


2017

# Small to Medium Enterprise Succession Planning: Millennial Employee Development

Mark Tarmann Jr.  
*Walden University*

Follow this and additional works at: <https://scholarworks.waldenu.edu/dissertations>

 Part of the [Business Administration, Management, and Operations Commons](#), [Management Sciences and Quantitative Methods Commons](#), and the [Sustainability Commons](#)

---

This Dissertation is brought to you for free and open access by the Walden Dissertations and Doctoral Studies Collection at ScholarWorks. It has been accepted for inclusion in Walden Dissertations and Doctoral Studies by an authorized administrator of ScholarWorks. For more information, please contact [ScholarWorks@waldenu.edu](mailto:ScholarWorks@waldenu.edu).

# Walden University

College of Management and Technology

This is to certify that the doctoral study by

Mark Tarmann

has been found to be complete and satisfactory in all respects,  
and that any and all revisions required by  
the review committee have been made.

## Review Committee

Dr. Carol-Anne Faint, Committee Chairperson, Doctor of Business Administration  
Faculty

Dr. Rocky Dwyer, Committee Member, Doctor of Business Administration Faculty

Dr. Scott Burrus, University Reviewer, Doctor of Business Administration Faculty

Chief Academic Officer  
Eric Riedel, Ph.D.

Walden University  
2017

Abstract

Small to Medium Enterprise Succession Planning: Millennial Employee Development

by

Mark J Tarmann Jr.

MS, University of Phoenix, 2009

BS, University of California at Davis, 2005

Doctoral Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

Walden University

October 2017

## Abstract

Increased mobility and a growing presence in the workforce by millennial employees are pushing sustainability to the forefront of concerns for business leaders. Especially for small to medium enterprises (SMEs) with limited human capital resources and no formal succession plans. Thus, increasing the need for insight on millennial employee development to mitigate voluntary turnover. The purpose of this multiple case study was to explore successful millennial employee developmental strategies employed by 3 SMEs leaders in southern New Jersey. These SMEs leaders were the ideal population with millennial employees with 3 or more years of employment and not solely family-run organizations. The unfolding model of voluntary turnover, expectancy theory, and the human capital theory was the conceptual framework that guided introspection into this phenomenon. Semistructured interviews collected data about the perceptions held by the SMEs leaders of the phenomenon in their respective organizations. Methodological data triangulation enabled the identification of evident millennial employee development themes and the basis of millennial employment development strategies as mitigation or the exertion of motivational force. The effort to answer the posed questions identified 4 prevalent themes (a) flexibility, (b) organic culture, (c) self-governance, and (d) laissez-faire leadership, which aligned with the mitigation versus motivational conceptions. The findings may contribute to societal change by broadening perceptions held by individuals and communities, particularly leaders, about millennial employees to dispel preconceived stigmas, reduce interaction ambiguities, and minimize the escalation of generational conflicts and discourse within respective communities.

Small to Medium Enterprise Succession Planning: Millennial Employee Development

by

Mark J Tarmann Jr.

MS, University of Phoenix, 2009

BS, University of California at Davis, 2005

Doctoral Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

Walden University

October 2017

## Dedication

I dedicate this study to Cynthia Mendiola Tarmann, my mother, an educator, and a major source of motivation. Words cannot capture the gratitude I have for the sacrifices she made. Taken too soon, let this moment signify the culmination of both of our doctoral journeys. I miss you, but know you are always with me.

## Acknowledgments

I would like to thank my wife, Toni, and son, Markie. I could not have done this without your unconditional support and love. I would like also to thank Dr. Faint and Dr. Dwyer; your continued encouragement and feedback have been invaluable. Finally, I would like to thank Pastor Joyce and the FUMC of Hammonton for supporting my efforts and helping me keep faith during tough times.

## Table of Contents

List of Tables .....	iv
Section 1: Foundation of the Study.....	1
Background of the Problem .....	2
Problem Statement .....	2
Purpose Statement.....	3
Nature of the Study .....	3
Research Question .....	5
Interview Questions .....	5
Conceptual Framework.....	6
Operational Definitions.....	7
Assumptions, Limitations, and Delimitations.....	7
Assumptions.....	8
Limitations .....	8
Delimitations.....	9
Significance of the Study .....	9
Contribution to Business Practice.....	9
Implications for Social Change.....	9
A Review of the Professional and Academic Literature.....	10
Relevant Theories .....	12
Alternative Theories.....	24
Small to Medium Enterprises.....	28



Succession.....	30
Millennials .....	35
Transition .....	39
Section 2: The Project.....	41
Purpose Statement.....	41
Role of the Researcher .....	41
Participants.....	44
Research Method and Design .....	46
Research Method .....	46
Research Design.....	48
Population and Sampling .....	50
Ethical Research.....	52
Data Collection Instruments .....	55
Data Collection Technique .....	57
Data Organization Technique .....	60
Data Analysis .....	60
Reliability and Validity.....	63
Reliability.....	63
Validity .....	63
Transition and Summary.....	66
Section 3: Application to Professional Practice and Implications for Change .....	67
Introduction.....	67

Presentation of the Findings.....	68
Theme 1: Flexibility.....	69
Theme 2: Organic Culture .....	70
Theme 3: Self-Governance .....	72
Theme 4: Laissez-Faire Leadership .....	74
Applications to Professional Practice .....	76
Implications for Social Change.....	78
Recommendations for Action .....	79
Recommendations for Further Research.....	82
Reflections .....	83
Conclusion .....	84
References.....	87
Appendix A: Interview Protocol.....	109

## List of Tables

Table 1. Literature Review Reference Source Summary .....	12
Table 2. Flexibility .....	69
Table 3. Organic Culture.....	71
Table 4. Self-Governance .....	73
Table 5. Laissez-Faire Leadership .....	75

## Section 1: Foundation of the Study

For small to medium enterprise (SME) leaders, any new business plan becomes the core of organizational operations (Halme & Korpela, 2014). To overcome shortcomings in sustainability, SME leaders will require new managerial practices to overcome obstacles (Massa, Farneti, & Scappini, 2015). A barrier of interest for SMEs was an insufficiency in human capital (Massa et al., 2015) complicated by increased voluntary separation by millennial employees. The context of this phenomenon presents a challenge and will require leaders to be strategic in their succession decision-making (Sherman, Patterson, Avitable, & Dahle, 2014). Thus, the purpose of this study and information that follows was to provide SME leaders insight into millennial employee development for succession planning.

In Section 1, I will provide the problem statement, the central research question and conceptual framework driving the study, and a review of the literature on millennial work values and leadership succession. In Section 2, I will provide issues pertinent to the validity and reliability of the study including the data collection and analysis process and ethical research standards. In Section 3, I will provide a discussion regarding the findings of the study and information pertinent to the application of the findings to professional practice and social change. Section 3 will conclude with my recommendations for future research, reflections, and conclusions.

### **Background of the Problem**

For sustainability, SME leaders must mitigate increasing difficulty in succession planning (Liu, Eubanks, & Chater, 2015) caused by a higher rate of voluntary turnover by millennial employees. Eras (2015) found that millennial employees are leaving employers more often than their predecessors. Moreover, the tenure of older generations in the workforce is more than three times that of millennial employees (U.S. Department of Labor, 2014). Voluntary turnover poses a greater loss than organization-initiated turnover because of the associated unwanted losses of knowledge and resources (Pee, Kankanhalli, Tan, & Tham, 2014). Since organizational leaders cannot avoid turnover, the mitigation of its adverse effects is as important as its management (Pee et al., 2014).

### **Problem Statement**

Some SME leaders lack succession plans (Abdullah, Azmi, Zin, Chee, & Yussoff, 2014), even though succession planning is crucial to business continuity (Gilding, Gregory, & Cosson, 2015). With 78% of the millennial workforce seeking new jobs within 2 years of employment (Prestia, Dyess, & Sherman, 2014), the limited opportunity for millennial employee development is making succession planning more difficult (Liu et al., 2015). The general business problem is some business leaders who do not integrate millennial employee development in succession planning experience an increased rate of voluntary turnover (Lee, Bartkus, & Lee, 2015). The specific business problem is that some SME leaders lack-millennial employee development strategies to remain sustainable.

### **Purpose Statement**

The purpose of this qualitative multiple case study was to explore millennial employee development strategies applied by SME leaders to remain sustainable. The population for the study included leaders of three SMEs in southern New Jersey. These leaders were ideal for this study as they demonstrated that despite limited staff pools their respective organizations have remained sustainable through the retention millennial employees for at least 3 years despite evidence of a higher voluntary turnover by millennial employees. Improved retention of millennial employees through strategic development initiatives may contribute to social change by raising awareness amongst other SME leaders of the criticality of succession planning and may alter preconceived stigmas caused by ambiguity regarding the generational group of individuals. The findings may benefit those SME leaders with limited human capital and an aging workforce to develop millennial employees for long-term retention and succession.

### **Nature of the Study**

Researchers can study succession planning through quantitative, mixed method, or qualitative strategies. A quantitative researcher applies a design to validate or reject a hypothesis (McCusker & Gunaydin, 2015) through formulating and testing hypotheses (Morse, 2015). The restrictions and necessary assumptions of quantitative work made it an inappropriate strategy for this study. Researchers in a mixed method research design conduct extensive inquiry and provide robust results that compensate for the limitations and potential deficits in individual methodologies (Swartz, Amatucci, & Coleman, 2016).

Yardley and Bishop (2016) stated mixed method research requires the integration of qualitative and quantitative methods. Since I excluded the use of a quantitative methodology I too would exclude the use of a mixed method. Swartz et al. (2016) also stated that mixed method research requires considerable time and resource requirements. As a result, the necessities of mixed methodology exceed the availability of my resource further supporting the exclusion of a mixed method strategy. Researchers utilize the qualitative research method to gain an understanding of less structured processes (Salona, Kaczynski, & Smith, 2015). I chose a qualitative research design to explore millennial employee development in SME succession plans because my study required the versatility and subjective nature of qualitative research.

Qualitative design options include phenomenological, narrative, and case study. Phenomenological researchers explore the lived experiences of participants (Corby, Taggart, & Cousins, 2015). A phenomenological design did not align with the procedural versus individual focus of this study. A narrative design uses a collection of career stories as a way of defining conduct in a social context (Pizzorno, Benozzo, Fina, Sabato, & Scopesi, 2014). The longitudinal collections of career narratives exceeded the needs of this study. Alternatively, longitudinal collection posed the risk of collecting extra noncontributive information. Yin (2014) stated that a case study design can provide insight on a chosen phenomenon. As a result, my choice to use a case study approach provided insights on millennial employee development in succession planning. Thus, a

case study was the appropriate design to explore the social processes in the development of millennial employees in succession plans.

### **Research Question**

The central research question of this study was: What millennial employee development strategies do SME leaders employ to remain sustainable?

### **Interview Questions**

1. Prior studies have shown millennial employees are voluntarily leaving employers within 2 years. What are your organization's succession planning strategies to develop millennial employees (EEs)?
2. How has the increased occupational mobility of millennial employees affected your ability to make succession planning decisions?
3. What specific strategies have you/your organizational leadership implemented to ensure long term development of millennial EEs?
4. How do you evaluate the strategies' success?
5. What challenges have you and your organizational leadership team experienced when trying to implement millennial employee development strategies?
6. How have you/your organizational leadership addressed these challenges?
7. What, if any, other benefits have accrued from developing millennial EEs?
8. What additional information or insights can you provide to enable me to understand millennial employee development in succession plans for your



organization?

### **Conceptual Framework**

The conceptual frameworks for the study included Lee and Mitchell's (1994) unfolding model of voluntary turnover, Vroom's (1964) expectancy theory, and Becker and Schultz's (1960) human capital theory. Both the unfolding model of voluntary turnover and expectancy theory respectively framed the cognitive processes of voluntary turnover and motivation. Alternatively, the human capital theory offered a means of framing employee development to mitigate employee mobility (Bae & Patterson, 201; Coff & Raffiee, 2015) Lee and Mitchell developed the unfolding model of voluntary turnover to identify shock constructs and cognitive pathways that lead to an employee's decision to separate from an employer (Davis, Trevor, & Feng, 2015). Respectively, Vroom attributed an employee's decision to leave on the impact of three cognitive constructs (Purvis, Zagenczyk, & McCray, 2015) related to the motivational forces that effect behavioral decisions (Chen, Ellis, & Suresh, 2016). In contrast, from an organizational perception Becker and Schultz's human capital theory conceptualized labor mobility, turnover, and employee development risks (Bae & Patterson, 2014). Lee and Mitchell and Vroom's concepts applied to the individualistic nature of voluntary turnover pertinent in this study of employee development, while Becker's concepts applied to the organizational effort to invest in the development of future organizational leaders.

## **Operational Definitions**

*Burnout:* Burnout is a nonshock catalyst for voluntary turnover, and a prolonged emotional and physical strain caused by a low level of job satisfaction (Wong & Laschinger, 2015)

*Human capital:* Human capital is the economic worth of employee abilities (Perepelkin, Perepelkina, & Morozova, 2016)

*Millennials:* Millennials are individuals born in the early 1980s to early 2000s, also referred to as Generation Y and Generation M (Chandler, 2015).

*Motivation:* Motivation is the actions or behaviors based on an individual's expectations (Purvis et al., 2015).

*Shocks:* Shocks are identifiable catalysts for voluntary turnover (Brewer, Chao, Colder, Kovner, & Chako, 2015).

*Succession plans:* Succession plans refer to human capital planning to assure continuance of leadership (Barzinpour, Jafari, & Biuki, 2015).

*Voluntary turnover:* Voluntary turnover is an employee's decision to leave an employer (Davis et al., 2015).

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

The assumptions, limitations, and delimitations of a study offer a framework for better comprehension for a reader. Each component frames independent dynamics pertinent to the study. Alternatively, the collaboration of assumption, limitations, and

delimitations increase the transparency of a researcher's intent in a study. In the following subsections, I will identify issues pertinent to this study.

### **Assumptions**

Assumptions are the unquestioned truths of the study (Grant, 2014). I made four assumptions concerning this study. The first assumption was that the turnover characteristics were unilateral for millennial employees regardless of age, gender, or occupation. Secondly, I assumed that a case study was the most effective means of studying succession plans. Another assumption was that leaders are currently planning leadership transfer to millennial employees. My final assumption was that the evidence obtained from organization leaders or leadership teams was better than evidence obtained from a millennial employee's perspective.

### **Limitations**

Limitations are the acknowledgment and requested dismissal of uncertainties related to a study (Lingard, 2015). There were three limitations present in this study. The first limitation I identified was the possibility of organizational proprietary rights limiting the ability to solicit strategic planning information. Another limitation was that the results of the research might only highlight trends applicable to the southern New Jersey area, restricting the generalization of findings. The third limitation was the subjectivity of cognitive processes, like turnover and succession planning, required interpretation (Glisson, 2015) limited by the ability of participants to speculate about them.

## **Delimitations**

Delimitations direct a reader's focus to the main ideas of the study and the relation between them (Svensson, 2016). Two delimitations were present in this study. The first was a limit on participant workforce size per the U.S. definition of small businesses. Large organizations or corporations offer strategies only pertinent to large pools of staff. The second delimitation was that I only focused on those SME leaders or leadership teams with a base of operations in southern New Jersey.

## **Significance of the Study**

### **Contribution to Business Practice**

My findings may contribute to business practice by identifying the need for millennial employee development strategies in SME succession plans. The development of effective development strategies is essential, as millennial employees are quickly becoming a prominent generation in the workplace. Leaders need to ensure that they develop the talent necessary for leadership succession (Downs, 2015) because those organizations that spend valuable resources on millennial employees without effective succession plans are wasting time and money (Craig, 2015).

### **Implications for Social Change**

This study has implications for social change by broadening knowledge about the importance of generational succession planning. The transference of business leadership to millennials is pertinent in multiple facets of society development including family structures, communities, and organizations. A goal of succession planning is talent

management (Ariss, Cascio, & Paauwe, 2014) to ensure a smooth transfer from one leader to the next (Caroll, 2015); be it skills passed from a father to son, from one government official to the next generation, or transfer of operations in organizations. As a result, Talent management (TM) as a source of motivation benefits individuals. as a source of motivation for engagement Communities and society benefit from ongoing gainful employment and capital stimulus. Thus, the findings of this study might aid SME leaders motivate and overcome millennial employee retention obstacles and aid in the survival of SMEs and continued gainful employment opportunities in southern New Jersey.

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

In this study, I explored the strategies successful SME leaders use to develop millennial employees in succession planning. The level of perceived mobility and increased rate of turnover by millennial employees threatens the sustainability of operations (Liu et al., 2015; Prestia et al., 2014). Organizational leaders who fail to adapt to the change in values exhibited by millennial employees, miss an opportunity to engage the upcoming generation (Winter & Jackson, 2015). The longterm development of millennial employees will require strategies for leaders to embrace a shift in perception from work-to-live to a work-life balance in succession planning (Winter & Jackson, 2015). Current evaluative and reward-based initiatives employed by leaders do not align with the confidence and entitlement values held by millennial employees (Liard, Harvey, & Lancaster, 2015). With the millennial employment trajectory on the rise (U.S.

Department of Labor, 2014) and a correlated increase in voluntary turnover (Ertas, 2015), research on millennial development for leadership succession is at the forefront of interest for organizational leaders.

I located a significant amount of literature from peer-reviewed articles and found these academic articles in a variety of sources. Sources included databases and search engines such as Google Scholar, ABI/Inform Complete, Business Source Complete, and ProQuest Central. My search criteria included the following key terms: *millennial*; *succession planning*; *voluntary turnover*; *employee retention*; *human capital*; and *tenure*. I also reviewed other materials, including books, dissertations, and government publications. In compliance with Walden doctoral study requirements, of the 89 references I used in this study, 88 (99%) were published within 5 years (2013–2017) of my expected year of CAO approval of my study. In adherence to the DBA doctoral study requirement, 82 (92%) of sources were peer reviewed. Table 1 visually captures a summary of the sources of professional and academic literature I reviewed in this study.

