

# The Succession Planning of Family-Owned Merchandising Business in Davao De Oro: A Multiple Case Study

A Dissertation

Presented to

The Faculty of the Graduate School

University of the Immaculate Conception

Davao City

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In Partial Fulfillment

of the Requirements for the Degree

Doctor in Business Management

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This dissertation titled “**THE SUCCESSION PLANNING OF FAMILY-OWNED MERCHANDISING BUSINESS IN DAVAO DE ORO: A MULTIPLE CASE STUDY**” of the University of the Immaculate Conception prepared and submitted by **JULIUS C. GETIGAN** in partial fulfillment of the requirements for the degree of Doctor in Business Management, has been examined and is recommended for approval and acceptance.

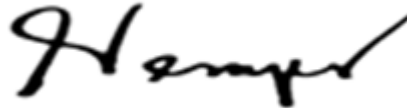


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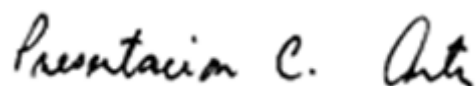
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## ACKNOWLEDGEMENT

This work would not be possible without the untiring efforts and constant guidance of people who became part of this academic pursuit.

I wish to express my sincere gratitude to my adviser, Dr. Dunhill Z. Bilog, for his professional guidance and expertise towards the completion of this research. His immense wisdom has become the strong pillar of this academic attempt.

To the Research Panel, headed by Dr. Gloria G. Gempes, with members, Dr. Mary Jane Amoguis, Dr. Joel B. Tan, and Dr. Presentacion C. Acosta, Dr. Emma V. Sagarino for their valuable suggestions, review, and comments in shaping my paper to become an academic work.

To the University of Immaculate Conception for providing me a learning institution, dedicated to academic and professional excellence.

To my family, who were my strong ally, for giving me the strength to survive and confidence to continue.

To all who have been with me in the most difficult yet fulfilling academic journey, my words of thanks are insufficient.

To Dr. Avee Joy B. Dayaganon, the Dean of the Graduate School, for her untiring support provided to the researcher until the completion of this study.

To our God almighty who always guide in my endeavor and always protect me.

JCG

## **DEDICATION**

This research is dedicated to my two sons, Michael John and Christian Louis, as well as all of my family and friends who have supported and encouraged me along the process. This theoretical feat would not be feasible without the prayers, and motivation of my BCBP Family - Brotherhood of Christian Businessmen and Professionals who prays for my quest. In addition, I dedicated my study to the Davao De Oro Businessmen, which allowed me to interview their top executives and review documents related to succession planning in family-owned businesses.

JCG

## ABSTRACT

This qualitative multiple case study aimed to explore strategies that managers/owners of family-owned businesses used to prepare future generations to assume managerial roles in the business. They were chosen through maximum variation sampling. The experiences and coping strategies of the five cases were examined using in-depth interviews. Triangulations of the gathered data was done in each case by interviewing their family members and friends and examination of historical documents. It was analyzed using thematic analysis resulting to five emergent themes on merchandizing business as regards succession planning: business continuity, hands-on training, formal education and coaching, motivational leadership, and job description formulation. The emergent themes for coping mechanism included the following: learning by doing, transparent selection process, and crisis management strategy. The five cases were not generally similar as there were only two cases who have similar declaration on their experiences on merchandizing business as regards to succession planning. As regards their coping strategies, one of the five cases adopted some approaches different from the rest of the cases.

**Keywords:-** *Business Management, Succession Planning, Family-Owned Merchandizing, Multiple Case Study, Philippines*

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## CHAPTER ONE INTRODUCTION

### *A. Background of the Study*

Organizations operate in a world influenced by internal and external forces. These enterprises aim for sustainability while keeping up with innumerable challenges. One of these is succession planning. In the Philippines, many families-owned and managed businesses recognize the importance of ownership and management. However, few know where and how to start developing a governance and succession plan. Seventy percent of these businesses never make it to the second generation, and ninety percent fail (Santiago, 2016). An estimate of a thousand family businesses fails in the succession process, according to Yedder (2018). This is affirmed by the study of Bennedsen et al. (2015) that the critical point in the life cycle of every family business is the process of generational exchange, i.e., succession.

Evidence indicates (Byrd & Megginson, 2013; Chittoor & Das, 2007). that only approximately 30% of the family-owned businesses transition to the second generation. In comparison, only 12% make it to the third, with a mere 3% making it to the fourth generation and beyond, with the remaining 97% being either sold or liquidated during the attrition, which accounts for the vast majority

There can be little doubt that the successful planning of successions holds the key to the long-term survival of family-owned businesses, and it is this reason that according to a report by Credit Suisse Research Institute, the country ranks 11th globally in terms of the number of family-run firms. The key to the future success of an organization is determined by how it assesses and understands the value of the people it has and what resources it will need in the future (Mehrabani & Mohamad, 2011). They further state that the one human resource tool which can assist in determining the current and future needs of the organization is succession planning.

Hence, the success of SMEs in which families prevail also depends on the successful transfer of management and ownership. Several studies (Kets de Vries, 1993; Miller et al., 2003; Morris et al.,). estimate that only 30 percent of family enterprises survive to the second generation because of unsolved or badly solved transition of ownership and management to the next family generation, and many enterprises fail soon after the second generation takes control

Previous family business succession studies focus on foreign businesses, particularly generational transfer (Steier & Miller, 2010; Salvato & Corbetta, 2013). Moreover, succession research usually focuses on the success or failure of this process. Little attention is paid to the risks faced by family businesses throughout the process (Botella-Carrubi & González-Cruz, 2019). Since the researcher has not come across a study that focuses on succession planning for businesses, particularly in Davao del Oro, this study intends to add knowledge on the preparation of succession for family-owned businesses in the Philippines, particularly in Davao de Oro.

