

Teaching Leadership Continuity: Integrating Succession Planning into Business and Leadership Education

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ABSTRACT

Purpose

This article highlights the urgent need to integrate succession planning into leadership and management education as a core competency rather than a peripheral topic. While leadership programs often emphasize strategy, motivation, and organizational culture, they frequently overlook succession planning a critical factor in ensuring leadership continuity and organizational resilience. The purpose of this study is to demonstrate how embedding succession planning within curricula can strengthen students' preparedness to navigate transitions and sustain organizational effectiveness.

Methodology

The article draws upon a qualitative phenomenological study involving 11 leaders from U.S. small-to-medium-sized logistics enterprises (SMEs). Data were collected through semi-structured interviews and analyzed using Braun and Clarke's (2006) six step thematic analysis framework. This approach was chosen to capture the lived experiences of SME leaders who have directly engaged in succession planning processes and leadership transitions.

Theoretical Framework

The analysis was informed by two complementary leadership theories: Transformational Leadership Theory, which emphasizes vision, influence, and motivation in guiding organizational change, and Leader Member Exchange (LMX) Theory, which underscores the quality of relationships and trust between leaders and followers as a foundation for effective succession. These frameworks provided conceptual lenses for interpreting the experiences and strategies of the participants.

Findings

Four major themes emerged from the study:

Leadership Experience with Succession: Participants described both proactive and reactive transitions, underscoring the risks of unplanned leadership gaps.

Succession Planning Strategies: leaders highlighted formal and informal approaches to preparing successors, especially under resource constraints typical of SMEs.

Mentorship and Culture: the role of trust, mentoring, and organizational culture was emphasized as essential in fostering continuity and leadership readiness.

Organizational Impact: succession processes directly influenced employee morale, knowledge retention, and long-term sustainability.

Practical and Pedagogical Implications

The findings suggest that business schools and professional programs can leverage succession planning not only as an organizational tool but also as a pedagogical framework. Integrating succession into curricula through case studies, role-play simulations, reflective exercises, and succession readiness checklists enables students to connect theory with practice. By treating succession planning as a leadership competency, educational institutions can prepare graduates who are equipped to manage leadership continuity, protect organizational culture, and promote resilience in diverse business environments.

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INTRODUCTION

Leadership education in MBA, DBA, and professional development programs traditionally emphasizes strategic management, organizational culture, motivation, and communication. However, a critical gap remains: succession planning is rarely treated as a core leadership competency. This omission is striking, given the central role succession plays in ensuring leadership

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continuity, preserving organizational knowledge, and maintaining stakeholder confidence. By neglecting succession planning in leadership curricula, academic institutions risk producing graduates who are ill-prepared to manage one of the most predictable yet disruptive challenges organizations face: leadership transitions.

The consequences of this oversight are especially pronounced in small-to-medium-sized enterprises (SMEs), where resource constraints often prevent the establishment of formalized succession strategies. Within the logistics sector, where operational efficiency and continuity are essential, failed or poorly managed succession efforts can lead to organizational instability, knowledge loss, reduced employee morale, and even business collapse. Unlike large corporations, SMEs rarely have the redundancy of leadership pipelines or institutionalized training programs, making them particularly vulnerable when a leader departs unexpectedly.

This article argues that embedding succession planning within leadership education offers a powerful means of bridging theory and practice. By exposing students to the dynamics of succession through case studies, simulations, and reflective exercises, educators can cultivate foresight and adaptability in future leaders. In doing so, curricula can better prepare graduates not only to manage succession effectively but also to design proactive systems that safeguard organizational resilience.

To support this pedagogical approach, the discussion is grounded in Transformational Leadership Theory and Leader-Member Exchange (LMX) Theory. Transformational Leadership emphasizes the capacity of leaders to inspire, influence, and guide organizations through change, making it directly relevant to the challenge of leadership succession. LMX Theory, on the other hand, highlights the quality of relationships between leaders and subordinates, offering insights into how trust and mentorship can smooth transitions. Together, these theories provide a conceptual lens for embedding succession planning as a foundational leadership skill.

Finally, this study situates succession planning within the framework of experiential learning, emphasizing that leadership competencies are best developed through active engagement, critical reflection, and real-world problem solving. By integrating succession planning into experiential learning models, leadership education can equip future leaders with the practical wisdom required to navigate continuity challenges in

diverse organizational contexts.

