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Using Succession Strategies to Increase Workplace Productivity

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Walden University

College of Management and Technology

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Walden University
2018

Abstract

Using Succession Strategies to Increase Workplace Productivity

by

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MS, Florida International University, 2008

BS, University of the West Indies, 2000

Doctoral Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

Walden University

December 2018

Abstract

Approximately 70% of small and medium-sized enterprises fail due to a lack of effective leadership succession planning. The purpose of this qualitative single case study was to explore strategies that some business leaders in the manufacturing sector in Jamaica used to implement leadership succession plans. Data were collected from semistructured interviews conducted with 5 business leaders who participated in the succession strategies of a manufacturing organization in Jamaica. Data were analyzed according to Yin's 5-step process. Analysis of data collected from interview sessions and review of company documentation were used to conduct methodological triangulation to validate the findings. Five themes emerged from data analysis: (a) identification of mission-critical roles, (b) talent acquisition and selection, (c) successor development and retention program, (d) organizational designs and policy implementation, and (e) senior leadership support and participation. The findings of this study might be used by business leaders to impact social change by developing and creating a leadership pipeline from diverse backgrounds to ensure future business growth in a competitive global environment.

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Dedication

This study is dedicated to my family and friends who have supported me throughout this doctoral journey. A special thank you to my wife Kathy and my two sons, Zachary and James, who have made tremendous sacrifices for me to complete this program. I am truly blessed to have you as my family.

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Section 1: Foundation of the Study

Background of the Problem

Leadership is the ability of an individual to encourage and inspire peers or followers to perform at their best while eliminating inefficiencies and increasing the value of the company (Collins, Worthington, & Schoen, 2016). Since the 20th century, the phenomenon of whether leaders are born or made has been debated and researched by scholars such as Stogdill (1948), who identified intelligence, dominance, self-confidence, energy, and job knowledge as inherent traits in a leader. According to Mozjat and Mirzaie (2014), it is essential for an effective leader to act appropriately in diverse situations demonstrating the need for more than inherent leadership traits.

Regardless of whether good leaders are born or made, business leaders have recognized the need for strong leadership and the importance of preserving the leadership pipeline through a process of effective leadership succession planning (Lawal, Thompson, & Thompson, 2016; Rothwell, 2010). Some business leaders have struggled with the successful implementation of leadership succession plans because of misalignment with organization strategy and lack of support from senior leaders (Buoziute-Rafanaviciene, Pudziene, & Turauskas, 2015). The lack of effective leadership succession strategies potentially exposes organizations to a future leadership crisis arising from the sudden departure of a leader or retirement (Browning & Boys, 2015). The focus of this study was to explore the successful implementation of leadership succession strategies of the manufacturing sector in Jamaica.

Problem Statement

Organizational leaders are reporting a shortage of qualified candidates for leadership roles (Oladapo, 2014); this shortage is occurring at a time when private sector organizations need qualified leaders to drive labor productivity initiatives (Alvani, Souteh, Jandaghi, & Inaloo, 2016). Approximately 70% of small and medium sized enterprises fail due to a lack of effective leadership succession planning to fill leadership roles (Kalra & Gupta, 2014). The general business problem is that some business leaders have not identified qualified successors for leadership roles, which can negatively affect workplace productivity for competitive advantage. The specific business problem is some business leaders in the manufacturing sector in Jamaica lack strategies to implement leadership succession plans.

Purpose Statement

The purpose of this qualitative single case study was to explore strategies that some business leaders in the manufacturing sector in Jamaica used to implement leadership succession plans. Data were collected from five business leaders from a manufacturing organization in Jamaica at its corporate office in Kingston, the capital. I selected this organization because the business leaders have successfully implemented leadership succession strategies that have improved workplace productivity. Data from this study could help business leaders to implement leadership succession strategies that work and contribute to positive social change by offering techniques to identify and develop potential leaders from an emerging labor force composed of diverse cultures and ethnicities. The implications for Jamaica involve providing business leaders with

solutions to respond to the changing labor demographics that affect future leadership roles.

Nature of the Study

This study uses a qualitative research method. The objective of a qualitative study is to investigate and seek to understand a particular phenomenon through a process of contrasting, comparing, grouping, and reproducing themes gathered from the viewpoints of those who lived it (O'Brien, Harris, Beckman, Reed, & Cook, 2014; Thomson, Petty, & Scholes, 2014). My intent with this study was not to be preemptive, but rather to thoroughly explore and interpret an understanding of the phenomenon based on the perspectives of participants. The use of quantitative and mixed methods in research usually begins with an understanding or hypothesis and involves the use of numerical data to explain a particular phenomenon (Bettany-Saltikov & Whittaker, 2014; McManamny, Sheen, Boyd, & Jennings, 2015) and is preemptive. Neither the quantitative nor the mixed method was appropriate for this study as their use requires examining the relationships or differences among variables, rather than exploring an understanding of the phenomenon based on the interpretation given by the participants who lived it.

I used a single case study design to explore the uniqueness of the phenomenon in a particular organization of interest. By using a qualitative single case study design, the researcher can conduct an analysis of a contemporary phenomenon and understand the specifications of the case, rather than what the phenomenon represents in general (Fallon, Collier-Meek, Maggin, Sanetti, & Johnson, 2015; Floyd & Fuller, 2014; Hyett, Kenny, &

Dickson-Swift, 2014). Multiple case study designs are more compelling and robust than a single case study and require replication of the research in more than one organization to establish generality (Yin, 2017), which is not the intent of this proposed study. A researcher conducting a phenomenological design seeks to understand the perceptions, descriptions, and multiple perspectives of the shared experience of the phenomenon by the participants (Verschuere et al., 2015). A phenomenological study is more suitable for studies involving intense human experiences (Verschuere et al., 2015), and would not be appropriate for this study. In an ethnographic study, a researcher explores a cultural phenomenon from the perspective of the participants in their natural environment, where observation is the primary tool used by the researcher (Marion, Eddleston, Friar, & Deeds, 2015). For this study, I used a semistructured interview technique with the participants as the primary tool for collecting data on the phenomenon, as opposed to the observation required by an ethnographic study; hence an ethnographic study is was not suitable.

Research Question

The following research question guided the study: What strategies do business leaders use to implement leadership succession plans?

Interview Questions

I used the following interview questions:

1. What strategies do you use to build the framework of your leadership succession plan?

2. What strategies do you use to manage pitfalls encountered in developing your leadership succession plans?
3. What strategies do you use to ensure the successful implementation of your succession plans?
4. How do you assess the effectiveness of your leadership succession strategies?
5. What strategies do you use to align succession planning with the organization's talent management strategy?
6. What are the challenges to successful succession planning?
7. What additional information regarding leadership succession strategies would you like to share?

Conceptual Framework

Rothwell's (2010) theory of succession planning focuses on the need to document succession planning in organizations to preserve institutional knowledge (Rothwell, 2010). Rothwell identified several key attributes associated with successor leader selection. These attributes are relation skills, changes in working policies and practices, the level of educational attainment, the age of successor, employee turnover in the organization, the number of implemented technological changes, traits of the successor, and changes in organizational culture (Rothwell, 2010). The findings of my research could indicate strategies of business leaders that illuminate Rothwell's theory of succession planning.

Operational Definitions

Baby Boomers: Baby Boomers are a category of workers born during the post-World War II baby boom, between 1946 and 1964 (Twigg & Majima, 2014).

Diversity management: Diversity management is the management of noticeable differences between members of a team in an organization, which could lead to a difference in behavior and organizational outcome (Oswick & Noon, 2014).

Emotional intelligence: Emotional intelligence is defined as the ability of a leader to recognize the presence of personal feelings and manage interpersonal relationships judiciously (McCleskey, 2014).

Employee engagement: Employee engagement is defined as a high level of commitment and passion toward the execution of job roles by employees within an organization (Mishra, Boynton, & Mishra, 2014).

Experiential knowledge: Experiential knowledge is achieved based on the experiences of the individual and is considered, by many scholars, to be the primary catalyst for organizational growth (Hilmersson, 2014).

Institutional knowledge: Institutional knowledge is acquired by an organization, over time, from within its operating environment (Perkins, 2014).

Leadership succession planning: Leadership succession planning is a critical and proactive approach to ensuring business sustainability, by identifying and developing internal talent for future leadership positions (Manning, Jones, Jones, & Fernandez, 2015).

Organizational citizenship behavior: Organizational citizenship behavior is

defined as those informal and involuntary behaviors of leaders that encourage the followers to cooperate with their leaders, thereby improving workplace productivity (Bolino, Hsiung, Harvey, & LePine, 2015).

Shared leadership: Shared leadership is defined as the distribution of leadership authority across members of a team (D’Innocenzo, Mathieu, & Kukenberger, 2016).

Tacit knowledge: Tacit knowledge is acquired from experience and based on an individual’s perceptions (Bratianu, 2016).

Assumptions, Limitations, and Delimitations

Assumptions

Assumptions are statements made by the researcher and presumed to be true for a specific research or for developing a new theory (Hoque, Covaleski, & Gooneratne, 2015). The first assumption I made regarding this study is that business leaders who have successfully implemented leadership succession strategies could mitigate any leadership crisis caused by the sudden departure or retirement of a leader. The second assumption is that the use of NVivo 11 as a professional qualitative software to analyze data generated from interviews, testimonials of business leaders, and other company data source, would provide a valid and reliable method of interpreting the understanding of the phenomenon. Nvivo is effectively used in qualitative research content analysis and systematic codification of themes (Rogerson, Soltani, & Copeland, 2016). Another assumption is that the interview questions, when used to generate responses from business leaders, would be sufficient to answer the central research question. The final assumption is that

all the participants told the truth about their experiences in implementing leadership succession strategies in the organization.

Limitations

Limitations are shortcomings of the research not within the control of the researcher but could impact the outcome of the study ((Lingard, 2015). The first limitation of this single case study is the inability to transfer the understanding of the phenomenon for all other organizations of similar size or structure to the chosen organization. The environmental conditions under which an organization succession plan is implemented must be considered, which entails the influence of both external and internal factors, which makes it difficult to transfer the findings. Second, because there are no correct or incorrect perspectives of the phenomenon, essential aspects of the phenomenon may have been ignored or overlooked by the participants. Finally, participants may not have been objective in their responses to the research questions, which could have introduced bias as it relates to the effectiveness of the business leaders' succession strategies.

Delimitations

Delimitations are described as the boundaries that the researcher establishes for the study (Karodia, Wallis, & Motiang, 2014). A large organization is defined as one with 500 or more employees (Harris & Patten, 2014; Marchington, 2015). The delimitation of this study is confined to business leaders within a large organization with the following parameters: (a) operating out of Jamaica in the West Indies (b) recognized for its success in developing and executing leadership succession strategies (c) has more

than 500 employees (d) operates a diverse and multigenerational workforce (e) experienced a change in leadership within the 5-year period 2012-2016.

Significance of the Study

Some business leaders suffered from a lack of appropriate leadership succession planning for effective leadership continuity (Alvani et al., 2016). Ineffective leadership transition could negatively influence both employee engagement and the performance of the organization (Latham, 2014). Business leaders could use the findings of this study to add value to Jamaican business by providing strategies to harness critical leadership talent, from middle management categories, through a process of effective leadership succession planning. Business leaders could also use the findings to improve employee engagement and the productivity of the organization.

Contribution to Business Practice

Business leaders could use the findings of this study to contribute to Jamaican business growth by developing leadership succession plans that work and positively influence workplace productivity. Effective leadership succession plans foster the development of appropriate leaders, regardless of gender, color, or religion, who will be capable of leading urgently needed organizational changes (Cook & Glass, 2014). The selection and development of the appropriate leaders could contribute to improving workplace productivity levels and growth in Jamaican businesses. Business leaders could use these findings to create a systematic process of developing critical leaders and establishing a leadership pipeline for the future that could positively influence workplace productivity for organizations in Jamaica.

Implications for Social Change

Business leaders and owners could use the findings of this study to positively influence social change by providing leadership succession strategies that could contribute to economic growth and an improved standard of living in Jamaica. Lack of effective leadership in Jamaican businesses hampers economic sustainability and creates social issues that negatively affect the standard of living (Abdulkadri, 2014). The Jamaican economic sustainability program is negatively affected by social constraints, such as health and education, and requires effective leadership to correct the challenge (Johnston & Montecino, 2012). Leaders who are devoted to public good could use the findings of this study to influence positive social change by providing practical solutions to identify and develop talent for future leadership roles.

A Review of the Professional and Academic Literature

An interpretive inquiry approach was used to explore the body of knowledge regarding the lack of leadership succession planning in organizations and the influence leadership succession planning has on workplace productivity. Interpretive methodologies allow the researcher to use the experiences of participants where themes are derived from the disclosure of participants rather than from predetermined perspectives of the phenomenon (Mayoh & Onwuegbuzie, 2015). Interpretive inquiry also allows the researcher to focus solely on the themes disclosed by the participants while demonstrating how the disclosure of those themes could be used to influence the business outcome (Mayoh & Onwuegbuzie, 2015).

For this study, I conducted a critical analysis and synthesis of the literature

regarding challenges of leadership succession planning and the influence such plans could have on workplace productivity. This critical analysis was achieved using government sources, peer reviewed journals, articles, reports, and books regarding the definition of succession planning, the importance of succession plans to business continuity, factors affecting succession planning, and the influence of leadership succession strategies on workplace productivity. Several databases were used to conduct the research, namely Google Scholar, ProQuest, Sage Premier, Walden library, Jamaica Productivity Center, and Business Source Complete.

The databases were searched using the following keywords and combinations of keywords; *leadership, succession planning, knowledge management, talent management, Baby Boomers, institutional knowledge, leadership emotional intelligence, tacit knowledge, experiential knowledge, workplace productivity, labor productivity, knowledge sharing, diversity management, generational gaps, Generation X, Generation Y, multigenerational workforce, succession planning theories, ethical leadership, global talent gap, global workforce, brain drain, interpretive inquiry, qualitative research, legal and ethical practices in recruitment, and leadership skills gap.*

Information gathered from the literature review allowed me to conceptualize the themes regarding the challenges of the phenomenon and to explore those themes to configure practical solutions that could lead to positive business outcome. The objective of this study was to explore strategies that business leaders in Jamaica use to implement organizational leadership succession plans. The literature review included 115 sources of

which 98% are from peer reviewed sources. Eighty-six percent of the 115 sources were published between the periods 2014 and 2017.

One challenge facing human resource practitioners and business leaders is the identification and development of talent for leadership succession. Underdeveloped talent management practices, the pending retirement of Baby Boomers, and substandard school systems contribute significantly to the current talent crisis (Oppong, 2013). Organizations that invest in the development of their leadership pipeline will attract and retain talent and build a competitive advantage in an increasingly competitive global environment (Chambers, 2013).

Finding the right talent for leadership and the design and implementation of effective leadership succession strategies have been a topical issue and a business challenge (Buoziute-Rafanaviciene et al., 2015). This challenge is exacerbated by the exodus of Baby Boomers from the workplace (Buoziute-Rafanaviciene et al., 2015), an increase in the sudden removal of business leaders because of unethical business practices (Mooney, Semadeni, & Kesner, 2017), and the opening of the global market that requires diversity in leadership. The challenge is compounded by the increased attention on the influence of leadership on workplace productivity (Azbik & Finan, 2016; Rothwell, 2010). I conducted the literature review by exploring the evolution of leadership succession planning, the differences and similarities in the scholarly literature, and the influence of leadership succession planning on workplace productivity.

Leadership Succession Planning Theory

The idea of leadership succession planning is not a new phenomenon and can be traced back through several generations and remains topical in many organizations (Estedadi & Hamidi, 2015). Oladapo (2014) posited that the development of a strong leadership pipeline is a critical strategic business objective for business leaders for competitive advantage, business sustainability, and employer of choice. Implementing a formal leadership succession plan requires the direct involvement of business leaders and a systematic approach to leadership development which is absent in many organizations (Santora, Sarros, Bozer, Esposito, & Bassi, 2015).

Fayol (1841-1925) has been cited by Rothwell as one of the first scholars to document and formalize the succession planning process adapted by leaders in organizations for the development of future leaders (Rothwell, 2010). The process of succession planning has evolved from Fayol's documentation to adapt to the changing global industry environment (Azbik & Finan, 2016; Chlebikova, Misankova, & Kramarova, 2015). Succession planning has since been redefined with a focus on leadership succession planning, particularly for the chief executive officer, and the effect on organizational performance (Hambrick & Quigley, 2014). Each organization has a different variation of a succession plan based on the organization's strategic objectives and unique competitive advantage (Azbik & Finan, 2016; Chlebikova et al., 2015). The establishment of one succession planning tool that applies to all organizations is not possible (Chlebikova et al., 2015). Succession planning is the prerogative of business leaders from each organization to develop strategies that best fit the needs of their

specific organization (Chlebikova et al., 2015). Business leaders should align leadership succession strategies to the organization's strategic objectives and business needs for greater effectiveness.

Regardless of the minor deviations among scholars on the importance of leadership succession strategies, what is common among the understanding of scholars is that the succession planning process is not a single event, but rather an ongoing process. Business leaders should implement an ongoing process to identify and develop talent for leadership roles necessary to keep the organization in a future prosperous state (Collins et al., 2016; Pulakos, Hanson, Arad, & Moye, 2015). Another understanding among scholars is that succession planning, when done correctly, is properly aligned with the organization's goals and objectives. Collins et al. (2016) stated the importance of aligning organizational goals with succession planning strategies, while seriously considering the effect of the transition process on both incumbent and successor. A carefully crafted alignment of organizational objectives and leadership succession strategies creates opportunities for business leaders to recognize, develop, and retain talent, which reduces the cost of external hires and promotes internal loyalty and productivity (Azbik & Finan, 2016; Estedadi & Hamidi, 2015). Business leaders' leadership succession strategies should systematically develop successors and allows for a seamless transition from the predecessor to successor.

