

Succession Plan in Automation Market

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Abstract: *The research falls under the interpretivist paradigm to explore the demand for the automation market which is anticipated to grow from 2024 to 2029. Exceptionally talented employees are in need since the baby boomers will be retiring by 2044 in Malaysia. Previous studies did not focus on the succession plan for this Automation Market since this has emerged as the new incite. The model developed in this study is based on the strategic process that identifies and develops potential leaders within an organization to fill key roles when current leaders retire, leave, or move to other positions. It is crucial for continuity succession planning which ensures a smooth transition when leaders depart, minimizing disruptions and maintaining operations. The need to focus on Talent Development in grooming internal talent, fostering growth, and providing opportunities for skill development. Also need to aggregate the Risk Mitigation by having a pipeline of qualified successors which reduces the risk of leadership gaps. Thereafter, on the Organizational Resilience whereby effective succession planning strengthens an organization's long-term resilience and adaptability. It is not just about replacing leaders but building a sustainable leadership pipeline. The methodology used for this paper was structured by a semi-structured interview. Based on the previous review and the findings, it is evident that succession planning is needed to prepare for the market's future growth.*

Keywords: *Automation market, successionplan, talent development, career management. Employees retain.*

1. Introduction

This case study interprets the critical role a human resource department plays in developing and communicating an effective succession plan, specifically the criteria chosen to fill future vacancies in the organization. Businesses promote two parts of a succession plan: a plan to select the right people and a process to retain, promote, and train the appropriate people to fill a new position (Galagan, 2010, Shan, Z., Wang, Y. 2024). By 2044, there is a potential for 14% of the population to belong to this age category, indicating Malaysia's transition towards becoming an older society (Zulfaka & Kasim, 2022). Plus, the projected market size for global process automation and instrumentation will increase from USD 74.2 billion in 2024 to USD 98.6 billion by 2029. (Based on <https://themalaysianreserve.com/category/pr-newswire/>). Therefore, the emergent five themes were established from the data gathered from participant interviews and the assessment of internal documents from the human resources department. The findings strongly indicate discrepancies within succession planning criteria and a lack of a formal succession plan. Human resources directors are responsible for the success of the development, implementation, and communication of the organisation's succession.

2. Literature Review

During the literature review, it was identified a deficiency in standardized criteria for developing effective succession plans to fill future vacancies in government and corporate organizations. Additionally, our review highlighted that the theory of planned behavior lends support to succession planning. This behavioral theory emphasizes the importance of selecting the appropriate employee as a successor for promotional opportunities, with the expectation that the successor will contribute to organizational growth Spurr & Abele, (2011). In their 2012 study, Leland, Carman, and Swartz investigated succession planning at the local level,

specifically focusing on ensuring the continuity of essential government functions. Leaders within government and nonprofit sectors encounter significant obstacles in implementing succession planning, often lacking the ability to incentivize employee development (Leland et al., 2012). Government leaders who fail to establish succession plans face higher employee turnover rates and decreased overall organizational consistency. This deficiency adversely affects government efficiency, underscoring the critical need for robust succession planning to positively impact local communities.

When company leaders assess the potential for organizational sustainability, they often emphasize the importance of human capital. The quality of employees significantly impacts an organization's success, especially in the challenge of finding qualified individuals to fill roles in an uncertain economy. Despite planning for successors, there is often a lack of concrete action in succession planning (Calareso, 2013). A notable trend in organizational development is the discrepancy between leaders' succession planning efforts and the criteria used to gauge the effectiveness of succession plans on employee performance (Greer & Virick, 2008). This inconsistency highlights a critical area where organizations can improve to better align leadership strategies with employee development and organizational goals. The challenge of comparing and evaluating applicants persists in today's competitive global workforce, contributing to concerns about filling job vacancies with qualified workers (Easton, 2011). Leaders may lack clarity on the effectiveness of their organization's succession plans, potentially overlooking the impact on employee performance. According to the theory of reasoned action, individuals are more inclined to engage in behaviors they perceive positively (Sheppard, Hartwick, & Warshaw, 1988).

Theory of Planned Behavior

The theory of planned behavior expands on the relationship between personal beliefs and actions, emphasizing how attitudes can shape actual behaviors (Ajzen, 1985). Building upon the theory of reasoned action Fishbein & Ajzen, (1975), it highlights that positive attitudes can drive behaviors driven by personal motivation (Sheppard et al., 1988). The concept of "perceived behavioral control" within the theory of planned behavior is derived from Bandura's self-efficacy theory (Bandura, 1977), which suggests that expectations and beliefs about one's capabilities influence behavior, such as motivation and responses to failure (Bandura, 1977). This theory finds its roots in earlier work on psychological needs, learning, and human imitation by Holt and Brown (1931), contributing to the development of social-cognitive theory in the early 1930s.

In the theory of planned behavior, three types of beliefs influence an individual's behavior: behavioral beliefs, normative beliefs, and control beliefs (Ajzen, 2006). Behavioral beliefs refer to an individual's beliefs about the outcomes or consequences of a particular behavior. For instance, in succession planning, a behavioral belief might involve the perception that selecting the right employee as a successor will lead to effective promotion and organizational growth (Spurk & Abele, 2011). These beliefs play a crucial role in shaping attitudes towards succession planning and influencing the decisions made within this process. In succession planning, the ability to perceive and execute strategic, long-term planning is pivotal for organizational success. This capability aligns with Bandura's social-cognitive theory, particularly the concept of perceived behavioral control (Bandura, 2011). Leaders in succession planning must navigate decisions regarding the development of effective

succession plans based on specific assumptions (Bennington & Minutolo, 2013). These assumptions guide the creation of strategies that ensure continuity and growth within the organization, reinforcing the importance of effective planning and leadership in succession processes.

