

# **Factors Influencing the Succession Planning in the Education Sector: A Systematic Literature Review**

**Arpan Upadhyaya**  
**Symbiosis International University (Deemed University) (SIU)**

**Abhijeet Lele**  
**Symbiosis Institute of Business Management (SIBM)**  
**Symbiosis International University (Deemed University) (SIU)**

*The purpose of the study is to get some insights from existing studies on how the planning of succession is done in the Education Sector. A review of 47 articles published in different journals was used to analyze the process and effectiveness of succession planning. This study finds that the major competencies required to be in a predecessor are risk-taking, open-mindedness, motivation, trustworthiness, communication skills, and value orientation. The paper concentrated on the process, timing, and experience of succession planning around the family firms only excluding the other non-family firms. The study suggested the scholars think about other factors like experience, educational parameters, intention to work, and the social perspective that may affect succession planning.*

*Keywords: successor, succession planning, systematic review, influencing factors, education sector*

## **INTRODUCTION**

Succession Planning is the process of selecting the best candidate from the pool of available deserving candidates for the required position (Chan et al., 2020). It helps manage the individual's career by optimizing the organization's needs and matching their aspirations. The perfect match between the organization and the individual is essential, in case any differences occur, then it not only impacts the individual but the firm and their employees are also affected by such a decision. The study shows that family firms look for more relationship-oriented successors while non-family firms look for more formal methods of succession planning (Ferrari, 2020).

With this in mind, the researcher here tries to analyze the factors on how succession planning is managed in private education institutions. The mushrooming of private educational institutions has been seen after the year 1990 with the restoration of democracy in the country. Most of the private institutions that are running now are still owned by the first generation people and the succession process has not been carried out or let's say the passing of the baton has not been done to the next generation. Apart from very few, transfer of ownership has not been seen in most of the institutions. While interacting with the school owner at a national level conference in Kathmandu, the researcher found that most of the private education institutions are having problems in succession planning which is why they want to sell their institution and move on to other businesses. 70% of the school owner with whom the researcher had interacted were willing

to sell the school due to the problem of finding a successor. This interaction raised a serious concern if the transfer of ownership is not done from the incumbent to the successor then how it impacts on organization and employees (Sutha & Perera, 2018).

The problem of succession planning has a direct impact on the organization and its employees (Moussa & Elgiziry, 2019). As the family-owned business has a significant contribution to the country's economy, the problem may impact economic growth. Most private-sector employee's work under family-owned companies (Bizri, 2016), and the same is the case with educational institutions. This research is focused on finding the factors that have influenced the succession planning in education sector. For this, the researcher has done systematic literature review which will help to analyze the various factors that were observed in previous research.

Succession planning has been a significant issue in a family-run business. In Nepal's context, the private education sector faces succession as a problem as its successor is not ready to take over the company. The future of family-owned education institutions is unclear due to the lack of knowledge regarding the importance of succession planning. The problem lies in the management itself, as they do not prioritize the importance of succession planning (Apostolopoulos & Liargovas, 2016). The successor should feel the importance of business for the employees and society, so early orientation about the company's vision is essential (Su & Dasmit, 2021). Early recognition of successors and providing training and development to them help to solve the issue of succession. The owner should define the entry timing to allow the successor to understand the timing of taking over the company.

After the mushrooming of family-owned institutions in Nepal after 1990, the first generation still owned the institution. They have now started to transfer ownership to their second-generation as their successor is not motivated to continue the legacy and run the family business. As the current situation shows, most first-generation owners are retiring soon—lack of idea and importance of succession impacts the survival of any business (Sreih et al., 2019). So, the identification of the problem is essential for all the stakeholders. The whole country's economy will be affected if the current situation is not appropriately handled. The owner, the organization, the employed, and the successor are the major ones who will suffer more from the problem (Garg & Weele, 2012). The existing knowledge believes that succession planning is an essential aspect for any organization (Ali & Mehreen, 2019). It should be adequately managed whether family or non-family business.