Business leaders without leadership succession strategies are not prepared for leadership change and are likely to encounter business disruptions in the future (Chlebikova et al., 2015). Leadership succession planning could be considered a process

by which business leaders plan for future leadership needs (Azbik & Finan, 2016; Chlebikova et al., 2015). Other scholars defined leadership succession planning as the best way to prepare an organization for leadership continuity and to prevent future leadership crisis (Titzer, Shirey, & Hauck, 2014). Succession planning is very important to business continuity reinforcing the need for business leaders to place more effort in the development of leadership succession plans (Walker & Forbes, 2014). Like Amato (2013), Calareso (2013) stated that business leaders need to place more focus on identifying and developing future leaders to ensure a smooth transition into the future. Business leaders should design their leadership succession strategies and align those strategies to the organization's business continuity plan.

The leadership succession planning process goes beyond the informal identification of talented individuals within the organization for future leadership roles. The succession planning process requires a systematic approach where talent is identified, developed, and provided with an opportunity to grow the skills set for effective leadership (Calareso, 2013). This view is also supported by Azbik and Finan (2016), who posited that leadership succession planning should go beyond selecting the best candidate from the available talent to include building a leadership pipeline that identifies and develops transformational leaders. The development of transformational leaders is essential to the success of an organization that is moving into the diverse future (Chlebikova et al., 2015). The leadership succession strategies should be based on the organization's strategic objective, which is to ensure that the organization meets its talent management objectives by securing the organization's future talent needs (Chlebikova et

al., 2015). Business leaders should align leadership succession strategies with the organization's talent management program for greater effectiveness.

Business leaders should secure the organization's future leadership needs by determining whether leadership succession planning will be considered from the point of recruitment. Acquiring future talent needs from the point of hiring provides focus to be placed on coaching, training, and developing individuals without overlooking any potential talent within the organization (Alter, 2015). Hiring the appropriate qualified people at the right time is critical to the success of the performance of an organization as well as creating a pool of talented employees from which future leaders can be identified and selected (Alter, 2015; Weare, 2015). The most effective succession planning strategy begins with recruiting the right talent at the right time for the right jobs (Alter, 2015)

Leadership succession planning should be strategically aligned with career and professional development programs specifically to promote and maintain a leadership pipeline within the organization. Sanjeev and Singh (2017) posited that to ensure that high potential employees are on a professional developmental program, business leaders must align the process of leadership succession with such developmental programs. This alignment of developmental leadership programs and leadership succession planning could be done by first conducting a leadership gap assessment based on desired articulated leadership competencies necessary to move the organization from its current state to a future state (Titzer et al., 2014). Leadership gap assessments should identify high performing employees who aspire for future leadership roles (Titzer et al., 2014). If, after aligning leadership gap assessments with available talent there still exists a talent

gap, business leaders should hire to close leadership gaps and with leadership succession in mind (Titzer et al., 2016). Business leaders should design leadership succession strategies to assess successors for leadership gaps systematically and to put in place developmental programs to close those gaps.

An effective leadership succession strategy will require the support and guidance of business leaders to ensure that those they lead are prepared for leadership. Samei and Feyzbakhsh (2015) posited that the process of succession planning will rely on the ability of leaders to provide subordinates with the support needed for their development. The long-term success of an organization will depend on the competencies of its leaders and potential leaders (Samei & Feyzbakhsh, 2015). Amato (2013) argued that business leaders are faced with the challenge of identifying potential leaders despite the general lack of confidence by business leaders in the competencies of the emerging leaders. Organizations should be deliberate in the development of their managers against the background of the strategic objectives and the environment within which the organization operates, to ensure an effective succession plan (Amato, 2013).

Businesses in Jamaica are not exempt from the apparent global leadership crisis. Jamaican business leaders have recognized the need for effective leadership succession for business continuity and the importance of attracting and recruiting the right talent for leadership succession (Minto-Coy, Cowell, & McLeod, 2016). The concept of effective leadership in business and developing and implementing strong leadership, with a vision to improve workplace productivity is high on the agenda for Jamaica business leaders (Minto-Coy et al., 2016).

Creating a strong leadership bench through effective succession planning mitigates leadership crises caused by unpredictability of change in leadership. These unpredictable changes are from the exodus of Baby Boomers (Cummings-White & Diala, 2013), leaders' untimely departure due to resignation, promotion, illness or death (Musa & Semasinghe, 2014), and unethical breaches committed by leaders which erode trust and loyalty (Ershaghi & Hames, 2013; Estedadi & Hamidi, 2015). The unpredictability of leadership changes is further compounded by the introduction of disruptive technology (Aluya, 2014), workforce diversity management (Al Ariss, Cascio, & Paauwe, 2014), change in culture and values (Chung & Luo, 2013), and the fight for scarce talent on the global market (Cascio, 2014). Business leaders should capture how they would respond to a sudden leadership change caused by unforeseen events in their leadership succession strategies.

Some business leaders experience a multifaceted organizational challenge because of the unpredictability of leadership change, reinforcing the need for adequate succession planning. Developing a succession planning tool that will mitigate potential crises arising from leadership change, will require business leaders to consider the size of the organization, the future human resource needs of the organization, and the available human resources with the required competencies (Chlebikova et al., 2015). Based on the strategic directions of the organization, business leaders should develop a set of skills for the selection of successors to secure the long-term sustainability of the organization (Lawal et al., 2016). The organization should also have qualified personnel who are knowledgeable in leadership succession planning and capable of developing the required

competencies found in the successor leaders while aligning the succession plan with the strategic objectives of the organization (Rothwell, 2010). Business leaders should establish a systematic process of identifying critical leadership competencies for success as part of the leadership succession strategy.

Not all scholars support the use of succession planning as the answer to solving the leadership crisis. Weare (2015) posited that preparing internal candidates to take over leadership roles in the future could be detrimental to the organization in a rapidly changing environment. Business leaders need to refresh and prepare for future changes and using internal candidates could result in cloning of the predecessor leader and a continuation of the status quo, which impedes required changes (Sanjeev & Singh, 2017). Rather than focusing on internal succession as a solution to the leadership crisis, Weare posited that business leaders should focus on future business needs and use the opportunity to upgrade future leadership roles and the competencies for these positions. If the desired skills cannot be found internally, the business leaders could be forced review external candidates in the event of the sudden departure of a leader (Rothwell, 2010). Leadership succession strategies should be systematic and allows for the identification and development of successors for future leadership roles. Leadership succession strategies should also be agile and allow business leaders to respond effectively to the sudden departure of a leader.

Internal and External Selection

Business leaders' decisions to select leaders internally or externally to fill future leadership roles often depend on the availability of expertise; however, other factors

influence this critical decision. Chlebikova et al. (2015) and Ferris, Jayaraman, and Lim (2015) noted that although there are factors that dictate the unavoidable need for leadership succession planning, business leaders' selections between an internal candidate and an external candidate for leadership succession is often influenced by the organization's fixed assets, size, ownership structure and financial performance. Leadership succession planning is a complicated process that takes business leaders years to be adequately developed and has no guarantee that a leader will be ready internally when the outgoing leader demits office (Rothwell, 2010). According to Pandiyan and Jayalashmi (2016), these varying factors under consideration has led to approximately one third of business leaders across the globe struggling with finding leadership replacements internally while about half of the business leaders are forced to recruit leaders externally to fill available vacancies. Business leaders' leadership succession strategies should take into consideration both internal and external recruitment strategies to mitigate an over-reliance on internal talent.

Despite the challenges faced by business leaders to decide between an internal incumbent and an external candidate, there is a preference for internal selection of leaders. Ferris et al. (2015) found patterns that suggested that most boards' selections of chief executive officers (CEOs) are done internally and that the majority of forced turnover is associated with the external appointment of CEOs indicating a preference for internal succession. A preference for internal leadership succession is based on the perception that the organization's leadership succession planning strategies are working effectively which facilitates a smoother transition from one leader to the next (McKee &

Froelich, 2016). This ease of transition from one leader to the next creates less disruption to the organization's strategic plans as internal incumbents have institutional knowledge that is transferred from the outgoing leader to the incumbent (Ferris et al., 2015).

However, not all business leaders are in favor of this smooth transition when there is a change in the strategic direction of the business (Ferris et al., 2015).

The smooth transition from an outgoing leader to an internal incumbent could also be the reason why business leaders choose an external candidate. The organizational strategic business plan could be to change the way business is conducted and how the organization is strategically managed to ensure that the new direction of the organization is executed effectively (Ferris et al., 2015). This new strategic outlook could require the need for a successor who had no previous association with the organization and bring unique value to the strategic direction of the organization (Ferris et al., 2015). External candidates are positively associated with new and unique ideas and are not influenced by existing policies, procedures and norms and can be disruptive (Ferris et al., 2015). Business leaders should consider the strategic direction of the organization and whether there is a need to change the existing culture of the organization or to continue with the existing culture when identifying successors for future leadership roles.

Despite the benefits associated with hiring an external candidate for a leadership role, business leaders are also cognizant of the cost associated with hiring the wrong external candidate. Business leaders that hire the wrong external candidate for leadership roles could incur financial losses between 25% and 200% of the compensation associated with the leadership role (Hall-Ellis, 2015). This potential loss creates a dilemma for

many business leaders who are without an effective succession planning strategy as the decision to hire from within or outside becomes more difficult than if a succession plan was implemented (Hall-Ellis, 2015). Rothwell (2010) stated that without a leadership succession plan, business leaders are often faced with the dilemma of choosing between an internal and an external candidate when replacing the leader of a business area that is unique to the organization or a mission critical job. The effective implementation of a leadership succession plan could prevent the organization from incurring the cost associated with hiring externally as well as losses incurred from hiring an external leader who is not fit for the role.

Business leaders should constantly identify and develop potential leaders for mission critical jobs. Ideally, the replacement of a leader of a unique or mission critical function to the business should be done internally to ensure transfer of institutional knowledge (Rothwell, 2010). The problem of leadership succession arises when the leadership bench strength is weak which forces business leaders to recruit externally (Rothwell, 2010). Whether an internal or external incumbent is chosen for a critical leadership role, there is an expectation that a leadership candidate will be ethical and accountable for the future performance of the organization (Eisenbeiss, Knippenberg, & Fahrbach, 2015). Senior business leaders should establish a leadership succession plan that incorporates the development of the desired behaviors internally while recruiting for these desired behaviors externally to fill key leadership roles (Rothwell, 2010). Add summary and synthesis to connect to back to your study. Mission critical jobs are

essential to business continuity and should be considered a priority by business leaders when developing leadership succession plans.

Succession plans can only successfully achieve the objective of identifying and developing talent if the plan involves the collaboration and focus of the senior business leaders and the human resources department. Human resource leaders and senior business leaders should collaborate to recruit the best candidates from both internal and external sources for leadership development (Rothwell, 2010). Oladapo (2014) posited that human resources leaders identify the lack of senior leaders' involvement in the leadership succession strategy as the primary reason for the failure of leadership succession plans. To implement succession planning strategies effectively, collaboration between senior business leaders and human resource leaders is necessary to align the long term strategic direction of the business with talent management strategies (Oladapo, 2014). Leadership succession strategies should be developed and led by senior leaders to ensure that leadership succession receive strategic focus. Business leaders should align leadership succession strategies with human resource policies and procedures for greater effectiveness.

Retirement of Baby Boomers

A strategy to the development of a successful leadership succession plan is the involvement of Baby Boomers approaching retirement age. Business leaders approaching retirement have institutional knowledge which is critical for business continuity and must be captured before they retire (Liebowitz & Liebowitz, 2015). Bogdány, Balogh, and Csizmadia (2014) posited that generational change is an inevitable

phenomenon that forces business leaders globally to respond to the emerging challenge of leadership change and potential talent gaps by focusing on leadership succession planning. The development of a leadership pipeline within the organization is a systematic strategic process designed to identify high performing talent and to prepare them for future leadership roles (Titzer et al., 2014). With an aging workforce nearing retirement, the development of a leadership pipeline is critical to succession planning and business continuity (Liebowitz & Liebowitz, 2015; Titzer et al., 2014). Business leaders should involve predecessors of leadership roles in the identification and development of successors as a critical component of the leadership succession strategy.

Business leaders should ensure that the workplace environment is desirable to both predecessor and successor to ensure the smooth transition of knowledge from the predecessor to successor. Business leaders should create an environment that is conducive to change to reduce the negative resistance that could arise with the leadership change (Perrenoud & Sullivan, 2017). Some businesses suffer from organizational bureaucracy such as confidentiality policies which prevents the successful transfer of knowledge from the predecessor to the successor (Hatak & Roessl, 2015). Business leaders are faced with the challenge of mitigating a potential crisis created by the shortage of leadership talent and the pending retirement of Baby Boomers (Conger, 2014; Perrenoud & Sullivan, 2017). This potential crisis is compounded by the lack of knowledge transfer from Baby Boomers to the next generation creating a knowledge gap in leadership succession (Perrenoud & Sullivan, 2017; Strawderman, 2014). Rothwell (2010) stated that some organizations across the globe are losing valuable talent because

of the retirement of Baby Boomers reinforcing the need for an effective succession planning strategy. Business leaders' leadership succession strategies should capture the creation of a working environment that is conducive to both successor and predecessor to ensure effective transfer of institutional knowledge.

The scholarly literature about Baby Boomers has highlighted the increase in the number of executives who are approaching retirement age and the impact of their departure on the organization's future sustainability. One affect is the increase in the level of negative exposure of the new leader to the business environment caused by the lack of knowledge transfer from the predecessor during the transition period (Shirley, 2016). The lack of knowledge transfer from the predecessor to successor places the organization in a vulnerable position with the competitors (Shirley, 2016). Shirley stated that approximately 90% of business leaders consider the transitional period to be the most vulnerable period throughout the career of a new leader. The negative effect caused by the lack of knowledge transfer from the predecessor to potential successors' forces business leaders to recognize the need for succession planning to mitigate the looming talent gap created because of the aging workforce and the pending risk to the business (Chambers, 2013). Business leaders should develop leadership succession strategies that provide a systematic process to transfer institutional knowledge from the predecessors to the successors for business continuity.

Investing time and financial resources to ensure the transfer of knowledge from the aging workforce to the new generation of leaders is necessary if the organization is to survive. Hall-Ellis (2015) posited that this investment should start from the point of

recruitment by ensuring that leadership candidates are recruited as part of the succession planning strategy. Recruits should have the essential competencies to potentially replace employees who are nearing retirement (Hall-Ellis, 2015). Once new emerging leaders have assumed roles of leadership, they rely on the knowledge of their predecessors passed experiences to understand new role properly and to communicate the business strategy for the future (Shirley, 2016). Some successful business leaders systematically retain critical knowledge from predecessors and pass this knowledge to the successor before the departure of the predecessor (Hall-Ellis, 2015). Transferring organizational knowledge from predecessor to successor is critical to any organization that is seeking to create a competitive advantage (Hatak & Roessl, 2015). As a business strategy, business leaders should focus attention on high risk leadership roles that could result in sudden vacancies and plan succession for these roles accordingly (Titzer et al., 2014). Business leaders' leadership succession strategies should allow for the adequate allocation of resources for the identification of successors and the transfer of business knowledge for competitive advantage.

Some organizations have been experiencing an exodus of Baby Boomers, without these organizations adequately retaining expert knowledge, through a process of systematic transfers from one generation of leaders to the next. Al Ariss et al. (2014) posited that the exodus of Baby Boomers without knowledge transfer to successors could be found in all types of enterprises, including small and medium firms, highlighting the importance of succession planning in all organizations. Approximately 30% of small businesses fail to make the transition successfully from the predecessor to successor

(Perrenoud & Sullivan, 2017). Business leaders need to implement a formal succession planning system where knowledge is transferred from the Baby Boomer generation to the next generation, and the development of internal talent for future leadership roles can occur (Wang, Wang, & Liang, 2014). The succession planning system must be designed and implemented systematically and strategically for effective knowledge transfer and to ensure business continuity (Estedadi & Hamidi, 2015).

In addition to ensuring business continuity, knowledge transfer, and succession planning are also critical to economic development and sustainability. Hatak and Roessl (2015) posited that millions of leadership successions take place in businesses per year across the globe. Despite the succession planning that takes place in businesses annually, effective knowledge transfer from the predecessor to the successor is a challenging but important task in a succession planning program (Hatak & Roessl, 2015). Effective knowledge transfer from predecessor to successor could lead to improving creativity, better operational efficiencies, and enhance employees' productivity (Hatak & Roessl, 2015). Based on the scholarly literature, the retiring of Baby Boomers creates a gap in organizations because of a lack of transfer of tacit and institutional knowledge (Cummings-White & Diala, 2013). Tacit and institutional knowledge are critical to the continuation of the organizational growth and developmental strategies and should be captured via a systematic approach where the transfer of knowledge from the predecessor to a successor is achieved (Cummings-White & Diala, 2013). A major contributing factor to the creation of the knowledge gap between Baby Boomers and the next

generation of leaders has to do with the challenges that arise from the lack of a relationship between mentor and mentee (Estedadi & Hamidi, 2015).