METHODOLOGY

Research Design

This study employed a qualitative phenomenological approach to capture and interpret the lived experiences of leaders navigating succession planning in small-to-medium-sized enterprises (SMEs). A phenomenological design was chosen because it allows for a deep exploration of participants' perspectives, meanings, and interpretations of succession-related events—phenomena that cannot be adequately understood through quantitative methods alone. By focusing on individual experiences, the study provides rich, context-sensitive insights into how leadership continuity is enacted in practice.

Sample and Context

The participants consisted of 11 leaders from U.S.-based logistics SMEs, selected through purposive sampling. The logistics sector was chosen because it is characterized by lean operations and high dependency on continuity of leadership, making succession planning particularly critical. SME leaders were targeted due to their unique challenges: limited financial resources, fewer formalized training systems, and an often-informal approach to succession planning. Participants held senior management or executive roles and were directly involved in succession decisions or leadership transitions within their organizations.

Data Collection

Data were gathered using semi-structured interviews, a method that provides both structure and flexibility. An interview guide was developed to ensure consistency across participants while allowing probing questions to follow emergent themes. Key areas explored included:

- Experiences with leadership transitions (planned and unplanned).
- Strategies employed to identify, prepare, or mentor successors.
- The role of organizational culture and trust in succession processes.
- Perceived impacts of succession planning (or lack thereof) on organizational stability.

Each interview lasted approximately 45–60 minutes and was conducted either face-to-face or virtually, depending on participant availability. Interviews were audio-recorded with consent and transcribed verbatim to ensure accuracy.



Data Analysis

The data were analyzed using Braun and Clarke's (2006) six-step thematic analysis, which provided a systematic and rigorous framework for identifying and interpreting patterns across the dataset. The six steps included:

- Familiarization with the data by reading and re-reading transcripts.
- Generating initial codes to capture significant features of the data.
- Searching for themes by grouping codes into broader categories.
- Reviewing themes to ensure coherence and representativeness across cases.
- Defining and naming themes to provide clarity and conceptual grounding.
- Producing the report, linking themes back to theoretical frameworks and research objectives.

This process yielded four overarching themes: leadership experience with succession, succession planning strategies, mentorship and culture, and organizational impact. These themes serve as the foundation for the pedagogical applications discussed in the findings section.

Theoretical Framing

The interpretation of data was informed by Transformational Leadership Theory and Leader Member Exchange (LMX) Theory. Transformational Leadership provided a lens for understanding how vision, influence, and adaptability are essential during leadership transitions. LMX Theory offered insights into how high-quality leader follower relationships, characterized by trust and mutual respect, support smoother and more effective successions. Together, these theories guided both the development of the interview protocol and the interpretation of findings, ensuring that practical experiences were situated within established leadership scholarship.

FINDINGS AND PEDAGOGICAL APPLICATIONS

The thematic analysis of interviews with SME logistics leaders produced four overarching themes that illustrate how succession planning is experienced and enacted in practice. Each theme carries direct pedagogical implications, offering pathways to integrate succession into leadership curricula.

Theme 1: Leadership Experience with Succession

Leaders reported a wide spectrum of experiences with succession, ranging from reactive transitions (triggered

by sudden illness, resignation, or retirement) to proactive approaches where future leaders were identified and groomed over time. Reactive transitions often led to operational disruptions, strained relationships, and short-term decision-making, while proactive planning fostered smoother transitions, stronger continuity, and greater employee confidence in leadership stability.

Pedagogical Application

To translate these insights into teaching practice, case study comparisons can be used. Students can analyze real-world examples of both reactive and proactive successions, assess the consequences of each, and discuss what could have been done differently. By critically evaluating successes and failures, learners can develop diagnostic skills for identifying succession risks and opportunities in diverse organizational contexts.

Theme 2: Succession Planning Strategies

Participants highlighted a variety of strategies for preparing successors, often shaped by the resource constraints typical of SMEs. Some relied on formal mechanisms such as competency frameworks, performance evaluations, or external recruitment pipelines. Others adopted informal practices, such as observing employee initiative, promoting from within, or rotating roles to build cross-functional skills. The common challenge across SMEs was balancing the need for structured preparation with the financial and time limitations inherent in smaller organizations.

Pedagogical Application

Students can engage in classroom simulations where they design succession plans for resource-constrained enterprises. These exercises challenge students to balance cost, efficiency, and fairness while considering organizational values and culture. By role-playing as executives, HR leaders, or board members, students gain practical exposure to the complexities of succession planning in real-world scenarios.