Table 1

*Literature Review Reference Source Summary*

	Older	2013	2014	2015	2016	Total	Percentage
Peer-reviewed journals	1	7	33	34	7	82	92
Dissertations	0	0	1	0	1	2	3
Government	0	0	2	0	0	2	2
Other	0	0	2	1	0	3	3
Total	1	7	38	35	8	89	100

In the following subsections, I will provide a comprehensive synthesis of existing literature to broaden understanding of concepts pertinent to the development of millennial employees and succession planning. On the basis that Some SME leaders lack succession plans despite the absolute need (Abdullah et al., 2014). The comprehensive analysis will start with a discussion of relevant theories. Next, I will discuss topics pertinent to the development and retention of millennial employees where topics will include the SMEs and succession. Finally, the section will conclude with discussions on millennials.

### **Relevant Theories**

In this study, I explored theories relevant to the development of millennial employees, including the unfolding model of voluntary turnover, expectancy theory, and human capital theory. Alternatively, additional considerations included the leader-member exchange theory, theory of reasoned action, and goal-setting theory. Of the

relevant theories, I will focus on the unfolding model of voluntary turnover, expectancy theory, and human capital theory as the conceptual frameworks of this study. Moreover, my discussion will include the basis for not including the alternative theories. In the exploration of methods to develop millennial employees, my intention with this study was to identify those themes pertinent to the cognitive considerations and behavior intentions of millennial employees as it related to voluntary separation and organizational efforts to invest in the development of future organizational leaders in succession plans. Ma, Seil, and Guerard (2016) stated succession plans can incorporate employee development plans. My introspection into the cognitive processes and organizational investments created an opportunity to identify the origins of voluntary turnover by millennial employees to learn how SME leaders can adjust millennial employee development strategies in succession plans.

**Unfolding model of turnover.** Leaders need to understand the cognitive process an employee undergoes in the decision to separate voluntarily from an organization. Lee and Mitchell's (1994) unfolding model of turnover examined and tested cognitive processes undergone in consideration of separating from an employer (Mitchell, Burch, & Lee, 2014). Lee and Mitchell's theory explored shock constructs that (a) brought attention to the outside job market, (b) removed basic routines that masked assessment of alternatives, and (c) forced a reconsideration of current organization commitments (Davis et al., 2015). After the identification of shock constructs, Lee and Mitchell elaborated on four cognitive paths employees take in consideration of leaving an employer. Routes



included leaving without consideration of alternative, reconsideration of organizational attachment, departing after examination choices, and departing after an extended period of job dissatisfaction (Brewer et al., 2015). All but the final path that resulted from prolonged dissatisfaction involved an identifiable shock that began the conscious reasoning to leave an employer. The central premise of the Lee and Mitchell's unfolding model theory was that individuals leave jobs in different manners and at different rates based on the initiating events, behavioral responses, and psychological constructs (Mitchell et al., 2014). Considerations taken in Lee and Mitchell's study included acknowledgment of the diversity and variance of the cognitive pathways millennials employees undergo in consideration of leaving an employer. Thus, Lee and Mitchell's unfolding model of voluntary turnover was the appropriate lens to explore retention strategies in the development of millennial employees in succession planning.

***Shocks.*** The unfolding model of voluntary turnover introduced the concept of shocks in the discussion of voluntary turnover. Shocks include any sudden event that disrupts an employee's sense of status quo (Holtom, Mitchell, Lee, & Inderrieden, 2005) and are identifiable as the reason for the employee's consideration of voluntary turnover (Brewer et al., 2015). Researchers agreed that events can be positive or negative (Seet, Jones, Acker, & Whittle, 2014; Shipp, Furst-Holloway, Harris, & Rosen, 2014). The expectation of the occurrence and nature of the shocks can vary (Shipp et al., 2014). For example, expected personal events can include marriage, childbirth, or relocation. Violation of an employee's established perceptions also falls under the classification of a

shock (Shipp et al., 2014). When an individual's values or goals do not align with the goals or values held by organizational leaders, the value or goal misalignment could initiate the consideration of leaving the employer (Sheet et al., 2014; Shipp et al., 2014). The consequences of shocks are dependent on how an employee interprets them as they occur (Holtom et al., 2005). For the purposes of this study, shocks of interest included those classified as negative, job related, or that were relevant to the maintenance of an employee's sense of status quo. Additionally, shocks pertinent to successions plans must have offered an opportunity for organizational leaders to influence some form of control. In consideration of how successful SME leaders develop millennial employees, the cognitive paths that encompass the psychological considerations millennial employees undergo in choosing to leave an employer required explanation. The paths relevant in the discussion of shocks were Path 1 through 3.

***Path 1.*** Path 1 of Lee and Mitchell's model associates turnover with the initiation of an employee's existent exit plan (Palanski, Avery, & Jirapon, 2014). The initiation of the established script occurs in the absence of any consideration of the ramifications or alternatives (Shipp et al., 2014). Expected jarring events can initiate plans such as a female employee who has previously decided not to return to employment after pregnancy. Alternatively, image violation can center on ethical standards (Palanski et al., 2014). For example, an employee may choose to separate due to an intolerance for any acts of possible fraud. The basis is that preestablished reactions signify a brief relationship between the organization and the employee (Palanski et al., 2014). An

employee who has preestablished plans to leave will do so in the absence of any dissatisfaction with the organization (Palanski et al., 2014; Shipp et al., 2014). The lack of emotional exhaustion, depersonalization, or evaluation of personal accomplishment disassociates Path 1 with the issue of burnout (Kim, 2015). Thus, leaders or leadership teams may have significant difficulty in mitigating events in succession plans. Aside from ethical operations, the most appropriate action may be the development of a sufficient pool of millennial leaders to minimize the impact of temporary relationships.

**Path 2.** Path 2 of Lee and Mitchell's model differs from Path 1 in that when an individual encounter a shock they evaluate their relationship with their employer (Palanski et al., 2014). Moreover, reactions occur without the existence of a prior script or plan (Shipp et al., 2014). The typical catalyst for Path 2 is an image violation; image violations can occur to both the personal and professional perceptions held by an employee (Chenevert, Jourdian, & Vandenberghe, 2016). Professional violations are of interest in succession planning, as the mitigation of personal perceptions may be difficult for leaders; moreover, an association occurred between the cognitive process and negative sentiments (Shipp et al., 2014). Advancement of an undesired supervisor or the consolidations of different departments are examples in which an employee's negative perceptions will supersede the benefits of continued employment. Thus, like Path 1, if warranted, the employee will separate from the employer without any consideration of any alternative (Palanski et al., 2014).

**Path 3.** Path 3 of Lee and Mitchell's model is the first in which the consideration

of alternatives occurs. Like the previous paths, the employee's initial response to the shock is a reevaluation of their current job and employer (Palanski et al., 2014). In contrast, in Path 3 an employee will then evaluate possible external options before leaving (Shipp et al., 2014). However, the most detrimental issue to succession is the loss of human capital caused by the shock of enticement from competitors (Shipp et al., 2014). Unexpected job offers by competitors are a standard catalyst of cognitive Path 3 (Shipp et al., 2014). When employees leave, they take investments in knowledge, craft, skills, and experience with them (Aryee, Walumbwa, Seidu, & Otaye, 2016). Furthermore, after separation, employees' exhibit positivity as the alternative may align better with their personal values (Shipp et al., 2014). Thus, leaders need to identify means to increase job embeddedness in employees to thwart the efforts of competitors.

***Burnout.*** Researchers have conducted seminal work on turnover where they examined the relationship between job embeddedness and burnout. Chan, Wan, and Kouk (2015) found that 40% of employees under 34 had the highest reported incidences of low job satisfaction and the highest turnover intentions within the first year of employment. They found that burnout was the proximal cause of the trend. Prior research has also found a negative correlation between burnout and job embeddedness (Candan, 2016; Chan et al., 2015). Chan et al. defined burnout as the byproduct of depersonalization and emotional exhaustion caused by low job satisfaction. External obligations like children and property ownership made some employees more enduring under increasing emotional exhaustion from low job satisfaction (Candan, 2015).

However, internal organizational strategies are necessary to retain employees. Internal corporate policies have high positive correlations between work engagement initiatives and job embeddedness (Candan, 2015; Takawira, Coetzee, & Schreuder, 2014). One issue discovered was that organizations need continuous self-evaluation of the level of employee engagement in current strategies (Takawira et al., 2014). Recommendations included improved schedules, training and development, and initiative to handle emotional exhaustion (Chan et al., 2015). Simply stated, organization leaders need to develop and encourage a sense of belonging among employees. As organization leaders implement strategies to increase job embeddedness through work engagement the mechanisms also warrant recognition for decreasing turnover intentions (Takawira et al., 2014).

*Path 4.* The link between burnout and Lee and Mitchell's Path 4 contrasts with the prior pathways of their model. Cognitive consideration of separation occurs in the absence of an identifiable shock; in the absence of a shock, an employee's dissatisfaction and low job satisfaction associate with the choice to leave an employer with burnout (Ship et al., 2014). Symptomology commonly associated with burnout includes skepticism and low self-worth (Baker & Costa, 2014). Fernet, Austin, Trepanier, and Dussault (2013) identified key burnout indicators as (a) emotional exhaustion, (b) depersonalization, and (c) reduced personal accomplishments. The distortion of personal worth or image violation is the catalyst in an employee's consideration of voluntary separation from an employer. In the exploration of methods to develop millennial

employees, the burnout component of interest is emotional exhaustion. Emotional exhaustion is the depletion of an employee's ability to cope with a situation (Pinto, Dawood, & Pinto, 2014). The variability in individual emotional exhaustion supports Lee and Mitchell's division of Path 4 into two components.

**Path 4a.** Like Paths 1 and 2, an employees' decision to separate from an employer occurs in the absence of consideration of alternative employment opportunities (Ship et al., 2014). A presumption is that the level of burnout has exceeded the individuals' threshold of exhaustion. For example, an individual spontaneously elects to resign with no prior indication of intent or alternative employment options. Without an identifiable occurrence, situations fall outside of Path 1 and 2. Thus, the employee's separation corresponds with an increasing dissatisfaction over a prolonged yet unspecified period (Palanski et al., 2014; Ship et al., 2014).

**Path 4b.** In contrast, to Path 4a, 4b indicates an employees' consideration of alternatives before separation like Path 2 (Palanski et al., 2014). Again, the lack of an identifiable shock misaligns with prior pathways. Thus, the separation is again associated with increased job dissatisfaction over an unspecified period (Palanski et al., 2014; Ship et al., 2014). An example of such an occurrence is an employee's growing dissatisfaction with menial tasks or repetitive instruction resulting in the employee seeking new employment opportunities. However, the individual does not exceed an emotional exhaustion threshold to result in immediate separation. Path 4b offers leaders an opportunity to identify and mitigate key burnout indicator not available with Path 4a.

***Evolution.*** Theories on human behavioral changes contributed to the development of the unfolding model of voluntary turnover. Before Lee and Mitchell's (1994) introduction of cognitive shocks in the unfolding model of voluntary turnover, behavior change theorist categorized an individual's choice on the violations of established images. Beach's (1990) proposed in the image theory that people maintain value, trajectory, and strategic images (Tang, 2016). As individuals received additional information, they compare the latest information to personal work values (value), goals (trajectory), and goal-attainment actions (strategic) constructs (Babalola, Stouten, & Euwema, 2016). Any violation of an employee's established image implied justification to separate from the employer (Babalola et al., 2016). Alternatively, Hulin's theory of withdrawal in 1991 characterized an employee's separation from an employer as an incremental process with identifiable stages and associated behaviors (Mitchell et al., 2014). The stages most pertinent to voluntary turnover include decreased job satisfaction, diminished productivity, and the eventuality of separation (Mitchell et al., 2014). The unfolding model of turnover poses attributes from both the image and withdrawal theories. In contrast to the ubiquitous changes in the image theory, the unfolding model of voluntary turnover facilitates change specificity through shock classification. Moreover, the unfolding model of turnover acknowledges internal cognitive paths versus the external stages posed in the withdrawal theory. The broadened model that incorporates both specificities in cause and individualistic progression enables introspection in the cause and effect mechanisms of voluntary separation that is pertinent

to the development millennial employees for succession planning.

**Expectancy theory.** Victor Vrooms (1964) expectancy theory is a theory of human behavioral changes. In contrast to Lee and Mitchell's unfolding model of voluntary turnover, the expectancy theory aids leaders in comprehending the forces that drive decisions (Chen et al., 2016). Vroom's expectancy theory stated that the behaviors which influence and employee's decision to leave an organization are dependent on motivational forces (Chen et al., 2016). Motivational forces are a collaboration of three constructs: (a) instrumentality, (b) expectancy, and (c) valence (Purvis et al., 2015). The constructs capture an individual's intangible assessment of success, the effort necessary to obtain success, and the attractiveness of the rewards that accompany the success (Purvis et al., 2015). Leaders need to incorporate attributes that take into consideration all three constructs in any goal behavior models such as succession plans to ensure they create the right motivational forces (Wood, Logar, & Riley, 2015). As the right combination of motivational forces is necessary as an employee's desire to contribute to an organization's sustainability is dependent on their self-interests (Purvis et al., 2015) and their tendency to only engage in behavior with attainable goals and rewards (Wood et al., 2015).

**Equation.** The expectancy theorist quantifies motivational forces (MF) as the multiplication of expectancy (E), instrumentality (I) and valence (V), thus  $MF = E \times I \times V$  (Ghoddousi, Bahrami, Chileshe, & Hosseini, 2014). The constructs serve varied purposes in behavioral decisions. Both instrumentality and valence correlate with an



employee's cognition of both intrinsic and extrinsic outcomes (Ghoddousi et al., 2014). Expectancy is the collection of intrinsic perceptions held by employees about the ability to achieve goals (Purvis et al., 2015). Thus, the E-I-V scores are a comprehensive means to assess behavioral decisions. Under the expectancy theory, voluntary separation is a calculated and rational act versus the reactive pathways in the unfolding model of voluntary turnover (Nobuo, Hirofumi, & Nobuyuki, 2014). Additionally, the expectancy theory has a predominant extrinsic weight versus the intrinsic nature of the unfolding model of voluntary turnover (Nobuo et al., 2014). Thus, behavioral decisions under the expectancy theory offer credence to the use of external rewards to mitigate turnover (Nobuo et al., 2014). Moreover, that the resources, reward/punishment systems, and support offered by organizational leaders can influence the expectancy and the psychological climate held by employees (Purvis, et al., 2015).

**Human Capital Theory.** Contrary to the behavioral offerings of the unfolding model of voluntary turnover and the expectancy theory, the human capital theory conceptualizes the economic value of human development. Notable contributors in the field of human capital include Theodore Schultz and Gary Becker. Both Schultz and Becker's work in 1960, framed the human capital theory as the cornerstone for advances in productivity (Sweetland, 2016; Weiss, 2015). Before the acceptance of the constructs of the human capital theory, organizational leaders perceived the development of employees as consumption versus investment (Sweetland, 2016). Thus, corporate leaders viewed the development of an employee as a luxury versus necessity (Sweetland, 2016).

Rahman and Nas (2013) noted that the perceptions held by organizational leaders about employee development associate with the turnover intentions held by employees. The correlation between development and the mitigation of voluntary turnover intentions highlighted by the human capital theory make it the appropriate lens to identify organizational efforts to lower employee mobility in succession planning.

The ideologies of both Becker and Schultz conceptualize human capital as the return on investment. That an organization leader's investment in the education of employees enable both the organization and employee to obtain desired goals (Rahman & Nas, 2013; Weiss, 2015). To illustrate that equality of return, Becker conducted an analysis based on education investment returns and found a 10% return in both business and human capital (Sweetland, 2016). Thus, the investment in employees is advantageous in strategic leadership decisions (Rahman & Nas, 2013). Biproducts of developmental investments by organizational leaders include increased motivation, productivity, cooperation, and employee utility (Rahman & Nas, 2013; Sweetland, 2016). Like the capital investments deposited into banks, the investments in human capital are an essential and valuable resource for the sustainment of operations after succession (Rahman & Nas, 2013; Sweetland, 2016).

The use of Lee and Mitchell's unfolding model of turnover and Vroom's expectancy theory as components of the conceptual framework of the study are to offer a spectrum of analysis of methodologies to develop millennial employees. The intrinsic and cognitive pathways of the unfolding model of voluntary turnover are the opposite to

the external and calculated motivational forces of the expectancy theory. Alternatively, the human capital theory enables the assessment of organizational leaders' perceptions on the development and its influence on their respective labor mobility, turnover, and employee development risks (Bae & Patterson, 2014). The intention of the study is to address a gap in the literature on millennial development for SME succession with the identification of which end of the spectrum is best to mitigate the trend of increased voluntary succession. Thus, an analysis of SMEs, succession, and millennial employee characteristic literature follows.

### **Alternative Theories**

The analysis of alternative theories ensured the appropriateness of the selected conceptual framework of the proposed study. Each theory is relevant in the effort to study millennial employees. Alternative behavioral theories included the leader-member exchange theory and the theory of reasoned action. The following offers a discussion of the alternative theories and basis of their exclusion as the conceptual framework for the development of a pipeline of experienced millennial employees.

**Leader-member exchange.** A contrasting theory of human behavior is the leader-member exchange theory. The LMX theory categorizes various relationships between leaders and subordinates (Bagger & Li, 2014). An example of such a relationship is the one between SME leaders and millennial employees. Harris, Li, and Kirkman (2014) found that high-level LMX relationships mitigate turnover intentions. High-level LMX relationships characteristics include mutual trust, respect,

and expectations (Bagger & Li, 2014). Alternatively, low LMX relationships occur when employee-employer contracts and specified job expectations inhibit exchanges (Bagger & Li, 2014). Incidences of low LMX relationships increase if employees perceive non-unilateral LMX relationships within the group (Harris et al., 2014). Such perceptions of inequality create workgroup conflict, degradation, and increased incidences of turnover (Harris et al., 2014).

Though prior research supports high LMX relationships as a mediator of turnover intentions, the LXM theory is not the appropriate lens to explore the development of millennial employees. Millennials continuously disrupt operational status quo in efforts to find value and challenge in their daily lives (Aruna & Anitha, 2015). The dominant self-actualization in millennial employees poses inherent disruptions in relationships resulting in low LMX relationships and higher rates of turnover consideration by employees (Harris et al., 2014). In contrast, the unfolding model of turnover and the expectancy theory base employee turnover intentions on individual cognitive concerns versus the external exchange of expectations. The basis for the exclusion of the LMX theory is that the LMX theories incorporation of both leader and subordinate perceptions contradicts the intention of the study to isolate methods to preserve the individualistic psychological contracts between millennial employees and employers.