An organization that incorporates mentorship programs in the succession planning strategies benefits from the retention of institutional knowledge that is passed on to potential leaders (Lawal et al., 2016). However, the relationship between mentor and mentee requires a willingness on the part of the mentor to trust the mentee, as in the case of the predecessor and successor relationship (Hatak & Roessler, 2015). The predecessor and successor relationship require the predecessor to trust the successor first before sharing the information acquired through experience (Hatak & Roessler, 2015). Effective knowledge transfer from predecessor to successor requires the predecessor to be patient, open-minded, trusting, and possess good communication skills (Samei & Feyzbakhsh, 2015). This process of transferring knowledge from the predecessor to successor can be further complicated if the predecessor becomes insecure because of the sharing of roles and the shifting of power from the predecessor to the successor (Hatak & Roessler, 2015). Business leaders should ensure that both predecessor and successor are comfortable with the mentor-mentee relationship and that the leadership succession strategies focus on the seamless transfer of power from the predecessor to successor.

Leadership succession planning should be strategically designed to capture job related experiences from retiring leaders as part of the organization's strategy to remain competitive in the increasingly competitive and hostile market environment. Business leaders should incorporate Baby Boomers in the development of leadership succession strategies, before their departure from the organization (Brčić & Mihelič, 2015). Baby

Boomers should also play a critical role in the identification of employees who possess the required competencies for effective leadership (Woolcock, 2015). Care must be taken to ensure that employees are not selected for succession based on similarities in behavior to the outgoing leader, but rather on the desired abilities that could take the organization to its future desired state (Woolcock, 2015). Business leaders should ensure that leadership succession strategies mitigate the cloning of a predecessor by establishing desired competencies for leadership roles.

Many Baby Boomers have retired from organizations without imparting tacit knowledge to successive generations of potential leaders (Brčić & Mihelič, 2015). Brčić and Mihelič (2015) stated that the absence of a formal and systematic process of mentoring and coaching in organizations have created a knowledge gap that hampers the development of talent and negatively impacts organizations' growth and sustainability. Tacit knowledge is defined as knowledge that cannot be explicitly transferred from one leader to the next but can be achieved through coaching and mentoring (Zaim, Gürcan, Tarım, Zaim, & Alpkan, 2015). Tacit knowledge contributes significantly to the alignment of an organization's intellectual capital and is critical to the success of the organization's financial and operational performance (Wang et al., 2014).

Baby Boomers have institutional knowledge that needs to be passed on to the next generation to ensure business continuity. The retention of institutional knowledge is necessary for organizations to maintain their culture and uniqueness, and leaders of organizations should implement systems to readily assess leadership readiness for institutional knowledge transfer within the organization (Lawal et al., 2016). One system

is to design and implement a succession planning tool that captures institutional knowledge in current positions and retains only the institutional knowledge that the organization deems to be essential to the organization's future growth and development (Cummings-White & Diala, 2013). Business leaders should also ensure that the succession planning tool is linked to written procedures that support the succession objectives and mitigate the challenges that prevent the organization from capturing and transferring institutional knowledge (Cummings-White & Diala, 2013).

Business leaders can capture institutional knowledge by Baby Boomers performing the role of advisor to successor incumbent before leaving the organization. By acting as advisors, Baby Boomers are given the opportunity to still function in a leadership role while grooming their successors (Liebowitz & Liebowitz, 2015). Liebowitz and Liebowitz found that business leaders who are performing the duties of an advisor entails acting in a temporary leadership role through phase retirement, while providing guidance, as a role model, to the successor leader. During the transition period, the successor leader learns from the advisor mostly by observation and shared leadership (Manning et al., 2015). The focus on leadership succession planning should go beyond traditional leadership developmental plans, where succession strategies are focused solely on the development of technical skills and institutional knowledge, and rather a holistic approach should be taken to develop a successor (Newhall, 2015). This holistic approach would consider the development of technical, institutional, and tacit or experiential knowledge (Newhall, 2015). Souto (2014) explored the challenges caused by the lack of transfer of tacit or experiential knowledge from Baby Boomers approaching retirement to

the succeeding generation. Baby Boomers have knowledge that is acquired over a period because of lived experiences, which is not passed on to the next generation of leaders; hence, a sudden departure of these Baby Boomers creates a knowledge gap challenge for organizations (Souto, 2014). Coaching and mentoring should form part of the leadership succession strategy for the more efficient transfer of tacit and institutional knowledge from the predecessor to the successor.

Experiential knowledge is acquired over a sustained period of developing insight and good judgment. Souto (2014) posited that experiential knowledge could only be passed on from one generation to the next if systems are created to connect retirees to organizations' succession strategies deliberately. Succession planning strategies must be flexible to accommodate the desires of the retirees to ensure that the transfer of experiential knowledge is achieved (Collins, Worthington, & Schoen, 2016). Flexibility could take the form of seminars, workshops, meetings and other forms mutually agreed to between retirees and organizational leadership (Collins et al., 2016). Collins et al. recognized the need for a cultural shift within organizations where leaders engage a more proactive approach to knowledge retention and bridging the gaps between outgoing leaders and incumbents in a more formal manner. The use of effective succession planning strategies that mitigate leadership knowledge loss by incorporating several approaches that include, but is not limited to, coaching and mentoring programs led by retirees (Collins et al., 2016).

Based on the scholarly literature on the inclusion of Baby Boomers in the succession planning process, the engagement process must be systematic and incorporate

the use of coaching and mentoring as the main tools of knowledge transfer (Amato, 2013; Cummings-White & Diala, 2013). Effective succession planning involves the use of coaching, mentoring, and rotating of potential leaders to ensure readiness for future leadership roles (Manning et al., 2015). Despite business leaders' recognition of the importance of getting Baby Boomers involved in the development of future leaders by process of knowledge transfer, business leaders should also recognize the distress that some Baby Boomers endure from the fear of retiring (Taylor, Pilkington, Feist, Dal Grande, & Hugo, 2014). Emotional intelligence must be applied to the succession process, recognizing the need to simultaneously prepare the Baby Boomers for retirement as part of the succession planning process (Burmeister & Deller, 2016). Business leaders should develop leadership succession strategies that recognize predecessors fear of retirement and incorporate emotional intelligence in the execution of those strategies.

Planning for leadership succession could stimulate business growth as well as forces the organization to implement a retirement strategy for older workers. Oloyede, Ayedun, and Ajibola (2016) posited that Baby Boomers' understanding of the organization's exit strategy, as part of the succession planning strategy, is critical to the outgoing leader's preparation for retirement. Baby Boomers' understanding of the organization's exit strategy also impacts the process of transferring knowledge to the next generation, and the alleviation of Baby Boomers' fear of retirement (Hall-Ellis, 2015). Outgoing business leaders' involvement in the succession planning process could result in anxiety, fear, and distress of the outgoing leader (Hall-Ellis, 2015). The engagement process in leadership succession planning must be managed effectively by senior leaders

and the board of directors (Burmeister & Deller, 2016). The management of the engagement process by senior leaders will ensure mutual benefit for organization and retirees (Burmeister & Deller, 2016).

There should be a deliberate and concerted effort between the board of directors and the senior leadership of the organization to collaborate and manage the potential crisis that could occur and mitigate the potential damage to the succession planning process. Baby Boomers could support the senior leaders and the board of directors to identify the potential candidates for succession (Hatak & Roessl, 2015). Predecessors are more willing to impart knowledge to potential successors if the predecessors are confident that the successors are the right fit for the leadership roles, underscoring the need for an establish knowledge transfer process (Manning et al., 2015). A knowledge transfer process will facilitate the correct selection of candidates for future leadership roles while creating a level of importance for the retirees (Burmeister & Deller, 2016). Regardless of what methods are used to ensure that there is a transition from Baby Boomers to the next generation of leaders, business will only remain viable if more focus is placed on knowledge transfer (Oloyede et al., 2016). Business leaders should involve baby boomers in the identification, development, and execution of leadership succession plans to mitigate pitfalls in the selection of successors.

Sudden Leadership Departure

Sethuraman and Suresh (2014) define effective leadership as a social process of influence designed to achieve voluntary participation of followers to reach the organization's goals and objectives. Leadership can also be defined as a multi-level

interactive relationship between a leader and a follower where similar goals and vision are collectively achieved without much opposition (Summerfield, 2014). In times of less favorable business climate, organizations' existence and positive employee outcome will depend on leadership styles capable of transforming a negative situation into a more desirable and productive state (Sethuraman & Suresh, 2014). This view is supported by Cegarra-Navarro, Soto-Acosta, and Wensley (2016) who posited that leaders who are capable of navigating the organization through periods of and rapidly changing markets are considered more favorably for positions of leadership than those leaders who struggle in chaotic environments. In more favorable business climate, it is important to have the right leaders to seize business opportunities to grow the business and stakeholders' interest (Hooijberg & Lane, 2016; Oloyede et al., 2016).

The definitions of leadership describe the importance of developing effective business leaders to navigate the business through a continually changing global economic environment and a strategy to replace business leaders in the event of a sudden departure. Leadership succession is a certain phenomenon in business, as leaders will leave voluntarily or involuntarily regardless of whether organizations are prepared for it (Quigley, Crossland, & Campbell, 2017). Leadership succession planning is an investment in the future of the organization by developing potential leaders to assume leadership roles in the event of the planned or sudden departure of a leader (Newhall, 2015). In the case of a sudden leadership departure, business leaders must be nimble and ready to compete in an aggressive, dynamic and uncertain global business environment for talent or rely on internal succession (Harraf, Wanasika, Tate, & Talbott, 2015).

Uncertainty in the global business environment could have a crippling effect on business continuity, forcing business leaders to be proactive in the implementation of strategic plans to mitigate losses (Rothwell, 2010). September 11, 2001, 172 vice presidents lost their lives when the world trade center collapsed from a terrorist attack, creating panic among shareholders and stakeholders bringing into focus organizations' readiness to respond to sudden leadership changes (Rothwell, 2010).

The readiness to respond to the sudden leadership change will mostly depend on the ability of the human resource function to recruit, train and develop the needed talent. Business leaders should implement human resource management systems to respond swiftly and effectively to a sudden change of leadership (Rothwell, 2010). Despite this recognition to respond swiftly to a sudden change in leadership by implementing and maintaining a strong leadership bench, many organizations across the globe have not resolved this crisis (Church, 2014). Church further posited that the significance of the development of leadership succession plans in organizations for business continuity cannot be overstated. Many organizations are without a succession plan that identifies and develops leaders for successful transition which creates an organizational risk (Rothwell, 2010). With the sudden departure of a business leader, a major organizational risk that could arise is the lack of leadership talent to lead the organization's niche market that could be unique to the organization (Rothwell, 2010).

It is easier to plan succession for leaders who are about to retire because the transition date is known, however, planning succession for leaders because of sudden departure should be part of the crisis plan of an organization. Leadership succession

planning process must be robust and cable of withstanding emergency situations such as the sudden departure of a leader to avoid a crisis (Woolcock, 2015). This type of systematic planning for the future mitigates the risk associated with filling the vacancy for mission critical jobs (Rothwell, 2010). Uncertainty exists regarding the identification of talent to be developed and the skill sets to be developed (Prestia, Dyess, & Sherman, 2014). The challenge is compounded by the uncertainty of business leaders regarding who within the organization is responsible for leadership development, and the architecture that should be implemented to support the talent development (Prestia et al., 2014). Business leaders can mitigate this challenge by focusing on the development of an effective leadership succession planning program that will provide the organization with a reasonable alternative, in the event of the sudden departure of a leader (Rothwell, 2010).

Business leaders should ensure business continuity by averting a leadership crisis from the sudden departure of a mission critical leader by implementing and maintaining a succession plan. Rothwell (2010) posited that succession planning requires the involvement of senior leaders in the identification of mission critical jobs and the allocation of financial resources to the leadership succession program. This collaborative approach between senior business leaders and human resource leaders could also compromise the succession planning program (Woolcock, 2015). One drawback of the collaborative approach is that sophisticated business leaders could undermine the leadership succession plan by identifying a few candidates who they believe will be ready in less than five years, while other leaders will simply identify candidates who are like

them (Woolcock, 2015).

Organizations are in dire need of leaders who motivate employees and contributing toward improving workplace productivity for competitive advantage. Woolcock (2015) posited that business leaders are still unclear about whom, or which department, is responsible for succession planning. This level of uncertainty could be crippling to an organization in the event of a sudden departure from a mission critical job, such as a chief executive officer (Woolcock, 2015). Leadership succession is an absolute phenomenon which underscores the need for business leaders to fully understand when leadership succession will have a positive or adverse impact on the business in the event of sudden departure (Woolcock, 2015). Business leaders can minimize organizational risk by mitigating the adverse effects when a leader departs the organization by devoting more focus to succession planning (Calareso, 2013). The sudden separation of a leader could place an organization in a crisis mode, depending on whether the organization was conducting ongoing assessments of its potentials systematically and formally (Calareso, 2013).

The appropriate form of assessment should be implemented to accurately measure the required competencies for leadership. Church, Rotolo, Ginther, and Levine (2015) posited that the appropriate form of assessment for leadership involves engaging the right methodologies used to measure competencies and assess talent for the right reasons.) Business leaders should have an established process where potential leaders are assessed and reassessed to ensure that those who are selected to fill leadership positions are those who have responded positively to the leadership development programs (Oloyede et al.,

2016). Leadership assessment tools should also be used to identify executive talent from the point of recruitment (Hooijberg & Lane, 2016; Oloyede et al., 2016). Identifying leadership talent from the point of recruitment minimizes the disruptions that come with the sudden change of leadership and prepare potential leaders to maximize opportunities arising from a changing business environment (Hooijberg & Lane, 2016; Oloyede et al., 2016).

Sudden turnover of potential leaders who have institutional knowledge could have a deleterious effect on organizations if knowledge transfer has not taken place before departure. Even though potential leaders could develop institutional knowledge which is essential for business continuity, business leaders might incorrectly use institutional knowledge as the sole basis to assess organizational, and culture fits (Dohrn, Lopez, & Reinhardt, 2015). Ongoing assessment of potential leaders based on the desired leadership competencies is critical to select a leader particularly in the case of a sudden departure of a leader (Calareso, 2013). Business leaders should go beyond selecting a potential successor based solely on the transfer of institutional knowledge, but also, potential candidates should have rich professional knowledge (Rothwell, 2010). In the absence of leadership bench strength, identifying a candidate with both institutional and professional knowledge from the global workforce in the case of a sudden departure of a leader could be difficult (Conger, 2014).

Business leaders should also consider external factors affecting the future of the organization when deciding on its leadership pipeline. Hooijberg and Lane (2016) posited that an assessment of industry environmental changes and how those changes

affect the strategies of an organization should be conducted by business leaders before deciding on the profile for potential leaders. Building a sustainable leadership pipeline is of major concern to business leaders for organizations' growth and development but is also critical to the protection of shareholders interest (Berns & Klarner, 2017; Hooijberg & Lane, 2016). In protecting the interest of shareholders reinforces the need for leadership succession planning to be deliberate and not left until a leader has suddenly departed the organization (Calareso, 2013). Despite this fact, ongoing comparisons between current skills and future required skills for leadership roles are rarely conducted in organizations, resulting in incorrect selection in the event of a leadership crisis such as the sudden departure of a leader (Newhall, 2015). Lack of comparisons between current and future desired competencies could result in promotions being done based on current required skills and ignoring future organizational needs, thereby creating a critical gap (Newhall, 2015). Only 34% of senior managers are committed to implementing leadership succession plans while 17% of companies are equipped to handle the sudden departure of a senior leader (Alter, 2013). This reality emphasizes the need to have a structured and systematic approach to identifying leadership gaps and developing high potential employees for future leadership roles (Newhall, 2015).

Lack of leadership succession planning and talent management could hinder organizations from reaching key financial targets and organizations' sustainability. Many business leaders have indicated that talent management is the greatest human resource risk to the organization sustainability and in the absence of one creates a crisis in the event of a sudden departure (Oppong, 2013). Regardless of this critical recognition by

organizational leaders, many leaders have not devoted time and resources to ensuring that the eminent crisis that could occur because of the sudden departure of a leader is averted, by proactively developing and implementing an effective leadership succession plan (McKee & Froelich, 2016).

Several reasons are given for business leaders' lack of preparation for dealing with a sudden departure of a leader. One reason given by business leaders for lack of leadership succession planning is the preoccupation with the operational running of the business while ignoring the need to plan for leadership change (Oloyede et al., 2016). According to Oloyede et al. (2016), business leaders do not consider leadership succession planning as an immediate need. Other scholars have found that the hiring strategy of the organization do not strategically align with future leadership needs nor do business leaders develop future leadership from the existing workforce (Hooijberg & Lane, 2016). Hall-Ellis (2015) posited that succession planning is one factor to bridge the gap between current and future organizational needs and maintaining high quality leadership within the organization. Business leaders without a formal succession planning system run the risk of negatively impacting organizational performance, eroding competitive advantage, and compromising organizational sustainability (Pandey & Sharma, 2014).

Business leaders should develop and implement a formal succession planning process in which potential leaders are identified and developed to assume the future leadership roles. This proactive approach to talent management underscores the point made by Hall-Ellis (2015) that an essential function of business leaders is to provide for

leadership succession, to prevent the organization from any undue hardship because of a vacancy in a leadership role. Business leaders should develop a leadership succession emergency plan to identify internal candidates who have the potential to fill future leadership roles in the case of an emergency (Hooijberg & Lane, 2016). Each area of leadership should identify at least one internal candidate who has met the profile established for that leadership role and capable of at least acting in the event of a sudden departure of a leader (Hooijberg & Lane, 2016).

