SUCCESSION PLANNING FOR ORGANISATIONAL SURVIVAL: CHALLENGES AND RECOMMENDATIONS

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ABSTRACT

Succession planning is an important component of organisational strategy because it assures leadership continuity and preserves institutional knowledge. In an era of fast change and unpredictability, an organisation's capacity to plan for and manage leadership changes is critical to its long-term survival and success. This study discusses the issues of succession planning and provides advice for overcoming them to ensure organisational resilience. This paper employs a scoping review conducted to investigate the existing literature on challenges and recommendations in succession planning for organisational survival in the era of Volatility, Uncertainty, Complexity, and Ambiguity (VUCA) so that organisations can prepare to deal with human capital in the VUCA world effectively. The process of gathering data for this scoping review involves looking up articles on Google Scholar, web of science and Scopus through which 15 articles have been identified to be relevant. The challenges of succession planning are then explored in detail, including the talent development and retention, cultural and generational differences and resistance to change and institutionalisation. Overall, this study provides a comprehensive analysis of the challenges and opportunities associated with succession planning, along with practical recommendations for organisations' effective succession strategies which promote their strategic goals and enhance their resilience in the face of change.

Keywords: Generation gap, organisational survival, succession planning, talent management.

INTRODUCTION

VUCA, which stands for volatility, uncertainty, complexity and ambiguity, a concept introduced by the US Military has provided valuable lessons for strategic decision-making in both policy and business (Das & Ara, 2014). Drawing the similarities with a battlefield, fast-paced actions take place within the fog of the unknown, there is a need for quick decisions-making process. Within this the ever-evolving landscape of modern businesses, the concept of succession planning has emerged as a critical component for organisational survival. Succession planning entails the deliberate and systematic process of identifying, developing, and nurturing individuals within an organisation to fill key leadership positions when they become vacant. As businesses face unprecedented challenges and uncertainties, the need for effective succession planning has never been more pressing (Yasmeen Bano & Ismail, 2022).

This literature review aims to delve into the complexities surrounding succession planning, focusing on the challenges organisations encounter in implementing effective strategies and proposing recommendations to overcome these hurdles. By examining current research, theoretical frameworks, and practical insights, this review seeks to provide a comprehensive understanding of the significance of succession planning and offer actionable strategies for organisational leaders to navigate succession transitions successfully.

Additionally, factors like cultural and generational differences, talent development and retention challenges, resistance to change along with institutionalisation, have made the succession planning process more complex (Okoh et al., 2021). Organisations must adapt to these external and internal factors while simultaneously nurture a pool of competent leaders capable of steering the organisation through turbulent times. Failure to address these challenges can jeopardise the continuity and long-term viability of the organisation, leading to talent shortages, leadership crises, and diminished competitive advantage.

Despite the challenges, organisations can enhance their succession planning practices by adopting proactive strategies and leveraging best practices. By taking a holistic approach that values the four challenges identified, organisations can create strong succession pipelines that support future growth and innovation. Furthermore, fostering a culture of continuous learning, mentorship, and knowledge sharing can facilitate smoother leadership transitions and mitigate the risks associated with succession gaps.

Considering the foregoing, this study aims to explore the intricacies of succession planning, identify key challenges hindering its effectiveness, and propose practical recommendations to address these challenges. By synthesising existing literature and empirical evidence, this study seeks to provide valuable insights for organisational leaders, HR professionals, and scholars interested in optimising succession planning practices for organisational survival and success.

METHODOLOGY

Scoping Review Method

A scoping review method is a systematic approach for mapping current literature on a certain issue and providing an overview of relevant information. Scoping reviews are a type of knowledge synthesis

that identifies trends and gaps within an existing knowledge base, or scope of knowledge, to influence research, policy, and practice (Westphaln, Regoeczi, Masotya, Vazquez-Westphaln, Lounsbury, McDavid, & Ronis, 2021). The review followed the five steps as described by Arksey and O'Malley (2005) depicted in figure1.