## **METHODOLOGY**

### **Systematic Literature Review**

Succession Planning is the process of developing the successor and exploring the qualities that are required to be a successor (Liu & Xue, 2020). Most of the research has focused more on the process and experience of succession planning, as little emphasis has been given to the factors that influence the succession process. Succession planning is a new idea in the context of the education sector of Nepal, particularly in the private sector. The education sector is in a growth phase, so competent individuals are essential to fill the vacant positions. The transfer of ownership from one generation to another is crucial to promote and maintain harmony as it determines how the firm will be carried out in the future. Most of the research under succession planning that were carried out has focused on finding out the key strategies adopted by the stakeholders during the succession process and identifying various factors that affect the operation of succession (Bozer et al., 2017) but these research has missed out on the impact of those factors on an organization and its employees. There should be a smooth relationship between the family and the business members, and effective operational strategies must be discussed. The primary motivation of the family firms is the expectation of the owner and the manager (Sreih et al., 2019). Some of the papers included failing to explain the reason behind the delayed transition process despite all the succession plans.

A systematic literature review has been done using various available databases. The review is restricted from 2000 A.D. to the present due to less availability of data. The earlier research on family succession shows that the transfer of business from the first generation to the second generation is 30% the second to the third is 15% while the third to the fourth is only 3% (Gabriel & Bitsch, 2019). The success of family

owned business lies in forming a solid foundation to succeed in the transition process (Ghee et al., 2015). The study shows that there have been many problems while looking for heir experience from outside organizations (Mokhber et al., 2017). There are high chances of developing the entrepreneurial spirit and starting their own apart from joining the family business. In some cases, the firm is less likely to grow or expand (Tobak et al., 2018). The founder needs to look for a successor who gives more commitment to the family to avoid future conflicts and work for the firm's best interest (Bizri, 2016). In the case of a firm owned by a single family, it is more likely to invest in innovations than the firm owned by multiple families (Pham et al., 2019). The risk-taking behavior in the new generation seems more like the founder as they seek more opportunities and have more knowledge of innovation than their previous one (Samei & Feyzbakhsh, 2015). The succeeding family members look for more options and can take the firm to a newer height through their experience in related fields.

The development of any firm is based on different phases (Duh, 2015). The four stages include the introductory or the initial phase of the business which is run in an unskilled manner, and in the second phase, the company is unstable. The firm then survives in the third stage, and in the fourth stage an important decision has to be made regarding the future of the business if all the previous steps are completed.

A global survey of executives conducted by Korn/Ferry International (2010) on more than 60 countries identified that 98% respondents believe that succession planning is important and only 35% had a formal program before replacing the top position. The timing for succession decreases with successor years of schooling and the parent's age, but at the same time, it increases with the incumbent's experience (Bizri, 2016). Developing the opportunities for the successor is essential, and most of the time, they are used under their potentiality, which creates disagreement in them. Therefore identification and development of a successor can learn new roles, and a more independent decision-maker is essential. In some cases, the firm's healthy financial position (Mihaylov & Zurbruegg, 2020) may lead to a delay in the timing of succession. Still, the willingness of the heir may lead to taking over the firm's financial position may not always determine the timing for succession.

Several authors have suggested a relationship between succession planning and its impact on organizations and employees. Managing succession planning requires the commitment and involvement of the top leadership (Chan et al., 2020). It is not an overnight task that can be achieved in a few days or months. This paper will inform the subject about the factors influencing the succession planning. The process of formal succession planning has been seen over the past 30 years (Pham et al., 2019) but in the field of education, it is yet to be formulated. The focus of this study was the factor influencing the succession planning in education sector, so capturing the boundaries following three research questions has been developed:

**RQ1:** *What are the different challenges faced during the process of succession planning and how is it related to other outcomes.*