Theory of Planned Behavior Model/Formula (Ajzen, 2006)

The theory of planned behavior offers valuable insights into business contexts, particularly concerning succession planning. As organizations face an increasing need for effective succession strategies, it becomes crucial to examine the intentions, attitudes, and behaviors of managerial groups (Bandura, 2011). Understanding these elements can help organizations assess how managers perceive succession planning, their motivations to engage in it, and the factors influencing their decisions and actions. By applying the theory of planned behavior, businesses can strategically align their succession planning efforts with the attitudes and intentions of their managerial teams, thereby enhancing the likelihood of successful leadership transitions and organizational continuity.

The need for more strategic behavior has become increasingly apparent in response to heightened competition and evolving business environments (Schlaegel & Koenig, 2013). Within the context of the theory of planned behavior applied to succession planning, analyzing leadership intentions and attitudes is critical as they directly influence behaviors (Sánchez-Medina et al., 2014). Further exploration of managerial behaviors provides insights into leadership norms within organizations (Schlaegel & Koenig, 2013).

A succession plan is a structured series of steps designed by an organization to promote employees and ensure continuity (Checknita, 2011). Its primary purpose is to outline the necessary procedures for an organization to sustain its mission and operational viability by selecting and developing qualified human capital (Calareso, 2013). This systematic approach helps organizations maintain stability and adaptability in dynamic business environments, ensuring they can effectively compete and thrive over the long term.

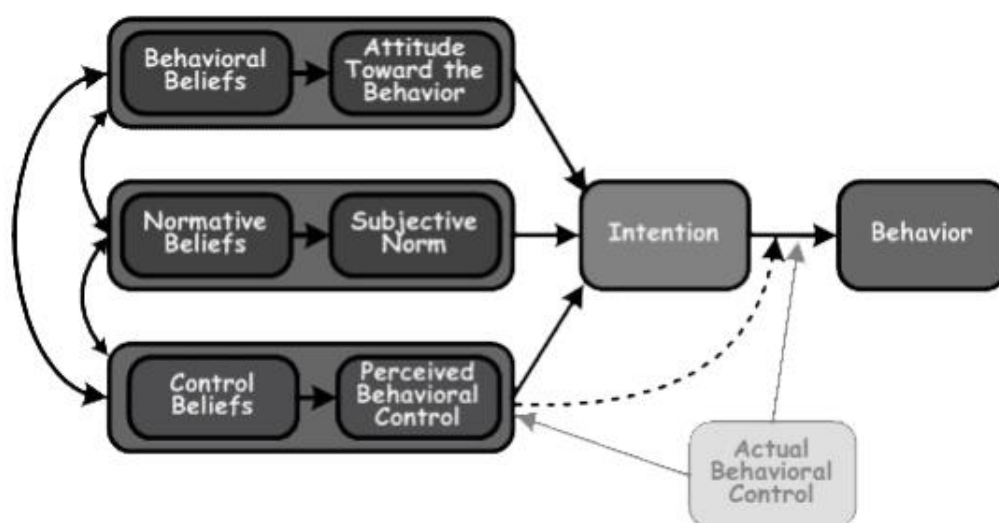


Figure 1. Theory of planned behavior model.

Businesses implement two key components within a succession plan: first, a strategy to identify and select suitable individuals; and second, a process to retain, develop, promote, and train these individuals for future positions (Galagan, 2010). In larger organizations, the human resources department typically plays a central role in selecting candidates for specific roles (Checknita, 2011), whereas in smaller businesses, the CEO or owner may personally handle employee hiring (Dahl, 2012). Several criteria influence individual employee succession, including retention rates, salary progression, promotion prospects, and levels of responsibility (Garg & Van Weele, 2012). Once a leader selects an individual for a position, that person assumes specific responsibilities aimed at advancing the organization's mission and vision (Kochanowski, 2011). This structured approach ensures that businesses can effectively cultivate talent, maintain operational continuity, and achieve long-term strategic objectives.

Elements of Successful Succession Plans

Common elements found in organizations with succession planning include a mission statement, a vision statement, and a strategic plan (Rothwell, 2010). These elements are fundamental for both large and small businesses as they provide a clear direction and purpose.

The mission statement outlines the organization's core purpose and what it aims to achieve, while the vision statement articulates the desired future state and long-term goals (Sanchez-Medina, Romero-Quintero, & Sosa-Cabrera, 2014). These statements serve as guiding principles that help leaders and employees understand the organization's overarching objectives.

In the context of succession planning, the mission and vision statements are particularly crucial because they inform the strategic plan. The strategic plan outlines how the organization will achieve its mission and vision, including strategies for leadership development, talent management, and succession processes (Kirkwood & Harris, 2011). By aligning succession planning with the mission and vision, businesses ensure continuity in leadership and a focused approach towards achieving their long-term goals.

Mission and vision statements in organizations encapsulate corporate values and key objectives, providing a foundational framework that remains steadfast despite leadership changes and other business variables (Office of Personnel Management [OPM], 2015). These statements serve as enduring guides that define the organization's purpose and direction over time.