Figure 1

Five Steps by Arksey and O'Malley (2005)
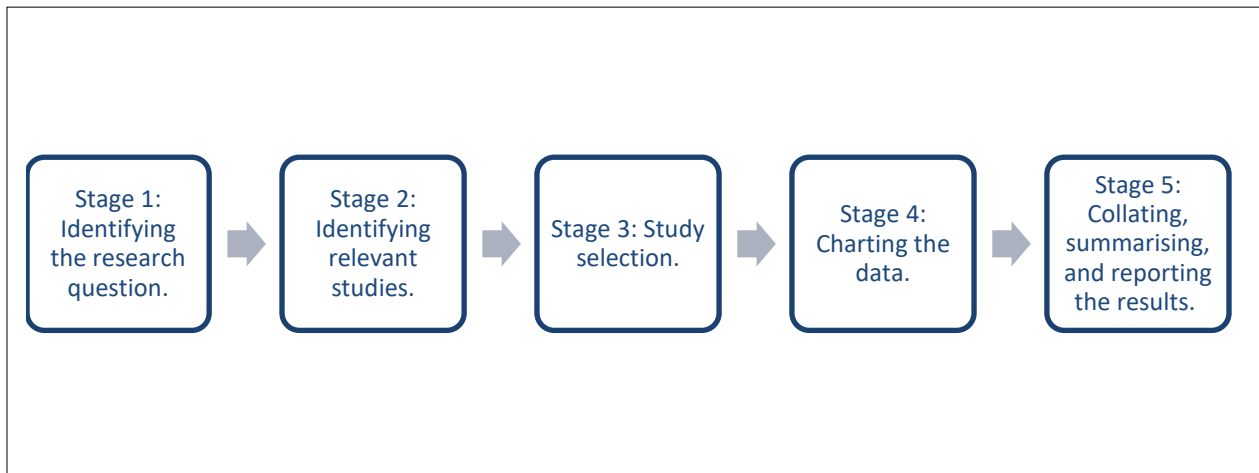
Identifying the Research Question

Addressing the research question entails undertaking systematic study to collect relevant data, assess findings, and reach conclusions that directly address the research question. The first stage is to clearly define the study topic, which in this case is about succession planning to ensure organisational survival. Once the research issue has been chosen, the following step is to conduct a thorough search of databases such as Scopus, Web of Science, and Google Scholar to identify suitable publications for inclusion in the review. This entails employing proper search terms and strategies, such as synonyms and related keywords, to conduct a thorough search.

Identifying Relevant Studies

At this stage, identification of relevant studies is done by searching and locating relevant articles for potential inclusion in the review. This step involves conducting a comprehensive search across databases, such as Scopus, Web of Science and Google Scholar. These databases excel in their coverage and selectivity methods, which result in a collection of documents that is well-organised. Some authors recommend utilising multiple databases when conducting article searches (Correa, Brito, Lima & Queiroz, 2022).

To ensure a comprehensive search, it is important to use appropriate search terms and strategies, including synonyms and related keywords (Shaffril, Ahmad, Samsuddin, Samah & Hamdan, 2020). The main keywords for the study include 'Succession Planning', 'Organisational Survival', 'Cultural and Generational Differences', 'Talent Development and Retention' and 'Resistance to Change and Institutionalisation'. Variations for the study's primary keywords are intended to give the chosen database more options for finding relevant articles to review.

Study Selection

Selection is an essential step in the scoping review process, and it involves the evaluation of article titles, charting the data, and potentially full texts to determine their eligibility for inclusion in the review. The selection process aims to identify and select articles that meet the predefined inclusion criteria and address the research question of the scoping review. It is begun by screening the titles and abstracts of the identified articles to assess their relevance to the research question.

Adhering to predefined inclusion and exclusion criteria, involving multiple reviewers, and maintaining clear documentation will help ensure the integrity and reliability of the scoping review. The inclusion and exclusion criteria as mentioned in Table 1 are applied to determine whether an article should proceed to the next stage of full-text selection. For the articles that pass the title and abstract screening, the full-text versions are obtained and reviewed. Each article is then thoroughly assessed against the inclusion and exclusion criteria. The review includes studies published in English and the article search is limited to articles published within a certain period. Therefore, based on this, the timeline between 2019 and 2024 has been selected as one of the inclusion criteria.