**RQ2:** *What are the different factors on which the succession decision-making process is done?*

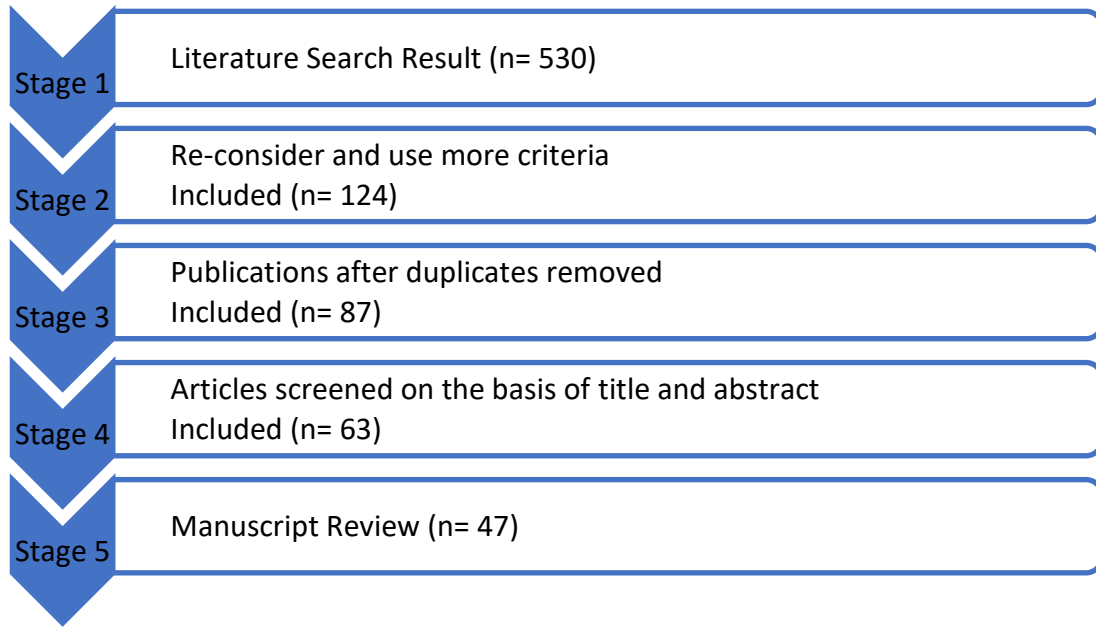
**RQ3:** *What does the literature express in the use of experience members in family-run businesses?*

### **Data Collection**

The collected literature review was based on some inclusion and exclusion criteria, including a selection of journals, time range for the journal, and selection of articles from those journals, reconsidering and using more criteria to select the articles. An online-based search was carried out for the whole process where various journals like Jstor, Scopus, Emerald Insight, EBSCO host, and Google Scholar were used. This paper has followed the five-stage guidelines proposed by (Transfield et al., 2003).

Based on the exclusion criteria, different book chapters, conference papers, and other unpublished articles were not used during data collection. The search has not limited any time range due to less report availability in the related field. During the first stage of the literature search results in 530 papers and then screening in four steps, the total manuscript review turns out to be 47 papers.

**FIGURE1  
STEPS FOR SAMPLE SELECTION**



**Characteristics of Included Studies**

This section tries to provide the data collected from the various articles used during the process of preparing the paper. Out of the evaluated study, most of the study used qualitative mode as it is considered more appropriate in providing in-depth knowledge on succession planning. But at the same time, it might bring biases in the study as different interactions, observations, and writing notes must be made. The secondary source of data collection with some concern of bias is done in some of the papers collected.

Different industries were selected where most of the study focused on small and medium-sized family firms. As explained in the given research, the role of these kinds of firms plays a significant role in a developing country’s economy (Matias & Franco, 2018). Some of the listed papers have also collected the data from secondary sources like literature papers where the sample size and the country of study have not been mentioned. Table 1 shows the descriptive properties of the different documents that were studied.