The researcher would provide a copy of the study's results to family-owned business owner-managers and family members in the line of succession, the academe, and MSMEs. Attendance at conferences and fora, as well as publication in esteemed journals, would be pursued to disseminate and contribute to the existing body of knowledge.

### *B. Purpose of the Study*

This qualitative multiple case research set out to investigate the methods family company owners and managers employed to get the next generation ready to take over as managers. Managers of family-owned product companies in the Davao De Oro region with succession plans made up the study's target group. A company strategy is necessary for the sustainability of the communities in which they operate, and succession planning is a method for businesses to embrace the future.

### *C. Research Questions*

- What are the experiences of the owners of the merchandise business in Davao de Oro as to succession planning?
- How do these merchandise businesses cope with the challenges of implementing succession planning?
- What explains the similarities and differences of each case?

### *D. Theoretical Lens*

The Robust approach of succession planning, which incorporates extensive internal and external candidate searches and recruiting, is regarded as the most proactive approach and serves as the foundation for this study. Potential successors to important posts receive training and development from it, and it gets them ready ahead of time so they can fill in quickly.



Moreover, the Theory of Planned Behavior (TPB) serves as its foundation (Ajzen, 1991). This popular theory of social psychology makes use of behavioral intentions to forecast behavior in people. The Theory of Reasoned Action (TRA) (Fishbein & Ajzen, 1975) is where the theory originated. By incorporating perceived behavioral control into the theory, TPB expanded on TRA. According to TPB, an individual's intention to engage in a specific behavior is largely determined by three factors: first, their attitude toward the behavior (ATT); second, how they perceive the subjective norms that apply to the behavior (SN); and third, how much behavioral control they perceive themselves to have (PBC).

That is to say, there's a good chance that someone will do the action if they feel that they have the required control over it, the conduct is socially acceptable in the context, and they have a favorable attitude about it.

Planned succession is a planned behavior. Thus, according to (Sharma et al., 2003). TPB specifies that succession behaviors should be motivated by an anticipated desirable outcome for the initiator, acceptance of the outcome by other stakeholders, and an initiator's perception that he can perform the behavior to result in the desired outcome

Furthermore, Groves' leadership succession model serves as the foundation for this investigation (2007). It is an amalgamation of the succession planning and leadership development processes with certain guidelines that upper management must adhere to. Establishing widespread mentorship ties between senior management and the workforce is the first stage in the process. The network between mentor and mentee has formed at this point, and the mentor is beginning to spot high potentials at lower engagement levels. The mentees' strengths and crucial areas for growth are addressed by the mentor throughout the career planning process, which exposes the recognized abilities to new elements. The next step is a leadership competence development program that familiarizes applicants with leadership duties and equips them with a leadership-based skill set through developmental leadership activities. Ultimately, following a rigorous selection process, the senior management team chooses the most deserving candidate to be the next leader.

#### *E. Importance of the Study*

Many family-owned firms' managers and owners lacked succession plans to keep their companies running when they left their positions (Kochanowski, 2011). Although it can be difficult, a succession plan must be implemented successfully in order to develop future leaders, particularly those who will take over the family firm. There is a dearth of research on succession planning in family-owned enterprises, thus it is necessary to identify implementation techniques that work. Owners of family-owned enterprises would profit from the study's conclusions. They would get knowledge from this research that would enable them to comprehend the complexities of succession planning. Moreover, it would provide situation stressing the challenges related to succession planning. Another one are the future researchers. This study would provide baseline data in coming up with a more in-depth study on succession planning among family-owned businesses.

#### *F. Delimitation and Limitation of the Study*

This study focused on the succession planning of family-owned merchandise businesses in Davao de Oro. Moreover, the participants only included five owner-manager of specific family-owned merchandise businesses therefore the views and the insights of the chosen participants do not necessarily reflect the views and insights of all merchandise family-owned business owners. Other limitations of this study included time, convenience, and the inability to take a broad view of data based on the chosen area of Davao De Oro family-owned Merchandise business or generalizable to every organization.

#### *G. Definition of Terms*

Succession planning is a tactic used to transfer ownership of a business and leadership positions to a family member or group of workers. This is also referred to as "replacement planning," and its purpose is to make sure that companies go on seamlessly in the event that their most valuable employees leave, move on to other opportunities, or die away.

A business that is actively owned and/or managed by multiple family members is referred to as a family-owned firm.

#### *H. Review of Related Literature*

This section of the study offers a review of relevant literature from a range of sources, including books, studies, and peer-reviewed articles, on topics including the nature of succession planning among family-owned businesses, the difficulties faced by owners, and the tactics used in succession planning.

##### *I. Experiences of Merchandise Business Owners as to Succession Planning*

###### ➤ *Business Continuity*

By pointing out that it is incorrect to judge whether a company is a family business based just on the lineage of its founder, Zellweger et al. (2011) contributed to this paradigm shift. It is better to assess the family firm's intention to stay in operation as an economic unit, even when business entities can be acquired and sold. They proposed that a more relevant metric than observations based on a single company would be to quantify entrepreneurship inside the family and the family's intention to continue functioning as an economic unit.