**Theory of reasoned action.** The TRA is another lens considered in the exploration of how SME leaders develop a pipeline of experienced millennial employees in succession plans. Ajzen and Fishbien's (1967) TRA is an influential framework for

research on the relationships between an individual's beliefs and their behavioral intentions (Wolf, WeinBenberger, Wehner, & Kabst, 2015). The principles of TRA stipulated that a person's behavior plans center on the individual's desire to engage in the chosen behavior (Sahi & Mahajan, 2014). Moreover, that under the TRA behavior is a byproduct of a person's attitude and individualistic standards (Wolf et al., 2015). Thus, under the TRA, a millennial employee's attitude and subjective norms predicate a choice to voluntary leave an employer (Sahi & Mahajan, 2014; Wolf et al., 2015). With such reasoning, a millennial employee's attitude encompasses the presumptions held by the employee about the desired outcome and the necessary behavior for accomplishment (Wolf et al., 2015). Alternatively, the subjective norms are beliefs held by the employee influenced by society pressures and the environment in which these employees developed (Kim, Lee, & Yoon, 2015; Wolf et al., 2015). Lee et al., (2015) found that a dominant factor in an individual's behavioral intention were societal pressures. The predominance of subjective societal norms present in the TRA is why the theory is an inappropriate lens in which to explore the development of a pipeline of experienced in succession plans. The subjectivity of society-based norms inclines the inclusion of ambiguous implications in findings based on the nurturement of individual millennial employees. The intention of the research is not to dismiss the impact of societal nurturement on individualistic behavioral intention but to differentiate and incorporate explanations for voluntary turnover outside of the theoretical boundaries outlined in the TRA. Additionally, Path 1 of Lee and Mitchell's theory of unfolding model of voluntary theory incorporates

consideration of preestablished behavioral patterns based on external societal influences.

**Goal-setting theory.** The goal-setting theory contrast prior alternative methods in its focus on process. In 2002, Loock and Latham's established the goal-setting theory that defined goals as the intentions of action (Loock, Staake, & Thiesse, 2013). The premise of the goal-setting theory is that goals inspire individuals to find the necessary processes to successfully obtain them (Luscombe, Lewis, & Biggs, 2013). Thus, the greater the goal, the higher effort, and commitment invested by an individual (Loock et al., 2013). Alternatively, Jung (2014) found a positive correlation between goal ambiguity and an increased rate of turnover intention. Under the goal-setting theory, goals represent a reward that focuses an employee's effort toward appropriate actions (Loock et al., 2013). Based on a reward premise, the mitigation of turnover is obtainable through the establishment of a goal millennial employee's desire. Moreover, if the millennial employees can dictate the parameters of the reward, their ambition will prolong the amount of time they will invest in achievement (Loock et al., 2013). Luscombe et al. (2013) stated that the predisposition of lofty expectations characteristic of millennial employees results in an intrinsic motivation that affects their performance. Thus, based on the tenets of the goal-setting theory, the lofty expectations held by millennial employees' fosters a passion and investment in the process of obtaining ambitious goals that inhibit turnover intentions.

The ambiguity of goals is the basis for excluding the theory as a viable lens to explore how SME leaders develop millennial employees in succession plans. Jung

(2014) stated that based on the goal-setting theory the inclusion of both internal and external rewards could increase the desirability of a goal that would influence individual motivations and improve job embeddedness in pursuit of accomplishment. However, the inclusion of such a broad spectrum of targets increases the susceptibility of findings to subjective assumptions on the most practical goals. Additionally, as found by Luscombe et al. (2013), research can only offer a limited list of goals to measure that diminishes the reliability of any resulting scale to capture relevant goal characteristics pertinent to the retention of millennial employees.

### **Small to Medium Enterprises**

The configuration of a SME is an ideal organization of interest. SMEs are not miniature versions of corporations but their own body with specific characteristics (De Oliveira, Escrivao, Nagano, Ferraudo, & Rosim, 2015). Entrepreneurial businesses and sole proprietorships lack staff. SMEs typically have diminished resources when compared to larger enterprises (Masi & Cagno, 2015). An assumption is that corporate entities have such significant pools of staff that the lack of ability to retain millennial employees is not a paramount strategic initiative. Thus, SMEs are ideal with limited staff and greater exposure to the risks associated with the inability to retain millennial employees.

**Definition.** A lack of uniformity in the definition of SMEs requires clarification. Definitions of SMEs have included size, capital assets, skill, and rate of sale turnover (Ene & Ene, 2014). In the United States, the Small Business Administration (SBA)

defined small businesses as employers with less than 500 employees (SBA, 2014). The SME Cooperation of Malaysia requires permanent staff to be less than 75% of workers or sale turnover less than approximately 4 million in U.S. currency (Rahman, Yaacob, & Radzi, 2015). While the European Union defined small enterprises as units with less than 250 employees and annual revenue less than 50 million Euros (Kamal & Flanagan, 2014). For population validity, the U.S. definitions of small business will ensure generalization of any models or strategies for groups (Ocumpaugh, Gowda, Heffernan, & Heffernan, 2014) in the United States.

**Leadership.** Organization leaders are central to the success of generational succession planning. Successful continuity of operations is dependent on the actions of existing leadership styles to promote or detour the growth of an organization (Ghee, Ibrahim, & Abdul-Haim, 2015). A leader's dexterity and transparency are critical. Many leaders struggle due to a lack of ability to recruit, train, and manage others (Lynch, 2015). Insufficiencies are evident with 70% of family businesses ceasing operation after transferring ownership from one generation to another (Giarmareo, 2015). Lynch (2015) found that success in hiring and retaining the next generation of leaders required an articulated career path, clearly defined roles, and avoidance of ambiguities that cause employees to develop a sense of survivorship. The transparency of expectations of employees in succession plans by leaders' aids a smooth transition of ownership. Smooth transitions are the result of prepared successors supported by a strong relationship with prominent level of rapport with exiting leaders (Ghee et al., 2015). Thus, leaders who



establish rapport ensure that key employees will remain with the organization after a leader leaves the organization (Giarmareo, 2015).

**Ethics.** Organizational ethics influence employee turnover. Individuals want to work for employers who exhibit similar ethical values (May et al., 2015). The greater the perceived fit between the ethical standards held by the individual with the ethical standards of the organization (DeConinck, 2014), the higher organizational commitment by employees (May et al., 2015). Monitoring an organization's ethical orientation requires an active role to address any issues of high employee turnover (Kim, Kang, Lee, & McLean, 2015). Leaders need to be proactive because workers forecast expected treatment in the organization through consideration of the organization's ethical standards (Kim et al., 2015). Thus, organizational management practices and plans need to include a way to increase the exhibition and transparency of moral standards (May et al., 2015) to develop a sufficient pool of ethically sound and committed leaders.

### **Succession**

The sustainability of operations presumably is the primary objective of any SME. However, the feasibility of sustaining operations is dependent on the methodology set forth in succession plans (Ghandi, & Kumar, 2014). The longitudinal dynamic of succession and succession planning encompass the focus of the study to identify means to develop a pipeline of experience millennial employees (Bogdány, Balogh, & Csizmadia, 2014).

**Succession plans.** The study of succession plans requires the establishment of

differences in succession plan concepts. A succession plan makes sure that the necessary knowledge and resources remain after critical employees leave (Ghandi & Kumar, 2014). Differentiation occurs between the concept of the succession of leadership and the succession of ownership (Bogdány et al., 2014). A succession of ownership or lifecycle succession is when the transfer of ownership to a successor occurs (Bogdány et al., 2014). In contrast, leadership succession aligns with the concept that succession plans are process models where succession is a periodic process (Bogdány et al., 2014), driven by the need to replace critical employees with the eventuality of ownership succession. Leadership succession is a crucial element in the survival of the organization (Van der Westhuizen & Garnet, 2014). Key components of interest of the leadership succession model include (a) identification of critical positions, (b) identification of competencies, and (c) the identification of succession management strategies (Ghandi & Kumar, 2014).

**Successor legitimization.** Previous literature on succession planning discussed the legitimization of successors. First, narrative work on succession planning identified a need for successors to construct a sense of family by linking actions to predecessors to create an emotional tie to employees (Dalpiaz et al., 2014). One way to establish a connection is through observation of predecessors. Second, successors can take the opportunity to initiate communication to build familiarity (Kennedy, 2015). Third, successors also need to praise key contributions and contributing creators (Dalpiaz et al., 2014). Mentorship and succession plans work simultaneously thus a successor should

continuously seek influence from multiple sources (Kennedy, 2015). The assumption is that continuous praise will make essential employees more inclined to invest time in worthy candidates (Dalpiaz et al., 2014). Fourth, successors need to express their individuality to find what works best for them (Kennedy, 2015). Successors should seek endorsements directly or indirectly from third parties outside of the organization to promote personal capabilities (Dalpiaz et al., 2014). Gilding et al. (2015) described an ideal state for succession and three plausible negative states for any deficiencies in the harmony or continuity of the organization. First, Institutionalization is the ideal state for the smooth transference of leadership in succession (Gilding et al., 2015). Gilding et al. defined institutionalization as an organization with strong continuity and harmony motivations (Gilding et al., 2015). Second, implosion occurs when weak continuity and harmony are present and results in failure of succession (Gilding et al., 2015). Third, imposition takes place in organizations with strong continuity motivations yet, weak harmony (Gilding et al., 2015). The poor harmony results in stakeholder's becoming obstacles to the successful and smooth succession of leadership (Gilding et al., 2015). Fourth, individualization categorizes a strong harmony but weak continuity (Gilding et al., 2015). The lack of desire to continue operation by stakeholders and their individualistic pursuit results in the absolution of the business and liquidation of assets (Gilding et al., 2015).

**Talent management.** A component of succession plans is talent management (TM). TM is the development of employee pools to help leaders fill essential positions

when vacated (Ariss et al., 2014). TM involves the identification of critical areas for the sustainability of operation, development of human capital in line with strategic initiatives, and the development of a human resources infrastructure to fill positions (Collings, 2014). A byproduct of efficient TM is motivation (Festing & Schafer, 2014). Based on the Collings' definition of TM SMEs need to identify critical positions, invest in the development and retention of employees, and institute a long-term plan with clear objectives. The byproduct of such actions may motivate millennial employees and thus serve as a useful tool to reduce voluntary turnover by millennial employees.

**Pre- and posthire.** Prehire and posthire turnover intervention strategies warrant discussion. Biodata offers predictive prehire intervention. Applicants with repeated submissions and unsolicited personal history are less likely to leave employers (Breugh, 2014), because the applicants are exhibiting a higher appreciation for the job opportunity. Job embeddedness acts as a buffer to the shocks (Holtom, Smith, Lindsay, & Burton, 2014) that start the cognitive decision process to leave or stay with an employer. Job complexity that elicits elevated levels of conscientiousness and emotional stability (David & Holladay, 2015) also contribute to job embeddedness (Holtom et al., 2014). The highest negative correlation of job embeddedness and turnover occurs in the review of the person-organization fit (Holtom et al., 2014). Jobs that required high personal demands that aligned with the values and goals of employees caused the largest decrease in voluntary turnover (Holtom et al., 2014). Thus, the complex tasks that require employees to be vigilant and thorough create the emotional stability that directly and

indirectly influences posthire turnover (David & Holladay, 2015).

**Retention.** An element of succession is employee retention. Employee retention strategic planning should be part of every principle operation (Cloutier, Felusiak, Hill, & Pemberton-Jones, 2015) and seek to increase employee tenure by aligning their ambitions with the ambitions of the organization (Haider et al., 2015). The alignment of goals increases commitment. Organizational leaders that place value in employees through strategic policies and processes reap the benefits of engagement and increased productivity by subordinates (Sandhya & Kumar, 2014). Financial incentive alone cannot guarantee commitment (Haider et al., 2015). Commitment includes a need for clear work roles, developed supervisory relationships, motivation, and educational opportunities (Cloutier et al., 2015). In the simplistic form, a high rate of satisfaction (Sandhya & Kumar, 2014) and perceptions of organizational support have a significant impact on the turnover intentions of employees (Cloutier et al., 2015). When organization leader fails to pay attention to employee retention, the repercussions can be fatal to the sustainability of operations.

**Psychological contracts.** Leaders need to place emphasis on the nurturement of psychological contracts (PCs) in succession plans. PCs are unwritten agreements between an employer and employee (Clinton & Guest, 2014). The expectations and perceptions held by either or both parties dictate the terms of the contract (Guchait, Cho, & Meurs, 2015). Prior work had examined the relationship of PCs and voluntary turnover and mitigation strategies (Clinton & Guest, 2014; Guchait et al., 2015).

Researchers found evidence found that trust (Clinton & Guest, 2014) and perceived organizational support (Guchait et al., 2015) mediated the incidences of voluntary separation. An implication is that employees see work as a relationship versus a transaction (Guchait et al., 2015). Moreover, that an employee expects fairness in the exchange for commitment and effort (Clinton & Guest, 2014). Such notions align with the idiosyncrasies associated with millennials. Researchers credit the preponderance of millennial parents who sought to intervene in any situation of difficulty with the development of individuals with interpersonal dependencies (Odenweller, Booth-Butterfield, & Weber, 2014). The deficit of social interaction and heightened anxieties characteristic of millennials predispose these individuals to fragile PCs and an instinctual response to quitting (Odenweller et al., 2014). Leaders then must manage millennial employee relational issues to ensure that a breach of PCs does not occur in their development of plans to succeed leadership.

### **Millennials**

The literature on generational differences supports a shift in career commitment and freedom of movement in younger generations (Lyons & Kuron, 2014). Successive generations seek self-fulfillment and are less committed to employers (Lyons & Kuron, 2014). Ertas (2015) found millennial employees to have a higher rate of mobility and nonlinear career compared to prior generations. The increased mobility support findings that the new generational workforce favors a work for life perspective that contrasts a prior generational stigma of living to work (Gursoy, Chi, & Karadag, 2013). Reviewing

the characteristics of millennials will provide a better understanding of the issues leaders face in the development of millennial employees.

**Definition.** Demographic indicators drive generational categorization. An individual's age, events, and shared experiences compose the generational definition (Devanney, 2015). Millennials consist of people born during or after 1981 (Bolton et al., 2013) and those in the workforce range in age from 23 to 35 (Devaney, 2015). Millennials are the children of the Baby Boomers and represent the biggest generational group since their parents (Debevec, Schewe, Madden, & Diamond, 2013). Millennials have developed in an era of significant technological advancement (Bolton et al., 2013). Key technological events that have influenced the nurturement of millennials include the new millennium Y2K and the surge of information digitalization (Cutler, 2015). Thus, a millennial heightened technological awareness and comfort distinguish them from other generations (Debevec et al., 2013). Alternatively, technology has expanded the breadth of available experiences. With the considerable influence of the Internet, millennials have come of age exposed to global versus regional cohorts (Debevec et al., 2013). The increased global exposure has resulted in millennials being more idealistic and attuned to a social disposition (Debevec et al., 2013). With the inundation of information and global liberties, millennials experience influences respective work values and job expectations that affect a leader's ability to develop a pipeline of experienced millennial employees.

**Nurturement.** The nurturement of millennials alludes to inherent deficiencies

that may contribute to the increased incidences of voluntary turnover. Millennials present poor critical thinking ability and need for immediate gratification due to an inundation of technological innovation (Turner & Thompson, 2014). Moreover, the exposure to over involved parents presents a detriment to a millennials decision-making ability and confidence (Odenweller et al., 2014). Johnson and Ng (2015) found incidences of higher impatience and incidences of job change as millennials pursue higher education accreditations. To circumvent millennial employee nurturement leaders may need to base succession plans on promotion and the availability of advancement (Johnson & Ng, 2016). The predominance of intervention by over-involved parents is of interest in consideration of methodologies to develop a pipeline of experienced millennial employees. The tendency for millennial parents to intervene in demanding situations offers a temporary remediation of discomfort for millennials (Odenweller et al., 2014). However, the intervention increases the susceptibility to an impaired confidence in coping ability (Odenweller et al., 2014). Thus, supporting the use of identified conceptual frameworks to explore the increased susceptibility by millennial employees to jarring events or shocks.

**Development.** The developmental expectations held by millennial employees may require leaders to adjust short and long-term developmental practices in succession plans. Those leaders that do not plan for developmental differences in millennial employees' risk missing trends and opportunities to engage and retain the younger generation (Winter & Jackson, 2015). The misalignment between the current evaluative



and reward practices used by leaders and millennial employee expectations requires reconsideration of current practices (Liard et al., 2015). Short-term development considerations for millennial employees need to place emphasis on the utility of the highly confident generation (Winter & Jackson, 2015). Millennial employees prefer an unprecedented ease of accessibility and clarity in communication (Rodriguez & Rodriguez, 2015). Thus, effective short-term developmental strategies may have to include the establishment of defined roles, paths of advancement, and the removal of professional development barriers (Winter & Jackson, 2015). Alternatively, millennial employees' have a decreased level of respect of hierarchical structures by millennial employees resulting in an emphasis on leisure and health versus possible higher incomes (Rodriguez & Rodriguez, 2015). Thus, long-term development initiatives will require leaders to embrace how millennial employees seek a work-life balance (Winter & Jackson, 2015).

**Entitlement.** Seminal work has attempted to conceptualize the prominent characteristics of entitlement in millennial employees (Leveson & Joiner, 2014; Maier, Tavanti, Bombard, Gentile, & Bradford, 2015). Liard et al. (2015) noted that millennials poses a disruptive sense of entitlement. A millennial has elevated sense of entitlement results in an expectation of higher economic rewards such as higher starting salaries (Leveson & Joiner, 2014). Leveson and Joiner (2014) who found that 69% of the new workforce entrants were unaware of how to continue sustainability efforts by an organization identify a divergence between expectation and ability held by millennial

employees. The elevated sense of entitlement also fuels a millennial employee's expectation to be a recipient of more recognition for their work (Hillman, 2014). In the development of a pipeline of experienced millennial employees, leaders may need to place higher levels of accountability and empowerment on millennial employees to neutralize the disruptive influence of entitlement (Liard et al., 2015; Maier et al., 2015).

