I give my high-potentials specific projects to work on that are a little above or beyond their full responsibilities.” According to Dewah and Mutula (2014), this type of cross training and talent awareness is a strategy that meets the needs of the high-potential employee to develop a new skill, demonstrate capability, and gain exposure to other leaders in the organization. Findings from this current study align with the participant perspectives that high-potential employees should be engaged in various development opportunities to display their leadership capability through social exchange in the organization.

All of the participants indicated that valuing high-potential employees is important for achieving performance and development purposes. Eight participants addressed being accountable as managers for the nurturing of the leadership skills of their high-potential employees. Participant DBASPS005 indicated that as a manager the intent of nurturing talent is to ensure that the high-potential employee leadership skills meet the business needs today and the future goals of the organization. Five participants indicated that nurturing the leadership skills of high-potential employees is a part of their roles as managers. Furthermore, the participants indicated that investing time in talent to develop leadership skills through nurturing transforms into the organization’s culture as a morale booster. This practice aligns with Murphy’s (2012) finding that managers need to develop qualified high-potential employees to drive business results and increase competitive advantage.

Participants indicated that they value internal training, education and assessment tools to assign high-potential employees to projects to display talent while developing

skills. Blattner & Walter (2015) argued that the remediation of high-potential employees learning gaps through the development new skills improve performance and they become more promotable employees creating a win-win culture for the organization. Six participants indicated that they support training and development opportunities for high-potential employees. Company processes and management development guides serve as tools to monitor and capture development progress. This strategy supports training and development as a consistent practice within the organization.

Six participants in this study referenced that they have strong relationships with their high-potential employees to advice and support through the development of leadership skills. Participants DBASPS003, DBASPS004, and DBASPS007 shared that they build relationships with high-potential employees based on focusing on successes while providing support for learning opportunities. Castelli (2015) identified that people high in learning agility perform well. All of the participants agreed that investing time in high-potential employees to address leadership skills gaps is important for morale and motivation. The company documents for leadership development strategies served as systematic guidelines for technology services managers to identify, develop, and monitor the learning progress of high-potential employees. Indeed, learning agile is synonymous with potential. The participants' responses, company processes, and guides indicated that there is synergy between the management practices and company documents for addressing leadership skills gaps of high-potential gaps.

Jing and Avery (2016) found that cultivating the leadership skills allows people with different degrees of potential to emerge and evolve as leaders. Participants agreed

that the organizational culture fosters ongoing dialogue to address the learning needs of high-potential employees. Furthermore, participants referred to building relationships as an organic leadership paradigm for addressing leadership gaps. In the review of these findings, the bi-directional relationship between managers and high-potential employees evolves through collaborations that address the leadership skills gaps (Daspit, Holt, Chrisman, & Long, 2016). Over time, trust and mutual commitment formed out of the relationship between the participants and their high-potential employees. Moradi's (2014) findings aligned with the perspectives of the participants in the current study that indicated that it is appropriate for managers to be accountable for the grooming, training, and development of qualified high-potential employees throughout the succession planning process.

Strengthening Replacement Planning Strategies

The final theme that emerged was the strengthening of the replacement planning to support core business objectives and leadership succession planning. Sheth (2016) argued that having a replacement planning strategy that ties the capabilities of high-potential employees with the organization need to deliver results creates a winning culture. The findings from this study indicated that internal and external business influencers act as detractors that impact leadership succession planning causing the need for a replacement strategy. Participants discussed six main topics related to Theme 4, which are shown in Table 4.

Table 4

Nodes Related to Theme 4: Strengthening Replacement-Planning Strategies

Theme 4 nodes	Sources	References
Re-engineer	7	14
Growth approach	6	9
Structured plan	5	17
Transparency	4	4
Synergy	4	5
Proactive	4	4
Total references Theme 4		53

Participants in this study mentioned business impacts that hinder the trajectory internal replacement planning strategies. According to Aitken and von Treuer (2014), incorporating succession management strategies with core business needs to drive performance, and operational excellence provides value to the development of leadership competencies of high-potential employees. Seven participants agreed that strengthening replacement-planning strategies would require re-engineering existing leadership succession planning to address impacts such as lack of focus by senior managers, minimal leadership growth opportunities, and an eroding middle management pipeline. Moreover, four participants indicated that the talent development program within the organization benefits from having a *robust leadership pipeline* through leadership succession planning. Two participants suggested that there should be a linkage between business strategies and succession planning to fuel the future goals of the organization. Finally, one participant stated that leadership succession planning “should not just be lip service” senior managers’ should be accountable for developing and implementing the strategy from the top down.