A greater comprehension of the capacity of family enterprises to generate wealth over generations may be attained by moving the investigation from the company level to the family level. Families may purchase companies, start new divisions within them, sell companies to raise money, or shut them down to reallocate resources. In order to maintain a competitive edge and guarantee the durability of family-controlled company activity through diversification and renewal, selling or shutting a firm may be the reverse of failure (Zellweger et al., 2008).

Families, which are the distinctive bundle of resources and capabilities that are unique to a business as a result of family interaction between the family, its individual members, and the business in the form of knowledge, social capital, and intentional trust, are one of the factors that distinguish family businesses from non-family businesses. On average, families in business were found to control 3.4 businesses and shift industries 2.1 times during their tenure as a family business operating unit (Zellweger et al., 2008). The relationships, assets, and competencies that provide a family firm a competitive edge must be recognized for it to succeed. Families, according to some writers (Habbershon & Williams, 1999; Rutherford, Kuratko, & Holt, 2008), enable a company to develop or put into practice tactics that increase its efficiency and effectiveness, possibly surpassing that of competitors.

#### ➤ *Hands-on Training*

However, upon deeper inspection, you'll find that families run the majority of enterprises worldwide, not only in the Philippines (Go, 2018). Undoubtedly, one of the main problems with the central idea of the research *Coping Strategies in Succession Planning Challenges* is learning by doing through practical training. In actuality, (Villonga et.al, 2004). The transfer of leadership to the following generation may be a challenging process, which puts the family business's continuation at risk.

Regarding the continuation of family businesses, there is also a great deal of space for cultural comparison in the Philippines (Santiago, 2000). The majority of the work that has already been written has concentrated on gender, family relationships, and important elements that encourage success intention. However, not much research has been done to examine how culture affects family business succession and the many roles that family members play. According to (Yukl, 2010), leadership is important for success, but for that to happen, the person who chooses the successor must be prepared to work as a collaborator after the successor has gained the necessary abilities to manage the company on their own and as a supervisor while the successor is still learning.

The guidelines for how monitoring boards must function are outlined in the National Association of Corporate Directors (NACD) Commission Report on Director Professionalism (National Association of Corporate Directors, 2011). The recommended form and standards, while not legally enforceable, can offer family companies valuable insight on optimal board practices and advisory board structure. Certain regulations that come from a monitoring board, including getting an independent outside audit for family companies looking to borrow money from banks, could apply to a family business. According to Sharma, in order for the subject of family business research to progress, it is imperative that new theories be used. A phenomena is examined in a real-world setting in a descriptive case study (Yin, 2014). A family-owned business's succession planning plans were examined as part of this study. For this study, I did not select the ethnographic design, grounded theory, or phenomenology. According to Skiba (2014), a phenomenological design is a technique where the researcher reports and investigates the meanings and lived experiences of participants' experiences that do not fit with the objective of investigating a business strategy.

Grounded theory focuses on formulating concepts and applying empirical analysis to support the hypotheses (Stone, 2013). The chosen case study design has the ability to provide a strategy that goes beyond the case. According to Killawi et al. (2014), ethnography is the study of common patterns of language, thought, and behavior within a cultural phenomenon; however, this definition did not fit the objectives of the study. Rather than suggesting a technique that goes outside the case, a qualitative descriptive case study approach was thus the most appropriate design to investigate this complex phenomena inside its real-world environment on a restricted system and data collecting from numerous sources.

According to Killawi et al. (2014), ethnography is the study of common patterns of language, thought, and behavior within a cultural phenomenon; however, this definition did not fit the objectives of the study. A descriptive case study methodology that is qualitative (Baran, Shanock, & Miller, 2012). was, thus, the most appropriate design to investigate this intricate phenomena in its natural setting.

An organization's long-term viability is ensured by succession planning. The development of organization theory and the determination of the effects of social change depend heavily on the interaction between employers and leaders. Four major theoretical concepts were developed as part of organizational theory: workers' well-being, cross-cultural and global challenges, workers' consideration of atypical work practices, and improvements that collaborate with multilevel modeling (Baran, Shanock, & Miller, 2012). According to Jantti & Greenhalgh (2012), business development theory was included in the conceptual framework. Maintaining essential areas of operations, such as marketing, collaborations, staff development, succession planning, better objectives, and the aptitude and application of the necessary abilities, are key components of effective business development.

According to Kirkwood and Price (2013), assumptions are declarations of belief and reasonable expectations made by the inquirer. Leaders and managers of a family-owned wealth management and financial planning business made up the study's participants. It was assumed that the data gathered would result in ongoing, relevant learning, as DeSimone and Buzza (2013) recommend. It was thus assumed that the answers would be accurate. By utilizing voluntary involvement and maintaining secrecy, the possibility that this assumption is correct was increased. The longevity of organizations depends heavily on executive leadership, yet it's possible that those in the next generation of business executives won't be qualified or skilled enough to run their companies.

#### ➤ *Performance Evaluation*

Successful succession management may be achieved by strengthening skill competency, streamlining goals, and creating a source of data for succession planning assessment (Jantti & Greenhalgh, 2012). Transparent succession planning in family-owned enterprises will be part of the training of the next generation of executives (Hagemann & Stroope, 2013). According to (Froelich, McKee, & Rathge, 2011), leadership is probably evolving as Baby Boomers retire, raising worries about a lack of competent leadership in many family-owned businesses.