**Depersonalization.** Leaders also need to evaluate the level of job satisfaction and turnover intentions of millennial employees (Lu & Gursoy, 2015). Based on the individualistic characteristics of millennials the issue of depersonalization is a critical component. Depersonalization is when leaders remove an employee's sense of individuality (Lu & Gursoy, 2016) through treatment, behavior, or extreme emotional demands (Kim, 2015). Such acts are counterintuitive to relational and individualistic recognition expected by millennial employees (Campion, 2015). Thus, any incident where millennial employees consider individual merit not considered perceived (Campion, 2015) the emotional exhaustion increased and resulted in a higher inclination to leave (Lu & Gursoy, 2016). Thus, a key consideration in the development of a pipeline of experienced millennial employees is how leaders develop a sufficient pool of millennial leaders while preserving the individualistic attention millennial employees require to avoid depersonalization.

### **Transition**

In Section 1, I put forth an effort to establish credence to explore the succession plan strategies SME leaders use to develop a pipeline of experienced millennial

employees. The proximal issue was the lack of succession planning by SMEs (Abdullah et al., 2014). Despite the necessity of succession plans (Gilding et al., 2015), SME leaders have forgone a means of ensuring the retention and the mitigation of voluntary turnover by employees (Lee et al., 2015). The inherent abstinence of succession planning by SME leaders presents a greater threat to the sustainability because the leaders of current operations face the increased flux of millennials employees into the workforce and an increased rate of voluntary turnover when compared to their predecessors (U.S. Department of Labor, 2014). Thus, SME leaders may benefit from the study to improve or enact succession initiatives and increase the retention of experienced millennial employees to ensure the sustainability of operations.

In Section 2, I will offer an opportunity to elaborate on the functional components of this study. First, Section 2 provides an extended review of the desired methodology, the role of the researcher, and the participants. Second, the intention is to identify ethical considerations, data collection tools and techniques, and data analysis. Third, the section will conclude with how to ensure the reliability and validity of the data. Finally, Section 2 transitions into Section 3, which contains the presentation of findings of the study, interpretations, and recommendations for further research.

## Section 2: The Project

In Section 2, I will discuss the methodology I chose to explore strategies employed in the development of millennial employees for succession planning. Topics of interest in the section will include the role of the researcher, the research method and design, participants, and ethical considerations. Section 3 will conclude the study with my discussion about the relevant business implications, impact on social change, and future research considerations.

### **Purpose Statement**

The purpose of this qualitative multiple case study was to explore millennial employee development strategies applied by SME leaders to remain sustainable. The population for the study was leaders of three SMEs in southern New Jersey. The three leaders of SMEs with limited staff pools that have retained multiple millennial employees for at least 3 years provided detailed information on how to develop and keep millennial employees for succession. The findings generated from this study may contribute to social change by making SME leaders aware of the criticality of succession planning and the necessity of increased efforts to develop millennial employees. The broadened knowledge benefits SME managers with limited human capital and aging workforces in the development of millennial employees for leadership succession.

### **Role of the Researcher**

In a qualitative study, a researcher's role is to serve as the human instrument to gather and interpret individual experiences (Sanjari, Bahramnezhad, Fomani, Shoghi, &

Cheraghi, 2014). The effectiveness of a human instrument depends on a researcher's ability to understand cause and effect (Collins & Cooper, 2014; Raheim et al., 2016). In a case study, a researcher must mitigate the constant interaction between a theoretical lens and the collected information (Yin, 2014). In this study, my role as a researcher was to obtain, analyze, and present findings based on participant-held perceptions about the development of millennial employees. Personal awareness and conscious identification of ethical concerns helped mitigate possible personal biases. Alternatively, I had to exhibit an adaptability and decisiveness during data collection to ensure the regulation of the interaction between the conceptual framework and data collection.

A close relationship between the topic and myself exists. The greater self-awareness that a researcher has translates into a greater understanding of findings by an audience (Collins & Cooper, 2014). Contributory attributes of self-awareness include (a) asking practical questions, (b) active listening, (c) adaptability, (d) a sound basis of local knowledge, and (e) avoidance of bias (Yin, 2014). As the researcher and a millennial employee, it was essential for me to have a neutral standpoint for the validity and reliability of the findings. Effective questioning, listening, adaptability, and an established protocol helped me mitigate bias and avoid the capture of data through a personal lens.

Self-awareness and rigorous protocols mitigated my personal biases and aided in the avoidance of looking at data through a personal lens or perspective. The value of a qualitative study to readers is dependent on the perceived level of rigor employed by the

researcher (Morse, 2015). Phenomenon research, and particularly qualitative research, is a rigorous process which requires a researcher to play a greater role as the researcher and instrument (McCusker & Gunaydin, 2015; Morse, 2015). Yin (2014) stated that the implementation of rules serves as procedural reminders to keep the researcher focus on permanent data collections. I put the following rules in place in this study to mitigate personal biases and possible creep into data collection. First, the exclusion of any SME operating the field of risk management avoided any personal occupation biases to surface. I also made conscious efforts to ask Level 2 questions. Yin (2014) defined Level 2 questions as those asked of individual cases but not particular interviewees. The avoidance of participant-specific questions mitigated my personal perceptions to influence individual interviewee responses. Thirdly, I maintained competency through neutrality with the mitigation of any incidences of perception creep into the interpretation of findings. A researcher must be able to accept both supportive and contrary evidence to exemplify neutrality (Yin, 2014). The use of member checking also aided me in ensuring the accuracy of the data collected regardless of the impact on findings.

Data collection only commenced after I received approval from the Walden University Institutional Review Board (IRB). The IRB reviews compliance and a researcher's effort to preserve the ethical standards outlined in the *Belmont Report* of (a) respect-for-person, (b) beneficence, and (c) justice (Office of Human Research Protections, 2016). The protocols of the *Belmont Report* are in place to ensure the protection of human subjects in research (Miracle, 2016; Yin, 2014). Care measures

include the procurement of informed consent, avoidance of harm, the protection of privacy, taking additional care with vulnerable groups, and equality in participant selection (Yin, 2014). A justification for the establishment of an interview protocol is to ensure the adherence to the *Belmont Report*. Protocols emphasize primary tasks (Yin, 2014). My key responsibilities for conducting interviews included securing access to SMEs and leaders through available mediums such as phone, the Internet, or social media; obtaining informed consent from the participants; and collaborating with the SME leaders to schedule interviews. In the absence of vulnerable participants, the protocol I used ensured the safety of participants and due diligence in the preservation of the secure information.

### **Participants**

Eligibility criteria for participant inclusion in this qualitative case study included organizational composition and staffing demographics. Michel and Kammerlander stated leaders represent the infrastructure of knowledge and direction in succession planning within their respective organizations. Therefore, I sought SME leaders for participation in the study. The exclusionary criterion I used in this study, as pertinent to organizational composition, was to exclude SMEs solely ran by families. Daspit, Holt, Chrisman, and Long (2016) stated that opportunity in succession planning research lies with the introspection into how an organization develops nonfamily stakeholders for succession planning. SME leaders, with a staff consisting of millennial employees with 3 or more years of employment within the organization, satisfied the proposed threshold of

experience. Seminal work on millennial employee retention has substantiated that voluntary turnover by millennial employees occurs within 2 years of employment (Ertas, 2015; Prestia et al., 2014). My requirement of 3 years or more of work by millennial employees accommodated any variance. Multiple platforms facilitated a means for me to gain access to participants. Professional affiliations, trade publications, and social media afforded a means of identifying and recruiting an appropriate sample. Identification of participants in multiple case studies requires care to identify individuals that will offer both predictive and contrasting results (Yin, 2014). Electronic platforms overcome barriers of accessibility and engagement allowing access to previously difficult groups of possible participants (Swartz et al., 2016).

Once identified, I primarily used electronic communication to establish a working relationship with potential participants. After an indication of interest, potential participants received an electronic message. The electronic message contained (a) an introduction to the project and me; (b) the research question; (c) data management, storage, and confidentiality protocols; and (d) an instruction to indicate consent and willingness to participate. Alternatively, due to possible limited access to online communications by SME leaders, phone conversations, text messages, and traditional mail delivery provided a mirror image of the electronic communication. My intention was to minimize disruption in the participants' daily processes.

My use of SME leaders with tenured millennial employees as participants aligned with the central research question to understand how SME leaders prioritize development



strategies for succession planning in response to an increasing rate of voluntary turnover by millennial. Barnham (2015) noted that when qualitative researchers discover how participants classify and justify actions, the resulting awareness results in an understanding of guidelines and opportunities to add value. Qualitative inquiries and the resulting knowledge are achievable through the permeation into a participant's vantage point (Katz, 2015). Qualitative research requires an awareness of the realities participants' construct and effort on the researcher's part to insert themselves into those realities. SME leaders of familial and nonfamilial staff consisting of millennial employees with 3 or more years of employment were ideal participants because they offered the most relevant and proximate vantage point to answer the central research question.

### **Research Method and Design**

The method and design of a study are the means of linking a research question to conclusions (Yin, 2014). In the following subsections, I will identify both the method and design of the study. The selected methodology and design are the blueprint for answering the posed question of research, establish the relevancy of data and collection methods, and the interpretation of results (Yin, 2014).

#### **Research Method**

In this study, I employed a qualitative method to understand the strategies used by SME leaders to develop millennial employees in succession plans. Qualitative research inquiries are appropriate in efforts to comprehend the collective perceptions and

expectations held by participants about an identified phenomenon or process (Katz, 2015; McCusker & Gunaydin, 2015). A qualitative method is also appropriate when a researcher intends to conceptualize the themes and identify relevant theory from the emerging trends expressed by participants (Morse, 2015). Thus, the integrity of the researcher carries a much greater importance in qualitative studies (McCusker & Gunaydin, 2015). Alternatively, a qualitative method offers an ability to garnish an in-depth and contextual understanding of phenomenon not obtainable through the rigidity of a quantitative method (Yates & Legget, 2016).

Yardley and Bishop (2015) stated that realist concepts are prevalent in quantitative research. Consequently, the realist concepts of prediction and control were an inappropriate approach for this study. A researcher's use of a quantitative methodology is appropriate in the examination of a broad issue through the analysis of variable relationships (McCusker & Gunaydin, 2015; Yates & Leggett, 2016). The variability of plausible millennial development strategies and organizational cultures and the inability to isolate key variables to compare was my basis to exclude quantitative methodology to answer the posed research question.

The exclusion of a quantitative methodology was also my basis to not use of a mixed method. The mixed method requires a researcher to integrate both qualitative and quantitative strategies (Yardley & Bishop, 2016). The exclusions that I previously listed inhibited the feasibility of integration. Additionally, I had limited time and resources for conduction of the study. As Swartz et al. (2016) stated the time and resources required

for a mixed methodology are extensive. Furthermore, McCusker and Gunaydin stated that the risks posed to the depth of inquiry and sample size created by a need for extensive resources and time limitations excluded mixed methodology as the appropriate method to gain a deep and rich understanding of the identified phenomenon. In summation, the need for versatility and subjectivity in my exploration of the millennial employee development strategies SME leaders employ in succession plans aligned with a qualitative methodology and excluded the rigidity of a quantitative methodology and avoided the budgetary and time concerns attributable to a mixed method.

### **Research Design**

I utilized a case study design to answer the posed research question of what strategies SME leaders use to develop millennial employees in succession plans. It is essential that a design not only aligns with the research question but also is congruent with the theoretical context of the research (Corby et al., 2015). A researcher who conducts case studies has an opportunity to explore in-depth a phenomenon defined by a time span, location, and environment (Sangster-Gormley, 2013; Yin, 2014). Sangster-Gormley (2015) stated that case study research is appropriate when attempting to identify, interpret, and link processes to implementation strategies. Thus, a case study design was appropriate to define millennial employee development processes implemented in succession plans by SME leaders.

A multicase study design ensured data saturation. I bound each case to the place in which the phenomenon occurs (Sangster-Gormley, 2013). Yin (2014) stated that a

researcher should consider the replications necessary versus sample size when determining the amount of data required. Case studies pose the greatest difficulty when attempting to classify an appropriate number of cases to ensure saturation (Marshall, Cardon, Poddar, & Renee, 2013). Case studies are difficult because the number of appropriate cases is discretionary (Marshall et al., 2013; Yin, 2014). Marshall et al. (2013) stated an appropriate option is to base judgment on an existing recommendation by qualitative methodologists. For this study, my judgment to collect data from three SMEs aligned with the qualitative methodology recommendations by Yin (2014). Yin stated the completion of two to three allow both the literal and logical replication of results to occur. The intention was to let the collected data dictate the necessity to conduct further replications.

An emphasis on individual experience was the basis of reason to exclude the use of a phenomenological design for the proposed study. A phenomenological design is appropriate in those situations in which a researcher seeks to conceptualize the experiences of an individual in response to specific events (Corby et al., 2015). A phenomenological design requires a researcher to have an inherent reliance on a participant's interpretation of their experience (Corby et al., 2015). In contrast, a case study incorporates participant perspectives in the triangulation of multiple data sources (Sangster-Gormley, 2013; Yin, 2014). Observational documentation substantiated or excluded developmental strategy themes highlighted in the semistructured interviews with SME leaders. For this study, the sole reliance on perceptual data was insufficient

to prove generation developmental strategies in success plans specifically for millennial employees. Thus, the use of a phenomenological design was the inappropriate design to answer the posed research question.

Like a phenomenological design, a narrative design was not the appropriate model for the study. The basis of exclusion was the longitudinal collection and compilation of participant stories (Pizzorno et al., 2014). Secondly, narrative design characteristics are present in case study design. Narrative design requires a researcher to ascertain a participant's experience in the past, present, and make presumptive assessments about the future (Pizzorno et al., 2014). The time requirement and feasibility of such a study exceeded this researcher's capability. Additionally, Yin (2014) stated that narrative evidence is present in a case study research as secondary data. Afforded narratives in a case study are in response to initial responses to protocol questions to further clarification (Yin, 2014). Thus, elements of narrative design are present in case studies that alleviate a necessity to use a narrative design as the primary means of study.

### **Population and Sampling**

The population for this study was three SMEs in southern New Jersey. Geographical and demographic criteria increase the homogeneity of the population (Robinson, 2014). Geographically, the population composed of those SMEs with operations primarily based in southern New Jersey. From a demographic standpoint, the leaders of the three SMEs with nonfamily stakeholders aligned with the objective to identify strategies to develop, retain, and succeed leadership operations to millennial

employees. An exclusionary criterion was the size of the organization. The United States defines SMEs as those organizations who employ less than 500 employees (SBA, 2014). Which made SMEs ideal because any employee development deficiencies in succession planning pose a greater risk to sustainability due to human capital limitations (Masi & Cagno, 2015).

Purposive selection allowed the identification of participants with the highest likelihood of contributory information to the posed research question (Gentles, Charles, Ploegg, & McKibbin, 2015; Yin, 2014). Purposive selection ensures the inclusion of participants that align best with the phenomenon of interest (Robinson, 2014). Selection criteria include (a) nonsolely family ran SMEs, (b) millennial stakeholders identified for leadership succession, and (c) millennial employees with active employment with the organization for at least 3 years. First, nonsolely family operated SMEs offer an opportunity to address a gap in existing succession planning research. Daspit et al. (2016) found that a gap in current succession planning research is on how SMEs develop non-family employees for leadership succession. Second, the absence of millennial leadership development for succession would negate the purpose of the study and not align with the posed research question. Finally, seminal work on millennial employee retention found voluntary separation by millennial employees occurs typically after 2 years (Ertas, 2015; Gursoy et al., 2013). Thus, SMEs with millennial staff with 3 or more years of employment exceeded precedent and served as confirmation of successful retention and developmental strategies in existing succession plans.

The feasibility of access and preference of the willing participants dictated the setting in which interviews occurred. Primary efforts focused on conducting interviews in areas driven by the participant's comfort. The establishment of interpersonal connections with participants was a necessity, as the need to follow up did present itself (Yates & Leggett, 2016). Face-to-face exchanges were ideal to establish a rapport, develop trust, and allow people to be more inclined to provide unsolicited information (Robinson, 2014). However, accessibility and privacy restraints may have inhibited the conduction of interviews on a participant's premises (Yin, 2014). Thus, in some situations, I had to employ alternative mediums and or settings options that included phone and Internet-based communications.

Population sampling and data saturation in qualitative work are discretionary in comparison to quantitative work (Palinkas et al., 2015; Yin, 2014). Qualitative research relies on the established or agreed upon methodology practices to obtain data saturation (Palinkas, Green, & Duan, 2015). Data saturation occurred when the depth of information collected resulted in no additional insight into the desired phenomenon (Fusch & Ness, 2015; Palinkas et al., 2015). The three SME leaders satisfied an assumption based on methodologist recommendations in that two to three cases would have been a sufficient sample size to obtain data saturation.

### **Ethical Research**

Research involving the analysis and dissemination of human perspectives requires a careful consideration of ethical practices (Yin, 2014). The Walden University IRB was

the institutional body that ensured recognition and addressment of such ethical consideration in this study. The approval number of 06-09-17-0580435 exemplified affirmation of Walden IRB approval of the study. Additionally, The National Institutes of Health conferred a satisfactory completion certificate to me for training on the protection of human participants on November 07, 2015. The following ethical considerations warranted endorsement and the procedural compliance with the requirements set by the Walden Universities IRB.

Persons meeting purposive sampling criteria that expressed an interest in participating in the study needed to provide informed consent to participate voluntarily. Informed consent protects participants by disclosing the purpose of the study, privacy and confidentiality efforts, and equitability to ensure participants understood their ability to change their decision to participate at any time (Yin, 2014). Consent by a participant acknowledged an understanding of the subject and information requested, that participation is voluntary and that the participant could make their own decisions (Connelly, 2014). The continuous reiteration of issues relative to informed consent throughout out the research process aided in the establishment of trust and affirm the participant's choice to participate in the study (Petrova, Dewing, & Camilleri, 2016). Also, based on the research question, the need to solicit any vulnerable groups was not present.