According to six participants, the replacement planning strategies should focus on growing the talent pipeline. Stumpf et al. (2014) indicated that leadership behavior that focuses on building a leadership talent pipeline that supports growth in talent and agility benefits the organization long term. Participant DBASPS012 stated that a healthier leadership talent pipeline should support the future strategy of the organization. Researchers Aitken and von Treuer (2014) argued that incorporating succession management strategies with core business needs to drive performance, and operational excellence provide value to the development of a leadership talent pipeline. The participants shared recommendations for developing a stronger pipeline of candidates, documenting critical leadership roles and responsibilities, and identifying a successor for business continuity. In view of these findings, a successful growth strategy for a leadership talent pipeline includes integrating business needs with individual talent value (Festing and Schäfer, 2014).

Transparency is important the manager and high-potential employee relationship. Four participants described transparency as a core function of the replacement planning strategy. Moreover, participant DBASPS007 stated managers should be transparent with high-potential employees when coaching on training needs, performance, and career aspirations. Analysis of company documents referenced employee career progression and skills development steps and revealed an opportunity for transparency to be reciprocal. Although transparency is encouraged, the findings from the current study indicated that it was not a consistent practice.

Achieving synergy between core business needs and succession planning yields an operational value (Onatolu, 2013). By contrast, four participants indicated that there was synergy between high performance and leadership development when high-potential employees had an active role in the succession planning process. In addition, Schullery (2013) argued that when high-potential employees are actively engaged in the replacement planning process with their managers, there is a positive effect on employee retention. A proactive approach for strengthening replacement-planning strategies could benefit leadership succession planning by integrating it into the organizational performance strategies. Four participants indicated being proactive about cultivating the replacement planning strategies strength could produce “managers in training” versus an excessive talent pipeline of “managers in waiting.” Nold and Michel (2016) indicated that a cultivating replacement planning strategy creates a winning culture that benefits both the high-potential employees and the organization. Findings from the current study indicated that there is operational value in the synergy between effective business performance, continuity planning, and leadership succession planning.

Applications to Professional Practice

Succession planning functions as a part of a leadership development program for future leaders. Leadership succession planning strategies are fundamental components of an organizational framework for the purpose to identify, attract, fill and retain leadership talent (Collins, 2013; Jantti & Greenhalgh, 2012). As the largest population in the workforce becomes eligible for retirement, there could be immediate vacancies in leadership positions affecting the loss of talented managers and executives (Eisenhart and

Sadjady, 2012; Toossi, 2012). Other challenges affecting the ability to improve leadership succession planning in a technology services organization are post-recession business environment, operating in a cost declining business model, lean leadership talent pipeline, and eroding replacement-planning strategies.

The purpose of this study was to explore the strategies technology services managers use to align core business objectives to improve leadership succession planning for high-potential employees. Participants in this study stated the preferred method was a strategy that integrated business continuity with people growth strategies and strategic planning. Understanding how technology services managers prefer to align core business objectives to improve leadership succession planning for high-potential employees could help managers with strategies for developing future leaders. Managers are striving to overcome internal and external barriers such as lack of focus by senior leaders, minimal promotion opportunities for high-potential employees, eroding middle management pipeline caused by offshoring, and internal movement of resources.

Findings from this study might help managers to develop and execute a successful strategy incorporates core business objectives with leadership succession planning that enables the professional development of employees. The results of this study could help managers to create a systematic cohesive leadership succession planning approach by understanding how technology services managers prefer to integrate business continuity with people growth and strategic planning for developing high-potential employees. The results of an improved leadership succession planning could nurture leadership and organizational behaviors that value employee engagement for professional development,

transparency between leaders and high-potentials employees, and growth in performance and resources.

Implications for Social Change

Exploring successful strategies technology services managers use to align core business objectives with leadership succession planning for high-potential employees, could help managers and senior leaders to improve strategies for developing future leaders. An effective integration of core business objectives with leadership succession planning could result in an increase in employee engagement across multiple lines of business through development opportunities, increase the productivity of an organization, and improve employee morale. An organization that connects employee engagement with company needs are capable of achieving stability (Sheth, 2016). Quintana et al. (2014) indicated that an organization with strong leadership behaviors focuses on the employability needs of high-potential employee and promote operational efficiencies. Increased operational efficiencies could improve employee motivation, performance, and social effectiveness within the workplace creating a winning culture.

Participants in this study drove the core business strategies, oversee operations needs and manage performance metrics. Cho and Poister (2014) argued that encouraging managers to develop high-potential employees benefits the organization performance, talent review process, and employee morale. Additionally, participants in this study indicated that find value in engaging in participating in identifying and developing potential leaders of the organizations through success planning strategies. Furthermore,

the participants exhibited leadership behaviors that comprehend the need to integrate business performance with leadership succession planning.