Hiring expenses and lost productivity are also significant factors. A research that comprised 10 businesses, five of which were family-owned and the other five not, found that executives' approaches to managing innovativeness and creating succession plans were largely similar in both cases, regardless of whether the firm was family-owned (Greenberg, 2012). According to (Grundström, Öberg, & Rönnbäck, 2011), leaders have the ability to bring about drastic changes and succession if they manage certain contextual circumstances well.

According to a research done in Croatia, Egypt, France, India, Kosovo, Kuwait, and the US, applied techniques have the same impact on family-owned enterprises as they do on small businesses (Lussier & Sonfield, 2012).

Testing family-owned firms for variations in succession planning was part of the study. Some nations showed significant differences, while others showed no changes at all (Lussier & Sonfield, 2012). In order to manage the structure of a firm and get ready for estate planning, succession planning is crucial in a variety of scenarios. Effective succession planning could involve creating boundaries between the firms and creating pay plans (Hann, 2014). As stated by Nieh and McLean (2011). A new model that acknowledges the advantages and disadvantages of each technique is produced by combining the Integrative Model of Effective Family Owned Businesses (FOB) with the FOB Knowledge Accumulation Model.

According to Nieh and McLean (2011), the new model takes into account four different levels: person, group, organization, and environment. At the individual level, the emphasis is on the participants' developing traits that have a big influence on succession success. Family systems are involved at the group level, which also emphasizes interpersonal and group dynamics. The organizational level takes care of the cultural characteristics and succession perspective of the system. The two main categories for environment level are contingency views and population ecology theories (Whatley, 2011). The advancement of links between managerial development, ethical atmosphere, and succession planning is demonstrated by the emphasis placed on FOBs. A crucial part of an organization's growth and competitiveness is played by its managers.

As a result, it's crucial to keep good managers on board and support a plan to introduce and use useful tools for managers' ongoing training and development (Nieh & McLean, 2011). Family-owned companies eventually have to deal with the fact that key personnel, including financial advisors and business executives, may retire. One might reach this insight by preparing ahead of time or by rushing at the last minute. When retirement planning is neglected and ignored in the hopes that it never occurs, this is known as reactive scrambling.

According to Flynn (2014), succession planning offers a chance to initiate discussions with those who are considering retiring as well as those who are currently in the process of doing so. Applying tactics that previously proved effective for the current administration to sustain growth and prosperity will be difficult for the successor. According to a research by Contreras et al. (2015), which involved 18 CEOs of family-owned businesses, successors recognized that firms enter a perilous phase when faced with leadership challenges.

According to the study's findings, CEOs were prepared to comply with formal regulations already in place, but in order to advance their expertise, they needed to be able to propose and carry out leadership development plans that were appropriate for the company. In order to foster the organization's growth and continuity, successors must assess their own abilities as well as the tactics to be employed (Contreras et al., 2015). Organizational continuity and succession planning include complex planning that is frequently influenced by emotions (Schulaka, 2015). Making ensuring the customers get the services they appreciate is one of the most crucial aspects. A leader's role may not always be fully filled by one person when they step down.

For the one role to function well, several people could be needed. Customer satisfaction should always come first, even if this strategy isn't always practical or economical (Schulaka, 2015). To that end, executives may need to go beyond the firm for CEO candidates, in particular. A study of 65 family-owned businesses across 17 sectors was done to see if family CEOs increased the bottom line of the company more than non-family CEOs (Viet, 2015). In a corporation, family members who succeed might provide greater value to the firm than non-family successors.

However, if given the proper resources and training to effectively manage the demands of the business environment and the strategic goals, young CEOs may contribute value to the firm (Viet, 2015). When a business owner decides it's time to retire, they often feel anxious because they don't know who will continue to grow the company when they go. Developing a succession plan facilitates a smooth transfer for the owner when the time comes to choose a successor. An analysis of (Roback, 2014) who's executive equity program which inspires leaders is a strategic instrument in creating a successful succession plan.

Managers that get financial incentives from the firm they work for are motivated to see the company through to the next stage of organizational business succession.

Even if there are amazing people, something has to change eventually. Giving successors equity to work with can be a good way to encourage growth and stability in the business (Roback, 2014). Businesses with a series of events that are constantly changing may find that their performance suffers and that bankruptcy is more likely (Elsaid, 2014). According to Elsaid (2014), switching from a female to a male CEO can improve an organization's performance and lower its risk of bankruptcy.

Many advisors in the financial sector plan to retire in the near future, and in order to leave a lasting legacy, many of these advisors hire and educate their successors well in advance of their retirement. Young professionals are being raised and developed so they can take over and run the company in the near future (Flaxington, 2014). Many advisers from the previous generation were thrust into positions and expected to work their way up. The seasoned advisers (Flaxington, 2014) are also aware that this won't provide the necessary outcomes and that consistency, concentration, and clarity are necessary for the next generation to flourish.

Research found that in addition to continual learning, acknowledging and honoring employees' accomplishments, and leading as a passionate and knowledgeable leader, a pleasant work atmosphere should be developed to offer employees or successors with an enjoyable environment (Yap & Webber, 2015). Only 3 out of 10 family-owned firms survive to pass down to the next generation, according to research done in Mexico on a variety of enterprises (Elizondo et al., 2014). Merely one out of three of them survived to reach the third generation. The process of putting in place and carrying out a succession plan is crucial to these outcomes.