Participants had to be cognizant that they could withdraw from the study at any time (Connelly, 2014). Members may have expressed an interest to remove the inclusion



of their data multiple ways. Had a participant expressed a desire to withdraw they could have communicated their request verbally via in-person, over the phone, or through other available electronic media including but not limited to the Internet, social media, or e-mail. I had intended to make an effort to maintain relationships in the event of withdrawing participants (Ball et al., 2014). Thus, had those members requested withdrawals they would have received a formal written acknowledgment of withdrawal and the confirmation of the removal of data from databases. Petrova et al. (2016) stated a similar action in how special accommodations including written correspondence served to support a participant's choice to withdraw free from fear of reprimand.

The use of an incentive to participate was an important ethical consideration. A primary benefit of an incentive is an increased motivation by participants to take part in a study (Robinson, 2014). In contrast, a risk is the increased motivation to falsify information in an interview just to obtain the incentive (Robinson, 2014). Thus, to avoid the collection of fabricated data, any SME leadership solicitation efforts occurred in the absence of any stimulus. The omission of an incentive and the affirmation of a researcher's confidence in the ability to obtain the desired participant pool was the ideal solicitation method in qualitative research (Robinson, 2014).

The protection of a participant's privacy is at the center of ethical considerations (Morse & Coulehan, 2015). The fundamental necessity of qualitative research is to instill the values associated with confidentiality. Petrova et al. (2016) noted that the preservation of participant confidentiality requires a researcher to put forth an effort to

exemplify self-governance, concealment, and nurture trust. A pertinent act of self-governance includes storing and safeguarding acquired data for at least 5 years. The anonymity of participant information is not obtainable in a qualitative study (Petrova et al., 2016). Also, the predominant use of small samples in qualitative studies may help individuals identify participant's process of elimination (Morse & Coulehan, 2015). To promote concealment, this researcher omitted any non-essential participant details in the study including demographics. I categorized and coded SME leaders as group units, i.e., C1, C2, and C3 respectively versus individualization. The categorization of participants minimizes any foreseeable risk of harm (Petrova et al., 2016). Thus, data records omit the names of the people or the name of their respective organization. Through encryption of pertinent information with the coding system I successfully removed any gender or other possible identifiers. Finally, a visible commitment to participant protection is the basis on which to establish trust. In qualitative research, the only guarantee is that a researcher will be proactive in protecting the confidentiality of participants (Petrova et al., 2016).

### **Data Collection Instruments**

Yin (2014) noted that individual researchers are the principal instrument to collect data in qualitative case studies. Thus, I was the primary data collection instrument in this multi-case qualitative study on the millennial employment development strategies employed by SME leaders in succession plans. The effectiveness of the humanistic tool depends on an ability to capture the subjective meanings participants offer about the

identified phenomenon (McCusker & Gunaydin, 2015). The conduction of semistructured interviews of SME leaders increased my ability to capture the subjective descriptions the leaders offered regarding millennial development strategies in succession plans. Semistructured interviews provide greater concentration on key areas of concern with the use of a formal interview protocol (Petrova et al., 2016). The interview protocol of the proposed study is in Appendix A.

Secondary data collection instruments included observations and documentation (Yates & Leggett, 2016; Yin 2014). The richness of collection is dependent on the appropriateness of data collection tools (Morse, 2015). Both observational notes composed during interviews and available documentation were the appropriate secondary collection instrument to coincide with interviews with SME leaders. Observational data allowed the instantaneous capture of actions or nonverbal expressions during interviews (Nguyen, 2014; Yin, 2014). Documentation, though inconsistent, are readily available using the internet and social media applications (Yin, 2014). The utilization of multiple methods enables an ability to triangulate findings (Yates & Leggett, 2016).

Triangulation and member checking enhanced the reliability and validity of the employed research instruments. The employment of multiple data collection, as in triangulation, increases the thoroughness of the data and strengthens the findings (Morse, 2015; Yin, 2014). Triangulation enhances the accuracy in which the participants' attitude is captured (Yin, 2014). Triangulation enables a researcher to obtain divergent perspectives regarding a unique phenomenon from multiple members (Boblin, Ireland,

Kirkpatrick, & Robertson, 2013; Morse, 2015). Thus, I used the triangulation of multiple resources including interviews, observations, and public documentation of the SMEs to strengthen the validity of the study. Alternatively, member checking increased the credibility of data by involving participants in the clarification and transcription of the collected data (Birt, Scott, Cavers, Campbell, & Walter, 2016). Member checking covers a broad range of activities including the return of transcripts, scripted follow-up interviews or independent review by focus groups (Birt et al., 2016). For this study, member checking defined my intention to return the interview transcripts to participants to increase the reliability of the interpretations.

### **Data Collection Technique**

The collection of data in qualitative study occurs not in the vacuum of a controlled laboratory but the environments of a personal participant (Yin, 2014). Additionally, the successful collection of data can be hit and miss initially (Morse, 2015). The primary data collection techniques of this study were interviews conducted in the respective environments of South Jersey SME leaders. A principle task is to secure authorization and accessibility to participants through the proper channels (Robinson, 2014). For each case, I solicited interviews through gatekeepers. Robinson (2014) defined gatekeepers as individuals who can serve as your endorser to actively help advertise the study and encourage leaders to participate. The intention was for gatekeepers such as employees, social media networking connections, or close associates to connect me with SME leaders. Initial efforts that utilized social media were

unsuccessful. However, personal networking connections served as endorsers to open communications with the three leaders of SMEs in southern Jersey.

Boblin et al. (2015) employed a similar data technique to overcome credibility obstacles and secure in-depth data. The conduction of interviews can identify those individuals possessing the desired knowledge (Boblin et al., 2015; Morse, 2015). Purposive selection protocols ensure participants align with the overall objective of the proposed study (Robinson, 2014). Thus, after establishing a connection with three SMEs leaders, I forward a solicitation e-mail which asked qualifying questions as listed in the interview protocols (Appendix B) in addition to instructions to afford informed consent. The questions posed contained the following three criteria. First, confirmation that the individual organization met the definition of a SME. Second, confirmed that the company currently employs millennial staff members with at least 3 years of tenure. Third, confirmed that the identified individual has authority and influence in the selection of employee development and succession planning strategic initiatives.

The use of purposive selection and semistructured interviews in data collection had disadvantages and advantages. A disadvantage of purposeful interview selection is the possibility of self-selection bias as voluntary participation is at the core of data collection (Robinson, 2014). Small to medium leaders of leadership groups may have affirmed qualifications to ensure representation in the study. In contrast, an advantage of purposive interview selection is the ability to narrow or diminish the degree of differences between each case participant (Palinkas et al., 2015). Purposive interview

selection was to help ensure that I was not wasting limited resources by conducting interviews with inapplicable participants. Disadvantages of qualitative interviews are participant deficiencies in recalling and constructively relaying their perspective about the identified phenomenon (Sorsa, Kiikkala & Astedt-Kurki, 2015; Yin, 2014). As the researcher, I needed to be careful that requests for clarification did not lead SME leaders to the desired response. Alternatively, an advantage of qualitative interviews is that they capture and frame a phenomenon through those present when they occur (Sangster-Gormley, 2013). Also, interviews are important in qualitative case study research (Yin, 2014). Thus, the conduction of interviews with SME leaders was key for the selected methodology and was the ideal manner to capture data to answer the posed research question.

Traditional member checking gives participants an opportunity to review and edit collected data independently (Kornbluh, 2015). Participant involvement in data collection mitigates possible researcher bias (Birt et al., 2016). The underlying basis for using member checking is the establishment of trust between the participant and researcher (Kornbluh, 2015; Birt et al., 2016). The establishment of trust fosters a balanced relationship between the researcher and participant which and helps build an openness in participants through the assurance of confidentiality (Petrova et al., 2016). I used member checking to avoid biases in transcription. Also, to protect participants and offer reassurances that the only recorded and reported data used in the proposed study had their approval.

### **Data Organization Technique**

Microsoft software applications and computer-assisted qualitative data analysis software (CAQDAS) are to be the infrastructure for organizing data. Thus, I created a case study database. Yin (2014) defined a case study database as a methodology to separate and store raw data for examination of research conclusions. The case study database utilized word processing tools or CAQDAS to prevent the commingling of data and the preservation of findings (Yates & Leggett, 2016; Yin, 2014). Qualitative data analysis software consists of a broad range of utilities to record, display, and analyze data (Paulus, Woods, Atkins, & Macklin, 2017). A case study database can be unrefined and consists of field notes, tabular materials, narrative compilations, and documents (Yin, 2014). Thus, Microsoft Excel and Word did serve to store preliminary information. The primary intention of a case study database is to preserve data and increase the reliability of conclusions (Yin, 2014). The availability of data and ability for participants to review data enhances the validity of data (Yates & Leggett, 2016). Per Walden University requirements, I will keep all data a term of no less than 5 years. Thus, an encrypted external hard drive stored in a locked personal safe will protect the confidentiality of participant information and prevent corruption or destruction of collected data.

### **Data Analysis**

The appropriate data analysis process for the proposed qualitative multi-case study was methodological triangulation. The term triangulation is associated with the use of multiple data sources to conclude (Boblin et al., 2013; Yin, 2014). Yin (2014) stated

that methodological triangulation increases the creditability of results through the corroboration of multiple data sources. Furthermore, Fusch and Ness (2015) indicated that triangulation has a high correlation with data saturation. Boblin et al. (2013) utilized triangulation in their seminal work on the implementation of best practice guidelines. Thus, I used methodological triangulation to corroborate data obtained from recorded semistructured interviews, direct observations, and public SME documentation.

The analysis process was as follows. First, with the permission of participants,' a digital audio recorder captured the semistructured interviews. Informed consent to record the interview substantiates the awareness a participant has of the study and intended use of the data (Yin, 2014). Second, dictation software and a computer facilitated the transcription of the interviews. Third, participants received a copy of the transcribed conversations for member checking. Member checking enhances the creditability of the transcript and quality of the data (Birt et al., 2016; Boblin et al., 2013). Fourth, I consolidate all data from field notes, observational notes, and organizational documentation into a Microsoft Word document. Fifth, I created tentative conclusions for each interview question. The conclusions were the basis of preliminary coding. Sixth, I entered all data including the interviews, the consolidated triangulation data, and coding into the available version of NVivo at the time of study.

NVivo and other CAQDAS help researchers analyze substantial amounts of evidence (Yin, 2014). I started the analysis with manipulation of NVivo data. Yin (2014) recommended playing with data as a useful starting point in case study analysis.



The focuses of the review were to examine plausible rival explanations for millennial employment development decisions in succession plans. Key themes correlated with the concepts posed in the unfolding model of turnover and expectancy theory. The use of rival theoretical explanations is a form of pattern matching. Pattern matching offered an empirical means to compare the results (Yin, 2014). Opposing variable pattern matching required operational definition of theoretical positions (Yin, 2014). Thus, I intend to organize results based on controlling shocks as posed in the unfolding model of voluntary turnover or the application of motivational force as rose in the expectancy theory. The themes pertinent to categorization as a shock include any millennial development intended to prevent disruption an employee's sense of status quo and the consideration of voluntary turnover (Brewer et al., 2015; Holtom et al., 2005). Alternatively, themes pertinent to categorization as a motivational force include any data that conceptually align with components of the expectancy equation of expectancy, instrumentality, and valence (Ghoddousi et al., 2014). I intend to treat shock mitigation and motivational force themes as independent and mutually exclusive variables. While the human capital theory encompassed the identification of dependent variables, which include organizational leaders' perceptions on employee development and its influence on their respective labor mobility, turnover, and employee development risks (Bae & Patterson, 2014). The intention is to identify millennial development strategies laden with shock mitigation or motivational forces are more evident in successful SME succession plans.

## **Reliability and Validity**

### **Reliability**

Yin (2014) defined reliability as the dependability of the actions chosen in a case study. I used triangulation, member checking, and CAQDAS to address dependability. Triangulation exemplifies efforts to explore the phenomenon from multiple perspectives and levels (Fusch & Ness, 2015; Yin, 2014). The collections and collaboration of multiple sources of data increase the richness of the findings (Boblin et al., 2013). Alternatively, the process of member checking is a reflective process whereby participants can further develop the dependability of initially captured data (Birt et al., 2016). Both triangulation and member checking increase dependability by enabling a researcher to incorporate and capture the fluidity of perceptions at different intervals (Birt et al., 2016). Alternatively, the use of CAQDAS increases dependability through increased accessibility and availability of data for inspection of data by other persons (Yin, 2014). Thus, triangulating data from member checked interview transcripts, observations, and documentation increased the richness of the data about the millennial employee development strategies SME leaders are using in success plans while the imputation of the data into NVivo enhanced the reliability of data. Collaboratively, the actions addressed the dependability of the study and associated findings.

### **Validity**

The validity of qualitative studies is the ability of a researcher to capture and signify the spirit of the phenomenon (Morse, 2015; Yin, 2014). The research itself is a

challenging and systemic endeavor that intends to frame an event and test concepts (McCusker et al., 2015). The constructs of validity in a qualitative study are (a) the establishment of credibility, (b) identification of the transferability of the study, (c) and creation of conformability with the assurance of data saturation. The following sections define and describe how I addressed each construct in the study.

**Credibility.** The level of rigor exemplified by a researcher in qualitative research determines the credibility of finding (Morse, 2015). The basis is that rigor is how external evaluators assess the value of the research and findings (Morse, 2015). I used triangulation and member checking to exemplify my efforts to establish rigor and thus credibility. Yin (2014) stated that data triangulation increases credibility through the convergence of multiple sources of evidence. Alternatively, member checking improves the accuracy and confirms the credibility of the collected data (Birt et al., 2016; Boblin et al., 2013). Thus, the consolidation of data gathered in semistructured interviews and member checking with the three SME leaders, observational notes, and documents ensured the thoroughness of efforts to meet the assumed expectations of external evaluators regarding the identification of successful employee development strategies of millennial employees implemented by SME leaders in succession plans.

**Transferability.** Transferability supersedes the need to replicate research, as replication of a study is unnecessary in qualitative inquiry (Morse, 2015). Thus, transferability is synonymous with external validity as both terms describe the application of finding to situations not posed in the initial study (Yin, 2014). I used triangulation and

member checking to address transferability by a reader and future researcher.

Triangulation broadens the range and breadth through the consolidation of multiple and variable data sets (Morse, 2015). Alternatively, member checking is essential in the establishment of trustworthiness and helps buffer the transference of finding against difficulties and criticisms (Kornbluh, 2015). Triangulation and member checking of data from semistructured interviews conducted in multiple nonindustry specific case studies were to increase the range and breadth of the application by readers to apply identified successful millennial employee development strategies in SME succession plans.

**Confirmability.** Confirmability is like credibility in that researchers are required to show a connection between findings and results (Moon, Brewer, Januchowski-Harley, Adams, & Blackman, 2016). Confirmability occurs when a studies approach indicates a researcher's position (Moon et al., 2016). Moreover, that researcher's use the appropriate constructs for the identified phenomenon (Yin, 2014). Thus, the focus of confirmability efforts is to ensure that proposed plans align with event specific measures (Yin, 2014). The collection of data from multiple sources is a means establish precious data that in turn can confirm findings (Boblin et al., 2013). Especially since the design of qualitative studies are not universal and the presence of a one-size-fits-all method is nonexistent (Fusch & Ness, 2015). The use of a multicase study design was the appropriate methodology to create a rich source of information in which to infer conclusions. Moreover, the use of probing questions helps readers acknowledge the obtainment of data saturation (Fusch & Ness, 2015). I structured semistructured interviews with SME

leaders with the goal that each participant would answer comparable questions. Additionally, Fusch and Ness (2015) linked data saturation to the triangulation of information from multiple sources. Thus, the conduction of semi-structured interviews addressed confirmability while the triangulation of information from the interviews, observational notes, and organizational document ensured data saturation.

### **Transition and Summary**

In Section 2, I put forth an effort to establish credence to the methodology employed to explore strategies used in the development of millennial employees for succession planning by SME leaders. A qualitative method and multiple case study design were the appropriate means to obtain data to answer the central research question. Purposive selection within the population of SME leaders of not solely familial ran SMEs, with millennial stakeholders identified for leadership succession, and millennial employees with active employment with the organization for at least 3 years were the desired sample. Triangulation and member checking of data from semistructured interviews, preferably face-to-face, observational notations, and company documentation were to ensure the validity and reliability of the data. I used the CAQDAS NVivo to help organize and analyze collected data. Section 3 summarizes the findings from the project above and notes possible implication for identified strategies in the development of millennial employee in succession planning by SME leaders. Future research and the limitations of the study warranted a discussion in Section 3.

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

#### **Introduction**

The purpose of this qualitative multiple case study was to explore millennial employee development strategies applied by SME leaders to remain sustainable. I developed 8 interview questions as the basis of inquiry to answer the central research question of this study. My semistructured interviews of three SME leaders in southern New Jersey garnered four relevant themes for successful succession planning through millennial employee development: (a) flexibility, (b) organic culture, (c) self-governance, and (d) laissez-faire leadership.

The centrality of issues were leadership efforts to minimize disruptions in millennial employee efforts to maintain a work-life balance. Based on the conceptual framework of this study, I found that mitigation of shocks, pertinent to Lee and Mitchell's (1994) unfolding model of voluntary turnover, is attributable to the high rate of millennial retention ideal for operational and leadership succession exhibited in each case. Alternatively, an individual could argue that leadership mitigation efforts could occur through the exertion of motivational force as theorized in Vroom's (1964) expectancy theory. However, the predominance of laissez-faire leadership sentiment was the basis of alignment with unfolding model of voluntary turnover as the best end of the spectrum to mitigate the trend of increased voluntary turnover by millennial employees.

In this section, I will present my findings. Section 3 will also contain information pertinent to the application of the findings to professional practice and social change.

Section 3 will conclude with my recommendations for future research, reflections, and conclusions.

### **Presentation of the Findings**

The overarching research question for this study was: What millennial employee development strategies do SME leaders employ to remain sustainable? Secondary to the research question was the question: What is the underlying employee development methodology used by SME leaders to retain young talent? My triangulation of SME leader participant responses in semistructured interviews, observational data, and public documentation highlighted four themes congruent with the central and secondary questions. The identified themes enabled my conceptualization of their relevancy to the conceptual framework of the study as Lee and Mitchell's (1994) unfolding model of voluntary turnover and Vroom's (1964) expectancy theory concepts and the individualistic nature of voluntary turnover pertinent in this study of employee development. I applied Becker's human capital theory concepts (Bae & Patterson, 2014) to the organizational effort to invest in the development of future organizational leaders. In the following subsections, I will elaborate on the identified themes of (a) flexibility, (b) organic culture, (c) self-governance, and (d) laissez-faire leadership with a discussion on how they confirm, disconfirm, or extend knowledge through comparative findings and their alignment with the conceptual framework of this study.