Scarcity of Talent

Businesses leaders are recognizing that to compete successfully in a global marketplace, where knowledge and technology are at the forefront of business strategies, attracting and retaining the best leadership talent is critical for business sustainability and competitive advantage. Pandiyan and Jayalashmi (2016) posited that based on the scarcity of leadership talent; there will be a shortage of middle management candidates who can assume leadership roles in organizations. This lack of leadership talent, compounded by the rapidly changing global business environment, is forcing business leaders to pursue change management initiatives and a new type of leadership critical to the organization's survival (Chambers, 2013). Finding candidates with the desired leadership traits in a tight labor market could be costly, time consuming and exposes the organization during the transition period (Azbik & Finan, 2016). Amidst the eminent challenge, this new type of leadership must be developed and retained despite the heightened competition for needed but scarce talent (Azbik & Finan, 2016). Azbik and Finan further posited that in a competitive global economic climate, businesses leaders

must compete for the hearts and minds of talented and capable individuals, and engage them in the ongoing learning processes, to keep them committed to the company's aspirations. The organization's ongoing learning process is essential to expand the body of knowledge required to improve and advance the internal competency toward achieving the organization's strategic objectives (Cohen, 2015). Building a global talent pool of high potential leaders that could fill leadership vacancies in the future is critical to an economy where talent is scarce (Collings, 2014). Building a talent pool with the desired behaviors for future leadership roles must be done using a robust talent management program inclusive of leadership succession planning (Azbik & Finan, 2016).

Scarcity of talent could have a crippling effect on an organization if mission critical jobs are not filled on time. Business leaders should identify potential leadership talent for leadership assignments as part of the business succession planning strategy for future leadership roles (Collings, 2014). By placing potential leaders on leadership assignments, business leaders are exposing and preparing potential leaders' mission critical roles (Collings, 2014). Considering this perspective, Estedadi and Hamidi (2015) described the succession planning process in organizations as the lifeline of the organization because, without an effective succession plan in a globally competitive environment, the organization will just cease to exist.

Leadership succession planning is a strategic business objective for business leaders in a competitive business environment. Leadership succession planning is both essential to the development and retention of talent and as a strategic and deliberate effort to ensure the ongoing positive performance of the organization in an environment where

talent is scarce (Titzer et al., 2014). A positive performance because of internal talent development gives the organization a competitive advantage that is hard to replicate in the market (Azbik & Finan, 2016). Alter (2013) stated that because of the ongoing changing business environment, an effective leadership succession plan is critical, and not optional, for business leaders to focus on developing a strong pool of leadership successors. Finding the right leaders for organizations has been reported, by many international companies, as the top human resource challenge based on the scarcity of talent (Oladapo, 2014). Business leaders should consider leadership succession planning as a business strategy for competitive advantage (Rothwell, 2010).

Other scholars have similarly identified the challenges faced by human resource practitioners to attract and retain talent in the global marketplace (Sparrow & Makram, 2015). Assessments for high potential and senior executives for future leadership roles are high priorities for business leaders in large organizations across the world (Church et al., 2015). The literature on leadership succession planning also revealed that organization leaders have recognized the need for strategic management of talent to fill mission critical positions, as the answer to businesses survival, in the current fast-changing global environment (Herd, Adams-Pope, Bowers, & Sims, 2016). Varhegyi and Jepsen (2017) stated that business leaders must proactively implement leadership succession plans to ensure business sustainability and future growth of the organization. Despite the recognition of the need to make leadership succession planning a priority for business continuity, not all business leaders focus on leadership succession planning as a priority (Amato, 2013). Harsh economic conditions have forced some business leaders to

focus on what is required to survive in the current situation rather than leadership succession planning which is considered an initiative for the distant future (Amato, 2013). This lack of focus on the future, by business leaders, compromises leadership succession plans and creates future leadership gaps (Amato, 2013).

Leadership succession planning should be strategically linked to the organization strategic objectives and requires the personal involvement of leadership at the helm. Executive leadership should participate in the identification of leadership gaps and the development of a systematic and structured approach to succession planning (Collings, 2014). Leadership succession strategies should be designed to ensure business survival by identifying and developing future leaders for mission critical positions while building organizational pride among young professionals who aspire toward leadership roles (Clark, 2015). Leadership gaps across the globe are increasing, and impacting organizations in every sector, because of the lack of skills and abilities within the available labor forces to fill the available jobs. Because of booming economies, there has been a shortage of skilled labor on the market that is compounded by an aging workforce and fewer new entrants (Oppong, 2013). Business leaders that can maximize productivity from their available talent by aligning talent management to organizational strategic goals will mitigate the crisis caused by the scarcity of talent (Sparrow & Makram, 2015).

Workforce Diversity

Business leaders should promote diversity in leadership succession planning to ensure that the pool of successors reflects the multiple perspectives in the global market

place for competitive advantage. Human resource practitioners should partner with senior business leaders of the organization to create and implement human resource management practices such as succession planning (Bozer, Kuna, & Santora, 2015). Bozer et al. posited that business leaders must align leadership succession plans to the organization's business strategy for competitive advantage. One such organizational strategy for competitive advantage is the pursuit of diversity management (Al Ariss et al., 2014; Velasco, Villar, Lunar, & Velasco, 2016). Bogdány et al. (2014) posited that when designing and implementing a leadership succession plan, business leaders should not ignore the cultural differences in an organization. The global workforce dictates that for business leaders to be successful in maximizing the organization's capacity, they must be effective at managing and leading a diverse workforce (Chambers, 2013). Organizations that implement a diversity management strategy experience improved workplace productivity and organizational profitability (Virick & Greer, 2012).

When designing a leadership succession plan, business leaders should incorporate diversity management strategies and be guided by legal legislations and ethical standards to avoid discriminatory practices. Business leaders who are guided by policies and procedures that incorporate diversity management strategies in their succession plans are more likely to impact the bottom line positively (Sabharwal, 2014). Business leaders should not ignore demographics as the collective representation of all groups of employees is essential to the success of the leadership succession plan (Virick & Greer, 2012). Business leaders, who incorporate diversity management in the strategic objectives of their organizations, seek to establish an inclusive environment and build

cultures that recognize and understand the importance of employee differences in talent management (Gelens, Hofmans, Dries, & Pepermans, 2014). Individuals who were placed on a team with diversity had a larger preference for a considerate leader than those who were included on a team that is not diverse (Homan & Greer, 2013). Business leaders must identify the desired behaviors in potential incumbents who are selected for leadership succession (Rothwell, 2010)

With the growing need to promote diversity in the organization, promoting considerate leaders could improve the performance teams. The ability of considerate leaders to see members of a diverse team as unique members of the team creates a competitive advantage for an organization and attracts talent from the global workforce (Homer & Greer, 2013). The success of an organization's succession plan depends on how well business leaders incorporate diversity management in employment practices to ensure that candidates are not discriminated against (Sabharwal, 2014). Discriminations in leadership succession planning could come in the form of race, color, ancestry, place of origin, political belief, religion, marital status, family status, physical appearances, mental disability, gender, sexual orientation, and age (Gumbus & Grodzinsky, 2016). The succession planning process that incorporates workplace diversity and avoids discriminatory practices will enhance the organization's brand (Gumbus & Grodzinsky, 2016). Branding affects the diversity of candidates based on whether the organization has a reputation for promoting inclusion and tolerance and abiding by antidiscrimination and equal opportunity employment regulations (Gumbus & Grodzinsky, 2016).

In addition to the avoidance of discriminatory and unethical practices in leadership succession planning, the recognition of differences in behavior by members of the diverse team could affect an outcome, employee engagement, and performance of the organization. The impact on employees' productivity could be because of team members' perception of the different groupings which could cause conflicts and lack of trust (Homan & Greer, 2013). Employees' productivity could also be affected by strategies used by leaders to resolve conflicts existing within a diverse group reiterating the need for emotional intelligent leaders (Glodstein, 2014). Because of the real possibility of conflicts arising in diverse groups, Rothwell (2010) stated the need to incorporate strategies that develop leaders to manage conflicts in leadership succession plans.

The challenges that could occur because of the management of diverse teams, business leaders that select successors who are capable of managing a diverse workforce benefit from a wider cross-section of ideas and creativity. Hann, Stinglhamber, and Delobbe (2014) posited that proper management of a diverse workforce supports business leaders' desire to become an employer of choice in a competitive global market where innovation is critical. Organizations could benefit significantly from the recruitment of a diverse workforce with varying cultures and backgrounds (Hann et al., 2014). A leadership succession plan that incorporates diversity management strategies could potentially strengthen the leadership global knowledge base, by enhancing the organization's leaders' collective ability to understand various cultures that influence decision making, particularly with organizations that function globally (Alter, 2013).

Diversity in leadership succession planning provides an organization with an opportunity to select potential leaders from a global and competitive market where talent is the most important factor to create a competitive advantage. Sherman (2015) posited that recruiting successor leaders from a diverse workforce also provide business leaders with a pool of talent with diverse thinking, different approaches and innovative ideas necessary to grow an organization. Business leaders' commitment to diversity management as part of the organization's employment branding strategy will attract the best candidates across the globe for positions of leadership (Gotsis & Grimani, 2016). Diversity management in succession planning is best achieved through systematic approaches which include coaching, mentoring, cross training, career pathing, networking, and clear opportunities for promotion (Virick & Greer, 2012). Al Ariss et al. (2014) posited that employees' perceptions of business leaders' behaviors in managing diversity will impact their willingness to learn and develop critical skills. Business leaders must incorporate desired behaviors in succession planning as suggested by Rothwell (2010).

Legal and Ethical Practices

Business leaders could use the process of succession planning to identify and select ethical leaders for future leadership roles. Rothwell (2010) posited that since the advent of Enron, Global Crossing, and WorldCom, which saw business leaders exhibiting unethical behaviors that led to the bankruptcy of these organizations, ethics, moral, and values have become more important in the selection of a successor. Business leaders should ensure that the legalities surrounding employment practices and ethical selection

are observed in the leadership succession planning process (Kumaran, 2015). Business leaders who ensure that ethical practices are observed in its leadership succession planning process is not just conducting ethical selection, but also a good business practice that will eventually enhance the organization's brand and reputation (Grossman, 2015). The succession plan of an organization should reflect both ethical practices to select leadership successors who have demonstrated ethical behaviors (Calareso, 2013).

Business leaders should align strategic objectives such as succession planning with legal and ethical business practices. For business leaders to be successful at implementing leadership succession programs that observe legal legislations and ethical business practices, the leaders of the organization must first align its succession planning practices with the organizational strategic plans (Gothard & Austin, 2013). The implementation of legal and ethical practices must be deliberate, with set objectives and goals, and should be incorporated into all aspects of the business, including leadership succession planning, for the organization to be successful in the long term (Gothard & Austin, 2013). The performance of an organization can be enhanced by the background of a successor background in emerging economies that experience significant and rapid changes while maintaining ethical and legal practices (Chung & Luo, 2013). Leadership succession strategies that incorporate legal and ethical practices have a major impact on the performance of the organization because of the successors influence on the organization's future policies and procedures (Cummings-White & Diala, 2013).

Potential leaders' familiarity with the organization's mission, vision, and strategic objectives are critical to the smooth transition from a predecessor to a successor. Potential

leaders understanding, and promotion of the organization's core values should be critical in the selection of leaders by business leaders (Calareso, 2013). The reputation of a successor and ability to influence the performance of an organization is based on previous successes, skills, knowledge, the capacity to adapt to the changing climate, disruption to organizational responses to stakeholders, and access to resources (Chung & Luo, 2013). Rothwell (2010) posited that customers will lose faith in business leaders who have a reputation of involving in unethical business practices. This phenomenon of reputation and ability to influence performance is noted to have a reverse effect in organizations operated and owned by family members (Chung & Luo, 2013). This reverse effect is also true for organizations that are entrenched in group relations (Chung & Luo, 2013).

Regardless of whether unethical business practices are real or perceived, what is clear from the literature review is that business with leaders who engage in unethical business practices are at risk of losing shareholders confidence and customer loyalty. The risk of losing shareholders confidence because of leaders' unethical practices reinforces the need to have successor leaders who have a reputation for ethical business (Rothwell, 2010).

Workplace Productivity

Business leaders who have successfully implemented a leadership succession program are more likely to improve workplace productivity than those who do not. Labor productivity enhanced workplace productivity when the unit of output per employee hour worked is increased (Sherekar, Tatikonda, & Student, 2016). Hambrick and Quigley

(2014) posited that many scholarly researches have focused on leadership succession and its effect on organizational performance. The relationship between leadership behavioral traits that lead to enhanced employee engagement and ultimately improve workplace productivity levels is not extensively researched by scholars, which create a gap in the literature (Carasco-Saul, Kim, & Kim, 2014). The competitiveness of the current global environment has forced business leaders of organizations to narrow the focus toward the contribution of effective leadership succession planning and maintaining positive workplace productivity levels as a means of survival and creating a competitive advantage in the marketplace (Ibidunni, Osibanjo, Adeniji, Salau, & Falola, 2016). Business leaders who have successfully implement leadership succession plans are more likely to have a motivated workforce, improve employee confidence, and higher workforce productivity (Hall-Ellis, 2015). Lawal (2016) posited that a strategic way to release the creativity of the workforce is through the establishment of leadership development programs.

The scarcity of available leadership talent in the global marketplace, and the need to improve workplace productivity forces business leaders to recognize leadership succession planning as a critical aspect of the organization's strategy (Taneja, Sewell, & Odom, 2015). Leadership succession strategies must be deliberate and should not be based solely on employees' technical competencies as inconsistencies or ineffective leadership practices could result in the decline in employee engagement and negatively impact the organization's bottom line (Titzer et al., 2014). The selection of a leader affects organizational performance and workplace productivity (Dohm, 2015). Rothwell

(2010) posited that leadership succession planning leads to employee development and employee development leads to employee engagement.

Business leaders achieve workplace productivity when the strategic objectives of labor productivity efficiencies and the efficient use of all other business resources are met (Utomi & Rahman, 2014). Dohrn (2015) concluded that the impact selection of leader on the performance of the organization and work place productivity is minimal when compared to other factors such as environmental challenges and institutional dilemmas (Dohrn, 2015). A relationship exists between absolute leadership strategy and labor productivity and that there is also a relationship between Democratic leadership and labor productivity (Mozjat & Mirzaie, 2014). Organizations with leaders who demonstrate high levels of commitment experienced higher levels of workplace productivity than organizations that use control strategies (Durai, Pravin, & Adaikalasamy, 2014).

To achieve the desired organizational productivity, leaders should motivate employees and strategically align labor to the goals of the organization (Zameer, Ali, Nisar, & Amir, 2014). Leaders should also be open to constructive feedback while ensuring alignment as this enhanced the working environment and improve leadership effectiveness (Day, Fleenor, Atwater, Sturm, & McKee, 2014). A properly communicated succession planning strategy that incorporates feedback and is properly align to the business strategy, foster loyalty and stability which leads to improved workplace productivity (Hejase, Hejase, Mikdashi, & Bazeih, 2016)). Employees who participate in a leadership succession program usually feel valued and are more likely to be engaged because of the possibility of assuming leadership roles in the future (Hejase et

al., 2016).

Succession planning strategies should incorporate the development of desired leadership behaviors and attitude. Leadership style, attitude, and behavior influences employee engagement, while employee engagement acts as a catalyst for improving workplace productivity (Soieb, Othman, & D'Silva, 2013). Employee engagement is achieved when employees within an organization demonstrate the desired behaviors and are inspired to make personal sacrifices and be committed with a passion for executing their job functions for the good of the organization (Soieb et al., 2013). This high level of commitment that found in engaged employees tends to impact the workplace productivity positively and improves organizational performance. An organization is often viewed as a reflection of its leadership team; the speed at which strategic changes occur will depend on the type of successor leader (Kunisch, Bartunek, Mueller, & Huy, 2017). Leadership characteristics or behaviors play a critical role in the execution of the organization's strategic objectives and will determine the potential failures that will interfere with the successful implementation of the organization's strategic plans (Kunisch et al., 2017). Organizational citizenship behavior is one such behavior that when displayed by business leaders were found to have a direct relationship with employee engagement and workplace productivity (Soieb et al., 2013). Organizational citizenship behaviors are developed informally by the leader and serve to inspire followers to cooperate in executing the mandate of the leader, thereby improving workplace productivity (Soieb et al., 2013).

The type of successor leader chosen by business leaders will signal to employees

the strategic direction of the organization and could impact employee productivity levels (Luan, Chen, Huang, & Wang, 2017). Business leaders exercise of power, authority, integrity, and charisma could influence the output levels of their subordinates, thereby improving workplace productivity (Soieb et al., 2013). Business leaders should engage their workforce to positively influence workplace productivity levels (Soieb et al., 2013). A CEO is most likely to be the leader with the greatest influence on the strategic direction of an organization (Kunisch et al., 2017).

Leadership succession planning strategies should incorporate the development of employee engagement plans, build trust in successor leaders and improve employee commitment to the organization. Chiu, Balkundi, and Weinberg (2017) posited that when employees perceive their manager as a leader, employees will be more committed to the organization and usually more engaged. This enhanced relationship between incumbent leaders and employees will motivate employees to go beyond the execution of regular duties and perform tasks outside of their normal scope of work to ensure that objectives are met (Hartnell, Kinicki, Lambert, Fugate, & Doyle Corner, 2016).