The difference between their ideals and possibility for succession in relation to the daughter's eventual role as a partner was the main subject of an English research conducted on a small family farm (Glover, 2014). Using a single site ethnographic case study, the researcher worked on the farm for two years, observing the organization. The study's findings illuminated the complexities of power. This piece explored the distinctions between family-owned enterprises and the investigation of gender processing reinforcement. Although gender is socially constructed, the researcher (Al-Dajani, Bika, Collins, & Swail, 2014) noted that there is little literature on gender theory in the context of family-owned company study.

Gender theory applied to family enterprises offers a critical theoretical deconstruction of contemporary perspectives on the operation, viability, and succession planning of family firms in the twenty-first century (Al-Dajani et al., 2014). Key family members are typically assigned to executive roles in family-owned enterprises in order to foster a strong organizational culture. According to study, family-owned firms have a high mortality rate when it comes to sustainability because of inadequate long-term planning and the lack of an efficient succession plan. To discern between senior management personnel's authority and experience inside the firm, this descriptive study conducted in-person interviews with them to gather data. The findings reached by Garcia and colleagues (2014). that the factors taken into account mostly responded to the founder's managerial style and the decision given by the director.

#### ➤ *Coaching and Formal Schooling*

A key requirement for effective succession planning and sustainability is education. It offers comprehension, communication, confidence, and leadership—all essential components of deliberate organizational transformation. Two linked approaches to teaching were postulated in this study (Lansberg & Gersick, 2015). The first strategy is known as a deductive or "outside-in" strategy. Through concepts, illustrations, and models, this method improves the owners' comprehension of the family company. The second strategy is known as inductive or "inside-out" (Lansberg & Gersick, 2015).

In order to better understand family companies and how they would handle particular scenarios, this technique urged owners to think back on events they were personally involved in. According to Lansberg and Gersick (2015), when properly coordinated, the two strategies can complement one another. Education may be used as a method of ongoing capacity-building that is strategically designed to anticipate the requirements of the family and the company over time.



For business owners, a planner plays a crucial function that includes formal succession planning. This raises the organization's worth and makes preparations for its transfer. Preparation, collaboration, and support from every department within the company are necessary for succession positioning (Bronza, Auslander, & Marrullier, 2015). The basis for succession planning is the planner's development of connections with key management and identification of the competencies and attributes required of key management (Bronza, et al., 2015). It has been observed that the work of succession positioning becomes more difficult to successfully execute if the company has several owners or partners.

One of the most important subjects in family-owned company study is succession or transition. Effective family business succession was found to depend on the family-owned corporation's ability to defend its existing position and elaborate on the organizational goals it had put in place, according to a case study of the family-owned Italian design company Alessi. According to Ahmadi-Zahrani, Nikmaram, and Latifi (2014), family-owned companies are essential to the growth of the local and global economies because they foster the creation of new jobs, company expansion, and a rise in entrepreneurial initiatives. In a study of family-owned companies in Iran's manufacturing cities around Tehran and their traits in the succession planning process, managers and supervisors of different industrial components answered questionnaires to provide data.

Succession planning is strongly impacted by family ties to the company and the ambition of reliable individuals to succeed (Ahmadi-Zahrani, et al., 2014). The findings revealed a significant and favorable correlation between the family's traits, particularly the likelihood of key management's success and succession planning (Ahmadi Zahrani, et al., 2014).

Four men and four women participated in a qualitative study at an Australian university health facility that aimed to serve as a potential model for succession planning (McMurray et al., 2012). The study used an open-ended questionnaire to assess the participants' perceptions of leadership, knowledge of the organization's plans, and motivation to assume leadership roles. The study's findings showed that organizational leaders needed to enhance stability and leadership development even if the leadership of the health institution and its goals for the future were adequate.

Because of the rapidly aging present leadership, publicly listed company executives often look within the company for potential CEO candidates based on characteristics shared by the incumbents, such as duration of tenure, comparable age profiles, and (Rejchrt & Higgs, 2014). The Hood Canal Company, a family-run business in Washington State, is currently in its sixth generation of ownership after more than 90 years in operation. The business has a lot of promise, but the top leadership lacks a succession plan, the board of directors is having difficulty keeping the firm afloat, and the company itself is aging (Pratt, 2012). Planning for succession may be essential to the company's viability. Portuguese family business executives, on the other hand, have been adjusting to succession leadership changes for more than a century. Large Portuguese companies' family ties develop differently from small and medium-sized Portuguese enterprises' family relationships.

In Portugal, small businesses are run by families. Families typically lack actual wealth and available cash, so they rely on their reputation, prior accomplishments, and ability to help them thrive. Large Portuguese companies are robust and long-lasting, and the larger companies can leverage valuable capital and professional expertise to establish and grow (Pedroso de Lima, 2013). Given the traits of large family businesses and the way that economics and family dynamics are intertwined, succession planning and appropriate training equip the next generation with the skills they need to succeed in leadership roles within companies. Although they firmly support family values, Portuguese business leaders integrate family into the company by creating strong plans, incorporating modernity symbols, and setting meritocratic standards.

In Turkey, families hold 95% of the companies. By their dedication to their community, they may set an example for other employees in the corporate world and add value to their families, cultures, and professional supervisors (Gümüs & Gümüs, 2014). Traditional life scripts are shaped by age, which also often influences social connections and status in civilizations. An acknowledged and expected aspect of aging is serious disease. Organizational leaders must assess their process and ascertain if a succession plan is in place when the chronological age, age expectations, and health of key persons are out of sync with reality and a major sickness arises before the anticipated time period (Pecchioni, 2012). Organizational leaders find it difficult to adjust their stance when something unforeseen occurs.