### Theme 1: Flexibility

The theme of flexibility encompassed any connotation by the SME leaders regarding efforts to minimize micromanagement. Rodriguez and Rodriguez (2015) noted that millennials exhibit a diminished respect for hierarchal structures. Stewart, Oliver, Cravens, and Oishi (2017) corroborated this notion in their new study by finding that millennials exhibited cultural workplace values and commitment ideologies that contrasted with those of older employees. The results of this study confirmed the necessity of flexibility as shown in the direct quotations presented in following table.

Table 2

#### *Theme 1: Flexibility*

Case	Comment
C1	They don't seem or want to tolerate a lot of rules and regulation
C2	We do not push our employees hard. They work 8-hour days and if we can get 5 productive hours of work it is a good day
C3	I give them an opportunity to work part time, with decent income, and a flexible schedule

Flexibility aligns with the mitigative necessity to control shocks categorized by Lee and Mitchell's (1994) unfolding model of voluntary turnover. Shocks force an employee to reconsider current organizational commitments (Davis et al., 2015). The highlighted comments demonstrate that the SMEs leaders are cognizant that any rigidity in development or oversight may increase the incidence of voluntary separation by millennial employees. Also, that greater flexibility offers a fair return for an increased commitment by millennial employees. Fair return, as categorized by the human capital



theory, offers the byproducts of increased motivation, productivity, cooperation, and employee utility (Rahman & Nas, 2013; Sweetland, 2016).

Observational data I collected also supported the prevalence of flexibility. In both C2 and C3, I observed that millennial employees in various roles experienced a minimal or insignificant amount of direction from managers. In C2, I observed unsupervised millennial employees due to the nature of operations. My observations affirmed the connotations that millennials develop best in less hierarchical structures on the basis that when provided flexibility in expectations, these employees exhibit an increased motivation to stay and be productive.

## **Theme 2: Organic Culture**

The theme of organic culture categorized any reference to uninhibited development. Mitchell et al. (2014) noted that the pertinent issue regarding voluntary turnover was perceived violations of personal images. Weber (2017) validated seminal work on millennial values in finding that millennials emphasize a value orientation toward personal competence. The direct quotations presented in following table confirm a millennial development preference for an organic or freeform culture.

Table 3

*Theme 2: Organic Culture*

Case	Comment
C1	I think if you make a happy friendly atmosphere in the work place it seems to entice them to want to stay
C2	We allow the employees to adjust efforts without the fear of reprimand depending on the task or environment
C3	The environment is purposely structured to allow flexibility, freedom, and creative liberties to keep them interested in staying

Environmental and cultural millennial development strategies align with both the conceptual framework of the expectancy theory and the unfolding model of voluntary turnover. The modification or lack of rigid organization culture as shown in the highlighted comments by SME leaders addresses job embeddedness and burnout. As Chan et al. (2015) found, burnout accounted for 40% of voluntary separation by millennial employees in their initial year of employment. Burnout, the byproduct of depersonalization and emotional exhaustion (Candan, 2016; Chan et al., 2016), is pertinent in the expectancy quotient of the motivational force equation and Paths 4 and 4a of the unfolding model of voluntary turnover. An SME leader's efforts to be cognizant of millennial employees' susceptibility to burnout, foster work engagement, and increase millennial employee perceptions of belonging proved the need for organizational leaders to continually self-evaluate the promotion and level of employee engagement in current strategies (Takawira et al., 2014).

Public documentation and my observations validated efforts by SME leaders to foster organic organization culture. The webpage for C2 stated that operations intended to offer an environment in which “people can hang out, study, meet a friend, or hold small meetings.” The comprehensive strategic initiative translated into a similar working environment. The organization offered a broad spectrum of personal innovation and collaboration. The culture showed minimal stagnation or depersonalization through the exuberance of creativity. It was as though each employee held ownership in some aspect of the experience, and thus, mitigating burnout and fostering employee engagement to garner a prominent level of retention. In confirmation of the culture’s effectiveness in millennial employee retention, C2 stated they have had only one millennial employee leave within 2years while in operation.

### **Theme 3: Self-Governance**

The theme of self-governance encompassed any connotation regarding the enablement of millennial employees to direct their development. Self-governance aligns with the concept of TM. TM for succession planning and sustainability was defined as any strategic initiatives to develop a human capital infrastructure (Collings, 2014; Festing & Shafer, 2014). Stewart et al. (2017) verified the need for managers to be cognizant of their human millennial capital in that leaders need to consider modifications to workplace culture and performance reviews to increase retention. Moreover, leaders need to consider changes that enable millennial employees to thrive and link personal

contributions to greater organizations objectives (Stewart et al., 2017). The comments by the SME leaders highlighted in the following table validate existent knowledge.

Table 4

*Theme 3: Self-Governance*

Case	Comment
C1	They automatically know what to do without anyone having to commanded them to do anything. That they take it upon themselves to do it. Or if there is a situation, instead of coming to me, they figure it out themselves
C2	We are constantly noticing millennial employees on their phones. This is an issue if it is distracting them from doing their job. But, sometimes it is an advantage, because the employees have access to information to help trouble shoot difficult tasks
C3	Employees progress into their own leadership roles as they are here because over time they become senior employees and in turn train Junior employees. Basically, the employees seem to form their own hierarchy.

Like organic culture, the ability for millennial employees to direct their development through self-governance aligns with both conceptual framework theories. Both the unfolding model of voluntary turnover and expectancy theory serve as the spectrums of cognitive considerations and behavior intentions of millennial employees as it relates to voluntary separation and organizational efforts to invest in the development of future leaders in succession plans. First, the use of an individual's self-perceptions to govern organizational buy-in places them at the forefront of mitigating applicable shocks to the current status quo. The millennial employees themselves versus management are overseeing initiating events, behavioral responses, and psychological constructs at the center of Lee and Mitchell's (1994) unfolding theory of voluntary turnover (Mitchell, Burch, & Lee, 2014). Second, self-efficacy enables the capture of the individual's

assessment of success, the efforts necessary for success, and the attractiveness of rewards which accompany success that are the primary constructs of motivational force conceptualized in the expectancy theory (Purvis et al., 2015.) However, in consideration of the central research question, self-governance, as conceptualized by the SME leaders as an effective business practice, carries greater relevance to the notion of mitigation of shocks versus the exertion of motivational force.

The limited human capital commonly associated with SMEs offered a convergence between the connotations regarding self-governance and unsolicited contributions by the SME leaders. C1 stated that self-governance is a necessity due to the predominance of duties and obligations that result in an inability to oversee operations. I could validate the scarcity of availability for C1 in the difficulty I experienced in securing a convenient time to conduct the interview. C2 confirmed the criticality of human capital, the ability of an individual to self-govern their actions, and the impact of operations when they shared a recent event where while on vacation, a millennial employee provided notice yet they did not fulfill the 2-week commitment requiring the leader to cut a holiday short. The story endorsed the notion that when SME leaders empower millennial employees to govern their actions, it can result in both beneficial and adverse consequences for development and succession planning.

#### **Theme 4: Laissez-Faire Leadership**

The theme of laissez-faire leadership included any connotation by SMEs leaders regarding passive leadership, the minimization of stressors, and avoidance of conflict.

Laissez-faire leaders work in whatever boundaries an organization's culture dictates (Faiz, Su, Ikran, & Saqib, 2017). Such adaptability is pertinent because leaders need to align both the short-term utility development expectations and long-term work-life developmental expectations held by millennials (Winter & Jackson, 2015). Faiz et al. (2017) found that laissez-faire leadership and efforts to minimize disruptions had a significant impact on employee motivation. Also, Faiz et al. noted a positive correlation between a laissez-faire leadership, increases in employee morale, and improved efficiency. The findings of this study support the positive correlation as shown in the following table.

Table 5

*Theme 4: Laissez-Faire Leadership*

Case	Comment
C1	Everybody needs to do things their own way. If you must tell them step by step it increases the aggravation. If the job gets finished, it should not matter what order or what way they do it if the job gets done. So, a happy workplace is one where we do not put so much stress on employees.
C2	With millennial employees, they seem more open to deviations from their schedule, for example, older employee look to leave right at the end of their shift where a millennial employee may be willing to take on an additional task that could result in working longer
C3	We encourage our employees to think like entrepreneurs which has proven to be very effective. I know at least two prior employees who will be great entrepreneurs. I think that if the employees were to be micro managed, I would not have the success in keeping the employees for as long as I do

From a developmental and business practice perspective, the notion of a laissez-faire leadership is counter intuitive. Seminal work on laissez-faire leadership and employee development note that employee development is not a concern for laissez-faire as laissez-faire leaders believe employees can be self-sufficient (Fiaz et al., 2017; Wong

& Giessner, 2015). However, as evidenced by the SME leaders, millennial values are central to strategic developmental initiatives. A millennial employee's need for value, a sense of belonging, and challenge continuously disrupts the status quo and drives innovative strategic thinking (Aruna & Anitha, 2015; Rodrigues & Rodriguez 2015.) Thus, the minimalist leadership as shown in findings is an appropriate means to increase job embeddedness. Job embeddedness, which is central, to the mitigative concepts identified in Mitchel and Lee's unfolding model of voluntary turnover.

Theoretical triangulation or perspectives observed about the theme of laissez-faire arose from the mission statement published on the website for C2. The mission of C2, is to offer a place to linger, to gather, to connect. I perceived this mission as a core strategic initiative in the development of millennial employees for succession planning. C2 validated the perception when they stated that employment in their industry is circular. That based on the nature of operations, location, and passive leadership millennial employees gravitate to seeking employment with them versus other establishments in the area. Thus, employee development, human capital management, and succession occur naturally with little disruption to high employee morale and minimal managerial intervention.

### **Applications to Professional Practice**

The underlining themes of the study findings in collaboration with the conceptual framework and confirmation that a greater population of SMEs may lack formal succession plans, and the triangulation of data with observational data and public

documentation are the basis of why and how the findings are relevant to improving business practices. First, the conduction of the study in a nonindustry specific environment and resultant themes of (a) flexibility, (b) organic culture, (c) self-governance, and (d) laissez-faire leadership promote the analytical generalization of findings. Yin (2014) defined analytical generalizations as those instances in which the findings may have inferences relevant to similar cases but also extend to those outside of the delimitations of the study. As the number of millennial employees increases in the workforce, not only SME leaders may benefit from an introspection of how leaders are balancing developmental initiatives with millennial work-to-live expectancies. Specifically, how leaders that place a prominent level of accountability on millennial employees will neutralize the adverse effects caused by a sense of entitlement (Liard et al., 2015).

Second, the mitigative qualities of the themes address the shocks and associated cognitive pathways conceptualized by Lee and Mitchell's unfolding model of voluntary turnover. Also, the increase the economic value of development imagined in the human capital theory. When combined, the conceptual approaches of this study and the findings offer other SME leaders a working hypothesis on millennial development to increase returns on millennial employee development investments. The findings are not exclusionary of the expectancy theory. However, biproducts of developmental investment to mitigate shocks and the retain millennial employees for succession include objectives central the expectancy theory motivational force equation. Biproducts of



developmental investment include increased motivation, productivity, cooperation, and employee utility (Rahman & Nas, 2013; Sweetland, 2016) through evidence of increased motivation, productivity, cooperation, and employee service (Rahman & Nas, 2013; Sweetland, 2016).

Third, the study results are a confirmation that SME leaders lack formal succession plans. Seminal work on SME sustainability found that the greatest threat to SME sustainability was a lack of formal succession plan (Abdullah et al., 2014; Benavidas-Velasco, Quintana-Garcia, & Guzman-Parra, 2013). Instead of a formal succession plan, the SME leaders studied had been successful in the long-term development and retention of millennial employees. Thus, I infer that the data collected in semistructured interview triangulated with observational data and public documentations produced findings that have addressed the central research question: What millennial employee development strategies do SME leaders employ to remain sustainable and apply to any SME with or without formal succession initiatives.

### **Implications for Social Change**

The use of study findings by leaders offer a tangible opportunity to improve societal perspectives held by leaders of millennial individuals. As individuals, seminal work found millennial employees perceived as a volatile, uncertain, complex, and an obscure group that presents a challenge for future societal leadership (Aruna & Anitha, 2015; Rodriguez & Rodriguez, 2015). The holistic minimization of micromanagement, as implicated by the findings, offer introspective into navigating leadership of the

growing presence in the workforce and society. Through a broadened perspective on millennial employees and associated development and leadership strategies, future societal leaders may alter preconceived stigmas caused by ambiguity regarding the generational of individuals.

The use of study findings by communities offer a tangible opportunity to broaden their knowledge of millennial employee expectations to minimize conflicts. Millennials employees have a sense of entitlement (Liard et al., 2015) which result in a preference for ease of accessibility and clarity of communication (Rodriquez & Rodriguez, 2015) within communities. Such expectations by millennial employees can cause discourse. The study findings are a confirmation of a need for less rigid nurturement. Thus, if communities place less emphasis on control, it may minimize conflict. Which affirms that if communities create greater accountability opportunities for millennial employees, it will neutralize the adverse effects caused by a sense of entitlement (Liard et al., 2015).

### **Recommendations for Action**

A succession plan makes sure that the necessary knowledge and resources remain after critical employees leave (Ghandi & Kumar, 2014). The purpose of this qualitative multiple case study was to explore millennial employee development strategies applied by SME leaders to remain sustainable. The four identified themes of (a) flexibility, (b) organic culture, (c) self-governance, and (d) laissez-faire leadership are the basis of five action recommendations for SME leaders. The intention is that the dissemination of results and the following recommendations for actions will occur through the publication

of this literature and training as the development of millennial employees and associated concerns of sustainability and succession come to the forefront of importance in the coming years.

First, cognizant SME leaders understand the need for flexibility in their development initiatives. Emphasis on hierarchy in employee development may be the proximal cause of shock resulting in a millennial employees' voluntary separation from the organization. As millennials exhibit a diminished respect for hierarchal structures (Rodriguez & Rodriguez, 2015). Thus, SME leaders should show flexibility in developmental relationships to foster fair return and increased commitment by millennial employees.

Second, the ideal organizational culture for the promulgation of millennial development and retention is organic. SME leaders should encourage a value orientation toward personal competence. Odenweller, Booth-Butterfield, and Weber (2015) found that the inundation of hovering parent nurturement was a detriment to millennial employees' abilities in decision making and critical thinking. As a result, SME leaders need to abstain from further instances of depersonalization to minimize burnout. Also, to enable the latitude for self-development by millennial employees to foster into increased job embeddedness.

Like the action recommendations regarding organizational culture, the third recommendation for action is that SME leaders need to develop a greater opportunity for accountability in development strategies for millennial employees through self-

governance. The better fit between the standards held by millennial employees and those occupied by the organization the higher organizational commitment by the employees (DeConink, 2014; Kim et al. 2015). Those jobs that demand high competency with tasks which require millennials to be vigilant create the emotional stability necessary to mitigate voluntary separation from the organization (Holtom et al., 2014). Hence, SME leaders should allow millennial employees to govern themselves during their respective development. A byproduct of which shall be higher organization commitment and ease in retention.

Recommendations for action would be incomplete without a discussion regarding leadership. The fourth recommendation for action is for SME leaders to adopt attributes associated with laissez-faire leadership. *Laissez-faire* leadership offers a passivity to minimize disruptions to a millennial employees' efforts to maintain a work-life balance. Millennial employee efforts to maintain a work-life balance align with what Anderson et al. (2017) categorized as the embodiment of the phrase "work smarter, not harder." Encroachment by an SME leader into a millennial employees' development initiatives may have adverse reactions to employee commitment. Thus, SME leaders must navigate the thin threshold between active and passive leadership.

The fifth recommendation for action was the necessity of succession planning to shift from theory to action by SME leaders. The findings affirmed that some SME leaders lack succession plans (Abdullah et al., 2014), even though succession planning is crucial to business continuity (Gilding, Gregory, & Cosson, 2015). The SME leaders

interviewed acknowledge the importance of succession planning yet despite proven effectiveness in the development and retention of millennial employees lacked formal, documented, and referenceable plans. As a result, SME leaders should use the identified strategies as the basis on which to develop millennial employee development driven succession plans for their respective organizations.

### **Recommendations for Further Research**

Future research could expand on the findings or address the limitations of this qualitative case study to further improvement by SME leaders in the development of millennial employees and succession planning. The four themes presented in finding (a) flexibility, (b) organic culture, (c) self-governance, and (d) laissez-faire leadership provide a starting point for broadened knowledge of each. Future research may seek to confirm, dispute, or disseminate the relevancy of each strategy in millennial development and succession planning by other populations including corporations. Also, future research may want to utilize the qualitative findings of this study as the foundation to develop a quantitative instrument to quantify the relevance of each identified theme.

Limitations of this study that future research may address include (a) geographical location, (b) industry generalization, and (c) research design. Research and data collection consisted of three cases in southern New Jersey. Future research may seek to validate, dispute, or further findings through the replication of the study in an alternate geographical location. Also, the three cases were demographically and operationally different. Future research may want to isolate an industry in which SMEs

operate. The cognitive considerations employees undergo during voluntary separation from an organization are subjective and depend heavily on interpretation. Future research may want to further research on SME millennial employee development in succession planning with the conduction of a mixed method study design. Thus, creating the opportunity for a unique introspection into the topic both subjectively through qualitative data and objectively through quantitative data.

### **Reflections**

As a millennial employee, the exploration of millennial employee development strategies used by SME leaders to remain sustainable offered a unique insight into how industry leaders are preparing to address the growing presence of millennials in the workforce and an eventual necessity to pass leadership to them. Like the DBA doctoral study process succession planning for SME leaders presents an uncertainty which through time, resourcefulness, and trial and error SME leaders can overcome. As a researcher, this qualitative case study reinforced the important role one plays as the researcher and the tool for data collection. Moreover, the vigilance in identifying personal bias and mitigating any disruption they may cause. A pertinent example was the experience of interacting with business leaders and getting them to participate.