Table 1

The Inclusion and Exclusion Standards

Criterion	Inclusion	Exclusion
Document type	Peer-reviewed journal articles, conference proceedings, government reports and policy documents, theses and dissertations, grey literature, books and book chapters, and official websites.	Personal blogs and websites, non-peer-reviewed sources, outdated or irrelevant sources, fictional literature, news articles, and media sources.
Language	English	Non-English
Year of publication	Between 2019 - 2024	2018 and older
Subject areas	Social science, business management, finance, and economics	Other than social science, business management, finance, and economics

Charting the Data

Charting the data is a crucial step in scoping review that involves extracting relevant information from the included studies and synthesising and interpreting the findings. It involves selecting and focusing on relevant aspects of data while hiding unnecessary details. Using the charting-data method, the relevant data from each included study are extracted. This process involves reviewing the full-text articles and recording the required information systematically. According to Shaffril et al., (2020), extraction may include both quantitative data (e.g., sample size, effect sizes, p-values) and qualitative

data (e.g., themes, quotations). It is also the most suitable technique to synthesise a mixed research design, which started with the identification of similar patterns from all the selected studies and were grouped together.

Collate, Summarise, and Report

From the data-charting method, three main themes have been identified. The accuracy of these challenges has been reviewed by the researchers to ensure their suitability to present the data. Several challenges unrelated to the research question have been excluded, and three challenges have been identified. The main themes are determined post reading, identification and synthesis. Afterward, the suitability of themes and the different interpretations of data are discussed by researchers until a mutual agreement is reached. These challenges are related to the research questions and objectives of the studies, which will be further explained in the results and discussions of the scoping reviews.

<div align="center">

FINDINGS

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The research findings outline a systematic process of record identification and screening for a study, beginning with 152 records sourced from various databases. After removing duplicate records, the total is reduced to 99. Subsequently, 99 records are screened, resulting in 15 records being included for final review. The review has restricted results due to a low number of papers meeting the demanding inclusion criteria for a scoping review method. Additionally, the document highlights the exclusion of records that do not focus on succession planning and those for which the full text is not available, with a total of 84 records falling into this category. The analysis of these 15 studies led to the development of three main themes: talent development and retention, cultural and generational differences, and resistance to change and institutionalisation. These themes represent the core challenges identified in the literature on succession planning visualized in Figure 2.
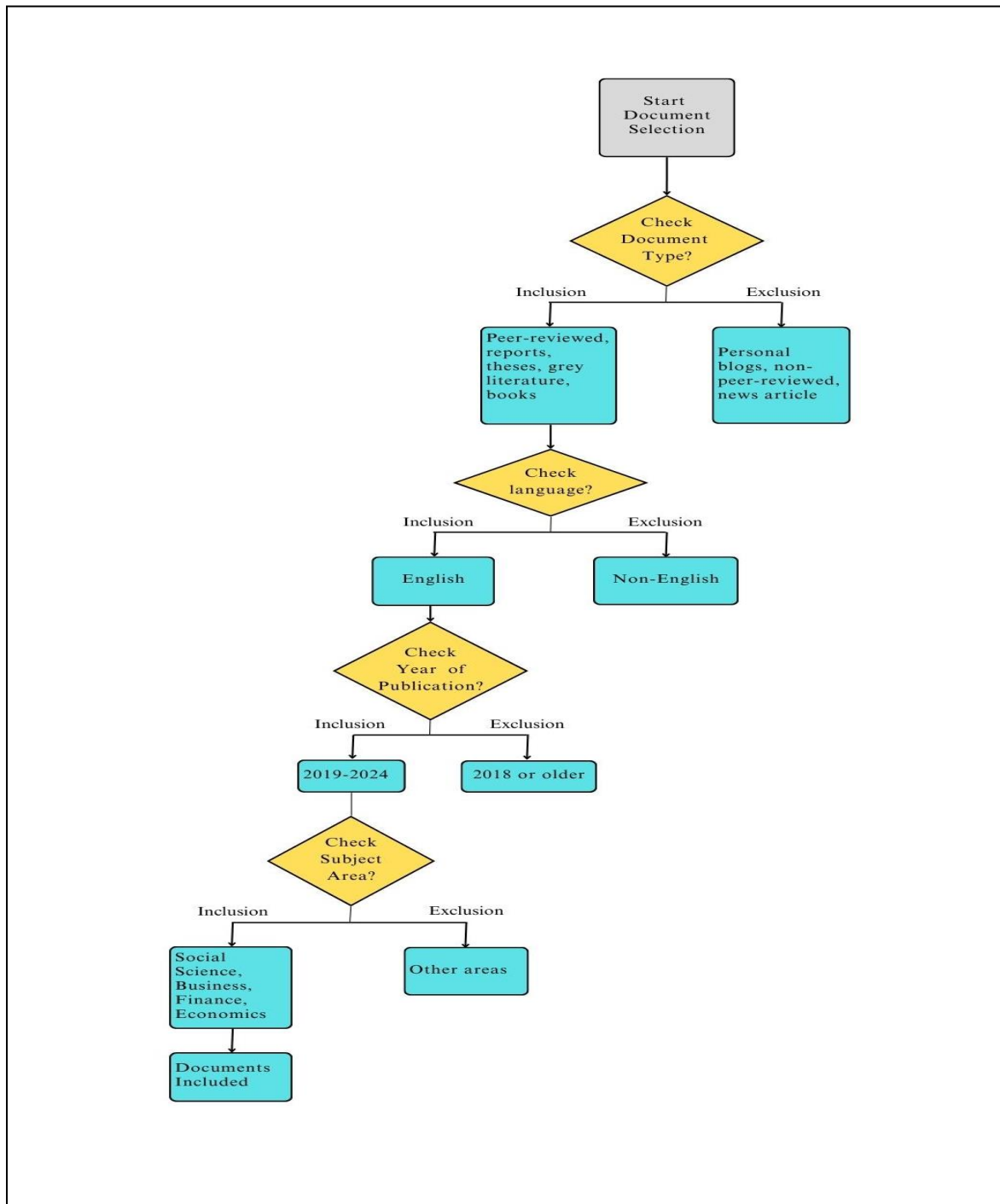
Figure 2