Upon discovering he had only a year to live, the family business's boss, Algood Press, promptly devised strategies to ensure the firm could continue operating without him (Cater, 2011). To lead the business throughout his sickness, he established a management committee of three family members and three nonfamily personnel.

When a family leader experiences an illness or an unanticipated event, succession becomes challenging. The business leader was able to review the extension of privileges and other important information to other managers within the company, as well as lay the groundwork for the process of deciding who will lead the management committee and become the company's next president (Cater, 2011). Succession planning ensures an organization's long-term sustainability and continuity. Effective succession planning, according to George (2013), may guarantee that important roles will be occupied by qualified individuals who can continue while saving money on external recruiting and training. It can also have a favorable impact on company performance and practice.

In order to manage the corporate structure and get ready for estate planning, succession planning is crucial in a variety of scenarios. Succession is a crucial process for organizational regeneration as it involves the transfer of ownership and perhaps leadership (Hayek, Williams, Wallace, Taneja & Salem, 2015). Although most family-owned business executives understand the need of succession planning, most do not consider it to be a top priority (Boyd et al., 2014). To ascertain the effects of the absence of succession planning in family-owned enterprises, more investigation is required. The focus group developed here confirmed the findings published by Venter et al. (2005), which state that family company successors exhibit a high degree of participation and integration in the family business, bolstered by strong family governance methods, commercial acumen, and adaptability to markets

However, in terms of successor training, connections between family members and partners, and succession experience, family firms' operational and functional procedures are generally similar to those of other enterprises. For instance, according to Zumilah (2008), a family business requires not only profit and economic sustainability, but also kindness and love for children (especially when it comes to succession planning) and respect for elderly family members, whose notable presence may contribute to the success of a family business.

Effective succession planning could involve creating boundaries between the firms and creating pay plans (Hann, 2014). Social identity and a connection to the family company may be related to transgenerational survival (Bjornberg & Nicholson, 2012). Adding generational layers complicates family business governance since every generation has a different viewpoint on the company (Filser, et al., 2013). If these issues are not resolved, they might jeopardize corporate success, family peace, and the enterprise's longevity.

The limits between family-owned enterprises and the analysis in relation to the reinforcement of gender processing were examined in this paper. The researcher acknowledged that gender is socially constructed, but she found little research on gender theory in family-owned businesses (Al-Dajani, et al., 2014). In family-owned businesses, important family members are typically appointed to management positions in order to foster an organizational culture.

According to study, family-owned firms have a high mortality rate when it comes to sustainability because of inadequate long-term planning and a lack of an efficient succession plan. Actually, as per Lansberg and Gersick (2015), showed that effective succession planning and sustainability depend heavily on education. It offers comprehension, communication, confidence, and leadership—the 27 essential components of deliberate organizational transformation. This study proposed two linked educational theories.

As a result, even though passing on businesses to the next generation is challenging due to unexpected retirement or death, the successful integration and management of the family components identified by Le Breton-Miller et al., (2014) would have a determining effect on the succession process. This study will aid in improving the strategy and planning to maintain the operation of family businesses. Moreover, all family-owned firms must consider succession planning in order to maintain family stability and control. Effective planning necessitates considering generational shared values, knowledge transfer, and the incumbent-successor relationship, which fosters mutual respect, trust, collaboration, and intimacy. Certain businesses are just more adept at this than others.

A group of skilled employees must participate in succession planning processes in order to facilitate a smooth transition of company leadership. An effective transition team may be formed by accountants or tax specialists, business advisors, and business valuation experts (Simoneaux & Stroud, 2014). Business leaders should focus on three key areas of concern in order to successfully navigate the succession planning process: individual, interpersonal, and organizational (Filser, Kraus, & Märk, 2013). The phases of conflict, such as preparation, transfer or takeover, and continuance, should also be addressed by leaders. More study is required to address the succession planning process's psychological effects and departing process.

Organizational development and competitiveness are facilitated by succession planning, which also enhances leadership in companies. The value of succession management emphasizes the significance of succession management, enabling development and retention while effectively carrying out the plans put in place by firms (Greenberg, 2012). The mass retirement of highly skilled Baby Boomers, which results in a significant loss of skills and knowledge as compared to retirement plans for university executives compared to libraries, is one of the biggest difficulties confronting companies (González, 2013).

In terms of succession planning, most institutions lagged behind libraries, with the exception of Notre Dame. Because there are so few candidates for senior positions at Notre Dame, the institution used succession planning to identify and develop its top executives (González, 2013). The results provide the libraries with three important lessons: the program's goal must be to nurture and promote talent; the organization as a whole must be involved in the training process; and leadership must support the program.

However, since succession planning can impact the value of assets and the organization's future, a study done with 143 family-owned businesses in Sweden reveals that the opinions of current leaders and family members are crucial to the succession planning process within the organization (Bjuggren & Sund, 2014). Organizations have relationships with clients, vendors, employees, and owners; as a result, leaders must be actively involved in the development and maintenance of succession planning. According to Darvish and Najafi (2014), businesses cannot progress toward effective leadership unless their strategic planning is in line with succession planning. Strategic planning is fueled by the effective design of succession procedures, which identify and train future leaders for positions of leadership. Family company owners could increase the pool of eligible applicants or actively seek out qualified prospects.