Theme 3: Mentorship and Culture

A recurring theme was the critical role of mentorship and organizational culture in sustaining leadership continuity. Leaders stressed that effective succession is not only about selecting the right person but also about creating a supportive environment where emerging leaders are mentored, trusted, and empowered. In SMEs, where leadership is often personal and relational, the culture of trust and openness directly influenced whether succession transitions were embraced or resisted by employees.



Pedagogical Application

Leadership education can emphasize the value of mentorship through reflective exercises and mentorship modules. Students can be asked to map their own experiences of mentorship, evaluate the role of trust in leadership continuity, and design mentorship frameworks that foster readiness. Such activities highlight the social and cultural dimensions of succession, complementing the technical and strategic aspects.

Theme 4: Organizational Impact

The study revealed that succession processes whether successful or poorly executed—had significant effects on employee morale, knowledge retention, and long-term sustainability. Well-managed transitions preserved institutional memory, maintained workforce engagement, and positioned SMEs for growth. In contrast, poorly handled successions often led to talent loss, weakened stakeholder trust, and in some cases, financial instability. Leaders consistently noted that succession outcomes shaped the organization's reputation and capacity for resilience in dynamic markets.

Pedagogical Application

Assignments can be designed where students evaluate organizational resilience by analyzing how different succession scenarios impact morale, knowledge transfer, and sustainability. For instance, students could assess a hypothetical SME undergoing leadership change, identify potential risks and opportunities, and propose interventions to strengthen continuity. This fosters critical thinking about the broader organizational consequences of succession planning.

DISCUSSION

The findings of this study highlight that embedding succession planning into leadership education bridges the gap between theory and practice. While succession planning has been widely acknowledged as a critical organizational process, it is seldom conceptualized as a pedagogical tool within business schools or professional leadership programs. By bringing real-world SME experiences into the classroom, educators can help students understand succession not as an abstract concept but as a lived organizational challenge requiring foresight, strategy, and adaptability. This aligns directly with the study's themes: proactive versus reactive transitions, resource-driven strategies, the role of mentorship and culture, and the organizational consequences of succession choices.

Bridging Theory and Practice

The integration of Transformational Leadership Theory and Leader–Member Exchange (LMX) Theory provides a strong conceptual foundation for succession planning education. Transformational Leadership emphasizes the leader's role in inspiring vision, motivating change, and cultivating future oriented strategies, all of which are essential during leadership transitions. LMX Theory reinforces the idea that the quality of leader–follower relationships shapes trust, morale, and organizational stability in times of succession. When applied in curricula, these theories give students tools to interpret succession as both a strategic and relational process. Classroom applications such as case analyses and simulations bridge theoretical models with the practical realities faced by SME leaders.

Alignment with Experiential Learning Pedagogy

Embedding succession into leadership education also aligns with experiential learning pedagogy. Kolb's (1984) experiential learning model emphasizes the cycle of concrete experience, reflective observation, abstract conceptualization, and active experimentation. Succession planning naturally fits this framework: students can experience simulations, reflect on case study outcomes, connect findings to leadership theory, and experiment with designing succession strategies in classroom settings. This pedagogical integration not only enhances conceptual understanding but also equips learners with practical skills transferable to real-world organizational contexts.

Comparative Insights from Family Business and SME Literature

The findings echo themes found in family business succession research, where leadership transitions are often complicated by interpersonal dynamics, trust, and cultural continuity (Sharma, Chrisman, & Chua, 2003). In both SMEs and family enterprises, resource limitations and relational networks strongly influence the success or failure of succession efforts. However, the logistics SMEs in this study reveal additional industry-specific challenges, such as maintaining operational efficiency during leadership disruptions. By drawing parallels between SMEs and family business scholarship, leadership curricula can provide comparative case-based teaching that underscores the universality of succession challenges across contexts while highlighting sector-specific nuances.



Global Relevance of Succession Planning in Leadership Curricula

Finally, succession planning must be understood as a globally relevant leadership competency. In an era of rapid globalization, digital transformation, and workforce mobility, leadership transitions are increasingly complex and frequent. While SMEs in the United States logistics sector formed the basis of this study, the findings resonate across industries and regions. Emerging economies face similar vulnerabilities due to limited formalized succession structures, while multinational corporations grapple with the complexities of global leadership pipelines. Embedding succession into curricula prepares graduates to manage these diverse scenarios, equipping them to navigate both local challenges and global leadership demands.