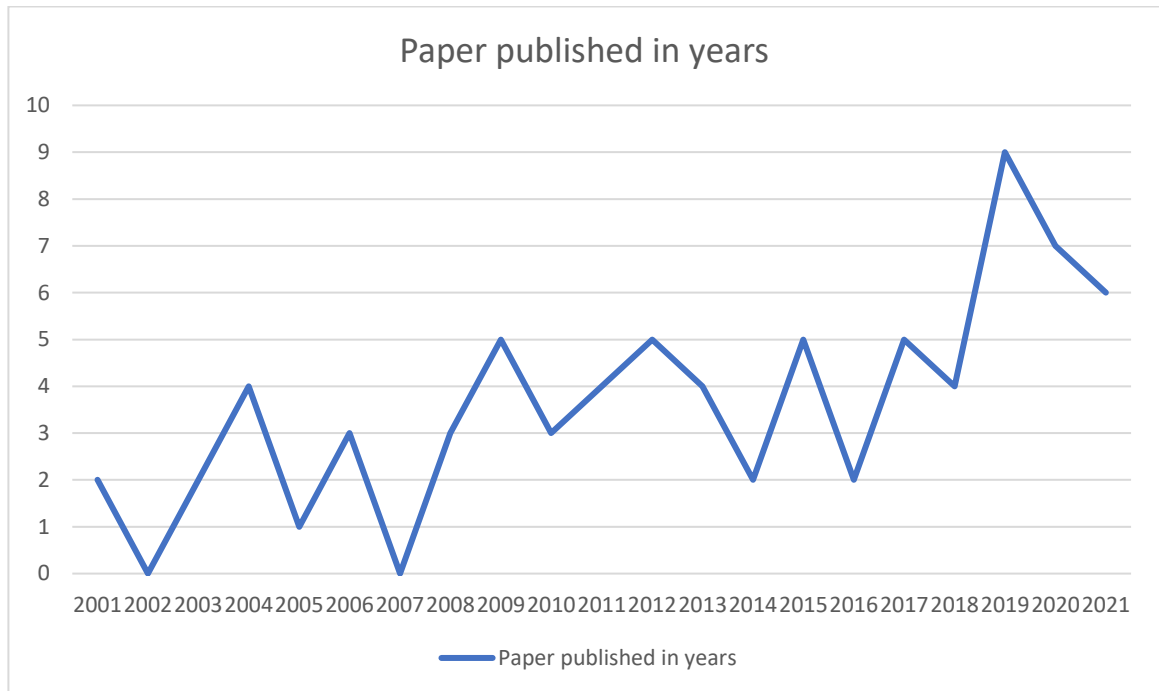
**TABLE 1**

Number of Research Papers	Journal
7	Journal of Small Business and Enterprise Development
5	International Journal of Entrepreneurial Behavior and Research
4	Journal of Family Business Management
3	British Journal of Management
2	Journal of Educational Administration
2	International Journal of Business and Management

2	Journal of Small Business Management
2	Family Business Review
1	Journal of Research in National Development
1	International Journal of Business and Social Sciences
1	Procedia Economics and Finance
1	Measuring Business Excellence
1	Organizations and Markets in Emerging Economies
1	Journal of Asia Business Studies
1	Management Research Review
1	Asian Academy of Management Journal
1	Education and Training
1	Industrial and Commercial Training
1	Asian Academy of Management Journal
1	International Journal of Managerial Finance
1	Journal of Agriculture and Resource Economics
1	Knowledge Management Resource and Practice
1	Journal of Entrepreneurship in Emerging Economies
1	Human Resource Management International Digest
1	African Journal of Business Management
1	International Journal of Manpower
1	Journal of Business Strategy
1	Journal of Organizational Change Management

*Total selected papers: 47 Total journals: 28*

**FIGURE 2**



The above chart shows the number of paper that were published and have been included in the research. Paper published from the year 2001 have been included and it shows that most of the papers have been included from the year 2019 to 2021.

## **DISCUSSION**

This paper has offered a broad understanding of the importance of an experienced successor in running a family firm and how implementing an effective succession plan can have less impact on organization employees with a high degree of morale and commitment in them. The given review provides an overview of selecting the articles, how the data are extracted and offers further insights not covered in previous research. The study indicates that factors like loss of status, fear of the unknown after retirement, and lack of challenges once the working life is over (Pandey & Sharma, 2014) lead to the incumbent delay in the transition process. In some cases, conflicts also arise during the process when the transfer of ownership from one generation to the next takes more time beyond expectation (Dolores Botella-Carrubi & González-Cruz, 2019). During the transition, the incumbent should be a part-timer and act as a mentor to the successor (Akinyele et al., 2015). On-the-job experience, job rotation, mentoring, and coaching helps to develop a more creative and dynamic successor (Seymour, 2008). Most of the studies show that the preparation time for succession planning is five to ten years (Fink & Brayman, 2004). During this time, the successor is supposed to get experience from inside and outside. The research fails to explain the impact of experienced successors. The study in Slovenia shows that the importance of experience successor in the firm's sustainability has been gradually increasing in the 21st century. Organizations have realized that the experience successor can start new projects and create more opportunities (Chakraborty & Biswas, 2020) for the employees and help in the firm's sustainability.