These findings were replicated in an Australian healthcare facility. In order to meet performance goals, cut expenses, and participate in the training and coaching of potential candidates, succession planning should encompass all organizational levels and kinds of management (Kippist, 2013). Leadership transition is impacted by changes in gender diversity and economy (Virick & Greer, 2012). The performance of incumbent managers affected the nomination of female successors, as listed (Virick & Greer, 2012). If the diversity climate was unfavorable, low-performing incumbents were less likely to nominate female successors. Survey and archival data were used to test these hypotheses regarding diverse leadership. Nonetheless, in an environment that valued diversity, managers who performed poorly and those who performed well were equally inclined to suggest female replacements.

According to an investigation done by Taiwanese companies between 1996 and 2005, outside successors are able to grow organizations due to the rapid changes in emerging markets. financial success (Chung & Luo, 2013). But with family-owned enterprises, the analysis is different since internal successors have better access to resources within the network. According to (Kippist, 2013), succession planning is essential for all company levels, but it's more important for health care providers that need to save costs and meet performance targets. Having a succession plan in place is crucial to identifying, attracting, training, and assisting future leaders and ensuring they possess the knowledge and abilities needed to take on the problems facing the healthcare industry.

A paucity of succession planning activities and inadequate planning techniques were found in a qualitative research of doctor managers in Australian hospitals (Kippist, 2013). Using succession planning and good management development may help organizations have a group of managers with the skills, expertise, and competence needed to deliver successful and efficient health care services.

Succession planning requires both the ability to identify the technical and leadership abilities of future leaders as well as the ability to maintain or surpass an organization's level of business once a leader transitions (Sinkin & Putney, 2014). In the nursing profession, succession planning is crucial, just like it is in other businesses.

Nursing succession planning is influenced by social, political, and financial concerns. It is anticipated that there will be a worldwide nursing shortage, which will make it difficult to find, hire, and retain leaders in the nursing industry (Griffith, 2012). For this reason, it is critical that leaders create a succession plan that involves all organizational levels of management. Early in their careers, nurses who aspire to leadership roles should prioritize good communication, coaching, and mentoring.

Future leaders can only be developed if organizational leaders can effectively train and develop these leaders to lead the organization into the future (Sinkin & Putney, 2014). It can be challenging to identify and prepare future leaders for effective roles, as noted by Lyon and Hollcroft (2012). Organizational leaders must rise to the obstacles of creating a succession plan. Businesses overlook the dangers involved in developing succession planning.

Because they have not had any significant occurrences, organizational leaders assume that risk assessments are not necessary and that insurance coverage will cover any risks that become problems. One critical strategic process that lowers leadership gaps and helps the most skilled workers develop the competencies needed for higher roles is managing the succession of ability and talent within businesses (Gandhi & Kumar, 2014). The process of grooming the most gifted "potentials" to take over as leaders in their current roles is known as succession planning.

CEOs are being forced to reevaluate how leaders obtain the essential senior leader development experiences as a result of significant changes in job activities and leveling organizational structures. While management development plans build a team of potential leaders with areas of specialization, which gives them opportunities for professional and personal development, succession plans assist executives in identifying and grooming potential leaders for progression into major, leadership positions effectively (Gandhi & Kumar, 2014). According to Fitsimmons (2013), succession planning provides an excellent basis for demonstrating the organic growth of sound foresight, which may be profitable and successful for the company. Colleges and universities are paying more attention to succession planning, but not always in a good way. Limitations, imperfections, and gaps have grown to be a source of conflict both inside and outside of Higher Education Institutions.

### ➤ *Motivational Leadership*

Leadership must determine the competencies of present management and the training necessary to help future leaders fill a role effectively when an employee departs the company in order to prepare future leaders (Wu, Nurhadi, & Zahro, 2016). It is impossible to finish or execute succession planning successfully without taking coaching and leadership into account. According to (Shamsuddin et al., 2012), these two factors are intimately related, and if one is managed improperly, a mountain of problems may result.

The present execution and succession plan has to be reviewed, according to a request made by the Malaysian Ministry of Higher Education (MOHE) (Shamsuddin et al., 2012). The intricacy and dynamism of succession planning in Chinese family-owned enterprises were found to exhibit *guanxi* in the study. In Chinese commerce, *guanxi* is defined as "relationships" or "connections" (Dou & Li, 2013). To investigate the dynamics of the family company, an exploratory case study was conducted on six Chinese family enterprises. The study's findings revealed that the *guanxi* network goes through four typical phases: rebuilding, triggering, preheating, and readjusting. Every stage was linked to carrying out a standard task, which encompassed acquiring the *guanxi* perspective and reconstructing the *guanxi* organizations, among other things.

A theoretical framework for succession planning based on organizational theories of creativity and administrative management was incorporated in research on theatrical firms. According to Landry (2011), the company executives looked at a variety of theoretical areas, such as the concepts, strategies, and importance of succession planning; the theoretical underpinnings and idea of succession; recommendations for the conceptual framework; and the advantages and disadvantages of the conceptual framework.

The use of strategic noise after announcing a CEO succession in case the incoming CEO has no previous experience as CEO or comes from a less well-known firm is supported by the strategic noise hypothesis. By disclosing unclear information about other significant events, a board of directors may seek to correct stakeholders' perceptions (Graffin, Boivie, & Carpenter, 2013). The interim CEO succession practice concludes that no systematic or theoretical research has been done. The study concluded by (Liang, et.al 2012) based on agency theory, both the organization's performance and the uncertainty of the environment are directly related to the succession process of the interim CEO.