A point of criticality for me in the DBA doctoral study, as the researcher, was the identification, solicitation, and obtainment of consent by participants. As a millennial, I can acknowledge a high dependence on electronic communication, (i.e., text, e-mail, instant messaging, and social media). However, it became relevant that these channels

were inappropriate for my targeted pool of participants. Be it that those of interest were of different generations, demographics, or sought information through other means like printed publication. The issue was that a major amount of effort and time that was put forth to establish relationships with participants.

Thankfully, the development and utilization of an interview protocol made the data collection portion a reprieve after participants provided consent. The necessity of perseverance and patience offered moments of reflection to grow as a researcher but more importantly as an individual. Thus, the DBA doctoral study process resulted in a positive social change in my ability to endure. The practice of patience and ability to endure will become greater necessity as current leaders seek to succeed leadership to millennial employees like me.

### **Conclusion**

2020 is rapidly approaching and with it a workforce composed of more than 50% of millennial employees (Kuhl, 2014). With an increased representation of millennial employees brings a heightened concern about their increasing rate of voluntary turnover and mobility. As evidenced by the finding that a high percentage of millennial employees are leaving occupation within two years (Prestia et al., 2014). As a result, the development, retention, and eventual succession of operations to millennial employees if not already will be the forefront of concerns for organizational leaders, especially SMEs with limited human capital.

Conduction of this study resulted in the identification of four underlying themes derived from interviews with three SME leaders in effort to answer the central research question: What millennial employee development strategies do SME leaders employ to remain sustainable? A secondary question regarding the underlying employee development methodology used by SME leaders to retain young talent found that the mitigation of shocks versus the exertion of motivational force was most effective. The summation of findings in consideration of the central and secondary questions posed found that the centrality of strategies were based on leadership efforts to minimize disruptions in millennial employee efforts to maintain a work-life balance.

To minimize disruptions, mitigate shocks, and prevent an increased mobility rate impact the sustainability of operation for SME leaders the five recommendations are the relevant take-home message for readers. First, SMEs leaders need to shift succession plan theorizing to formal composition. Second, organization hierarchies and associated the rigidity hold negative connotations with millennial employees. Thus, supporting a need to emphasize flexibility to foster equitable and fair return by the millennial employees, Third, employee development must occur in an atmosphere or organizational culture that is organic and one in which millennial employees can self-develop in the absence of hovering parents. Fourth, SME leaders must create more opportunities for accountability where millennial employees can govern themselves during their respective development. A byproduct of which shall be higher organization commitment and ease in retention. Such as self-governance. Fifth, contrary to personal perceptions regarding



development and the necessity of increased management presence the study finding identify a recommendation that SME leaders broaden practices to exhibit a laissez-faire leadership style. A method which aligns with the underlying core that the millennial employee development strategies successful SME leaders employ to remain sustainable center on minimizing disruption to efforts by millennial employees to maintain a work-life balance.

## References

- Abdullah, I. H. T., Azmi, M. S., Zin, S. M., Chee, L. S., & Yusoff, N. A. (2014). Interaction between Chinese family business and cultural differences in Malaysia. *Asian Social Science*, *10*, 118. doi:10.5539/ass.v10n10p118
- Anderson, H. J., Baur, J. E., Griffith, J.A., & Buckley, M.R. (2017). What works for you may not work for (Gen) Me: Limitations of present leadership theories for a new generation. *Leadership Quarterly*, 245-260. doi:10.1016/j.leaqua.2016.08.001
- Ariss, A., Cascio, W. F., & Paauwe, J. (2014). Talent management: Current theories and future research directions. *Journal of World Business*, *49*, 173-179. doi:10.1016/j.jwb.2013.11.001
- Aruna, M., & Anitha, J. (2015). Employee retention enablers: Generation Y employees. *SCMS Journal of Indian Management*, *12*, 94-103. Retrieved from [www.scmsgroup.org](http://www.scmsgroup.org)
- Aryee, S., Walumbwa, F. O., Seidu, E. Y. M., & Otaye, L. E. (2016). Developing and leveraging human capital resource to promote service quality: Testing theory of performance. *Journal of Management*, *42*, 480-499. doi:10.1177/0149206312471394
- Babalola, M. M., Stouten, J., & Euwema, M. (2016). Frequent change and turnover intention: The moderating role of ethical leadership. *Journal of Business Ethics*, *134*, 311-322. doi:10.1007/s10551-014-2433-z
- Bae, S., & Patterson, L. (2014). Comparison and implications of human capital theory at

the individual, organizational, and country levels. *Journal of Organizational Culture, Communication, & Conflict*, 18, 11-28. Retrieved from [alliedacademies.org](http://alliedacademies.org)

Bagger, J., & Li, A. (2014). How does supervisory family support influence employees' attitude and behaviors? A social exchange perspective. *Journal of Management*, 40, 1123-1150. doi:10.177/0149206311413922

Bakker, A.B., & Costa, P.L. (2014). Chronic job burnout and daily functioning: A theoretical analysis. *Burnout Research*, 1, 112-119. doi:10.1016/j.burn.2014.04.003

Ball, M. P., Bobe, J. R., Chou, M. F., Clegg, T., Estep, Lunshof, J. E...Church, G. M. (2014). Harvard personal genome project: Lessons from participatory public research. *Genome Medicine*, 6(10), 1-7. Retrieved from [genomemedicine.com](http://genomemedicine.com)

Barnham, C. (2015). Quantitative and qualitative research perceptual foundations. *International Journal of Market Research*, 57, 837-854. doi:10.2501/IJMR-2015-070

Barzinpour, F., Jafari, M., & Biuki, S. H. M. (2015). Presenting the way of implementing succession with the approach of organizational knowledge transfer (a case study of aerospace industry). *Advances in Natural and Applied Sciences*, 9, 75. Retrieved from [www.aensi.org](http://www.aensi.org)

Birt, L., Scott, S., Cavers, D. Campbell, C., & Walter, F. (2016). Member checking: A tool to enhance trustworthiness or merely a nod to validation? *Qualitative Health*

*Research*, 26, 1802-1811. doi:10.1177/1049732316654870

Boblin, S. L., Ireland, S., Kirkpatrick, H., & Robertson, K. (2013). Using stake's qualitative case study approach to explore implementation of evidence-based practice. *Qualitative Health Research*, 23, 1267-1275.

doi:10.1177/1049732313502128

Bogdány, E., Balogh, Á., & Csizmadia, T. (2014). Leadership succession and the origin of successor in Hungarian SMEs. *Management & Marketing*, 9, 283-300.

Retrieved from [www.managementmarketing.ro](http://www.managementmarketing.ro)

Bolton, R. N., Parasuraman, A., Hoefnagels, A., Migchels, N., Kabadayi, S., Gruber, T. . . Solnet, D. (2013). Understanding Generation Y and their use of social media: A review and research agenda. *Journal of Service Management*, 24, 245-267.

doi:10.1108/09564231311326987

Breaugh, J. A. (2014). Predicting voluntary turnover from job applicant biodata and other applicant information. *International Journal of Selection and Assessment*, 22, 321-332. doi:10.1111/ijsa.12080

Brewer, C. S., Chao, Y. Y., Colder, C. R., Kovner, C. T., & Chacko, T. P. (2015). A structural equation model of turnover for a longitudinal survey among early career registered nurses. *International Journal of Nursing Studies*, 52, 1735-1745.

doi:10.1016/j.ijnurstu.2015.06.017

Campione, W. A. (2015). Corporate offerings: Why aren't millennials staying? *Journal of Applied Business and Economics*, 17, 60-75. Retrieved from

www.aebrjournal.org

- Candan, H. (2016). A research on the relationship between job embeddedness with performance and burnout of academicians in Turkey. *IOSR Journal of Business and Management, 18*, 68-80. doi:10.9790/487x-1803026880
- Carroll, J. (2015). 7 things that make or break a succession. (Cover story). *Journal of Financial Planning, 28*(12), 24-26. Retrieved from www.fpanet.org
- Chan, S. H., Wan, Y. K. P., & Kouk, O. M. (2015). Relationships among burnout, job satisfaction, and turnover of casino employees in Macau. *Journal of Hospitality Marketing & Management, 24*, 345-374. doi:10.1080/19368623.2014.911712
- Chandler, N. (2015). Millennials, entrepreneurs, and the Hungarian workforce of the future. *Vezetéstudomány/Budapest Management Review, 46*, 15-24. Retrieved from www.worldcat.org
- Chen, L., Ellis, S. C., & Suresh, N. (2016). A supplier development adoption framework using expectancy theory. *International Journal of Operations & Productivity Management, 36*, 592-615. doi:10.1108/ijopm-09-2013-0413
- Chenevert, D., Jourdain, G., & Vandenberghe, C. (2016). The role of high-involvement work practices and professional self-image in nursing recruits' turnover: A three-year prospective study. *International Journal of Nursing Studies, 53*, 73-84. doi:10.1016/j.ijnurstu.2015.09.005
- Clinton, M. E., & Guest, D. E. (2014). Psychological contract breach and voluntary turnover: Testing a multiple mediation model. *Journal of Occupational &*

*Organizational Psychology*, 87, 200-207. doi:10.1111/joop.12033

Cloutier, O., Felusiak, L., Hill, C., & Pemberton-Jones, E. J. (2015). The importance of developing strategies for employee retention. *Journal of Leadership, Accountability and Ethics*, 12, 119-129. Retrieved from [www.na-businesspress.com](http://www.na-businesspress.com)

Coff, R., & Raffie, J. (2015). Toward a theory of perceived firm-specific human capital. *Academy of Management Perspectives*, 29, 326-341. doi:10.5465/amp.2014.0112

Collings, D. G. (2014). Integrating global mobility and global talent management: Exploring the challenges and strategic opportunities. *Journal of World Business*, 49, 253-261. doi:10.1016/j.jwb.2013.11.009

Collins, C. S., & Cooper, J. E. (2014). Emotional intelligence and the qualitative researcher. *International Journal of Qualitative Method*, 13, 88-103. doi:10.1177/160940691401300134

Connelly, L. M. (2014). Ethical considerations in research studies. *MEDSURG Nursing*, 23, 54-55. Retrieved from [ww.ajj.com](http://ww.ajj.com)

Corby, D., Taggart, L., & Cousins, W. (2015). People with intellectual disability and human science research: A systematic review of phenomenological studies using interviews for data collection. *Research in Developmental Disabilities*, 47, 451-465. doi:10.1016/j.ridd.2015.09.001

Craig, M. (2015). Cost effectiveness of retaining top internal talent in contrast to recruiting top talent. *Competition Forum*, 13, 203-209. Retrieved from

www.worldcat.org

- Cutler, N. E. (2015). Millennials and finance: The “Amazon Generation.” *Journal of Financial Service Professionals*, 69, 33-39. Retrieved from financialpro.org
- Dalpiaz, E., Tracey, P., & Phillips, N. (2014). Succession narrative in family business: The case of Alessi. *Entrepreneurship: Theory & Practice*, 38, 1375-1394.  
doi:10.1111/etap.12129
- Daspist, J. J., Holt, D. T., Chrisman, J. J., & Long, R. G. (2016). Examining family firm succession from a social exchange perspective: A multiphase, multi stakeholder review. *Family Business Review*, 29, 44-64. doi:10.1177/0894486515599688
- David, E. M., & Holladay, C. L. (2015). Intervening mechanisms between personality and turnover: Mediator and suppressor effects. *Journal of Business and Psychology*, 30, 137-147. doi:10.1007/s10869-013-9355-4
- Davis, P. R., Trevor, C. O., & Feng, J. (2015). Creating a more quit friendly national workforce? Individual layoff history and voluntary turnover. *Journal of Applied Psychology*, 100, 1434-1455. doi:1037/ap10000012
- De Oliveira, J., Escrivao, E., Nagano, M. S., Ferraudo, A. S., & Rosim, D. (2015). What do small business owner-managers do? A managerial work perspective. *Journal of Global Entrepreneurship Research*, 5(1), 1-21.  
doi:10.1186/s40497-015-0032-9
- Debevec, K., Schewe, C. D., Madden, T. J., & Diamond, W. D. (2013). Are today’s millennials splintering into a new generational cohort? Maybe! *Journal of*

- Consumer Behavior*, 12, 20-31. doi:10.1002/cb.1400
- DeConinck, J. B. (2015). Outcomes of ethical leadership among salespeople. *Journal of Business Research*, 68, 1086-1093. doi:10.1016/j.jbusres.2014.10.011
- DeVanney, S. A. (2015). Understanding the millennial generation. *Journal of Financial Service Professionals*, 69, 11-14. Retrieved from financialpro.org
- Downs, L. (2015). Star talent: Investing in high-potential employees for organizational success. *Industrial and Commercial Training*, 47, 349-355.  
doi:10.1108/ict-06-015-0041
- Ene, E. E., & Ene, J. C. (2015). Financing small to medium scale business in African countries: Problems and prospects. *Australian Journal of Business and Management Research*, 4, 9-17. Retrieved from www.ajbmr.com
- Ertas, N. (2015). Turnover intentions and work motivations of millennial employees in federal service. *Public Personal Management*, 44(3), 401-423.  
doi:10.1177/00910260155881993
- Fernet, C., Austin, S., Trepanier, S. G., & Dussault, M. (2013). How do job characteristics contribute to burnout? Exploring the distinct mediating roles of perceived autonomy, competence, and relatedness. *European Journal of Work and Organizational Psychology*, 22, 123-137.  
doi:10.1080/1359432X.2011.632161
- Festing, M., & Schafer, L. (2014). Generational challenges to talent management: A framework for talent retention based on the psychological-contract perspective.



*Journal of World Business*, 49, 262-271. doi:10.1016/j.jwb.2013.11.010

- Fiaz, M., Su, Q., Ikram, A., & Saqib, A. (2017). Leadership styles and employees' motivation: Perspective from an emerging economy. *Journal of Developing Areas*, 51, 143-156. doi:10.1353/jda.2017.0093
- Fusch, P. I., & Ness, L. R. (2015). Are we there yet? Data saturation in qualitative research. *Qualitative Report*, 20, 1408-1416. Retrieved from [www.nova.edu](http://www.nova.edu)
- Gandhi, D., & Kumar, P. (2014). Succession planning: Developing leaders for tomorrow to ensure organizational success. *International Journal of Business & Management*, 2, 1-5. Retrieved from [www.theijbm.com](http://www.theijbm.com).
- Gentles, S. J., Charles, C., Ploegg, J., & McKibbin, K. A. (2015). Sampling in qualitative research: Insights from an overview of the methods literature. *Qualitative Report*, 20, 1772-1789. Retrieved from [tqr.nova.edu](http://tqr.nova.edu) research
- Ghee, W. Y., Ibrahim, M. D., & Abdul-Haim, H. (2015). Family business succession planning: Unleashing the key factors of business performance. *Asian Academy of Management Journal*, 20, 103-126. Retrieved from [web.usm.my/aamj](http://web.usm.my/aamj)
- Ghoddousi, P., Bahrami, N., Chileshe, N., & Hosseini, M. R. (2014). Mapping site-based construction workers' motivation: Expectancy theory approach. *Australasian Journal of Construction Economics and Building*, 14, 60-77.  
doi:10.5130/ajceb.v14i1.3712
- Giarmareo, J. (2012). The three levels of family business succession planning. *Journal of Financial Service Professionals*, 66, 59-69. Retrieved from [financialpro.org](http://financialpro.org)

- Gilding, M., Gregory, S., & Cosson, B. (2015). Motives and outcomes in family business succession planning. *Entrepreneurship Theory and Practice*, 39, 299-312. doi:10.1111/etap.12040
- Glisson, C. (2015). The role of organizational culture and climate in innovation and effectiveness. *Human Service Organizations: Management, Leadership, & Governance*, 39, 245-250. doi:10.1080/23303131.2015.1087770
- Grant, A. (2014). Troubling 'lived experience': A post-structural critique of mental health nursing qualitative research assumptions. *Journal of Psychiatric & Mental Health Nursing*, 21, 544-549. doi:10.1111/jpm.12113
- Guchait, P., Cho, S., & Meurs, J. A. (2015). Psychological contracts, perceived organizational and supervisory support: Investigating the impact on intent to leave among hospitality employees in India. *Journal of Human Resources in Hospitality & Tourism*, 14, 290-315. doi:10.1080/15332845.2015.1002070
- Gursoy, D., Chi, C.G.Q., & Karadag, E. (2013). Generational differences in work values and attitudes among frontline and service contract employees. *International Journal of Hospitality Management*, 32, 40-48. doi:10.1016/j.ijhm.2012.04.002
- Haider, M., Rasli, A., Akhtar, S., Yusoff, R. B. M., Malik, O. M., Aamir, A.,...Tariq, F. (2015). The impact of human resource practices on employee retention in the telecom sector. *International Journal of Economics and Financial Issues*, 5, 63-69. doi:10.9790/487x-16167681
- Halme, M., & Korpela, M. (2014). Responsible innovation toward sustainable

- development in small and medium-sized enterprises: A resource perspective. *Business Strategy & The Environment*, 23, 547-566. doi:10.1002/bse.1801
- Harris, T. B., Li, N., & Kirkman, B. L. (2014). Leader-member exchange (LMX) in context: How LMX differentiation and LMX relational separation attenuate LMX's influence on OCB and turnover intentions. *Leadership Quarterly*, 25, 314-328. doi:10.1016/j.leaqua.2013.09.001
- Hillman, D. R. (2014). Understanding multigenerational work-value conflict resolution. *Journal of Workplace Behavioral Health*, 29, 240-257. doi:10.1080/15555240.2014.933961
- Holtom, B., Mitchell, T.R., Lee, T.W., & Inderrieden, E.J. (2005). Shocks as cause of turnover: What they are and how organizations can manage them. *Human Resource Management*, 44, 337-352. doi:10.1002/hrm.20074
- Holtom, B. C., Smith, D. R., Lindsay, D. R., & Burton, J. P. (2014). The relative strength of job attitudes and job embeddedness in predicting turnover in a US military academy. *Military Psychology*, 26, 397-408. doi:10.1037/mil0000055
- Jung, C. S. (2014). Why are goals important in the public sector? Exploring the benefits of goal clarity for reducing turnover intention. *Journal of Public Administration Research & Theory*, 24, 209-234. doi:10.1093/jopart/mus058
- Johnson, J. M., & Ng, E. S. (2016). Money talks or millennials walk: The effect of compensation on nonprofit millennial workers sector-switching intentions. *Review of Public Personnel Administration*, 36, 283-305.

doi:10.1177/0734371x15587980.