Systematic Process

Table 2

Description of Included Studies

No.	Authors	Data Collection Method	Type	Study Population	*N*	Study Design	Themes
1.	Yasmeen et al. (2022)	Survey method	Article	University	300	Quantitative	Cultural and Generational Differences
2.	Chia et al. (2021)	Library method/ Document analysis	Article	University	N/A	Quantitative	Cultural and Generational Differences
3.	Karaki, M. (2022)	Document analysis, Face-to-face interviews	Thesis	Non-profit organisation	4	Qualitative	Talent Development and Retention
4.	Okoh et al. (2021)	Survey method	Article	Family- owned business	357	Quantitative	Cultural and Generational Differences
5.	Alrossais (2023)	Document analysis, Face-to-face interviews	Thesis	Family- owned business	13	Qualitative	Cultural and Generational Differences
6.	Maroga et al. (2024)	Survey method	Article	State-owned enterprise	227	Quantitative	Talent Development and Retention
7.	Salau (2022)	Survey method	Article	Small & Medium Enterprises	185	Quantitative	Cultural and Generational Differences
8.	Utami, C. W. (2019)	Survey method	Article	Family- owned business	89	Quantitative	Cultural and Generational Differences

No.	Authors	Data Collection Method	Type	Study Population	N	Study Design	Themes
9.	Akaa et al. (2024)	Survey method	Article	Family- owned business	336	Quantitative	Talent Development and Retention
10.	Mustapha et al. (2022)	Face-to-face interviews	Article	Small & Medium Enterprises	8	Qualitative	Resistance to Change and Institutionalization
11.	Agwa (2023)	Survey method	Article	Family- owned business	82	Quantitative	Resistance to Change and Institutionalization
12.	Brenkman (2020)	Face-to-face interviews	Thesis	Family- owned business	7	Qualitative	Resistance to Change and Institutionalization
13.	Odekina (2022)	Survey method	Article	Financial institutions' employees	226	Quantitative	Resistance to Change and Institutionalization
14.	Lu et al. (2022)	Survey method	Article	Family- owned business	198	Quantitative	Resistance to Change and Institutionalization
15.	Worlu et al. (2022)	Library method/document analysis	Article	Family- owned business	N/A	Qualitative	Resistance to Change and Institutionalization

DISCUSSION

Succession planning emerges as one of the unavoidable pillars of the organisation's future development, especially for the family businesses and SMEs that they form. It is central to an organisation particularly when it comes to overcoming delicate succession issues. Nevertheless, there are some issues one must consider while engaging in effective succession planning strategies (Yasmeen Bano & Ismail, 2022). This essay investigates three problems in succession planning and their role in organisational survival, with evidence proved by reliable data.