Leadership behaviors that demonstrate emotional intelligence were also found to enhance job performance and employee productivity positively (Vidyarthi, Anand, & Liden, 2014). A study conducted by Arnold, Fletcher, and Anderson (2015) about the factors that influence performance in elite sports, indicated that both self-related factors and environmental related factors affect a leader's ability to influence followers' performance and the organizational performance positively. Emotional intelligence is an example of a competency that differentiates a leader, who is capable of mobilizing others to make

sacrifices for shared aspirations, from an average leader (Ngirande & Timothy, 2014). Emotional intelligent leaders can recognize the presence of personal feelings and effectively manage interpersonal relationships judiciously (McCleskey, 2014). In a competitive global environment management of talent is critical and building organizational sustainability will require leaders who are not just technically competent but also possess the emotional intelligence to lead and engage teams (Chambers, 2013). Human resource leaders should ensure that the current and future business leaders are trained in emotional intelligence as part of the succession planning process (Chambers, 2013). Training in emotional intelligence would allow business leaders to recognize their emotions and the emotions of potential leaders to communicate the right messages required for the development of the next generation of leaders (Chambers, 2013).

Interpersonal relationship is essential to the development of trust between business leaders and potential leaders, which influences workplace. Emotional intelligence is critical to how coworkers perceive and trust each other, which impacts their levels of productivity and organizational performance (Christie, Jordan, & Troth, 2015). The development of trust and the perception of real integrity between successors help to facilitate knowledge sharing and the creation of a learning environment that directly affects workplace productivity levels and leadership growth (Wang et al., 2014). Human resource leaders should help business leaders to create a learning environment where trust between predecessor leader and a successor are attainable through an efficient change management process. The strength of the organizational change will depend on the extent to which the human resource leader can aid business leaders to reduce

employees' change cynicism that threatens the leadership succession planning process (Brown, Kulik, Cregan, & Metz, 2015).

Brown et al. (2015) posited that the level of cynicism in the relationship between employees and business leaders will depend on whether the human resource function adopts an expert administrative role or that of a change agent. When the human resource leader assumes the role of a change agent as opposed to an administrative expert, the level of change cynicism is more likely to be less which improves the organization's ability to attain organizational capacity more efficiently (Brown et al., 2015). For a business leader to develop an effective leadership succession plan, consideration must be given to a wide range of factors including, but not limited to, individual competencies which include behavioral factors such as emotional intelligence, organizational culture, core values, and environmental factors (Chambers, 2013). These factors affect the output of employees and organizational productivity levels (Chambers, 2013). Succession planning strategies should identify the desired behavioral gaps in potential leaders and design individual development plans for each potential leader where progress can be objectively measured (Chambers, 2013).

Scholarly literature about leadership succession strategies indicated that not much emphasis is placed on the contribution of leadership succession strategies toward workplace productivity, despite its known impact (Alvani et al., 2016). Gaps are found in the literature regarding the desired behaviors and attitudes that should be assessed when selecting talent for leadership succession (Soieb et al., 2013). Despite the research that shows the correlation between leadership and workplace productivity, there is a general

acceptance that the more engaged the employees are by their leaders, the more productive they will be (Carasco-Saul et al., 2014). Business leaders and human resource practitioners are faced with the challenge of systematically developing leadership succession strategies that will improve those leadership traits or attributes recognized as leading to improved workplace productivity. This qualitative case study seeks to capture the understanding of that phenomenon by exploring the attributes of successor leaders and how these attributes contribute toward labor productivity.

Transition

Business leaders have recognized the importance of leadership succession strategies to organizations' success; however, not many business leaders focus on using succession strategies to improve workplace productivity (Estedadi & Hamidi, 2015; Manning et al., 2015). The research from this study supports the conceptual framework by capturing the systematic succession planning process used by business leaders to ensure leadership continuity for competitive business advantage. Section 2 includes the data collection process and the role of the researcher as the research instrument to ensure that ethical standards are met to conduct the research and the selection of participants. Section 2 will also describe the justification for the selection of the research method and research design as well as a full description of the informed consent process and ethical protection of participants. Findings of this case study and how these findings could be applied to professional business practices will be detailed in Section 3. Section 3 will also include how the findings of this proposed study might impact social change, the limitations of the study, areas for further research, and the conclusion.

Section 2: The Project

Purpose Statement

The purpose of this qualitative single case study was to explore strategies that some business leaders in the manufacturing sector in Jamaica used to implement leadership succession plans. Data were collected from five business leaders from a manufacturing organization in Jamaica, at its corporate office in Kingston. I selected this organization because the business leaders have successfully implemented leadership succession strategies that have improved workplace productivity. Data from this study could help business leaders to implement leadership succession strategies that work and contribute to positive social change by offering techniques to identify and develop potential leaders from an emerging labor force composed of diverse cultures and ethnicities. The implications for Jamaica involve providing business leaders with solutions to respond to the changing labor demographics that affect future leadership roles.

Role of the Researcher

The role of the researcher as a human instrument is to collect, interpret, and identify emergent themes from data using various data sources to facilitate the process of triangulation (Sale, 2015). A qualitative researcher is robust in approach and capable of reliably transforming the interactions with participants into meaningful data (Lewis, 2015). A qualitative case study researcher is the data collection instrument used to explore a phenomenon using multiple data sources, and to validate the findings by minimizing bias and avoiding arbitrary data interpretation (Katz, 2015). The qualitative

researcher uses naturalistic inquiry strategies to develop the appropriate research design for the study (Shehata, Ellis, & Foster, 2015). Add summary and synthesis to balance out the use of sourced information with your own analysis.

My primary source of data collection were open-ended interviews conducted with five participants who are leaders in the chosen organization. Interview questions were designed to obtain an understanding of their interpretation of strategies used to develop and implement leadership succession plans as they have experienced it. Supportive data was collected via the company website and physical documentation of policies and procedures. The 1979 Belmont Report provided a summary of the ethical principles mandated by the National Commission for the Protection of Human Subjects for Biomedical and Behavioral Research (U.S. Department of Health and Human Services, 1979). The Belmont Report defines the boundaries for assessing the risk benefit criteria use to decide the appropriateness of the research (U.S. Department of Health and Human Services, 1979). The Belmont Report also defines the ethical principles for selecting participants for research, as well as the definition of what constitutes informed consent for behavioral research (U.S. Department of Health and Human Services, 1979). I selected participants and sought their consent in accordance with the Belmont Report and within the boundaries of the report.

Qualitative researchers are exposed to potential bias based on personal experiences and predetermined interpretation of the phenomenon and its existence (Fleet, Burton, Reeves, & DasGupta, 2016; Malone et al., 2014). A researcher's personal biases is mitigated by providing the participants with necessary information about their roles in

the study, the role of the researcher, and how both parties are expected to interact during the research (Fleet et al., 2016). The predisposition of the researcher to the phenomenon could also cause a researcher to be exposed to selection bias by choosing familiar participants who share a similar interpretation of the phenomenon (Malone et al., 2014). Qualitative researchers must be careful not to lead the participants to a preconceived understanding of the phenomenon when conducting interviews, as this could bias the participants' response to the understanding of the phenomenon (Henriques, 2014). To allow participants to recall their lived experiences of the phenomenon in their unique way, the interviewer should maintain epoch by not modifying the participants' interpretations (Henriques, 2014). Fleet et al. (2016) posited that the case study researcher should establish a confidentiality policy with participants of the study and conduct ongoing self-reflexivity to mitigate bias caused by predetermined dispositions. I self-reflected on my understanding of the phenomenon and acknowledged how that understanding could influence the interpretation of the data given by the participants and how these participants were selected.

Methodological triangulation was used to ensure the accuracy and reliability of the data received from the participants. Without conducting triangulation, a researcher risks drawing misleading and inaccurate conclusions from the interviews (Fusch & Ness, 2015). Methodological triangulation is used by researchers to demonstrate complementarity or the coming together of data from different sources to enhance the validity of the case study findings (Joslin & Müller, 2016). I conducted methodological triangulation by collecting data via several data sources within the organization, such as

the website, observation, and archival documentation of succession planning evidence to support the data collected from the open-ended interview questions. Based on my experience as a human resource practitioner for the last 15 years working in three major sectors (bauxite, manufacturing, and the financial sector) in Jamaica I have been exposed to and participated in leadership succession planning strategies and the implementation of those strategies. My exposure to leadership succession planning in organizations that I have worked could create the possibility of bias. Jamaica is a small country and the possibility was that I could have been acquainted with the research participants in a professional capacity.

I used predetermined criteria to select participants and to ensure that participants were chosen based on their rich interpretation of the phenomenon rather than because of my professional association with the participants. Research questions were appropriately linked to the research topic and the agreed to interview protocol to ensure that there was study focus (see Lewis, 2015). An interview protocol is described by Benia, Hauck-Filho, Dillenburg, and Stein (2015) as a guide for the interviewer and the participants throughout the interview in which parties are comfortable operating in a supportive environment where their personal rights are not violated. An interview protocol could be done in phases such as an introduction, description of the phenomenon, and summary (Castillo-Montoya, 2016). The interview protocol provides a researcher with a focus on the critical factors during the interview process which, when followed, should significantly increase the reliability of the case study (Yin, 2017). I emailed the interview questions and interview protocol to each of the participants prior to the interview to

ensure that they were prepared to answer the questions in a systematic manner that provides focus on the central research question. The interview questions (see Appendix A) and interview protocol (see Appendix B) assisted to keep each interview to a maximum of 1 hour.

Participants

Qualitative research is designed to contribute to the existing body of knowledge by exploring the meaning of the phenomenon via the life experiences of the participants (Flannery, 2016). The objective of the qualitative single case study is critical when deciding on an appropriate sample size (Leung, 2015; Lewis, 2015). Sampling for qualitative research goes beyond the selection of a sample size and includes integrity assessment of the research objectives as well as the reliability and validity of the data collected (Roy et al., 2015). The reliability and validity of the data collected will depend on the quality of the participants' selected, based on knowledge of the phenomenon and their experiences of the phenomenon (Leung, 2015). The targeted participants were leaders of a major corporation, at its corporate office in Kingston, Jamaica, who has successfully participated in the development and implementation of the organization's leadership succession plan. A central research question provides the basis for the analysis of the study (Elo et al., 2014). The selection criteria for each of the study participants was based on the ability of each participant to provide rich information in support of the research question and an in depth understanding of the phenomenon (Cleary, Horsfall, & Hayter, 2014; Khan, 2014).

Based on the research question for this study, business leaders from the organization were targeted because (a) of their involvement in the building of the organization's leadership pipeline and for developing a smooth transition from one leader to the next, (b) they lead an organization with more than 500 employees (c) they manage operations with a diverse workforce, and (d) they had engaged in leadership change within the last 5 years. My association with the Human Resource Management Association of Jamaica as a director has provided me with network opportunities with the human resource leaders of major businesses operating in Jamaica. The targeted business leaders operated out of one of Jamaica's major corporations that engage in manufacturing and financial services. The organization distributes products and services in Jamaica, Europe, the USA, and the Caribbean. I initiated contact with the chief human resources officer for the organization, who also sits on the organization's board of directors, and in a position to assist with the selection of the participants. I made contact via an initial email requesting a meeting to discuss the purpose of the study and why I chose the organization. I made contact via telephone to ensure that that the email was received and to provide any clarification regarding the mails if necessary.

Once a meeting with the chief human resource officer was granted, I used the opportunity to explain the purpose of the research, why the organization was selected, how the participants will be selected, what is expected of the participants, and the right to cancel interviews. I also explained what my role as the researcher was, what ethical standards I was guided by, the confidentiality of the information received, how I could be contacted for clarification or further information, and how the study could impact social

change. I further engaged the chief human resources officer to help with the identification of the five members of the leadership team who participated in the study, based on (a) who are actively involved in the development of the organization's leadership succession strategies and (b) who are actively involved in the development of a successor. The chief human resources officer provided me with a list of the candidates who met the selection criteria, and I selected the five most suited participants. I ensured the confidentiality of the participants by contacting each participant independent of the chief human resources officer. An organization is made up of explicit and nonexplicit relations and a qualitative researcher could potentially explicitly expose the nonexplicit relationships (Henriques, 2014). I established a working relationship with all the participants by making them aware of all the known potential risks such as minor discomfort that may arise from participating in a semistructured interview. Qualitative researchers must seek consent from potential participants to meet the legal requirements of the study and to ensure that the rights of all participants are protected (Schelbe et al., 2015; U.S. Department of Health and Human Services, 1979).

Once these business leaders were identified, I commenced the working relationship by seeking their consent to participate in the research via email explaining the purpose of the study, the extent of their involvement, the associated risks, rights to withdraw from the study, benefits of the findings to business leaders, and the potential impact on social change. I explained to the participants the importance of observing ethical and confidential principles when conducting the interviews, and that I am guided by the Belmont Report of 1979. I further enhanced the working relationship with study

participants by explaining the process by which the researcher maintains confidentiality. The importance of confidentiality was explained to each participant at the start of the interview, as well as my legal obligation to protect the participants' identities by using a coding process to remove personal identifiers. I improved the relationship by explaining to participants how their identities were protected by ensuring that interview transcripts were categorized using a coding mechanism that cannot be traced to the participants during or after analysis.

Research Method and Design

Research Method

A qualitative research method was used for this single case study. The objective of this study was to explore strategies that business leaders used to implement leadership succession plans in a single local context. An effective research method is one that provides for the careful alignment of the focus of the research to the data collection method and analysis (Ahmed & Ahmed, 2014; Elo et al., 2014). For this study, a qualitative research method was most appropriate to explore and illuminate the meaning of the phenomenon through the experiences and description of the phenomenon by the participants (Ahmed & Ahmed, 2014; Lewis, 2015). A qualitative approach allows a researcher to collect and analyze data about human behavior that could not be done by using statistical or mechanical analysis (Devotta et al., 2016; Leung, 2015). Qualitative researchers must ensure that the trustworthiness of the data collected is preserved by ensuring that the method or methods used to collect the data is credible, effective, and represents the intended focus (Elo et al., 2014; Leung, 2015). A researcher can only

convince scholars and readers of the credibility of the research by providing proof that the data collected is trust worthy (Birt, Scott, Cavers, Campbell, & Walter, 2016; Elo et al., 2014). A researcher must carefully select a research method that provides for the collection of data that will provide content analysis that is valid and reliable (Elo et al., 2014; Leung, 2015).

Quantitative and mixed methods approaches use statistical analysis, such as descriptive statistics, to obtain important facts from the sample data which is difficult to interpret (Dasgupta, 2015; Leung, 2015). Statistical analysis cannot be used to describe human emotions and behaviors, which can be obtained by conducting qualitative research (Leung, 2015). Quantitative and mixed method approaches involve quantitative predictions in the form of a hypothesis, to preempt the findings of the study and assumes generality (Bettany-Saltikov & Whittaker, 2014; Yin, 2017), which was not the intent of this study and not appropriate. The objective of this study was not to predict nor to assume generality of the findings, but to interpret the participants understanding of the phenomenon. Quantitative and mixed methods were less appropriate than qualitative method for this study. A qualitative approach was the appropriate method to explore the interpretation of the phenomenon of leadership succession planning that works as described by business leaders who lived the phenomenon in a single case. I explored the interpretation of the phenomenon by asking participants open-ended interview questions about the central research question and systematically captured responses that described participants' experiences and interpretation of the phenomenon.

Research Design

A single case study design was selected for this qualitative study. The selection of a case study design is based on the purpose of the study and the availability of useful and credible information (Yin, 2017). Single case study design might be best suited for unusual cases and when the findings could provide others with a better understanding of the phenomenon (Yin, 2017). Hyett et al. (2014) stated that a single case study design is most appropriate where the researcher's intention is to explore the complexities of a real-life phenomenon by using multiple data sources. A single case study is an appropriate approach to exploring a phenomenon in which there are no right answers, but the intention was to provide a rich description of the phenomenon in its extraordinary setting (De Massis & Kotlar, 2014).

Using a single case study design, I had the opportunity to explore leadership succession strategies in a real-life context that are working effectively. I used open-ended interview questions to gather data from participants to capture the experiences that each participant has of the phenomenon in a single organization; which justifies the use of a single case study design. A multiple case study design is most appropriate where the intention of the researcher is to explore generality of the results by identifying and replicating themes in more than one case (Yin, 2017). Unlike a multiple case study design, a single case study allows the researcher to focus on the unique factors that contribute to the successful implementation of leadership succession plans in a single organization (Neuhofer, Buhalis, & Ladkin, 2015). A multiple case study design was not appropriate for this study because the purpose was not to compare leadership succession

strategies across organizations, but rather to explore the phenomenon in a single setting where leadership succession plans were successfully realized.

Narrative theory requires the collaboration of the researcher and participants to gain new understandings of the phenomenon based on stories told by the participants about how they lived their lives and experienced the phenomenon within a larger social context of the world (Cutting, 2016); which was not the purpose of this study. An ethnographic study requires the researcher to be engaged daily in an intimate daily interaction with participants in the participants' natural environment to gain an understanding of the phenomenon (Lapegna, 2015); which was not the approach of this study. Grounded theory and ethnographic designs are less flexible than a single case study and were not appropriate for this study. A researcher using phenomenology to conduct a qualitative study explores the participants' views and experiences of a phenomenon and uses the participants understanding of the phenomenon to describe its essence (Sloan & Bowe, 2014). A phenomenological study is related to human science and was not appropriate for this study.