A corporate strategic plan outlines both short-term and long-term organizational goals, along with the necessary steps to achieve them (Successfactors, 2014). Within this strategic framework, a succession plan is crafted to identify and prepare future leaders through a structured series of steps (Successfactors, 2014). Elements crucial to succession planning include metrics such as employee retention rates, salary progression, promotion rates, and levels of responsibility (Spurk & Abele, 2011; Turnbull, Greenwood, Tworoger, & Golden, 2011). An effective succession plan should also encompass guidelines for tenure, training initiatives, recognition through awards, and career development programs (Thompson, 2010). These components collectively enhance the skills and readiness of current and future leaders within the organization, ensuring continuity and growth.

Many organizations integrate these criteria into their succession planning processes, recognizing their importance in fostering leadership development and organizational resilience (Valentine, 2011). This comprehensive approach supports the evaluation of succession planning effectiveness, focusing on how well these measures contribute to preparing and advancing leaders within the company.

HR

Within organizations, the human resource (HR) department plays a pivotal role in outlining hiring and promotion practices for both internal and external candidates. HR professionals ensure compliance with state and federal regulations while strategically managing the hiring and promotion processes across all generations of the workforce (Crumpacker & Crumpacker, 2007).

Modern workplaces often comprise multiple generations, spanning from Baby Boomers to Generation Z, each with unique skills, perspectives, and career expectations (Crumpacker & Crumpacker, 2007). This diversity underscores the importance of HR's role in fostering inclusivity and fairness in succession planning.

Internally, HR personnel act as intermediaries between candidates and organizational leaders when developing succession plans. They facilitate the identification and development of talent within the company, ensuring that potential successors are equipped with the necessary skills and experience to step into key roles seamlessly. This proactive approach helps organizations maintain continuity and adaptability amid changing leadership needs and business environments.

In large corporations, human resources (HR) personnel play a critical role in promoting diversity by reviewing opportunities to advance a diverse group of individuals into top management positions. This includes evaluating candidates through employee reviews and other qualitative assessments. HR professionals gather feedback from executives and draw on past performance and experiences to identify potential leadership candidates based on their values and behaviors (Crumpacker & Crumpacker, 2007).

Key considerations in evaluating candidates include performance measurements and tenure, which provide insights into a candidate's readiness for higher responsibilities. HR departments are responsible for developing comprehensive succession plans that outline clear criteria for selecting the best candidates to fill future roles. These criteria are communicated across the organization, and tools and resources are provided to help employees develop the skills necessary for future positions.

Organizational support is crucial in fostering employee trust and confidence. Employees need assurance that their skills and competencies are valued, and that the organization will invest in their development for future opportunities. According to Ballaro and Washington (2016), perceived organizational support refers to employees' perceptions of the support provided by their leaders. HR leaders play a pivotal role in this by actively developing and communicating succession plans, ensuring employees are aware of opportunities and can plan their careers accordingly.

Effective communication between HR leaders, employees, and organizational leaders is essential in confirming perceived support. When HR leaders transparently communicate succession plans and provide avenues for employees to acquire necessary skills, it reinforces employees' trust in the organization and its commitment to their professional growth and advancement. This proactive approach not only prepares the workforce for future vacancies but also strengthens organizational resilience and continuity in leadership.

3. Method

The research employed a qualitative exploratory case study methodology and design, chosen for its suitability in exploring the nature of inquiry in qualitative research (Goldblatt, Karielie-Miller, & Neumann, 2010; Yin, 2009). The study unfolded in two distinct phases:

Phase 1 involved conducting semi-structured interviews with employees likely including executives, HR personnel, and potentially employees involved in succession planning discussions. This phase aimed to gather insights, perspectives, and subjective experiences related to succession planning within the organization.

Phase 2 focused on collecting and analyzing archival data from the human resources department intranet site. This data likely included documentation such as succession plans, performance evaluations, promotion histories, and other relevant records. Analyzing this archival data provided corroborative evidence and deeper understanding of the formalized succession planning processes and outcomes within the organization.

The case study approach was particularly well-suited for this research design as it allowed researchers to gather comprehensive data from multiple sources interviews and document analysis (DeWalt & DeWalt, 2011; Yin, 2009). This holistic approach enabled the researchers to triangulate information, validating findings across different types of data and providing a rich, nuanced understanding of succession planning practices in the organization.

Ultimately, the results derived from the interviews and archival data analysis offered firsthand insights into how succession planning was perceived, practiced, and evaluated within the studied organization. This methodology facilitated a thorough exploration of the topic, offering valuable implications for both theory and practice in organizational succession planning.

In this qualitative case study, the interview questions were specifically crafted to delve into various aspects critical to succession planning within the organization. These included criteria for selecting successors, salary progression, employee retention strategies, promotion policies, levels of responsibility, and the availability and impact of career broadening programs. These questions were designed to gather detailed insights from employees in succession planning discussions.

Additionally, archival records from the human resources department were essential for providing historical and contextual data. These records likely included personnel files, performance evaluations, training histories, and other documentation relevant to succession planning practices within the organization.

However, due to the small size of the company selected for the study and the long tenure of the current business owner, the availability of artifacts and archival records might have been limited. This limitation is recognized in qualitative research methodology, where the depth and richness of data collected can be influenced by factors such as organization size and the duration of ownership (Stake, 2010).

Despite these constraints, the qualitative case study approach allowed researchers to gather valuable firsthand information and insights directly from participants. The focused interview questions and analysis of archival records provided a comprehensive understanding of how succession planning was approached and executed within the specific organizational context, contributing to both theoretical knowledge and practical applications in succession management.

The research questions for this study aim to interpret how a manufacturing business measures and implements its succession planning processes. These questions are designed to understand the effectiveness and impact of succession planning within the organization:

Research Questions:

RQ1. What are criteria used by the organization's leaders to evaluate the effectiveness of the succession plan?