Cultural and Generational Differences

A lot of cultural and generational differences existing in the organisation are usually the main problem encountered when succession planning is done. The cultural taste and generational difference may cause them some trouble, especially in family-owned companies, where the traditions and values are deeply enshrined as their standard practice. Alrossais (2023) observed that family businesses in the country experience a lot of challenges in the succession process because of the cultural norms and the social vision.

Take an eldest son's scenario, who is most expected to assume the leadership of the inherited family business despite his qualifications or capabilities. Under which the best suited members of the family for leadership roles might be neglected just because of some traditional practices (Yasmeen Bano & Ismail, 2022). Referring to the fact that intergenerational gaps between those of the older generation and the younger one usually exist within the family business, it can be the source of conflicts in business strategy and decision- making procedures (Chia et al., 2021).

Apart from all the factors that make succession planning in family businesses tougher, gender and generation expectations make the picture even more complicated. Generation gap between Baby Boomers, Gen X, Millennials, and Gen Z creates a difference in their views on leadership succession which could in turn generate a range of goals or diverging picture of leadership succession (Karaki, 2022). Truth be told, interaction among members of Gen Z with career development and autonomy, whereas Baby Boomers may give more weight to stability and traditions. Surging in such discrepancies may result in inter-tribal conflicts and disputes regarding succession decisions among others (Okoh et al., 2021).

Comprehensive information exchange and conflict solving processes must be in place so that the organisation strives successfully through the crises. Through publicising the open conversation and agreement among the family members, the business can prevent conflicts among the family members and make the transition leadership smoother (Salau, 2022). The establishment of systemic communication channels and taking due consideration of third-party mediators as the need arises are some of the methods that can be applied to address the issue of divergent expectations, aspirations, and priorities, so that a common vision that is mutually beneficial is achieved (Utami, 2019).

Talent Development and Retention

Another challenge of succession planning is finding, delegating, and keeping staff engaged so that they can attend critical leadership positions in the future. Top talent is a valuable and unique resource for the organisations and having the capacity to retain such talent gives companies a competitive edge in the market (Alabbas et al., 2024). Organisations will need to come up with strategic actions to sponsor

the employees training and development programs to pave way for replacing the successors (Akaa et al., 2024). But this process can be limited by the specific conditions which are resource constraints and their competing priorities, especially among the Small and Medium Enterprises (SMEs) and non-profit organisations (Karaki, 2022).

Maroga et al., (2024) have endorsed that leadership of self is crafted to intervene the succession planning with turnover intention. The particular fact is that the workers who feel that the way they can be promoted and the ways in which they can develop professionally are more likely to remain loyal to the organisation. On the other hand, limited or unanticipated growth hampers advancement can lead to demotivation, which can also result in high turnover rates for elite talents.

Furthermore, as a concept of succession planning always ties with employee retention rates especially for the public higher learning institutions (HLIs) in Malaysia. The recent study by Bano et al. (2022) has indicated that talent development is crucial not only for addressing immediate succession needs of the organisations but also for establishing a long-term leadership pipeline that ensures organisational continuity and resilience.

Resistance to Change and Institutionalisation

Other than that, the challenge of succession planning is dealing with the implementation and institutionalisation barriers within the organisation. Succession planning will often lead to restructuring of an organisation and role realignment, and this will be encountered with the resistance of the incumbent leaders and the employee bodies. Brenkmann (2020), who deals with business succession processes in small and medium enterprises, points out the issues of emotional nature that are caused by the change in generations.

Resistance to change may come from many elements, such as fear of the unknown, loss of control, and doubt about the organisation direction. Existing leaders might hoard authority and be reluctant to give up the control or seek for new leadership styles (Worlu et al., 2022). On the other hand, many workers also do not welcome changes to existing business processes and procedures for fearing their job insecurity or loss of standing in the company (Lu et al., 2022).