Population and Sampling

I used a purposeful sampling method called criterion sampling to select participants from business leaders in one organization in Kingston Jamaica who have implemented leadership succession plans that work. Criterion sampling method allows for the identification and selection of participants for the study based on predetermined criteria of importance (Palinkas et al., 2015). Purposeful sampling was appropriate for this case study because it allowed the researcher to conduct an in-depth study into an

information rich case on leadership succession strategies that work. Palinkas et al. (2015) and Barratt, Ferris, and Lenton (2015) stated that purposeful sampling is appropriate for qualitative studies where participants who have a wide knowledge of the phenomenon of interest can be readily identified, particularly in cases where resources are limited to conduct the study. Purposeful sampling is the most appropriate technique in qualitative research where resources to conduct a study are limited and where potential participants with a rich source of information regarding the phenomenon are known (Barratt et al., 2015; Duan, Bhaumik, Palinkas, & Hoagwood, 2015).

Purposeful sampling provides a researcher with flexibility to select participants who can provide substantial and critical information regarding the phenomenon (Benoot, Hannes, & Bilsen, 2016; Carr, Watt-Watson, McGillion, & Huizinga, 2016). Hasanpoor-Azghdy, Simbar, and Vedadhir (2014) described purposeful sampling technique as using prior knowledge of potential participants' involvement with the phenomenon and recognizing potential participants as rich sources of information on the phenomenon to select participants. Participants should be willing and able to provide the relevant data regarding the phenomenon and should be able to communicate their experiences in a manner that can be understood by the researcher (Palinkas et al., 2015). A criticism of qualitative researchers is the selecting of sample sizes without adequately disclosing justification for the selection (Malterud, Siersma, & Guassora, 2015; Marshall, Cardon, Poddar, & Fontenot, 2013).

The sample size is adequate when a researcher can establish content analysis validity based on the research question (Cleary, Horsfall, & Hayter, 2014; Fusch & Ness,

2015; Marshall, 2014). Robinson (2014) argued that an appropriate sample size is one that requires flexibility as the research progresses. Flexibility is critical to achieving data saturation as too many participants might cause redundancies in the data collection while too few participants could cause data gaps in the interpretation of the phenomenon (Cleary et al., 2014). Harris (2013) suggested that qualitative cases studies should use 5 to 25 participants to obtain data saturation for a single case. A sample size of 5 to achieve data saturation for a single case is also supported by Roy et al. (2015) and Marshall et al. (2013). Marshall et al. (2013) advanced that a credible qualitative study is only achieved through data saturation. A researcher should aim for data saturation by selecting as many participants that will represent a reasonable sample to ensure that most of the important perceptions regarding the phenomenon are covered (Robinson, 2014).

Data saturation is achieved by introducing new participants to the study if required to the point of data redundancy (Marshall et al., 2013) and where the objective of the study is fully elucidated (Malterud, 2015). Cleary et al. (2014) posited that the participants selected must be able to provide in-depth information specific to the research question and the interpretation of the phenomenon. Saturation is reached when additional participants would not add any significant findings to the study, to save resources (Robinson, 2014). A qualitative researcher would know that data saturation is attained when no new themes or categories emerge from the study (Marshall, 2014).

Based on the scholarly research for an acceptable sample size of 5 when conducting a qualitative case study (Harris, 2013; Marshall et al., 2013; Roy et al., 2015), I used a purposeful sampling technique to select 5 participants who are business leaders

with rich knowledge and involvement in the organizations' succession planning strategies. I sought the assistance of the organization's Chief Human Resource Officer to select the 5 most suitable business leaders with a rich understanding of the phenomenon. I used open-ended interview questions to interview the 5 selected business leaders at their offices. Qualitative case studies require the researcher to use reflectivity to determine the direction of the research (Lancaster, 2016; Quinney, Dwyer, & Chapman, 2016). A researcher might expand the sample size during the research (Lancaster, 2016; Quinney et al., 2016). I decided not to expand the sample size after careful analysis of the data received from the current participants as further interpretation of the phenomenon was not required. Based on Robinson (2014) and Barratt et al.'s (2015) definition of data saturation in qualitative studies, I was prepared to interview other business leaders within the organization until no further significant understanding of the phenomenon could be achieved.

Ethical Research

Ethical research in qualitative studies requires the researcher to consider the process for voluntary participation of participants and how the privacy and dignity of the participants will be protected (Bromley, Mikesell, Jones, & Khodyakov, 2015). The Belmont Report of 1979 requires the researcher to ensure that focus is placed on the wellbeing of the participants throughout the study (Bromley et al., 2015; U.S. Department of Health and Human Services, 1979). Before conducting this research, I performed a thorough review of the Institutional Review Board's (IRB) application process to ensure that all the IRB criteria were met before submitting for approval. Tsan and Tsan (2015)

posited that the IRB ensures that the ethical review protocol for protecting the rights and wellbeing of participants are followed by the researcher or institution conducting the research.

Qualitative research ethical protocols require the researcher to protect the confidentiality of the information received from the participants by taking active steps to code and secure data and to preserve the integrity of the study (Tsai et al., 2016). A researcher must be able to link information collected to each participant's responses (Lancaster, 2016). Due care was taken to ensure that the confidentiality of each participant was protected. To obtain consent from each participant, a researcher should establish a protocol describing how the data will be collected, stored, secured, who will have access to the data, and the length of time that the data will be kept in storage before being destroyed (Harriss & Atkinson, 2015).

I ensured that the confidentiality of the data received, and the identity of the participants were protected by replacing cover sheet of each interview sheet containing identifiers for participants with a key code that is store separately from other data files. Hard copies of data collected are held in a fire and water proof vault properly secured to prevent tampering for safe keeping, and computerized records are assigned security codes to restrict access. All data files electronic or hard copies will be stored for 5 years before destroyed. The Walden University IRB approval number for this study is 06-11-18-0275886. A completed copy of the manuscript was shared with each participant of the study, and the intention to do so was communicated in the letter of participation.

Data Collection Instruments

The qualitative case study researcher is responsible for the gathering and storing of data from several sources in a logical and systematic manner to identify patterns and themes (Lewis, 2015). The role of a researcher as a data collection instrument goes beyond data collection. The concept of the researcher as a data collection instrument connects researcher and research in many ways (Kaczynski, Salmona, & Smith, 2014). The connection means that the researcher should consider his or her influence on the construction of the meaning of the phenomenon during the collection and analysis of data (Kaczynski et al., 2014). The researcher as an instrument in qualitative studies provides the researcher with an opportunity to obtain a more in depth understanding of the phenomenon that can only be achieved through interactions with the participants (Leung, 2015). Selecting the most appropriate approach to data collection in qualitative research is critical to the credibility of the content analysis (Elmo et al., 2014). For a researcher to demonstrate that the study that was conducted is reliable and credible, the researcher must prove that: (a) the was collected in a trustworthy manner, and (b) the data collected addresses the phenomenon being studied (Graneheim & Lundman, 2004).

As the researcher, I was the primary data collection instrument and commenced data collection by identifying and requesting the voluntary participation of business leaders within the chosen organization. These business leaders were selected based on their participation in their organization's leadership succession planning strategies and were those who have had a rich experience on the impact of leadership succession on workplace productivity. Interviews in qualitative research are highly used and are very

effective in collecting data from participants who have a rich understanding of the phenomenon and provide the researcher with an opportunity to seek clarification to arrive at the correct interpretations of the phenomenon (Lewis, 2015). Maunsell (2016) posited that even though the balance of power could shift from interviewer to interviewee, a well prepared and skillful interviewer could control the shift of power to gather meaningful data from the interviews. Qualitative researchers have special skills learned over time, which allows them to interview participants meaningfully (Devotta et al., 2016).

I conducted face-to-face semistructured interviews using open-ended questions, to provide the participants with an opportunity to describe the phenomenon in a manner that was most comfortable to them. Seeing that the participants were all business leaders of the same organization, I discussed with each participant where at the location was most convenient for the interview. I also consulted with the Chief Human Resources Officer about the possibility of a central location where all participants could be interviewed if the participants had no preference regarding location. I did not conduct a pilot test even though pilot tests are sometimes used in qualitative research (Brugha et al., 2016). To further enhance the reliability of the data collected, I conducted both member checking and methodological triangulation.

Member checking is described by Birt et al. (2016) as respondent validation where the researcher returns data to the interviewees for feedback on the accuracy of the data and the interpretation of the results. The accuracy of the data collected was enhanced through an established member checking process. A transcript of each interview was sent to the respective participants to confirm data accuracy. Ramthun and Matkin (2014)

posited that conducting member checking close to the end of the study is an effective way to ensure the accuracy and authenticity of the data collected. Further member checking will be done at the end of the study by sending the findings of the completed study to the participants for feedback and analysis. Feedback from the participants could include data that the participants deem erroneous, or misrepresented what was communicated in the interviews, validating the process of member checking (Ekström & Idvall, 2015; Thomas, 2017).

A qualitative researcher could gather an enormous and overwhelming amount of data while conducting a case study (Houghton, Murphy, Shaw, & Casey, 2015). NVivo a computer-based software is used by qualitative researchers to manage the large quantities of data (Castleberry, 2014; Houghton et al., 2015; Zamawe, 2015). I used NVivo 12 to manage and organize the large quantities of data gathered from the research interviews. NVivo 12 was also used to identify patterns and trends in the data and to store audio files for ease of retrieval. NVivo allows qualitative researcher to identify themes, and to apply codes to the themes, during the analysis of the data (Carr et al., 2016; Kanodra et al., 2016). I used NVivo 12 to systematically apply codes to themes identified from the interviews and other company documentations. I contacted study participants via emails and provided each participant with a copy of the interview questions (see Appendix A). A copy of the confidentiality agreement that protects the participants from misuse of the information provided in the interview was also sent to each study participant.

Data Collection Technique

The guiding research question for this study was: What strategies do business leaders use to implement organizational succession plans? I commenced the process of gathering data to answer the research question by seeking the approval of the Walden University IRB to conduct the study and to contact and seek consent from potential participants to voluntarily participate in the study. Once IRB approval was granted, I emailed the Chief Human Resources Officer for the chosen organization followed by a phone call stating my intention to conduct a study on the organization's leadership succession strategies. The Chief Human Resources Officer was advised of my intention to contact members of the organization's leadership team, who have knowledge of the organization's succession strategies, seeking consent for their voluntary participation in open-ended interviews.

The Chief Human Resources Officer was my main contact within the organization and I sought guidance for the selection of the candidates who were most knowledgeable regarding the organization's succession planning strategies. I emailed the potential participants stating the purpose of the study, the benefits to the organization and the participants, and the role of the participants in the study. Telephone contact was made with each participant to clarify the email that was sent and to answer any questions that could be of concern.

Peters and Halcomb (2015) posited that interviews are considered appropriate for qualitative research to collect data. Interviews provide the participants with an opportunity to explain their experiences and understanding of the phenomenon in their

way (Peters & Halcomb, 2015). Researchers must be adequately prepared to ensure that the opportunity to collect rich and meaningful data from participants is maximized.

Interviews were scheduled at participants' private offices with the help of the Chief Human Resources Officer for the organization. I conducted face-to-face, open-ended, 1-hour interview session with each participant. The session was recorded using two digital tape recorders to mitigate unforeseen glitches that could arise. I made notes only when a point was made that requires clarification, or if I recognised a new theme that requires further research.

Open-ended interviews must be managed properly by the interviewer to ensure that the burden of power remains with the interviewer and does not shift to the interviewee (Quinney et al., 2016). With this possibility of a power shift in the interviews, I ensured that I kept the interviewee on track and managed the time allotted for each session. I monitored the time spent in each interview session by setting the timer on my watch and occasionally reminded the interviewee to stay within the time allotted for the interview without offending the interviewee. To ensure reliability and integrity of the data collected, I ensured that the transcript for each participant was paraphrased and presented to each participant in a second interview session that lasted approximately 30 minutes on each occasion. I manually analyzed the data for key words, statements, and identify emerging themes before uploading the transcripts to NVivo 12 for further coding of themes and data analysis.

Data Organization Technique

Case study research involves the gathering and collection of a large amount of data from several and diverse sources, which require the researcher to establish a data organization technique to avoid losing sight of the purpose of the research (Lewis, 2015). Organizing qualitative research data is essential to avoid confusion and delaying the process of data analysis (Chowdhury, 2015). A well organized and structured data process provides for effective cross comparison of large amount of data, data retrieval, and credible data analysis (Leung, 2015). Setting up a data tracking system is one element of a good database management process for the enhancement of data retrieval and analysis. Without an effective data organization technique, the categorizing, sorting, storing, retrieving data for analysis, and the safety and security of data would be compromised (Lewis, 2015).

Confidentiality and anonymity of participants must be maintained by the researcher according to the terms and conditions laid out in the consent letter (Lancaster, 2016). I ensured the security and confidentiality of paper notes of interviews, videos, audio tapes, transcripts, consent agreements, emails and all other hard copy data source are properly secured in a vault and password protected. The vault is kept at home in my study away from interference from family members or colleagues. These files will be kept in the vault for a period no less than five years and will only be reused if necessary after receiving written consent from participants. Digital records were encrypted and assigned security codes to restrict access. Restricted access for digital data files will also be kept for five years. After the five years period has expired, the hard copy data

collected will be destroyed by shredding the files before incinerating. Computer files will be deleted and wiped from computer hard drive. I used Microsoft Excel to archive and organize my referencing in APA format and ensured that I maintain the 85/15 % rule for references within five years of graduation date. NVivo 12 was used to assist with coding emergent data and organized the data into themes while storing and archiving data in a systematic manner that is easily retrievable.

Data Analysis

Methodological triangulation is a cross verification technique of data collected by using more than one data collection method or source to validate the interpretation of the phenomenon (Denzin, 1978). Effective data analysis is valuable to the credibility and trustworthiness of the results from a qualitative case study (Yin, 2017). The validity of the findings in qualitative case studies depends on the appropriateness of the data analysis (Lancaster, 2016). A qualitative researcher follows a systematic analytical strategy which links the case study data to the research question and conceptual framework to ensure that the research process of data analysis is complete (Yin, 2017). According to Yin (2017), following a process of collecting data, sorting data into meaningful groups, coding data into identifiable themes, drawing conclusions based on analysis, and identifying other areas for further research is a general strategy that could be used by a qualitative case study researcher. Reviewing data received from interviews against interview notes and member checking is critical to the process of data analysis for validity (Marshall & Rossman, 2014).

Open-ended interviews were conducted with participants to answer questions relating to the central research question of: What strategies do business leaders use to improve leadership succession plans? Two audio digital tape recorders were used to record the interviews after which I transcribed the discussions from the tapes verbatim. The transcripts were corroborated with the interview notes for data accuracy. I then paraphrased the participants' responses to the interview questions and conducted member checking with participants to ensure the accuracy of the interpretation of the participants' understanding of the phenomenon. Corrections were made to the transcript before uploading to NVivo 12. NVivo 12, a computer-based software was used to store, sort, retrieve, categorize, code and analyze the data collected. NVivo software is effectively used by a qualitative researcher to store and retrieve data for content analysis (Houghton et al., 2015; Kaefer, Roper, & Sinha, 2015). NVivo could be used to identify and code data for content analysis (Boellaard, Brandt, Johnson, & Zorn, 2014). Computerized software systems such as NVivo cannot replace the need for researchers to be knowledgeable regarding collection and analysis of data collected; however, NVivo provides an easier and systematic way of storing and analyzing the data (Castleberry, 2014).

I read each transcript repeatedly while comparing information from the data to extract and separate the information into meaningful units. Sundin, Nilsson, Waage-Andrée, and Björn (2015) posited that meaningful units contain related information with one central meaning. I separated the information by the identification of key words, statements, or paragraphs used by the participants. I further reduced the meaningful units

into smaller units and assigned work codes to each smaller unit. These work codes were arranged into sections or categories based on the interrelatedness of the coded units. I assigned themes to each category based on the existence of an underlying meaning that connected the data points and described the phenomenon as experienced by the participants.

An advantage to using a case study design in qualitative research is the ability to use multiple data sources to develop converging lines of inquiry that leads to a more credible description and understanding of the phenomenon (Yin, 2017). A qualitative case study design allows the researcher to research the phenomenon in its natural context while providing comparisons in diverse settings (Houghton et al., 2013). Convergent evidence provides the researcher with an opportunity to use methodological triangulation to improve the case study construct validity, and to validate the accuracy of the participants' perception of the phenomenon (Kern, 2016). I gathered data from other sources such as documented succession planning policies and procedures, mentoring and coaching plans, individual development plans, flow charts, information on the company website, and any other data that was available and relevant to the answering of the central research question. This data was imported into NVivo 12 and systematically arranged and sorted to facilitate ease of data retrieval, identification, and coding of themes and the identification of areas that require further research.

A qualitative researcher should continue to group and regroup the data by similarities and differences before assigning themes to the grouped categories (Elo et al., 2014). I assigned themes to groups of data by searching the data for important words or

statements and assigned codes before grouping the codes based on relatedness or similarities. The themes identified were compared and contrasted with the themes identified in the literature review, theoretical concepts identified in the conceptual framework, and emergent themes identified in studies published after writing my proposal. Elo et al. (2014) posited that a researcher could become caught up in the interview process leading to bias in the interpretation of the participants' perspective of the phenomenon or could lead to an arbitrary judgment of the results. Verification biases could significantly affect the data analysis, and as such, the researcher should engage in the process of reflexivity to ensure that verification biases are mitigated (Elo et al., 2014). I mitigated verification biases by conducting debriefing sessions with the participants to corroborate my interpretation of the findings.