The finding of this study indicates that the process of succession is done after Tier 2 but still finding the competent person at that level is still a problem (Sambrook, 2005). Although the research is based on small firms, extensive research is required to generalize other small firms. The three factors are essential for the successor's selection process, including leadership, managerial skills, and willingness and

commitment (Dimmock & Tan, 2013). These factors play an important role while the decision making process is done. It is crucial to identify employees' career plans annually as it helps to identify the gaps and opportunities. The process of succession planning is carried out by the firms but not at a sufficient level. Fear of high training cost and loss of control over decision-making has sidelined the process of succession planning. There is ample room for developing traits and skills in family firms where motivation and respect to family and non-family members are critical attributes that need to be developed in the successor (Bhuvana, 2018). However, most of the research has highlighted the importance of pre and post succession phases but fails to analyze the inter-generation relationship before the process of succession critically (Liu & Xue, 2020). Training to successor helps to link with the business directly, but the study fails to explain the survival strategies essential to keep the family firms alive. Iranian private businesses are mostly family businesses, although most of the markets are dominated by the government (Farashah et al., 2011). Even the less support from the government, these family firms have survived and grown successfully.

The study highlighted that a rigorous implementation strategy is required as many succession planning fails due to execution errors and barriers to change. Unless the implementation part is carried out effectively, there is no point in focusing only on the planning phase. If necessary, input from external sources with evidence of successful works helps add effective implementation models. Planning needs to be done in a future-oriented way rather than just completing or fulfilling the vacant position. There have been many issues that need to be addressed, including the selection and development of leaders. The sustainability of quality leadership must be ensured for the growth, be it family or non-family firms. It is necessary to evaluate whether the successor has done suitable training activities and has sufficient working experience, be it on the job or off the job. If the requirements are met with the required competencies and education, the right time for succession has come. Most of the literature reflects that succession should be considered a process rather than a one-time event (Duh, 2015). For the smooth operation of any business firm, the incumbent and successor should mutually agree and engage in the transition of new roles and responsibilities. In some cases, early commitment from the succession leads to a delay in the retirement of the incumbent. Still, the previous studies did not focus on various other factors that may delay retirement timing. The elements may include lack of experience, educational parameters, intention to work, and many more. Planning for succession helps determine the various conditions under which business transfer from the owner to the successor is done. Succession Plans act as a road map for the family or non-family business firm, but the research in this part is less focused.

During the transition phase of any business, three kinds of problems are generally faced by the owner (El Manaa et al., 2010). The first problem is the emotional problem seen during the baton transfer from the incumbent to the heir. The second problem is the complexity in the process and the lack of experience of a successor to handle the situation. The third is about the legislative formalities that both owner-manager had to deal with. This study has focused on these influencing forces that the firm generally faces, and its impact on sustainability. When the firm requires the successor's experience from an outside organization, the successor may choose their career in other working areas or maybe in a foreign country. The arrival of an experienced successor in any firm leads to change in the working culture and style of the organization (Tobak et al., 2018). The successor should have a detailed understanding of the organization, so s/he should enter the firm as a helper and, after a particular experience lower-level management, move to the managerial level with mid-level management experience and finally be the organization's leader. Organization in western society applies a formalized structure that helps administrative continuity (Wu et al., 2020). Men are taken more seriously than women when it comes to organizational continuity.

Although a successor's experience in an organization impacts acts various factors, the study of succession planning is more rigid in two components selection of successor and preparation of successor in terms of knowledge and skills. The importance of social perspective for the successor has not been highlighted and is a concern for future researchers.

## CONCLUSION

There are some contributions made from this paper towards the process and success of succession planning. The first contribution of the study is the identification of three types of knowledge and two tiers of succession which further adds that trust and affability are the two major components for maintain family relationship during the process of succession but (Wu et al., 2020) finds that attitude plays more important role than trust during succession process. The second contribution clarifies that early succession can result in probability of success and high level of commitment among the successor where transparency among the family members is also essential. Early preparation to the succession process is key to organizational success be it educational or other family firms (Su & Daspit, 2021). Early succession may also be harmful to the business as it is difficult to stay long time in the decision making power. It is important to include all the relevant stakeholders in the discussion phase during the selection process of the successor. The third contribution is about the Ghanaian economy where SMEs contribute 70% of GDP and employs 75% of labor force (Obara & Nangih, 2017). It shows that Ghana's economy is completely dependent on SMEs. More than 4 lakh of employees are working in private educational institution and majority are enrolled in family owned firms. Although the percentage seems less but the impact is more in the education sector. Process of selection here mainly depends on attitude formation, availability of resources, opinions of other stakeholders, and objective of the founder.