RQ1a. How does the organization use succession planning to fill future vacancies?

RQ1b. How are the criteria best support internal candidates for filling future vacancies in higher positions within the organization?

RQ2. How do the employees' retention rates, salary rates, promotion rates, and responsibility levels impact succession planning in the organization?

RQ2a. How are the tenure, training, awards, and career-broadening opportunities impact succession planning in the organization?

Population and Sample:

The study focuses on a specific manufacturing company based in Malaysia, making this manufacturing company a representative sample of the broader business landscape in the state. The organization under study employs 30 individuals, offering a manageable sample size conducive to qualitative research methods such as interviews and archival data analysis.

By investigating these research questions within the context of a manufacturing company, the study seeks to provide insights into how succession planning practices are developed, implemented, and evaluated in organizations of this size and industry, contributing to both academic understanding and practical application in succession management.

In this study, the sample consisted of 15 employees from a manufacturing company from Europe. The sample was purposefully selected to include a diverse representation of the organization's workforce across different levels and roles:

Front-line manufacturing employees: These individuals are directly involved in production and operations.

Managers: This group includes supervisors and mid-level managers responsible for overseeing teams and operations.

Human resources personnel: Employees involved in HR functions, particularly in talent management and succession planning.

Executives: Senior leaders and decision-makers within the organization.

The sampling approach ensured that employees were selected based on their relevance to the study's focus on succession planning and their experience in the manufacturing field. Employees were categorized into Levels 1, 2, or 3 within the organization, likely reflecting different tiers of responsibility and expertise.

By including a cross-section of employees from various levels and roles, the study aimed to capture diverse perspectives and insights related to succession planning practices within the organization. This approach facilitated a comprehensive examination of how different stakeholders perceive and participate in succession planning processes, thereby enriching the study's findings and implications.

Five employees participated in the case study

Interview

Phase 1 of data collection for this study involved conducting semi-structured interviews with 5 participants from the organization, representing various levels and roles. The interview questions were carefully crafted to align with the research questions and aimed to gather insights into succession planning practices and their perceived effectiveness within the company.

Key aspects of the data collection process included:

Semi-structured Interviews: The interviews were designed to be semi-structured, allowing flexibility to interpret participants' responses in depth while ensuring consistency across key topics related to succession planning.

Content Alignment: Interview questions were directly aligned with the research questions, focusing on criteria for evaluating succession plan effectiveness, processes for filling future vacancies, impacts of retention rates, salary progression, promotion policies, responsibility levels, tenure, training, awards, and career development opportunities.

Permission and Member Checking: During the interviews, a practice known as member checking was employed, where recorded responses were played back to participants. This process allowed participants to verify the accuracy of their responses and clarify any misunderstandings or inaccuracies (Carlson, 2010).

Member checking enhances the credibility and validity of qualitative research findings by ensuring that participants' perspectives are accurately represented. It also fosters trust and collaboration between researchers and participants, contributing to a richer understanding of the research topic.

Overall, these methodological approaches in Phase 1 of data collection helped gather comprehensive insights into succession planning practices within the manufacturing company, laying the foundation for analyzing and interpreting the data in subsequent phases of the study.

Data Analysis

In the second phase of the case study, data analysis involved the examination and analysis of participants' records obtained from the human resources department. These documents, which likely included personnel files, performance evaluations, training histories, and other relevant records, provided additional contextual information and insights into succession planning practices within the organization.

Key aspects of the data analysis process included:

Document Collection: The human resources department provided access to participants' documents, ensuring confidentiality and adherence to ethical standards.

Data Analysis: The collected documents were systematically analyzed to identify patterns, trends, and themes related to succession planning. This analysis aimed to validate and complement the findings from the semi-structured interviews conducted in Phase 1.

Integration with Interview Findings: The information derived from document analysis was compared and integrated with the insights obtained from the interviews. This triangulation of data sources helped corroborate emerging themes and strengthen the study's conclusions (Stake, 2010).

Support for Research Questions: The findings from document analysis further supported the research questions by providing concrete examples and empirical evidence of how succession planning criteria, processes, and outcomes were implemented and perceived within the organization.

By combining insights from both semi-structured interviews and document analysis, the study achieved a comprehensive understanding of succession planning practices and their impacts within the manufacturing company. This methodological approach ensured robustness in data collection and analysis, contributing to the validity and reliability of the study's findings.

Saturation

Saturation in qualitative research refers to the point at which no new information or themes emerge from additional data collection, indicating that the data collected adequately represent the phenomena under study (Charmaz, 2006). Several factors can influence the rate of saturation, including sample size and the scope of the research objectives (Stake, 2010).

Given that this study focused on a manufacturing business and aimed to interpret succession planning practices, saturation occurred relatively quickly. Specifically, saturation was observed after the fifth participant was interviewed. At this point, subsequent interviews did not yield new materially significant information, or additional themes related to succession planning.

The rapid achievement of saturation in this study can be attributed to the focused nature of the research within a specific organizational context and the purposive sampling of participants representing various levels and roles. The interviews and subsequent document analysis provided comprehensive insights into how succession planning criteria, processes, and outcomes were perceived and implemented within the organization.

The recognition of saturation after five interviews underscores the efficiency and effectiveness of the qualitative data collection process in capturing the depth and diversity of perspectives relevant to the research questions. It also highlights the methodological rigor applied in ensuring that data saturation was achieved, thereby enhancing the credibility and reliability of the study's findings.