Although there is a shortage of qualified mid-management and executive level emerging talent within the organization who are ready to drive core business strategies, technology services managers strive to support leadership succession planning practices for the benefit of the employee and organization. The integration of business priorities with leadership succession planning may increase the ability for managers to inspire and motivate high-potential employees to be more than managers in waiting but to be future leaders that achieve business profitability (Caplan, 2014; Jantti & Greenhalgh, 2012; Sheth, 2016; Stewart, 2016). This integrated approach empowers managers to coach and nurture high-potential employees through an effective leadership development process that benefits the organization, employees, and the community.

At the technology services organization, managers implementing a systemically integrated leadership succession strategy that aligns business performance measures and practices with strategic planning for developing high-potential employees could have a positive effect on social change. The implication for positive social change includes the potential to provide managers with candidates for leadership positions who are high performers and positive contributors towards business performance. Their contributions in turn could help with improved profitability and growth of the organization. The participants affirmed that high-potential employees that are actively engaged in leadership succession are motivated and exhibit positive morale. The results of this study could have an impact on operational cost by minimizing the risk of losing qualified

internal candidates. Through profitability, growth, increase morale, and employee retention, the community could benefit from the social change drivers that enable stability of the organization, thereby, creating a healthy partnership.

Recommendations for Action

There is a concern among business leaders that the silver tsunami, which represents 45% of the workforce, is eligible for retirement by 2020, could affect succession strategies (Collins, 2014; Toossi, 2012). The result of employees retiring creating vacancies in critical leadership positions could occur within an organization. Technology services organizations that have effective leadership succession planning produce positive performance results. Organizations with an ineffective or dormant succession management could encounter decline in employee motivation, a decline in operational effectiveness, and mediocre performance results (Cho & Lewis, 2012, Delbecq et al., 2013, Galbraith et al., 2012, Hansen & Leuty, 2012). To enable operational effectiveness, efficiencies, and growth, technology services managers must implement an integrated leadership succession strategy that aligns business continuity with people growth strategies and strategic planning for developing high-potential employees. Based on the results of this study, I recommend the following actions:

1. Managers use a three-prong leadership development approach that focuses on leadership competencies, performance, and business development. The results of this study revealed that an integrated leadership succession strategy creates synergy between the development of high-potential employees, business continuity, and strategic growth. The components of an integrated leadership

succession planning strategy should include leadership competencies that identify capabilities, performance achievement that delivers results, and the ability to develop and lead strategic business plans. Executives should engage managers to develop a competency model to identify the best leadership style for the organization and avoid a one size fits all management style profile. The recommended learning cycle events for an integrated leadership strategy are time to study, observe, participate, and implement.

2. Managers leverage a leadership gap analysis to develop leadership succession plans for critical leader roles. Leader roles are an essential function within a business organization. An organization leadership gap analysis identifies the where the potential talent pipeline deficiencies are in the leadership succession planning strategy. Managers should execute succession planning across middle management to upper executive levels. The leadership gaps analysis should comprehend the same management and executive levels.
3. Managers foster a culture where high-potential employees are actively engaged in the leadership succession planning process. Creating transparency between leaders and high-potentials employees fosters clear communication of opportunities and expectations for employees wishing to progress to different roles (Jantti & Greenhalgh, 2012). Managers should establish a relationship of trust with high-potential employees and peers. Managers should leverage this approach for employee engagement to change the perception of high-potential employees from *future leaders in waiting* to

future leaders in training. Embracing this growth mind-set should help to strengthen an organization's leadership talent pipeline and the boost the morale of the high-potential employees.

After the approval of the study, it is important to share the results of the study with the community research partner. I will provide the sponsor and the technology services managers who were the participants an email containing a copy of the abstract, recommendations for actions, and a summary of the study for the stakeholders. I plan to present an overview of my study, and the results and recommendations of action to organizational stakeholders, including the chief human resource officer from the research site. I will disseminate the results of my study through journal publications, speaking at leadership conferences, summits, and seminars, and participating in panel sessions. Finally, I plan to seek out opportunities to co publish with other scholars and researchers.

Recommendations for Further Research

Leadership succession planning is a process that enables organizational leaders to identify and develop high-potential employees as successors. Exploring the strategies that technology services managers use to align core business objectives to improve leadership succession planning did identify areas of opportunity that warrant future research. There is an opportunity to explore the consistency between the process and practice of leadership succession planning. Future researchers could choose to investigate how replacement-planning practices affect the retention rate of high-potential employees. In addition, expanding the research to technology services companies with a globally

diverse workforce could yield different finding. These are the recommendations that researchers should consider for further studies.