PRACTICAL IMPLICATIONS

The insights from this study not only contribute to leadership theory but also provide practical tools that business schools and professional programs can embed into their curricula. By operationalizing succession planning as a teaching framework, educators can foster foresight, adaptability, and continuity skills in emerging leaders. Three main pedagogical applications stand out:

Succession Readiness Checklists

One of the simplest yet most effective tools for integrating succession planning into leadership education is the use of readiness checklists. These instruments guide students in systematically evaluating an organization's preparedness for leadership transitions. Such checklists can include criteria like:

- Identification of potential successors.
- Documentation of critical institutional knowledge.
- Evaluation of leadership competencies required for continuity.
- Risk assessments of sudden departures.

By applying checklists to case studies or simulated organizations, students develop the ability to diagnose succession gaps and propose evidence-based strategies for improvement. This exercise also cultivates a mindset of anticipatory leadership, preparing graduates to identify vulnerabilities before crises emerge.

Role-Play Scenarios of Leadership Transitions

Succession is not purely a technical process; it is deeply social and relational, often involving complex interpersonal dynamics. To capture this dimension, role-play scenarios can be incorporated into leadership training. For example, students may assume roles such

as outgoing leaders, successors, board members, or employees, and work through scripted succession challenges ranging from planned retirements to sudden resignations.

These scenarios expose students to the emotional and cultural complexities of succession, including resistance to change, issues of trust, and the negotiation of organizational values. Role-play exercises also strengthen students' communication, negotiation, and decision-making skills competencies critical for real-world leadership transitions.

Mentorship Frameworks for Business Schools and Professional Programs

The findings highlight that mentorship and culture are central to effective succession planning. To reinforce this in education, programs can embed mentorship frameworks where students both practice and reflect on mentor-mentee relationships. Examples include:

- Pairing students in mentor/mentee dyads to reflect on trust-building and knowledge transfer.
- Designing mentorship plans that align with succession goals for simulated organizations.
- Inviting guest leaders to share real-world mentoring experiences tied to succession planning.

By emphasizing mentorship as a leadership competency, curricula move beyond technical succession strategies to address the relational foundations of leadership continuity. Students learn to appreciate the role of culture, trust, and personal investment in sustaining organizational resilience.

Broader Pedagogical Value

Collectively, these tools checklists, role-play scenarios, and mentorship frameworks equip students with both the analytical skills to design succession systems and the relational skills to implement them effectively. They also support experiential learning, ensuring that succession planning is not taught as abstract theory but as a lived practice, bridging the classroom and the workplace.

CONCLUSION

This study demonstrates that succession planning must be recognized as a foundational leadership competency, not an optional or peripheral consideration. Leadership education that focuses solely on strategy, communication, and ethics without addressing continuity risks leaving graduates unprepared for one of the most persistent organizational challenges: the inevitable transition of leadership. By reframing succession planning as an essential component of



leadership preparation, educators can ensure that future leaders enter organizations equipped to safeguard institutional stability, preserve knowledge, and maintain trust during times of change.

Integrating succession planning alongside strategy, communication, and ethics enriches the leadership curriculum in two important ways. First, it reinforces the notion that leadership is not only about setting direction and motivating teams, but also about ensuring long-term organizational resilience. Second, it highlights the interdependence of these competencies: effective communication builds trust during succession, ethical decision-making fosters fairness in selecting and mentoring successors, and strategic foresight enables proactive planning for continuity. Together, these competencies create a holistic framework for sustainable leadership.

The findings from SME logistics leaders illustrate that succession is not simply a technical process of replacing one leader with another, but a relational and cultural phenomenon that shapes organizational morale, identity, and performance. By embedding these lessons into business education through case studies, simulations, reflective exercises, and mentorship frameworks, leadership programs can prepare students to navigate continuity challenges with confidence and adaptability.

Looking forward, the global relevance of succession planning must also be emphasized. In an interconnected world shaped by rapid technological change, demographic shifts, and globalization, leadership transitions are inevitable across all organizational types, whether SMEs, family businesses, or multinational corporations. Incorporating succession into curricula not only strengthens the resilience of individual organizations but also contributes to broader economic and social stability.

Ultimately, by treating succession planning as a core leadership competency, leadership education can better fulfill its purpose: preparing graduates to lead not only in the present but also into the future. Succession readiness equips leaders to think beyond their own tenure, ensuring that organizations remain innovative, adaptive, and sustainable in an era of uncertainty and change.

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