Kamal, E. M., & Flanagan, R. (2014). Key characteristics of rural construction SMEs.

*Journal of Construction in Developing Countries, 19*, 1-13. Retrieved from

www.usm.my/

Katz, S. (2015). Qualitative-based methodology to teaching qualitative methodology in

higher education. *International Journal of Teaching and Learning in Higher*

*Education, 27*, 352-363. Retrieved from www.isetl.org

Kennedy, K. (2015). From one millennial to another: Advice on being the succession plan.

*Journal of Financial Planning, 28*, 20-22. Retrieved from www.journalfp.net

Kim, J. (2015). What increases public employees' turnover intention? *Public Personal*

*Management, 44*, 496-519. doi:10.1177/0091026015604447

Kim, H., Kang, D. S., Lee, S. W., & McLean, G. (2015). Career commitment as a

mediator between organization-related variables and motivation for training and

turnover Intentions. *Journal of Career Development, 43*, 130-144

doi:0894845315584160

Kim, S., Lee, J., & Yoon, D. (2015). Norms in social media: The application of theory of

reasoned action and personal norms in predicting interactions with Facebook page

like ads. *Communication Research Reports, 32*, 322-331.

doi:10.1080/08824096.2015.1089851

Kornbluh, M. (2015). Combatting challenges to establishing trustworthiness in

qualitative research. *Qualitative Research in Psychology, 12*, 397-414.

doi:10.1080/14780887.2015.1021941

Kuhl, J. (2014). Investing in millennials for the future of your organization. *Leader to Leader, 2014*, 25-30. doi: 10.1002/ltl.20110

Lee, Y. G., Bartkus, K. R., & Lee, M. (2015). The diversity of legacy motivation: Succession planning of African-American, Mexican-American, and Korean-American business owners. *American Journal of Entrepreneurship, 8*, 71-93. Retrieved from americanjournalentrepreneurship.org

Leveson, L., & Joiner, T.A. (2014). Exploring corporate social responsibility values of millennial job-seeking students. *Education and Training, 56*(1), 21-34. doi:10.1108/ET-11-2012-0121

Liard, M. D., Harvey, P., & Lancaster, J. (2015). Accountability, entitlement, tenure, and satisfaction in Generation Y. *Journal of Managerial Psychology, 30*. 87-100. doi:10.1108/JMP-06-2014-0227

Lingard, L. (2015). The art of limitations. *Perspectives on Medical Education, 4*, 136–137. doi:10.1007/s40037-015-0181-0

Liu, C., Eubanks, D. L., & Chater, N. (2015). The weakness of strong ties: Sampling basis, social files, and nepotism in family business succession. *Leadership Quarterly, 26*, 419-435. doi:10.1016/j.leaqua.2015.02.007

Loock, C. M., Staake, T., & Thiesse, F. (2013). Motivation energy-efficient behavior with Green IS: An investigation of goal setting and role of defaults. *MIS Quarterly, 37*, 1313-A5. Retrieved from www.misq.org

- Lu, A. C. C., & Gursoy, D. (2016). Impact of job burnout on satisfaction and turnover intention do generational differences matter? *Journal of Hospitality & Tourism Research, 40*, 210-235. doi:10.1177/1096348013495696
- Luscombe, J., Lewis, I., & Biggs, H. C. (2013). Essential elements for recruitment and retention: Generation Y. *Education & Training, 55*, 272-290. doi:10.1108/00400911311309323
- Lynch, M. (2015). Successful transitions: Getting it right. *Journal of Financial Planning, 28*, 16-18. Retrieved from [www.onefpa.org](http://www.onefpa.org)
- Lyons, S., & Kuron, L. (2014). Generational differences in the workplace: A review of evidence and directions for future research. *Journal of Organizational Behavior, 35*, S139-S157. doi:10.1002/job.1913
- Ma, S., Seidl, D., & Guerard, S. (2015). The new CEO and post succession process: An integration of past research and future directions. *International Journal of Management Review, 17*, 460-482. doi:10.1111/ijmr.12048
- Maier, T., Tavanti, M., Bombard, P., Gentile, M., & Bradford, B. (2015). Millennial generation perceptions of value-centered leadership principles. *Journal of Human Resources in Hospitality and Tourism, 14*, 382-397. doi:10.1080/15331845.2015.1008386
- Marshall, B., Cardon, P., Poddar, A., & Fontenot, R. (2013). Does sample size matter in qualitative research? A review of qualitative interviews in is research. *Journal of Computer Information Systems, 54*, 11-22.

doi:10.1080/08874417.2013.11645667

- Masi, D., & Cagno, E. (2015). Barriers to OHS interventions in small and medium-sized enterprises. *Safety Science, 71*, 226-241. doi:10.1016/j.ssci.2014.05.020
- Massa, L., Farneti, F., & Scappini, B. (2015). Developing a sustainability report in a small to medium enterprise: Process and consequences. *Meditari Accountancy Research, 23*, 62. doi:10.1108/medar-02-2014-0030
- May, D. R., Chang, Y. K., & Shao, R. (2015). Does ethical membership matter? Moral identification and its organizational implications. *Journal of Applied Psychology, 100*, 681-694. doi:10.1037/a0038344
- McCusker, K., & Gunaydin, S. (2015). Research using qualitative, quantitative or mixed methods and choice based on the research. *Perfusion, 30*, 537-542. doi:10.1177/0267659114559116
- Michel, A., & Kammerlander, N. (2015). Trusted advisors in family business's succession-planning process- an agency perspective. *Journal of Business Strategy, 6*, 45-57. doi:10.1016/j.jfbs.2014.10.005
- Miracle, V. A. (2016). The *Belmont Report*: Triple crown of research ethics. *Educational Dimension, 35*, 223-228. doi:10.1097/dcc.0000000000000186
- Mitchell, T. R., Burch, T. C., & Lee, T. W. (2014). The need to consider time, level, and trends: A turnover perspective. *Journal of Organizational Behavior, 35*, 296-300. doi:10.1002/job.1898
- Moon, K., Brewer, T. D., Januchowshi-Hartley, S. R., Adams, V. M., & Blackman, D.

- A., (2016). A guideline to improve qualitative social science publishing in ecology, and conservation journal, *Ecology and Society*, 21(3),17.  
doi:10.5751/ES-08663-210317
- Morse, J. M. (2015). Critical analysis of strategies for determining rigor in qualitative inquiry. *Qualitative Health Research*, 25, 1212-1222.  
doi:10.1177//1049732315588501
- Morse, J. M., & Coulehan, J. (2015). Maintaining confidentiality in qualitative publications. *Qualitative Health Research*, 25, 151-152.  
doi:10.1177/1049732314563489
- Nguyen, T. Q. T. (2014). Conducting semi-structured interviews with Vietnamese. *Quality Research Journal*, 15, 35-46. doi:10.1108/QRJ-04-2014-0012
- Nobuo, T., Hirofumi, O., & Nobuyuki, I. (2014). Spurious correlation between self-determination and job satisfaction: A case of Company X from 2004-2013. *Annals of Business Administrative Science*, 13, 243-254. doi:10.7880/abas.13.243
- Ocuppaugh, J., Baker, R., Gowda, S., Heffernan, N., & Heffernan, C. (2014). Population validity for educational data mining models: A case study in affect detection. *British Journal of Educational Technology*, 45, 487-501.  
doi:10.1111/bjet.12156
- Office for Human Research Protections. (2016). *The Belmont Report*. Retrieved from [www.hhs.gov/ohrp/regulations-and-policy/belmont-report](http://www.hhs.gov/ohrp/regulations-and-policy/belmont-report)
- Odenweller, K. G., Booth-Butterfied, M., & Weber, K. (2014). Investigating helicopter



parenting, family environments, and relational outcomes for millennials.

*Communication Studies*, 65, 407-425. doi:10.1080/10510974.2013.811434

Palanski, M., Avey, J. B., & Jirapon, N. (2014). The effects of ethical leadership and abusive supervision on job search behaviors in the turnover process. *Journal of Business Ethics*, 121, 135-146. doi:10.1007/s10551-013-1690-6

Palinks, L. A., Horowitz, S. M., Green, C. A., Wisdom, J., Duan, N., & Hoagwood, K. (2015). Purposeful sampling for qualitative data collection and analysis in mixed method implementation research. *Administration and Policy in Mental Health and Mental Health Services Research*, 42, 533-544.

doi:10.1007//s10488-013-0528-y

Paulus, T., Woods, M., Atkins, D. P., & Macklin, R. (2017). The discourse of QDAS: reporting practices of ATLAS.ti and NVivo users with implications for best practices. *International Journal of Social Research Methodology*, 20(1), 35-47.

doi:10.1080/13645579.2015.11024454

Pee, L. G., Kankanhalli, A., Tan, G. W., & Tham, G. Z. (2014). Mitigating the Impact of Member Turnover in Information Systems Development Projects. *IEEE Transactions on Engineering Management*, 6, 702-716.

doi:10.1109/tem.2014.2332339

Perepelkin, V. A., Perepelkina, E. V., & Morozova, E. S. (2016). Evolution of the concept "human capital" in economic science. *International Journal of Environmental & Science Education*, 11, 7649-7658. Retrieved from

www.ijese.com/

- Petrova, E., Dewing, J., & Camilleri, M. (2016). Confidentiality in participatory research: Challenges form one study. *Nursing Ethics*, 23 442-454.  
doi:10.1177/0969733014564909
- Pinto, J., Dawood, S., & Pinto, M. B. (2014). Project management and burnout: Implications of the demand-control-support model on project based work. *International Journal of Project Management*, 32, 578-589.  
doi:10.1016/j.ijproman.2013.09.003
- Pizzorno, M. C., Benozzo, A., Fina, A., Sabato, S., & Scopesi, M. (2014). Parent-child career construction: A narrative study from a gender perspective. *Journal of Vocational Behavior*, 84, 420-430. doi:10.1016/j.jvb.2014.03.001
- Prestia, A. S., Dyess, S. M., & Sherman, R. O. (2014). Planting the seeds of succession. *Nursing Management*, 45, 3(3), 30-37.  
doi:10.1097/01.numa.0000443941.68503.09
- Purvis, R. L., Zagenczyk, T. J., & McCray, G. E. (2015). What's in it for me? Using expectancy theory and climate to explain stakeholder participation, its direction and intensity. *International Journal of Project Management*, 33, 3-14.  
doi:10.1016/j.ijproman.2014.03.003
- Raheim, M., Magnussen, L., Sekse, R., Lunde, A., Jacobsen, T., & Blystad, A. (2016). Researcher-researched in qualitative research: Shifts in positions and researchers vulnerability. *International Journal of Qualitative Studies on Health and Well-*

*Being*, 11, 1-12. doi:10.3402/qhw.v11.30996

Rahman, W., & Nas, Z. (2013). Employee development and turnover intention: Theory validation. *European Journal of Training and Development*, 37, 564-579.

doi:10.1108/EJTD-May-2012-0015

Rahman, N. A., Yaacob, Z., & Radzi, R. M. (2015). Determinants of effective financial risk management in small business: A theoretical framework. *Information Management and Business Review*, 7, 87-92. Retrieved from [www.ifrnd.org](http://www.ifrnd.org)

Robinson, O.C. (2014). Sampling in interview-based qualitative research: A theoretical and practical guide. *Qualitative Research in Psychology*, 11, 25-41.

doi:10.1080/14780887.2013.801543

Rodriguez, A., & Rodriguez, Y. (2015). Metaphors for today's leadership: VUCA world, millennial and "cloud leaders." *Journal of Management Development*, 34, 854-886. doi:10.1108/JMD-09-2013-0110

Salona, M., Kaczynski, & Smith, T. (2015). Qualitative theory in finance: Theory into practice. *Australian Journal of Management*, 40, 403-413.

doi:10.1177/0312896214536204

Sandhya, K., & Kumar, D. P. (2014). Employee retention-A strategic tool for organisational growth and sustaining competitiveness. *Journal of Strategic*

*Human Resource Management*, 3, 42-45. Retrieved from

[www.publishingindia.com](http://www.publishingindia.com)

Sangster-Gormely, E. (2013). How case-study research can help explain the

implementation of the nurse practitioner role. *Nurse Researcher*, 20, 6-11.

doi:10.7748/nr2013.03.20.4.6.e291

Sanjari, M., Bahramnezhad, F., Fomani, F. K., Shoghi, M., & Cheraghi, M. A. (2014).

Ethical challenges of researchers in qualitative studies: The necessity to develop a specific guideline. *Journal of Medical Ethics and History of Medicine*, 7, 1-6.

Retrieved from [www.tums.ac.ir/](http://www.tums.ac.ir/)

Seet, P. S., Jones, J., Acker, T., & Whittle, M. (2014). Shocks among managers of

indigenous arts centers in remote Australia. *Management Decisions*, 53, 763-785.

doi:10.1108/md-06-2014-0386

Sherman, R. O., Patterson, P., Avitable, T., & Dahle, J. (2014). Perioperative nurse

leader perspectives on succession planning: A call to action. *Nursing Economics*, 32, 186-203. Retrieved from [www.nursingconomics.net](http://www.nursingconomics.net)

Shipp, A. J., Furst-Holloway, S., Harris, T. B., & Rosen, B. (2014). Gone today but here

tomorrow: Extending the unfolding model of turnover to consider boomerang employees. *Personnel Psychology*, 67, 421-462. doi:10.1111/peps.12039

Small Business Administration. (2014, March). *Office of Advocacy: Frequently asked*

*questions*. Retrieved from [www.sba.gov](http://www.sba.gov)

Sorsa, M. A., Kiikkala, I., & Astedt-Kurki, P. (2015). Bracketing as a skill in conducting

unstructured qualitative interviews, *Nurse Researcher*, 22, 8-12.

doi:10.7748/nr.22.4.8.e1317

Stewart, J. S., Oliver, E. G., Cravens, K. S., & Oishi, S. (2017). Managing millennials:

Embracing generational differences. *Business Horizons*, 60, 45-54.

doi: 10.1016/j.bushor.2016.08.011

Stenson, L. (2016). Towards an integration of research on teaching and learning.

*Scandinavian Journal of Education Research*, 60, 272-285.

doi:10.1080/00313831.2015.1120233

Swartz, E., Amatucci, F. M., & Coleman, S. (2016). Using a multiple method and mixed mode approach to examine women entrepreneur negotiating styles. *International Journal of Gender and Entrepreneurship*, 8, 48-68.

doi:10.1108/ijge-09-2013-0060

Swetland, S. R. (2016). What the public should know: A fundamental review of school finance and human capital theory. *Journal of School Public Relations*, 36, 292-319. Retrieved from journals.rowman.com

Takawira, N. Coetzee, M, & Schreuder, D. (2014). Job embeddedness, work engagement and turnover intention of staff in higher education institutions: An exploratory study. *SA Journal of Human Resource Management*, 12, 1-10.

doi:10.4102/sajhrm.v12i1.524

Tang, J. (2016). Linking personal turbulence and creative behavior: The influences of scanning and search in the entrepreneurial process. *Journal of Business Research*, 69, 1167-1174. doi:10.1016/j.jbusres.2015.09.017

Turner, P., & Thompson, E. (2014). College retention initiatives meeting the needs of millennial freshman students. *College Student Journal*, 1, 94-104. Retrieved

from [www.projectinnovation.biz](http://www.projectinnovation.biz)

- U.S. Department of Labor. (2014). *Employee tenure in 2014*. Retrieved from [www.bls.gov](http://www.bls.gov)
- Weber, J. (2017). Discovering the millennials' personal values orientation: A comparison of two managerial populations. *Journal of Business Ethics, 143*, 517-529. doi:10.1007/s10551-015-2803-1
- Weiss, Y. (2015). Gary Becker on human capital. *Journal of Demographic Economics, 81*, 27-31. doi:10.1017/dem.2014.4
- Winter, R. P., & Jackson, B. A. (2015). Work values preferences of Generation Y: performance relationship insights in the Australian public service. *International Journal of Human Resource Management, 1-19*. doi:10.1080/09585192.2015.1102161
- Wolf, S., WeiBenberger, B. E., Wehner, M. C., & Kabst, R. (2015). Controllers as business partners in managerial decision-making: Attitude, subjective norm, and internal improvements. *Journal of Accounting & Organizational Change, 11*, 24-26. doi:10.1108/JAOC-10-2012-0100
- Wong, C. A., & Laschinger, H. K. S. (2015). The influence of frontline manager job strain on burnout, commitment and turnover intention: A cross-sectional study. *International Journal of Nursing Studies, 52*, 1824-1833. doi:10.1016/j.ijnurstu.2015.09.006
- Wood, A., Logar, C. M., & Riley, W. B. (2015). Initiating exporting: The role of

managerial motivation in small to medium enterprises. *Journal of Business Research*, 68, 2358-2365. doi:10.1016/j.busres.2015.03.043

Yardley, L., & Bishop, F. L. (2015). Using mixed methods in health research: Benefits and challenges. *British Journal of Health Psychology*, 20(1), 1-4.  
doi:10.1111/bjhp.12126

Yates, J., & Leggett, T. (2016). Qualitative research: An introduction. *Radiologic Technology*, 88, 225-231. Retrieved from [www.asrt.org](http://www.asrt.org)

Yin, R. K. (2014). *Case study research: Design and Methods* (5th ed.). Thousand Oaks, CA: Sage.

## Appendix A: Interview Protocol

### **Preinterview:**

1. Salutations and introductions between researcher and participant
2. Verify eligibility through the administration of purposeful sampling questions.
3. Conduct audio test on recording equipment

### **Interview:**

1. Turn on recorder (mobile application on iPhone/or digital recorder)
2. Conduct verbal stamp (Date, time, and case study number)
3. Proceed with six core interview question
4. Conduct follow-up questions as needed
5. Record observations via written notations on notepad
6. Conduct closing verbal stamp (time)

### **Postinterview**

1. Conduct post interview recording quality test
2. Confirm availability and contact information for participant for possible follow up and member checking
3. Reiterate consent, ability to withdraw, purpose of member checking, and availability of a summary of findings upon approval of the study by Walden University.
4. Gratitude and closing remarks between researcher and participant