Triangulation

Triangulation is a valuable methodological approach in qualitative research that enhances the credibility and validity of study findings by comparing multiple sources of data (Yin, 2009; Leech & Onwuegbuzie, 2007). In the context of this study on succession planning within a manufacturing business, triangulation was employed to ensure robustness in data collection and analysis.

Sources of Data Triangulation:

Participant Interviews: Semi-structured interviews were conducted with 15 participants from various levels and roles within the organization. These interviews provided qualitative insights into perceptions, experiences, and practices related to succession planning. Each interviewee offered unique perspectives based on their position and involvement in the succession planning process.

Archival Data Analysis: The study also involved analyzing archival data obtained from the human resources department. These documents included employee records such as performance evaluations, promotion histories, training records, and other relevant documentation. Analysis of these archival records provided empirical evidence and contextual background to support and complement the findings from the interviews.

Benefits of Triangulation:

Enhanced Credibility: By triangulating data from interviews and archival records, the study ensured that findings were grounded in multiple sources of evidence. This approach reduces bias and strengthens the reliability of conclusions drawn from the data.

Comprehensive Understanding: Triangulation facilitated a comprehensive exploration of succession planning practices within the organization. It allowed researchers to cross-check information, identify patterns, and validate emerging themes across different data sources.

Validation of Findings: Comparing findings from interviews with insights gleaned from archival data enabled researchers to verify the consistency and coherence of conclusions. It helped confirm whether the interpretations and conclusions drawn from qualitative data were supported by empirical evidence.

In summary, triangulation in this study involved leveraging both qualitative interviews and archival data analysis to provide a robust and nuanced understanding of succession planning practices in the manufacturing business. This methodological rigour strengthens the validity and reliability of the research findings, offering valuable insights for both academic research and practical application in organizational management.

Coding

The coding process in the study involved using NVivo 10 software, Microsoft Excel for initial data storage, and later NVivo 14 for further analysis. Here's a breakdown of how coding and analysis were conducted based on the description:

Data Collection and Storage:

NVivo 14 and Excel: Original data, including transcripts from semi-structured interviews and participants' records (such as HR documents and personnel files), were stored in Microsoft Excel initially. NVivo 14 was then used to organize and manage these sources of data systematically.

Coding Process:

Categorization as "Sources": In NVivo 14, each type of data source (e.g., HR documents, personnel files, interview audio) was categorized as "sources." This step likely involved importing or linking these data files into NVivo 14 for centralized coding and analysis.

Creation of Nodes: Nodes in NVivo 14 were used for coding specific themes or categories relevant to the research questions. For instance, criteria related to succession planning, employee retention, promotion policies, and other aspects were identified and coded under respective nodes.

Analysis Using Nodes:

Node Coding: The coding process involved assigning excerpts of data (from transcripts, documents, etc.) to relevant nodes. This allowed researchers to organize and systematically analyze responses and information pertaining to different aspects of succession planning.

Member Checking:

Verification of Responses: Member checking was implemented to ensure the accuracy and validity of data collected during interviews. This involved reading back participants' responses to confirm their accuracy and to clarify any misunderstandings or discrepancies.

Findings and Participation Rate:

Response Rate: Out of 10 employees solicited for participation, 5 employees responded, yielding a response rate of approximately 50%. This sample included a mix of genders, with 3 male participants and 2 female participants.

Interview Process: Each participant was interviewed sequentially with structured questions related to succession planning. Responses were documented on interview sheets and subsequently verified through member checking to enhance data accuracy.

Participant Engagement: Participants demonstrated genuine interest and comfort in discussing succession planning within the organization, contributing to the richness and depth of qualitative data collected.

Overall, the use of NVivo 14 for coding and analysis, coupled with member checking for data validation, ensured a systematic and rigorous approach to exploring succession planning practices in the manufacturing business. These methodological practices enhance the reliability

and credibility of findings, providing valuable insights for both research and practical application in organizational management.

Transcription of Data

Based on the description provided, here's a breakdown and analysis of how the qualitative data from the interviews was transcribed, analyzed, and interpreted in the study on succession planning:

Data Transcription:

Interviews were manually transcribed using Microsoft Word. This process involved converting audio recordings of the interviews into written text format. Transcription is crucial as it allows for detailed analysis and exploration of themes and patterns within the qualitative data.

Data Analysis Methodology:

Approach Used: The data analysis method employed in the study follows the guidelines outlined by Hsieh and Shannon (2005). This method typically involves several approaches to ensure thorough analysis of qualitative data.

Summative Approach: In the study, the summative approach was utilized to identify and interpret key themes from the transcribed data. This approach involves synthesizing and summarizing the data to distill overarching themes that emerge across the interviews.

Identification of Key Themes:

Theme 1: Filling a Vacancy:

This theme highlights that one of the primary focuses of succession planning is to prepare for and fill vacancies within the organization.

The interviews and supporting HR documents emphasized the importance of proactive planning and selection of successors with the necessary skills and traits.

References to Ajzen (2006) and SuccessFactors (2013, 2014) underscored the theoretical and practical frameworks used to guide succession planning practices, including open selection processes and detailed planning of successor traits.

It was noted that delaying or inadequately filling vacancies could lead to increased workload and challenges for existing employees, reinforcing the urgency and strategic importance of succession planning.

Integration of Theory and Practice:

The analysis integrated theoretical insights (e.g., Ajzen's theory of planned behavior) with practical implications drawn from HR documents and participant responses.

This integration helped contextualize the findings within existing frameworks and real-world organizational practices, enhancing the relevance and applicability of the study's conclusions.