Reliability and Validity

Reliability

Elo et al. (2014) and Lewis (2015) agreed that for the results of the qualitative case study research to be reliable, the qualitative researcher should accurately collect, transcribe, categorize, and code the vast amount of data before assigning the appropriate themes. Morse (2015) posited that the examination of trustworthiness of the study is important for qualitative research to be considered as reliable. Achieving rigor in qualitative studies is critical to establishing credibility and transferability of the findings, which is necessary to prove reliability (Morse, 2015). Reliability in qualitative studies also requires dependability on study findings over a sustained period (Elo et al., 2014; Lincoln & Guba, 1985).

Member checking is an appropriate method to validate the accuracy of the interpretation of the data collected from the participants (Marshall & Rossman, 2014). Member checking allows the participants of the study to provide meaningful feedback regarding the identified themes, the methods used to arrive at the findings, and to discuss the findings of the study (Andrasik et al., 2014; Harvey, 2015). Member checking is an effective means to address rigor and dependability on the results of qualitative research (English, 2015; Lincoln & Guba, 1985; Tong & Dew, 2016). Dependability of this study was achieved by ensuring that the process by which the participants were selected was clearly and accurately described, as well as the characteristics of the participants. Dependability was further achieved by ensuring the accuracy of the interpretation of the understanding of the phenomenon as described by the participants. The participants confirmed the accuracy of the interpretation of the interviews at second 30 minutes interview. I emailed each participant the findings of the study and provide an opportunity for (a) feedback related to the accuracy of the interpretation of their description of the phenomenon and (b) feedback related to the method and process used to arrive at the conclusions of the findings.

Validity

Validity of qualitative studies refers to a researcher's transparency regarding how the results were attained from the point of data collection to the point of conclusion (Elo et al., 2014; Noble & Smith, 2015). Validity in a qualitative study subject a researcher to an iterative process where the researcher collects data based on leads provided by the participants, rather than following a predetermined step-by-step approach to data

collection (O'Brien et al., 2014). Credibility in a qualitative study refers to the ability of a researcher to confidently align the findings of the research to the research question (Elo et al., 2014). Internal validity refers to the ability of the researcher to successfully defend the credibility of the inferences drawn from the study (Elo et al., 2014; Morse, 2015). The ability to extend the study beyond the researched organization to other organizations is also considered proof of external validity (Morse, 2015). The conclusions drawn by a researcher must be easily identified by the participants of the study as their experiences of the phenomenon.

Denzin (1978) identified four types of triangulation: methodological, data, investigative, and theoretical. I used two approaches to ensure the credibility of the findings of the study: methodological triangulation, and member checking.

Methodological triangulation is a technique that involves the use of more than one data source to validate the findings of the study (Denzin, 1978). Been et al. (2015) endorsed methodological triangulation as a useful technique to validate the results of a qualitative case study. Anderson, Toles, Corazzini, McDaniel, and Colón-Emeric (2014) identified several sources that could be used for triangulation evidence, such as documents, business reports, policies and procedures, archival records, and organizational charts.

Member checking is used by researchers to establish credibility by allowing participants to review the researcher's interpretations of the transcripts for accuracy (Harvey, 2015; Houghton et al., 2013; Lincoln & Guba, 1985). The interpretations of the transcripts were shared with participants of the study via email (O'Mara, McDonald, Gillespie, Brown, & Miles, 2014). To ensure validity of the study, I compared the

findings from the semistructured interviews with company documentations, archival records and member checking for similarities, differences, and emerging themes.

Transcripts from semistructured interviews were recorded verbatim, interpreted and the interpretations shared with the participants for feedback on the accuracy of the interpretations. I facilitated meetings with participants closer to the end of the study to share the process by which the conclusions of the study were drawn for feedback.

Confirmability is defined by Elo et al. (2014) as the ability of more than one independent researcher to agree on the credibility and interpretation of the study findings. Confirmability of the study could be achieved by describing the consistency with which the study was conducted with the participants and the applicability of the findings (Noble & Smith, 2015). Confirmability was established by an audit trail that outlines the process of data collection and analysis for readers to understand the research process and the basis for the conclusions. Confirmability of a study refers to a researcher's ability to establish the accuracy of the data and provide other researchers and readers with reassurance on the (Houghton et al., 2013; O'Mara et al., 2014).

Transferability refers to the ability of the researcher to provide the readers of the study with evidence that the findings could apply to other contexts or populations (Anney, 2014; Elo et al., 2014). Graneheim and Lundman (2004) posited that a researcher could establish transferability in a qualitative study by providing the reader with an extensive presentation of the conclusions drawn from the study. Transferability of the findings would be further strengthened if accompanied by quotations from the participants' interviews that support the findings (Graneheim & Lundman, 2004;

Houghton et al., 2013). I ensured transferability of the study by including rich details in the description of the process, data analysis and findings in the final report to assist the readers with the application of the findings. I ensured that the final report entails portions of the raw data, direct quotes, observation notes, and a description of how the themes were derived.

Data saturation is achieved when the researcher is no longer able to acquire new information regarding the research question, and no new emergent theme can be identified from the available information (Fusch & Ness, 2015). Data saturation is achieved when the researcher has exhausted the ability to do further coding of themes from the available data (Fusch & Ness, 2015; Morse, 2015; Trulsson, Strandmark, Mohlin, & Berggren, 2014). Data saturation goes beyond sampling to include alignment to theory and depth of the research findings (Roy et al., 2015). I achieved data saturation by using a purposive sampling method. Purposive sampling was chosen for this study because it provided the researcher with an opportunity to narrow the participants to only those individuals who have a rich knowledge and interpretation of the phenomenon being studied. Purposive sampling is an effective method of achieving data saturation, due care must be taken to ensure that a full description of the sampling method is disclosed to the readers of the study (Elo et al., 2014; Lincoln & Guba, 1985; Lucas, 2014).

Transition and Summary

My objective in Section 2 of this qualitative single case study was to explain the method and design that was used to collect, store, organize, and analyze data, and the role of the researcher as the research instrument in the data collection process. In Section 2, I

also explained the informed consent process that was be used, ethical standards that were met to ensure the protection of participants, and techniques used to ensure that the findings of the study were reliable and valid.

In Section 3 of this study, I provided readers with a final report consisting of a presentation of the study findings, interpretations of the data, and how the study findings could be applied to professional business practice and their impact on social change. The findings of the study were grounded by the conceptual framework and purpose statement and included an overview of the study, recommendations for action, reflections, limitations, and areas for future research.

Section 3: Application to Professional Practice and Implications for Change

Introduction

The purpose of this qualitative single case study was to explore the strategies that business leaders used to implement leadership succession plans in a manufacturing organization in Jamaica. The data came from five business leaders, predecessor-successor observation, and company documentation at a manufacturing organization with its head office in Kingston, Jamaica. The findings revealed strategies that business leaders used to implement leadership succession plans to increase workplace productivity.

Presentation of the Findings

I conducted semistructured interviews with five business leaders because of their in-depth knowledge of the organization's succession planning strategies as well as their involvement in the development of a successor. The participants were asked seven open-ended interview questions (see Appendix A) related to the guiding research question: What strategies do business leaders use to implement leadership succession plans? I conducted member checking by providing participants with a summary of my understanding of the participants' perceptions of leadership succession planning strategies. Participants confirmed my interpretation as being accurate. I conducted a detailed analysis of the participants' interview transcript and my interpretation summaries by using Yin's (2017) five steps to qualitative data analysis. I ensured that the data was both reliable and valid in part by conducting an observation session wherein study participants participated in leadership succession planning and made notes in my research journal of verbal and nonverbal behavior. I conducted further methodological

triangulation by reviewing company documentation on leadership succession planning provided by the participants. I used observation notes, interview transcripts, member checking summaries, and company documentation to arrive at 34 themes. From the 34 themes, five major themes were derived: (a) identification of mission critical roles, (b) talent acquisition and selection, (c) successor development and retention program, (d) organizational designs and policy implementation, and (e) senior leadership support and participation.

Theme 1: Identification of Mission Critical Positions

The findings of the study supported the literature review and conceptual framework which identified mission-critical roles as essential to the development of a successful leadership succession plan. Rothwell (2010) stated that business leaders should identify mission-critical roles in the business and identify successors with the appropriate attributes to be placed on a succession plan for those roles. Clarke (2015) supported the importance of identifying successors from the young professional groups and develop them for mission-critical roles.

All five participants stated the importance of identifying successors for mission-critical positions as part of developing a framework for the organization's leadership succession strategy. Participants described mission-critical positions as essential to the success of the business, very difficult to fill, and requiring unique business knowledge. P1 stated, "The key positions were determined by a number of things, it could be a position that is very difficult to fill technically, for example, a specialist role, or it could be a position that makes critical decisions for the organization". This definition of

mission-critical roles was also supported by P5 who said, “Key roles as to do with critical areas of the business or if a role cannot operate without a manager”. When business leaders depart from mission-critical positions, the operations of the organizations could be significantly affected without ready successors. The observation session captured the succession planning for a critical leadership position but not at the senior management level, which corroborated participants’ statements that mission-critical positions were not confined at the senior management level but may be at any level of the organization. Based on the observation session, for a role to be classified as a mission-critical role, it just needs to meet one of the three criteria identified by the participants namely job essential to the success of the business, very difficult to fill, and require unique business knowledge.

All five participants agreed that conducting succession planning for every position within the business was not practical because of a lack of financial resources. Business leaders were forced to map positions in the organization and focus on those positions that were needed to forward the business agenda. Forty percent of the participants noted that business leaders met periodically to collectively identify those roles that are essential to the business success. P2 stated,

As a management team we decided on which areas are critical to the business and based on that we have approximately 10 positions that are involved in succession planning. So, the key areas are identified by a team from the management unit.

Add summary and synthesis to fully integrate the quote and provide analysis.

A review of the succession planning document used by participants in the selection of successors for mission critical positions showed the incumbents of the roles, requirements for the roles, potential successors, successors' profile, readiness ratings, action plans, and time lines. The succession planning documentation aligned to the conceptual framework which stated that in developing successors, business leaders should identify who the incumbents are, the qualification for the roles, and whether the positions require specialized knowledge. The documentation on the successors' development program supported the views of scholars such as Varhegyi and Jepsen (2017) on proactive approaches to implementing leadership succession plans for business continuity.

All the participants of the study agreed that some of the competencies required for some mission-critical roles were unique to the business and can only be developed by implementing an effective leadership succession plan. The identification of highly technical roles and roles that require specific competencies were in alignment with the conceptual framework for this case study. Rothwell (2010) posited that the mapping of mission-critical positions and developing successors for those positions is essential to business continuity. Rothwell further stated that leadership succession strategies should consider specialized knowledge and the level of educational attainment when identifying successors for succession planning. P2 stated, "certain things are critical to the job, and the successor would have been exposed to those things". Herd et al (2016) stated that a systematic succession plan would allow for the transfer of unique business knowledge from the predecessor to the successor for mission-critical or key business roles. Transfer

of unique business knowledge from predecessor to successor was supported by other scholars such as Liebowitz and Liebowitz (2015) who posited that the transfer of institutional knowledge from predecessor to successor is critical to business continuity.

Theme 2: Talent Acquisition and Selection

The literature review on leadership succession strategies extensively highlighted the need to incorporate talent acquisition and selection as a critical part of the organization's leadership succession program. The conceptual framework on succession planning theory also highlighted the need to recruit talent based on successors ability to positively influence the performance of the organization, and to assume future leadership roles (Rothwell, 2010). Rothwell (2010) further stated that the reputation of the successor could impact the performance of the business, hence key attributes for success must be identified in the selection of a successor. Rothwell's view on the impact of successor selection on organizational performance was supported by other scholars such as Dohm (2015). Dohm posited that the choice of a leader could impact the organization's bottom line as well as employee productivity. The theme of talent acquisition and selection emerging as a major theme from the participants' supported the literature review and the conceptual framework on leadership succession strategies.

All five participants of the study explained the importance of selecting the right candidates internally or externally for leadership succession. All the participants explained that attributes for success must be predetermined and form part of the basis for selecting candidates for leadership succession. These attributes must be identified from the available internal talent pool before considering external recruitment. P1 stated,

One way to look at selection is actually to do what you call cross training. Cross training is where you have a potential successor perform the role or act in the position for short periods that way you can determine your capability assuming that you are filling from inside which is ideally the preferred option.

P1 further stated that if the talent is not available internally based on predetermined attributes, then talent is acquired externally. P5 stated, “Having identified the critical roles, I look throughout the organization to see if there is anybody based on some set criteria, that would be suitable to fill those roles and prepare them for it”. Participants’ decisions to select successors internally first before going externally was supported by the succession plan interview sheets shared by the participants. The interview sheet used by the participants for selecting candidates for succession showed specific questions asked to the potential successors to gather data on the successors attributes and used as part of the criteria for selecting a successor. I observed participants in a succession planning session asking questions of a potential successor from the interview sheet and documenting answers provided by the successors. All the participants were generally of the view that as part of the leadership succession strategy, key attributes were identified and used as part of the selection criteria for successors and for the identification of developmental gaps.

All participants agreed that scarcity of talent is a significant challenge for talent acquisition and selection for succession planning. The challenge of talent shortage faced by the participants of the study corroborates with the literature review and conceptual framework. Oladapo (2014) posited that scarcity of right talent is a challenging issue

facing human resource practitioners across the world. The problem is further complicated by the need to retain the talent after the talent has been identified and acquired (Sparrow & Makram, 2015). Despite the scarcity of talent, all participants in the study mentioned the importance of identifying talent from the point of recruitment for future leadership roles. P3 stated, “For me, even if the role is not a primary role, my practice is that I do not only hire you for a specific job. I look at what you can do down the road”. All the participants agreed that recruiting talent with transferable skills is done to increase the talent pool for critical leadership roles that may be difficult to fill in the future.

The literature review and conceptual framework captured the need to recruit successors for future leadership roles. Azbik and Finan (2016) posited that because of the future leadership challenge, business leaders should acquire talent that could be developed internally for future leadership roles. The conceptual framework on leadership succession planning theory highlighted successor traits as necessary to the selection of successors for future leadership roles. All the participants mentioned the identification of incumbents with the desired attributes to move the organization to its future state as critical to the organization’s leadership succession strategies.

Rothwell (2010) posited that there is a need for consensus between predecessor and successor regarding leadership transition. P1 noted, “At that point, we seek consensus as to whether the person is interested or not. Because some persons might have the potential but not interested in doing the role”. Consensus between predecessor and successor is important to prevent an organization from investing in a successor who

has no interest in the leadership role (Rothwell, 2010). Managers interview sheets shared by the participants showed how predecessor and successor arrived at consensus. The sheet showed the core competencies for the position, the definition of each competency, the successor's self-assessment of readiness based on each competency, and the predecessor's assessment of the successor's readiness based on each competency. I observed both the successor and predecessor using the interview sheets to conduct an independent assessment on the successor's readiness for the leadership role. The predecessor and the successor independently arrived at a rating for each of the competencies before discussing their justifications for their scores of each of the competencies. The predecessor and the successor arrived at a consensus on the successor's rating for each of the competencies for the leadership role.

Consensus goes beyond predecessor and successor and should include the consensus among business leaders on the pool of talent for future leadership roles (Rothwell, 2010). P3 stated,

We do not start the discussions with the successors until we agree amongst ourselves as leaders on the selected successors. We have documentation for each step of the selection process leading to consensus. So, once we have consensus as a leadership team, we then speak with the selected successors”.

The succession plan sheet documented by the participants showed a list of the critical positions, the potential successors and their readiness score. Collaboration among business leaders is critical for the succession program to be successful (Rothwell, 2010). Rothwell (2010) stated that the movement of talent from one organization to another

organization aids in the development of talent. The selection of potential selectors should allow for consensus among business leaders and is supported by both conceptual framework and literature review.

Other factors such as talent mobility should be considered when acquiring and selecting potential successors. P3 stated, “Generally, business leaders want to abide by the succession plan, however, because they are accountable for the performance of their unit, it is sometimes a tug-of-war to have a successor relocated when required.” This point made by P3 supported Rothwell (2010) who maintained that there must be a consensus between participants and key decision makers regarding critical roles and how the successors will be developed for those roles. Participants’ consideration of talent mobility supports the conceptual framework and the literature review.

Theme 3: Successor Development and Retention Program

Rothwell’s (2010) leadership succession planning theory stated that business leaders must be clear on who in the organization is responsible for the organization’s leadership succession strategies. Rothwell further noted that that training and development is essential to leadership succession and talent retention. This view is supported by other scholars in the literature review such as Azbik and Finan (2016) who posited that leadership must be developed and retained amidst the risk of losing talent to other organization. All the participants in this case study mentioned training and development and talent retention as critical components of an organization’s leadership succession plan. P1 stated, “It’s important for me to have highly skilled technical people available and retained and that tends to be a good part of our focus”. P1 explained that

implementing a retention strategy after investing in the training and development of a successor, was essential. P4 explained that because acquiring the right talent was challenging, a good succession plan should have a good retention plan. Titzer et al. (2014) posited that the alignment of a retention strategy with a succession strategy was important particularly for roles that are difficult to fill. The participants' view that a retention strategy is a critical component of the leadership succession plan supported the conceptual framework and the literature review on leadership succession strategies.