Based on the study due to the lack of previous succession experience to the first generation, most of the firm lacks the knowledge of preparation of successor at an early stage and its importance to the firm. The organization will be more successful if it uses formalized succession plan (Mihaylov & Zurbruegg, 2020) with certain requirements in it including years of experience with more commitment towards the organization. The experience of the successor may be outside the organization or within the organization as it differs from the requirement and nature of the family firms. In case of the commitment towards the organization the written succession planning brings more commitment than the oral succession plan in the family successor (Kitayi, 2017). This paper finds out that there exists a succession plan process and criteria in most of the firms whether it is family firms or non-family firms and it helps in providing opportunities to its existing employees.

The study shows that the role of the incumbent is important in planning and building the next generation before bringing them into the education sector. Developing a competent workforce and consistent management from day one will have advantage over the other organization. It would be much better if the organization have clear defined rules and policies during the timing of succession. The policies here may include that the successor must have working experience outside the company and should have required level of education. If the timing of handing over the baton to the successor is not followed as per the planning then the incumbent might lose the commitment from the successor. In some cases role of parents and their support might increase the level of affective and normative commitment but ultimately decreases continual commitment in the firm (Sreih et al., 2019). The research found that intention towards the family business arises from the parental encouragement, recognition and performance feedback towards their children (Hillebrand, 2019). Parental control and manipulation discourages the children from joining the family firms (Chan et al., 2020). Therefore the anticipation of difficulties that may arise during different phases of succession be it planning phase or development of heir phase should be clearly identified.

An important finding of this study is that the major competencies required to be in a predecessor are risk taking, open mildness, motivation, trust worthiness, communication skills and value orientation (Samei & Feyzbakhsh, 2015). In case of educated and experienced successor, the significance of open mindness and communication skills in predecessor is required. In case of reverse situation risk taking, patience and trust worthiness plays a major role (Samei & Feyzbakhsh, 2015). There is gap between perceived and actual status of succession planning. The study shows that there has not been any changes in planning process in case of manufacturing firms as compared with that of the earlier studies. Similar kind of research should be conducted annually in these kinds of firms to make them aware about the impact and importance of succession planning on company's success. The process of succession planning has not immediate effect in the organization as it is slow and gradual process (Matias & Franco, 2018), so the organization do not



recognize its potential although performance and potential of employee are the two major aspects that an organization should look on successor.

As a further contribution to the literature, it has been drawn that there are many difficulties that may arise in the family firms, so for the sustainability of these firms and to operate it successfully, the timing plays a crucial role in succession planning. Most of the articles concludes that the potential conflict in the organization arises due to three major issues that includes individual, interpersonal and organizational issues. Less restrictive policies and more flexible environment helps to resolve such conflicts. An organization culture that gives value to honesty and transparency above politeness and secrecy has an effective succession management history. An important finding of this study is that, both the incumbent and successor are likely to face challenges during the timing of transition as the incumbent is supposed to step down from the leadership role and the successor steps into it (Glauben et al., 2009). Further extensive research is required to get the effective and actionable succession plan that are required during the timing of succession.

Results from this study indicates that due to the lack of experience family members in family firms there has been problem in deciding to what extent the family should take the right of the firm. The family should identify the future consequences and its impact to the organization and employees if there is not any experienced family member to run the business. Managing relationship with the firm's supplier like customer, government agencies and other interest groups plays an important role and these suppliers also help in determining the future of any business firm.

The study will benefit the owner of the family education institution and the employees working on it. The result of this study will help them to anticipate what sort of problems occur in the future and how they can be minimized without impacting the organization and its employees. As the problem is growing concern for all the family-owned businesses (Bigliardi & Dormio, 2009), not only the educational institutions, the study will also be beneficial for them to analyze the various factors and plan the process and timing of succession accordingly. Results from the study helps the future researcher and the other stakeholder of the study.

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