Overall Findings and Implications:

Through the thematic analysis, the study identified five key themes related to succession planning. Each theme likely represents a critical aspect of how succession planning is perceived, practiced, and managed within the manufacturing business.

The findings provide insights into best practices for succession planning, emphasizing the importance of proactive preparation, strategic selection of successors, and the implications of effective succession planning on organizational continuity and employee workload.

In summary, the study employed rigorous methods of data transcription and analysis to interpret themes related to succession planning. By integrating theoretical frameworks with empirical data, the study contributes valuable insights into enhancing organizational practices related to succession management and workforce planning. These findings can inform both academic research and practical strategies for improving succession planning processes in organizations.

Theme 2: Promotional traits.

Based on the additional insights provided, let's further analyze the traits and educational criteria identified within the study on succession planning:

Positive Attitude and Good Attendance: These were highlighted as essential traits for employees aspiring for promotion within the organization. The emphasis on positive attitudes and attendance underscores their impact on workplace culture and productivity (Dahl, 2012).

Cultural Fit: Traits that support the organization's unique culture were also identified as influential in promotion decisions. This aligns with the notion that cultural fit contributes to employee satisfaction and organizational cohesion (Leland et al., 2012).

Theory of Planned Behavior in Succession Planning:

Behavioral Expectations: Utilizing the theory of planned behavior (Ajzen, 2006) helps in defining and communicating expected behaviors and traits for succession planning. By outlining preferred traits aligned with leadership roles, organizations can guide employees in developing these attributes to enhance their career progression opportunities.

Theme 3 Additional Educational Criteria

Educational Background: The study found that educational qualifications from local universities or trade schools were strongly preferred criteria for succession planning. This supports the notion that education enhances employees' skills and competencies, thereby driving organizational performance and success (Galagan, 2010; Jackson, 2009; SuccessFactors, 2014).

Impact of Education on Succession Planning

Skill Enhancement: Education facilitates the acquisition of new skill sets essential for meeting evolving job demands and organizational goals. This aligns with modern workforce dynamics where continuous learning and skill development are critical for career advancement and organizational adaptability (SuccessFactors, 2014).

In conclusion, the study highlights the importance of both behavioral traits and educational qualifications in succession planning within the context of a manufacturing business. By integrating theories like the theory of planned behavior and insights from HR practices, organizations can strategically align succession planning criteria with leadership development goals. This approach not only enhances organizational readiness but also empowers employees

to cultivate skills and behaviors conducive to their professional growth and advancement within the company.

Based on participant responses, education at a certified institution meant a certain level of quality was expected to be demonstrated in a more qualified workforce. Succession planning as a planned behavior may include educational requirements as it provides proof of behavior capability to drive performance (Ajzen, 2006). If employees came from a certified educational institution, a framework for working machines within a manufacturing environment positively impacted employee performance.

Theme 4: On-the-job training.

Based on the additional information provided, let's further interpret the significance of education and on-the-job training in the study on succession planning:

Education as an Important Theme:

Education from certified institutions was highlighted as a crucial factor in determining the quality and capability of the workforce. This initial education provides a foundational level of knowledge and skills necessary for employees to perform effectively in their roles.

Continued On-the-Job Training:

Despite the importance of formal education, on-the-job training was identified as equally relevant. This training allows employees to acquire new skills specific to different machines and roles within the manufacturing environment (Easton, 2011).

Unofficial Mentorship Roles: Some employees took on unofficial mentorship roles, driven by their personal initiative to learn new roles and skills. This informal mentorship can be instrumental in transferring tacit knowledge and best practices from experienced employees to newer ones, thereby enhancing skill development and job performance.

Integration with Succession Planning:

Succession planning in organizations should integrate both formal education and on-the-job training. While education sets a foundational level of competence, ongoing training ensures that employees remain adaptable and capable of handling new technologies and responsibilities. Incorporating on-the-job training into succession planning initiatives supports continuous learning and skill enhancement, preparing employees for future leadership roles and operational responsibilities.

Employee Development and Organizational Culture:

Encouraging on-the-job training and mentorship roles fosters a culture of continuous improvement and knowledge sharing within the organization. This contributes to employee engagement, retention, and overall organizational effectiveness.

By recognizing and supporting employees' initiative to learn new roles, organizations can capitalize on internal talent development, aligning individual career aspirations with organizational goals.

In conclusion, the study underscores the importance of both formal education and ongoing on-the-job training in succession planning within a manufacturing context. By combining these elements, organizations can build a robust pipeline of skilled talent capable of driving

operational excellence and adapting to evolving industry demands. This approach not only enhances employee satisfaction and retention but also strengthens the organization's competitive advantage in the marketplace. Further interpret the dynamics of training and guidance within the study on succession planning and employee development:

Employee Need for Additional Training:

Participants expressed a clear need for additional training to acquire new skills and enhance job performance. This reflects a proactive approach among employees to improve their capabilities and contribute more effectively to organizational goals.

Hesitation to Change Behavior Without Guidance:

Despite the willingness to learn, employees cited hesitation to change behaviors without official guidance. This highlights the importance of structured and formalized training programs within the organization to facilitate skill development and behavior change effectively.

Importance of Official Guidance and Documentation:

Formal guidance on on-the-job training through documented plans in human resources documents is crucial. Such plans provide a clear framework and initiative for employees to engage in learning new skill sets and adapting to new roles.

A documented plan not only communicates organizational expectations but also encourages employees to take ownership of their development by outlining clear pathways for skill acquisition and career advancement.