All the participants of the study outlined the need for training and development to close the gaps between successors current competencies and the competencies required to be successful in the leadership role. Participants identified the use of individual development plans for all successors to identify developmental gaps and aligned these plans to the training and development plans. Rothwell (2010) posited that individual development plans are done for successors after identifying key positions that will soon become vacant. Rothwell further stated that the individual development plans capture the gaps between current successor competencies and the required competencies for the leadership roles. P5 noted, "Evaluation sheet highlights the areas that successors need either development in or probably not even development but further strengthening". Chambers (2013) posited that competency gaps captured on the individual plans are closed by implementing training and development programs where successors are assessed for readiness before the successor can assume the leadership role. This point was supported by P1 who said, "You may identify gaps that successors may have, and then develop a training plan to bring the successors to the level required". The individual

development plans referred to as the successor management training plan was shared with me by the participants of the study. The documentation of the training plan captured training needs identified, training methods, action plan, who is responsible, timelines, and status. All the participants of the study highlighted that the individual development plans for successors have specific objectives that are measurable, and feedback given to successors on a periodic basis about their progress. P3 stated that the feedback given to successors on the progress of their individual development takes the form of both formal and informal sessions. Individual development plans are aligned to experiential-based learning and are implemented simultaneously to close developmental gaps.

All the participants of the study highlighted experiential based learning as an effective method of expanding successors knowledge and closing developmental gaps identified on successors' individual developmental plans. The conceptual framework identified experiential based learning as a form of leadership development program that assesses successors in a visible and systematic way. Participants explained that experiential-based learning may take the form of job rotation, acting roles, and participation in special developmental programs. One such program mentioned by 60 % of the participants was an "Incubator Program." P5 stated that the incubator program is an innovative way of identifying talent from the junior levels across the organization and putting these successors in a special program to develop and close competency gaps in preparation for future leadership roles. P5 maintained that, "What the internal incubator does, is allow business leaders to find talent within the group first. So, it's training successor before you are actually ready for them". Documentation on the incubator

program provided by the participants showed an incubation program profile, training needs for the role, individual development plans, and appraisals. The information on the documentation was used to create a structured quarterly program which culminates with an annual readiness score for each successor. The incubator program supported the literature review that showed the need to assess potential leaders before they assume the role (Church et al., 2015). P1, P4, and P5 mentioned using acting assignments and job rotation as a method of measuring the readiness of successors for leadership roles which supported the conceptual framework

Theme 4: Organizational Designs and Policy Implementation

All participants of the study stated the importance of aligning leadership succession strategies to the business model, organizational profitability, and the human resources policies and procedures. Both the literature review and the conceptual framework are aligned with the theme of organizational design and policy implementation. The literature review on leadership succession strategies showed the need for business leaders to align leadership succession strategies with the overarching organizational strategies. Sabharwal (2014) posited that business leaders should develop, implement, and align leadership succession policies with organizational strategies such as diversity management. Leadership succession strategies should also be aligned with the organization's policies on legal and ethical practices (Pandiyani & Jayalashmi, 2016).

The conceptual framework of Rothwell's leadership succession planning theory captures the need for leadership succession strategies to be systematic and aligned with the organization's needs and requirements. P1 stated, "The first thing a business leader

should do is to identify the nature of the business and identify what sort of leadership is needed to make the particular business successful”. P1 further stated that the type of business that the organization was engaged in was used to determine which roles were priority when looking at leadership succession. Once the critical roles were identified, the process of developing successors was guided by the organization’s human resources policies and procedures. A power point presentation on the organization’s succession plan shared by the participants, showed the alignment of succession planning to several business policies such as recruitment, promotion, performance management, development planning, and talent development implementation. I reviewed documentations provided by the group human resources department to the business leaders to ensure that a systematic approach to succession planning was maintained. The documentations included a communication plan, successors action plan, employee interview sheets and succession readiness criteria plan.

P2 noted, “The succession strategies are based on company policies. It looked at the key business areas in the company and based on that we try to identify persons who could be successors for these key areas”. P2’s point supported the literature review which stated that business leaders should ensure that the organization’s succession strategies are used to align future leadership roles with the right attributes for the position Wear (2015). At the observation session, participants highlighted to the successor that the succession planning meeting was in line with the documented succession policies and procedures. Participants further highlighted the need to follow the guidelines of the policies and used the templates provided to capture the relevant information. P2 said,

“We rely on our parent company to guide us, and they have several policies relating to succession planning, and we merely adopt these policies. From time to time based on implementation, we will see where some things do not work, and we will change it as we move along”. All the participants of the study agreed that there were limited financial resources to conduct succession planning and that succession planning for every role in the organization was not practical. Succession strategies are prioritized based on the business needs and the structure of the organization. P1 noted that, “The alignment is essentially looking at what the organization needs and looking at the best practical way to fit those positions”. Aligning succession strategies to business needs was aligned to the conceptual framework which stated that business leaders should align leadership succession plans to the needs of the organization. All the participants of the study explained that leadership succession plans should be a systematic process guided by documented human resources policies and procedures and driven by business needs.

Theme 5: Senior Leadership Support and Participation

All the participants of the study identified Senior Leadership Support and Participation as an essential aspect of the leadership succession strategy. Rothwell (2010) stated that without the support of the senior leadership of the organization, the leadership succession strategies would fail. Senior leadership involvement in the leadership succession process will ensure that the process receives the strategic focus required for knowledge transfer from the predecessor to the successor (Burmeister & Deller, 2016). Participants noted that senior leaders meet annually to review the list of

successors for critical roles and to assess the effectiveness of the leadership succession plans.

P3 noted:

We have succession planning in place, and each year we do a review of our succession planning. It is linked to my performance appraisal and is one of my quantifiable objectives, so it is ongoing. We regard it as so important that for the last seven years it has been one of my quantifiable objectives because we try to make sure that these key roles are in place.

P3 also said that incumbents are not advised of being on the succession plan until there is an agreement among the senior leadership on who the successors will be. A review of the succession planning document presented by the participants revealed a structured way of reviewing the list of successors for leadership roles, assignment of readiness rating scores, and timelines for closing developmental gaps. The review process mentioned by the participants was depicted in the succession planning cycle and documented in the organization's power point presentation on the succession communication plan. Conducting an annual review of the succession planning process is aligned with the conceptual framework. Rothwell (2010) identified the need for business leaders to attend periodic meetings to ensure that the process is improving.

P1 noted that senior leaders including the general manager should partner with the human resources department to establish policies to support the coaching, mentoring, and guidance on how the leadership succession plans should be executed. P1's point supported the conceptual framework because Rothwell (2010) noted that the involvement

of the Chief Executive Officer is critical to the success of the succession planning program. Rothwell further stated that despite the need for collaboration with the leaders of the human resources department, the succession planning process should not be led by the human resources department because only the CEO can hold senior leaders accountable for its execution. The partnership between the senior leadership and the human resources practitioners is critical to the selection, development and retention of successors for critical roles.

All the participants of the study stated that senior leadership must be transparent in the communication of the leadership succession strategies to the organization. Rothwell (2010) concluded that senior leaders who communicate succession strategies effectively could mitigate speculations and assumptions. The participants view on senior leaders' communication effectiveness supports Hall-Ellis (2015) and Lawal (2016) conclusion that business leaders who execute leadership succession strategies transparently and effectively may motivate the workforce and enhance workplace productivity. P5 noted, "The successful implementation of the succession planning process is based on how we communicate the selection of the successor to the various departments and transparency in how it was carried out". P5's comment supported Lawal (2016) who posited that if employees do not perceive senior leaders as transparent with the strategies being implemented, the leadership succession plans will not be as effective and may demotivate some categories of workers. A copy of the power point presentation used to communicate the succession planning process revealed that business leaders were aware of the inherent risks associated with the ineffective communication of the

succession planning program. The observation session revealed that business leaders took the time to explain to the potential successors the succession planning process and provided successors with an opportunity to seek clarification to remove ambiguity.

Applications to Professional Practice

The findings of this qualitative case study showed that business leaders in manufacturing organizations recognized the need to implement leadership succession strategies particularly for roles considered to be mission-critical jobs. However, the participants of the study have concluded that because of the shortage of leadership talent, there was a significant need for more financial investment in the development of successors internally for these mission critical roles. Alvani et al. (2016) posited that business leaders need to focus on the development of talent because of a shortage of qualified leaders.

Business leaders could use the findings of this study to develop leadership succession strategies that effectively identify and develop internal talent for future leadership roles in the organization. Business leaders should identify the roles in the organization that are critical to the successful operation of the business and prioritize the development of those successors where resources are limited. Once the critical roles are identified, business leaders should identify talent within the organization based on predetermined criteria, then develop those talents to fill future leadership roles.

The selection of incumbents for future leadership roles should incorporate workplace policies and procedures such as legal and ethical practices and diversity policies. Cook and Glass (2014) posited that business leaders that develop leadership

succession strategies with diversity management plans are more likely to attract talent from varying backgrounds. The predetermined selection criteria should also incorporate incumbent attributes such as their ability to fit into the desired culture of the organization and the flexibility to move talent to areas where it is needed the most. Participants stated that it is important to include the predecessor in the successor selection process. P1 posited that without the involvement of the predecessor in the selection of a successor the risk of selecting the wrong incumbent would be heightened because the predecessor would have firsthand knowledge of the incumbent's competencies and attributes.

Leadership succession strategies should include training and development programs to close successors' developmental gaps. Important to the effectiveness of developmental programs is the assessment of successors' gaps by using individual development plans and aligning those plans with performance management systems. Another important inclusion in the training and developmental plans are the use of experiential-based learning to expose successors to leadership roles and to assess successors for leadership readiness. Experiential-based learning is an effective method of communicating to successors their value to the organization and business leaders' intentions to develop them for future leadership roles. Participants of the study stated that exposing successors to leadership roles will reduce the risk of losing talent to other organizations.

Senior leadership should go beyond the development of leadership succession strategies and get involved in the implementation of the succession plans. Senior leadership must appear to be transparent with the leadership succession plans and must be

able to communicate effectively the process used to select incumbents. Participants of the study highlighted the need for senior leadership involvement in the succession strategies for the succession plans to be in focus, remain relevant, and receive financial support for greater effectiveness. Senior leadership determines the direction and culture of the organization and play a critical role in the selection of successors. Senior leadership involvement in the selection process ensures the cultural alignment of successors and reinforces commitment to leadership succession.

Implications for Social Change

Business leaders and owners could use the findings of this study to impact social change by creating a leadership pipeline at all levels of the organization from diverse backgrounds, to ensure the future growth of the businesses in a competitive global environment. The findings of this study showed the need for business leaders to put in place a systematic process of leadership succession where talent can be harnessed internally and externally and developed for future leadership roles. The findings of the study also showed that if business leaders and leaders devoted to public good, implements leadership succession strategies effectively could build employee loyalty; improve workplace productivity, and drive organizational profitability. Growth in business could improve the standard of living for the communities within which the companies operate and generate more government revenues for economic sustainability programs.

Recommendations for Action

Based on the findings of this study several themes emerged and recommendations for actions. The first recommendation is for the human resources department to partner with business leaders to communicate the organization's leadership succession strategies throughout the organization more systematically and transparently. Participants' may be aware of the organization's leadership succession plans. However, their interpretation of aspects of the policy may differ because of inadequate training on the interpretation and application of the organization's policies, procedures, and tools governing leadership succession. For example, from an observation session, I observed that both successor and predecessor had some challenges using the succession planning tools which could be more effective with more training on the use of succession tools.

Business leaders should ensure that predecessors play a more critical role in the selection of their successors. For example, two of the participants in this study had no input on the choice of their successor. Predecessors often supervise successors and should have a reasonable assessment of the incumbents' abilities and the likelihood of success in the roles. A predecessor will be more likely to share institutional knowledge with a successor if the predecessor trusts the successor to use the information with integrity. Business leaders need to establish a more collaborative and structured approach to allow the release of potential successors from their substantive roles in the business, to facilitate the training and development for future leadership roles. Job rotation and temporary appointments to leadership roles provide successors with critical

experiential-based learning that will provide business leaders with an opportunity to assess successors for necessary competencies and attributes for the future leadership role.

The development of a successor should form part of the quantifiable objective for all and not just some of the business leaders. Business leaders who are assessed on the implementation of leadership strategies will be more likely to focus on leadership development as equally important as other business imperatives. Finally, business leaders should consider investing more financial resources for the development of successors for mission-critical jobs. The nature of the operations requires business leaders to develop successors internally to fill roles that are unique to the organization and will be difficult to fill externally. Business leaders should pay more attention to the training and development of successors for mission-critical jobs internally and invest more financial resources to ensure its successful implementation.

The findings of this study could be incorporated in an organization's training sessions with business leaders, documented succession planning tools and, succession planning policies and procedures to ensure that gaps that could potentially negatively impact the successful implementation of the organization's leadership succession strategies are mitigated.

Recommendations for Further Research

A single case study design was used to explore leadership succession strategies in one manufacturing organization in Jamaica that is known for its business leaders' implementations of leadership succession strategies that work. A limitation of this study is that the findings are based on these five business leaders' experiences, and the

strategies used were based on the organization's unique circumstances and not necessarily transferable to other organizations. Areas for further research include the effectiveness of incubator programs in stemming the leadership succession challenge in organizations. An incubator program identifies individuals from the point of recruitment and places them in a special program focused on developing competencies and attributes needed for mission-critical roles.

Another area of consideration for further research is to explore the extent to which organizations that measure their business leaders on the effectiveness of their successors' development are better able to implement leadership succession plans than organizations that do not. Finally, participants in the study posited that the organization needs to have invested more resources in leadership succession planning. More research needs to be done on whether organizations that invest heavily in leadership succession perform better than those that do not.

Reflections

My journey throughout this Doctor of Business Administration Program at Walden University has changed my approach and thinking towards the development of an organization's human capital. This program provided me with new and broader thinking on strategies that can be implemented by business leaders to create a leadership bench strength to mitigate the talent gap found in organizations and on the broader society. I have come to a more profound realization that business leaders in general, see the need for leadership succession strategies in organizations, particularly for business continuity; however, because of the focus on financial performance, a systematic and

strategic approach to leadership succession strategy is often compromised. I recognized from the business leaders in this study the implications of not administering transparent leadership succession plans effectively, and the result of not effectively communicating those plans throughout the organization. Ineffective implementation of leadership succession strategies could cause employees' demotivation and a reduction in productivity.

The business leaders who have participated in this study were willing and able to share their rich experiences on leadership succession strategies, and an important take away from those leaders was the need to go beyond the development of the successors' technical competencies, but rather a holistic approach to succession planning must be utilized. This holistic approach should seriously consider the five themes discussed in the presentations of findings.

Conclusion

Leadership succession strategies are critical to the development of the next generation of business leaders for business continuity. The leader of the organization and the executive management team should periodically reassess, and measure leadership succession plans for effectiveness. Business leaders should align leadership succession strategies with the organization's talent management strategies and adequate financial and human resources allocated to its effective implementation. Focused should be given to mission-critical roles identified by business leaders as unique to the organization, and a transparent method of selection of these successors should be communicated to all employees. The use of predecessors as mentors and coaches are useful in transferring

institutional knowledge to successors and should be incorporated into the organization's leadership succession plans.

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Appendix A: Interview Questions

Interview Questions

I will use the following interview questions:

1. What strategies do you use to build the framework of your leadership succession plan?
2. What strategies do you use to manage pitfalls encountered in developing your leadership succession plans?
3. What strategies do you use to ensure the successful implementation of your succession plans?
4. How do you assess the effectiveness of your leadership succession strategies?
5. What strategies do you use to align succession planning with the organization's talent management strategy?
6. What are the challenges to successful succession planning?
7. What additional information regarding leadership succession strategies would you like to share?

Appendix B: Individual Interview Protocol

Individual Interview Protocol

Introduction

Thank you for participating in my doctoral study in which I will be exploring the research topic of “Using Succession Strategies to Increase Workplace Productivity”. This semistructured interview will be approximately 1 hour long and you will be asked seven questions pertaining to the research topic. Based on the responses you give to each of the questions, I could ask additional questions for clarification to ensure that my understanding of your interpretation of the phenomenon is correct. With your permission, this interview will be recorded using two tape recorders and I will also be making notes of pertinent points that could require further research or clarification. Please note that this interview is voluntary and, therefore, if at any time you feel the need to discontinue, we will do so immediately.

Description of the Phenomenon

Many business leaders struggle with the successful implementation of leadership succession strategies that could eventually lead to increased workplace productivity. The lack of effective leadership succession strategies potentially exposes organizations to a future leadership crisis when a leader demits office. Some business leaders fail to implement successful leadership succession strategies because of misalignment with organization strategy as well as by being preoccupied with other business priorities. The focus of this proposed study is to explore the successful implementation of leadership succession strategies of the manufacturing sector in Jamaica.

Summary

A summary of the transcripts from the recorders from your interview will be sent to you for your confirmation of the accuracy of the interpretation. I will also send you a summary of the findings from the entire research for feedback. I will then schedule a follow up meeting with you to discuss the findings of the research and to provide an opportunity for feedback related to the accuracy of the interpretation of the description of the phenomenon and the methodology and process used to arrive at the conclusions of the findings. Should you have any question pertaining to this process, you could contact the researcher via email at dayton.robinson@waldenu.edu. If you want to talk privately about your rights as a participant, you can call the Research Participant Advocate at my university.