Besides, institutionalising succession practices leads to a gradual change of culture and mindset. Succession planning is seen as having a moderating effect on organisation culture by Salau (2022). A nurturing and flexile organisational culture that encourages the submission of succession planning plans can promote a setting accentuating change and rewarding innovation (Odekina, 2022). By contrast, a culture that is rigid or has stubborn character may be a hindrance to the change process and curtail the introduction of new ideas, hence threatening the organisation in its ability to remain competent in the long term (Agwa, 2023).

Adequately dealing with resistance to change and the effect of institutionalisation calls for forward-looking and effective leadership, the establishment of sound communication channels, and a steadfast commitment to the creation of a culture of presence, trust and perpetual improvement (Mustapha et al., 2022). To overcome resistance to change, organisations must prioritise transparent communication and engage employees in the succession process early on as well as allocating platforms for open dialogue. Offering leadership development programs that align with the organisation's future vision can also ease transitions.

Above all, proper succession planning will help an organisation to sustain and increase in productivity too. However, it is also not free from challenges and problem. Cultural and generational gaps, how to handle talented employees, and opposition to change represent some of the biggest barriers various businesses face when implementing the most effective succession planning strategies. Through addressing these issues in advance, taking into account the relevant research and experience in the industry, organisational culture of leadership can be built, and the level of adaptability and change are provided.

RECOMMENDATIONS

Having identified the challenges faced by organisations for succession planning to be implemented, this article will propose recommendations, based on literature available, on ways for organisations to move forward.

To Succeed is to Start Early

According to Lu et al. (2021), as family-owned businesses are passed down to the next generation, the succession plan begins at an early age of the successor. A successful succession planning can be executed by the organisations through implementing mentorship programs that pair young talents with experienced leaders (Akaa et al., 2024). This can help cultivate the necessary skills and provide hands-on experience, ensuring smoother transitions in leadership (Okoh et al., 2021).

Make them Stay

The recurring problems that arise with ensuring a successful succession plan are keeping the good candidates on board. This has been agreed by many literatures (Akaa et al., 2024; Yasmeen et al., 2022; Odekina, 2022; Okoh et al, 2021). Hence, Yasmeen et al. (2022) suggested that usage of technology can create a sense of belonging among employees, thus encouraging them to stay longer within the organisation. Maroga et al. (2024) further suggested employees who feel valued and appreciated by their organisation will have better job satisfaction level thus, would be able to stay longer. Employees will be attracted to organisations that are able to provide them with better compensation and have more benefits (Chia et al., 2021). Furthermore, better talent management has been associated with higher level of performance by the employees (Alabbas, 2024). Organisations are encouraged to include more non-monetary strategies, such as creating positive organisational culture or offering better career advancement opportunities that may enable higher retention level.

Communication is the Key

Most of the challenges that arose in fostering succession planning stemmed from the employees unable to understand what the management really intended. Thus, having proper and clear communication is the key (Salau, 2022). In the context of family-owned business, succession planning will not be effective if there is lack of communication from the older generation to their heirs (Utami, 2019). This is also supported by Karaki (2022) as among other factors that can ensure accomplishment of succession planning is communication. To ensure effective transition, organisations should create thorough leadership transition plan as well as conduct regular meeting prioritising succession planning as its main agenda. This can ensure all employees are fully onboard with the organisation's vision for leadership succession and prevent any foreseeable misunderstanding.

CONCLUSION

In conclusion, the intricate process of succession planning presents multifaceted challenges, including cultural and generational differences, talent development and retention, and resistance to change and institutionalisation. These obstacles can significantly impact organisational survival and performance, particularly for family businesses and SMEs. Organisations must take immediate steps to implement structured succession plans, prioritising early preparation, talent retention, and practice effective communication. Only through a proactive and strategic approach can they ensure not only survival but also success in today's competitive environment. The importance of early planning, employee retention strategies, and effective communication cannot be overstated. Embracing technology, fostering a culture of mentorship, and facilitating transparent communication channels are crucial steps in mitigating these challenges. Ultimately, successful succession planning hinges on a proactive and comprehensive approach that considers not only organisational dynamics but also the individual aspirations and talents of potential successors. Looking ahead, organisations that embrace forward-thinking succession strategies will be better equipped to navigate future uncertainties, ensuring continued growth and success.

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