Driving Employee Initiative:

Initiatives for employees to learn new roles or improve job performance hinge on clear communication and support from organizational leadership. This includes providing resources, mentorship, and opportunities for hands-on training aligned with business objectives.

Integration with Succession Planning:

Incorporating structured on-the-job training plans into succession planning initiatives ensures that employees are adequately prepared to assume higher roles and responsibilities within the organization.

By fostering a culture of continuous learning and development, organizations can empower employees to adapt to changes, innovate, and contribute to long-term organizational success. The study highlights the critical role of formal guidance and documented training plans in facilitating employee development and succession planning within a manufacturing context. By addressing employee needs for structured training and providing clear pathways for skill enhancement, organizations can enhance workforce readiness and cultivate a culture of proactive learning and growth. This approach not only supports individual career advancement but also strengthens the organization's capacity to respond to industry challenges and opportunities effectively.

Theme 5: Employee performance evaluation.

the insights provided, let's further interpret the importance of employee performance evaluations and their role in succession planning within the study:

Importance of Employee Performance Evaluations:

Participants emphasized that employee performance evaluations play a crucial role in determining promotion opportunities within the organization. This aligns with the literature, which suggests that formal performance evaluations are integral components of succession planning (Lafley & Tichy, 2011).

Criteria for Promotion:

Good performance evaluations throughout the year are viewed as indicators of a reliable and efficient employee. Consistently demonstrating understanding of job responsibilities and delivering good performance contributes to building a reputation for dependability.

Leaders within the organization rely on these evaluations to assess an employee's readiness for promotion, considering their ability to consistently meet or exceed performance expectations (Ajzen, 2006).

Link to Planned Behavior Theory:

The theory of planned behavior (Ajzen, 2006) suggests that repeated behaviors aligned with organizational goals, such as good performance, can enhance an employee's standing within the succession planning process. This includes demonstrating reliability and efficiency, which are valued traits in potential successors.

Impact on Promotion and Succession Planning:

Employees who consistently perform well and receive positive evaluations are more likely to be considered for advancement opportunities. This process supports succession planning by ensuring that individuals with proven capabilities and reliability are prepared to assume higher responsibilities within the organization.

Building a Reputation for Dependability:

A reputation for dependability and reliability becomes crucial for career progression and promotion within the organization. Employees who are perceived as dependable through their performance evaluations are seen as trustworthy and capable of handling increased responsibilities.

In summary, the study underscores the critical role of employee performance evaluations in succession planning within a manufacturing context. By aligning individual performance with organizational goals and values, organizations can effectively identify and prepare potential successors for leadership roles. This approach not only supports career development but also strengthens the organization's leadership pipeline, ensuring continuity and success in achieving strategic objectives.

Limitations

The discussion of transferability in qualitative case studies and how it applies to the research on succession planning within a manufacturing company.

Definition of Transferability:

Transferability in qualitative research refers to the extent to which findings from one study can be applicable or transferred to other contexts or settings (Polit & Hungler, 2003). It involves assessing whether similar results and conclusions could be expected in different situations or among different groups.

Limitations of Single-Case Study Design:

The study focused on a single unit of analysis, a manufacturing company. This type of research design, known as a qualitative case study, offers rich insights into the specific context and dynamics of that organization (Merriam, 2009).

However, the limitation arises from the fact that findings derived from a single case study may not necessarily be generalizable to larger populations or different types of businesses. This is because each organization has unique characteristics, cultures, and operational contexts that may influence the outcomes observed.

Contextual Factors and Specificity:

The complex and dynamic nature of manufacturing businesses, as noted in the study, can significantly influence research findings. Factors such as organizational culture, leadership styles, industry norms, and local economic conditions shape how succession planning is implemented and its effectiveness.

These specific contextual factors are crucial in understanding the nuances of succession planning within the study's setting but may not fully represent the experiences and practices of larger or different types of organizations.

Implications for Transferability:

Given the focus on a single manufacturing company, the transferability of the study's findings to other organizations should be approached with caution. Researchers and practitioners should consider the unique context and conditions under which succession planning operates in various organizational settings.

To enhance transferability, future research could involve multiple case studies across different industries or sizes of organizations. This comparative approach would allow for a broader understanding of succession planning practices and their effectiveness across diverse contexts.

4. Conclusion

While the qualitative case study provides valuable insights into succession planning within a manufacturing company, its transferability to larger populations or different business types may be limited due to its specific focus. Acknowledging these limitations helps in interpreting and applying the findings appropriately within similar organizational contexts.

In summary, while the study offers valuable depth and understanding of succession planning in a manufacturing company, its applicability to broader contexts requires careful consideration of contextual factors and the unique nature of the studied organization. Future research can further interpret these dynamics to enhance the transferability of qualitative findings across diverse organizational settings.

Implications

Implications within the organization, here are the key points and recommendations summarized:

Perception vs. Reality of Succession Planning:

There is a discrepancy between employees' understanding of what a succession plan entails and the actual definition and criteria set forth by the human resources department. This gap in perception hinders employees' ability to prepare effectively for future promotional opportunities.

Impact of Discrepancies on Organizational Effectiveness:

The lack of a formalized succession plan or clear criteria negatively affects the organization's ability to fill future vacancies strategically. This can lead to inefficiencies and challenges in maintaining long-term organizational strategy and continuity.

Critical Importance of Succession Planning:

Succession planning is crucial for organizational resilience and sustainability. It ensures that capable employees are prepared to step into key roles when vacancies arise, thereby minimizing disruption and maintaining operational effectiveness.