Reflections

The purpose of this qualitative case study was to explore successful strategies that technology services managers in mid-size companies use to align core business objectives to improve leadership succession planning. At the beginning of this study, I had no preconceived thoughts about the possible findings other than the managers participating in the study could have different preferences. Each participant stated that aligning business strategy with leadership succession planning provides relevance and purpose to the organization. The majority of the participants stated that their preferred method is a strategy that incorporates business continuity with people growth and strategic planning. There were other structured and unstructured strategies shared by the participants.

Obtaining a letter of cooperation from a community research partner was a lengthy and intimidating process. Once I secured a community research partner, I was concerned that I would not receive any company documents during the data collection process; however, this was not an issue. The participants shared their success strategies during the interview process, provided company, and archival information that included processes, procedures, presentations and forms of evidence to their successful strategies in leadership succession planning. I was appreciative that my community research partner sponsor highly encouraged the participants to provide me with their full support. Through the interviews and sources of evidence, I achieved data saturation.

I identified the method for analyzing the data that would prevent inadvertent bias early in the study. The use of a software program supported the organization and coded of the rich data during the data analysis process (Sinkovics & Penz, 2011). The literature review was as daunting as analyzing the rich text data; however, over time, I improved my ability to summarize concepts and identify emerging themes. Conducting a qualitative case study yields a significant amount of rich text data.

I gained motivation and excitement about the study with each interview because of the participants' openness to share their experiences with me. In each interview, participants showed a natural level of caring and willingness to develop high-potential employees and achieve operational efficiencies. I admired their leadership behavior and rich interactions with the future leaders of the organization.

My academic participation in the Walden University Doctoral Business Administration (DBA) program has been a gratifying and humbling experience. At the beginning of my journey, I was ready for the challenge. Along the way, I worked with some great staff and faculty members, found supportive classmates, and met new life-long friends. There were moments when I felt overwhelmed, stuck, and frustrated; however, I preserved and prevailed. I am grateful for the encouragement of my chair, peers, and mentors along my DBA journey.

Conclusion

The purpose of this qualitative single case study was to explore the strategies technology services managers in mid-size companies use to align core business objectives to improve leadership succession planning. The 12 participants from a

technology services organization participated in interviews to answer the research question. The four themes that emerged from the data analysis of strategies for leadership succession planning were meeting organizational needs, sourcing strategies for internal candidates, addressing leadership skills gaps, and strengthening replacement planning. Leadership succession planning enables executives and managers to identify high-potential employees that exhibit proficient leadership competencies, strong business acumen, and advanced skills necessary to address business needs and long-term strategy for growth. When managers identify and develop high-potential employees that demonstrate leadership behavior that links operational performance with business development the results could cause business profitability to raise. Leading an integrated strategy that focuses on achieving business goals, maintaining business continuity, people growth and strategic planning empowers managers to develop high-potential employees to be better leaders who are properly equipped to take the business to the next level.

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Appendix A. Interview Protocol Guide

Interview Scheduled Date _____ Interview Date _____

Participant Identification: DBASPS

- Consent to participate received Disclosure and consent to record
- Confirm confidentiality and voluntary Informed that transcript will be available

The specific business problem is that some technology services managers lack strategies to align core business objectives to improve leadership succession planning.

Share purpose of the study:

The purpose of this qualitative case study is to explore strategies technology services managers in mid-size companies use to align core business objectives to improve leadership succession planning.

Research question for this study:

What strategies do technology services managers use to align core business objectives to improve leadership succession planning?

Start recording

Record Interview Start Time _____

Interview Questions:

1. How do you use leadership succession planning to identify high potential talent?
2. What role does your manager play in leadership succession planning for your direct reports?
3. What strategies do you use to enable leadership succession planning as an internal focused function to core business objectives?
4. How do you identify your employees as high potential talent?
5. How do you develop your high potential talent for leadership positions?

6. To what extent do you focus on core competencies compared to role specific competencies, specifically for leadership succession planning?
7. How do you identify the critical job roles that, if vacated suddenly, would require an urgent replacement?
8. How do you describe the condition of the organization's bench strength, the population of employees in the talent pool?
9. How do you work with other managers on leadership succession planning at your company?
10. What additional insight can you provide to other Managers on integrating core business objectives to improve leadership succession planning to identify high potential talent?

Stop recording

Record Interview End Time _____

Remind participant that the interview transcription will be send for his/her review and approval.

Thank the participant for volunteering to share his/her personal experiences.

Appendix B: Description of Company Reviewed Documents

Description of Reviewed Company Documents for Case Study

Document identification	Description	<i>n</i>
Company Document 1	Talent Assessment Process	4
Company Document 2	Development Planning Presentation	1
Company Document 3	Management Development Process Guide	4
Company Document 4	Candidate Development Approval Form	2
Company Document 5	Competencies Reference List	5

Note: n = quantity