Recommendations for Future Research:

Future research should compare succession planning practices across other manufacturing businesses. This comparative analysis can provide insights into best practices, challenges, and effective strategies that can be adopted or adapted to improve succession planning within various organizational contexts.

Integration into Organizational Strategy:

The findings underscore the importance of integrating succession planning into overall organizational strategy. Leaders, both in senior management and within human resources, should take proactive steps to develop and implement formal succession plans that align with organizational goals and values.

Proactive Leadership and HR Role

Leaders and HR personnel play a pivotal role in championing succession planning initiatives. Their proactive engagement and support are essential for creating a culture where succession planning is valued and effectively implemented.

Continuous Improvement:

Continuous evaluation and refinement of succession planning criteria and processes are necessary to adapt to changing organizational needs and external environments. This iterative approach ensures that succession planning remains relevant and effective over time.

In conclusion, the study highlights the critical need for organizations, particularly manufacturing businesses, to develop and implement formal succession plans. Addressing discrepancies in understanding and practice, integrating succession planning into strategic planning, and fostering proactive leadership and HR engagement are key steps toward enhancing organizational resilience and long-term success.

Summary

The identified gaps in succession planning within the organization, here are some recommendations and insights to consider for developing and implementing a formalized succession plan:

Current State and Awareness

The study revealed that there is currently no formal succession plan documented within the organization. Many employees are unaware of what a succession plan entails, and the criteria used for filling future vacancies.

Recommendations for Development

Collaboration between HR and Leadership: It's essential for Human Resources (HR) to collaborate closely with organizational leaders to develop and implement a formal succession plan. This plan should outline clear steps and criteria for identifying and preparing potential successors.

Key Components of Succession Plan

Individual Development Plans (IDP): Implementing IDPs for each employee can provide a structured roadmap for career progression. This includes identifying necessary skills and competencies for future roles and outlining developmental activities to achieve them.

Career Broadening Programs: These programs should offer diverse training and opportunities aimed at expanding employees' skills and knowledge beyond their current roles. Recognition through awards can further motivate employees to participate and excel.

Pathway for Continued Education: Establishing a clear pathway for ongoing education, both within the organization (through in-house training and mentorship programs) and externally (college or trade school opportunities), supports continuous skill enhancement.

Annual Performance Evaluations: Regular performance evaluations tied to job responsibilities provide feedback on employee performance. This feedback is crucial for identifying high-potential employees and addressing areas needing improvement.

Implementation Strategy

Communication and Training: Ensure effective communication of the succession plan to all employees. Conduct training sessions to educate them on the plan's objectives, criteria for advancement, and their role in the process.

Leadership Buy-in: Gain leadership buy-in and commitment to actively support and champion the succession planning initiatives. Leaders should be involved in identifying potential successors, providing mentorship, and advocating for employee development.

Monitoring and Evaluation

Continuous Improvement: Periodically review and revise the succession plan based on feedback and evolving organizational needs. Monitor the effectiveness of the plan through metrics such as promotion rates, employee satisfaction, and retention.

Documentation and Formalization:

Ensure that the succession plan is documented comprehensively, including all criteria and processes. This documentation should be accessible to employees and updated regularly to reflect changes in organizational strategy and workforce dynamics. By implementing these recommendations, the organization can create a structured and supportive environment for

employee development and succession readiness. This proactive approach not only prepares the organization for future leadership transitions but also enhances employee engagement and retention by fostering a culture of continuous learning and career advancement.

Recommendations

Here are some detailed recommendations for future research in this area:

Comparative Multiple Case Study: Conduct a comparative analysis involving multiple manufacturing companies. This approach would allow researchers to interpret variations in succession planning strategies, effectiveness, and outcomes across different organizational contexts. By including companies that vary in size, specialization, and technological integration, researchers can identify best practices and challenges that are specific to different segments of the manufacturing sector.

Longitudinal Study: Undertake a longitudinal study to track the evolution of succession planning practices within manufacturing firms over time. This would provide insights into how these practices adapt in response to technological changes, economic fluctuations, and leadership transitions. Longitudinal data would also reveal trends and patterns in succession outcomes and their impact on business sustainability.

Focus on Technological Integration: Given the rapid integration of new machinery and technology in manufacturing, future research should focus on how technological advancements influence succession planning strategies. Investigate how companies incorporate technological competencies into their succession criteria and development plans for future leaders.

Qualitative Exploration of Succession Challenges by conduct in-depth qualitative research to interpret the specific challenges and barriers that manufacturing companies face in succession planning. This could involve interviews with business owners, executives, and HR personnel to understand perceptions, attitudes, and decision-making processes related to succession.

Impact of Succession Planning on Business Continuity: Evaluate the impact of effective succession planning on business continuity and resilience in manufacturing firms. Measure key performance indicators such as revenue stability, employee retention, and customer satisfaction before and after implementing succession plans.

Best Practices Identification: Identify and document best practices in succession planning from successful manufacturing companies. This could involve case studies of companies that have successfully navigated leadership transitions and maintained competitive advantage through effective succession strategies.

Cross-Industry Comparison: Expand the scope of research beyond manufacturing to compare succession planning practices across different industries. This comparative approach would provide insights into transferable strategies and lessons learned that could benefit manufacturers.

Employee Perspectives: Incorporate employee perspectives into future research to understand how succession planning practices influence motivation, career development, and job

satisfaction among employees. This could include surveys or focus groups to gather qualitative data on employee perceptions and experiences.

By addressing these avenues for future research, scholars can contribute valuable knowledge to enhance succession planning practices in manufacturing companies, ultimately supporting their long-term sustainability and competitiveness in evolving markets.

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