### ➤ *Job Description Formulation*

Succession planning is directly impacted by family ties to the company and the aspirations of reliable individuals. The findings revealed a strong and significant correlation between the family's traits, particularly the likelihood of key management's success and succession planning (Ahmadi Zahrani, et al., 2014). An Italian designed firm's case study of a family-owned business revealed that (Dalpiaz, Tracey, & Phillips, 2014) that the family-owned business had to justify jobs on its current position and elaborate on the organizational objectives it implemented in order for there to be an effective family business succession.

To reduce disruption and ensure a transparent and seamless transition, organizations facing the unanticipated departure of their CEO should search for a resolute and experienced individual to serve as the interim CEO (Liang et al., 2012). CEOs that are not employed by the firm have more negotiating leverage than CEOs that are. Assessment of Performance. The goal of this work is to investigate how family business researchers measure performance, what trends emerge, how performance measurement fits general family business research themes, and how researchers might improve their methods for assessing family business performance in light of the growth of family business research (Sharma, 2004; Debicki, Matherne, Kellermanns, & Chrisman, 2009; Mazzi, 2011; Stewart & Miner, 2011) and the significance of performance measurement (Venkatraman, & Ramanujam, 1986).

For example, family companies prioritize a unique mix of non-financial and financial objectives (Astrachan, 2010).

As a result, CEO successors from outside the organization will probably be paid substantially more than those from within (Elsaid, Davidson, & Wang, 2011). The risk associated with outside successors is higher than that of inner successors due to their increased knowledge asymmetry. Whereas outer successors' compensation packages are more performance-related and pay-at-risk, inside successors' compensation packages tend to be a higher proportion of earnings.

According to research, outside CEOs might want to carry over the same salary package from their former employer to their new role (Elsaid, Davidson, & Wang, 2011). In the twenty-first century, succession planning is essential for enterprises. According to (Wu, Nurhadi, & Zahro, 2016), in order to effectively prepare future leaders, leadership must assess the competencies of present management as well as the training necessary to help future leaders fill a role effectively when an employee departs the company.



*J. Coping Strategies in Succession Planning*➤ *Learning by Doing*

The most significant challenge this organization faced was how to manage successful transitions from one generation of leadership to the next. This is one of the themes in *Coping Strategies in Succession Planning Challenges*, which emphasizes the prospect's involvement in the decision-making process in learning by doing (Dalpiaz, et al., 2014). According to Ahmadi et al. (2014), family-owned enterprises are essential to both local and global economic development because they foster the growth of firms, the creation of new jobs, and the expansion of entrepreneurial initiatives. Surveys of managers and supervisors of different industrial components were used to gather data for research on family-owned enterprises in Iran's Tehran manufacturing towns and their traits in the succession planning process.

➤ *Transparent Selection Process*

Additionally, underperforming incumbents were less likely to name successors in the event of a negative diversity climate. But in an environment that valued diversity, both high- and low-performing managers were equally inclined to choose and suggest male successors (Virick & Greer, 2012). According to a study (Chung & Luo, 2013) conducted by Taiwanese companies between 1996 and 2005, emerging markets are changing quickly, which makes external competitors more able to boost an organization's profitability.

Moreover, with family-owned enterprises, the analysis is different since internal successors have better access to resources within the network. Factors impacting the succession process and business success include the successors' readiness to take over the company and their relationship and proximity to the business organizer (predecessor) (Cabrera-Suárez, 2005). According to Smallbone and Welter (2001), planning for organizational continuity and succession planning is difficult and frequently influenced by emotions. An uncertain environment is more common in developing and transitional economies where turbulent social, economic, and political environments influence the nature and place of business and entrepreneurship.

One of the most crucial elements in ensuring that clients obtain the valued service in the future. A leader's role may not always be filled by a single person when they leave (Schulaka, 2015). For a position to be maintained efficiently, several people may be needed. There comes a time when a business owner realizes it is time to retire, but nervousness results from the question of who would keep the organization prospering after the retirement occurs. Satisfying the customer should be the goal, which may require leaders to look for successors (Schulaka, 2015). Having a succession plan in place before the owner has actually choose a successor provides for a perfect transition.

An executive equity program is a strategic tool for creating a successful succession plan because it incentivizes managers to support leaders with a stake in the company and financial incentives, which in turn encourages them to contribute to the company's success during the business succession phase of the organization (Roback, 2014). Furthermore, there are others that are outstanding, but ultimately something needs to change. Offering stock to heirs can be a good way to encourage stability and expansion inside a firm.

All of this is consistent with the findings of Cabrera-Suárez et al. (2001), Morris et al. (1996), and other studies as the goal of predecessors is to provide successors with the information and abilities needed to guide a company to success and guarantee its survival. However, Sharma (2004) highlights the strategic need of transferring implicit knowledge to the following generation in order to keep and expand a family business after the next generation assumes leadership (Chirico, 2008). But it's not only about passing on implicit knowledge from one generation to the next that matters. The performance and competitiveness of the company both during and after the transfer of ownership and leadership responsibilities require the next generation to provide new insights.

Consequently, we think that the act of generating knowledge during the succession process is essential. Because owning families are reluctant or unable to disclose or even acknowledge a problem in public that affects them, crisis management is particularly difficult for family businesses (Haag & Sund, 2016). The diversity of family business models, according to Gupta et al. (2010), suggests that we should pay close attention to the context in which family businesses operate because of the innate relationship between the owning family, the business, and the context. This is because family firms are impacted by external disruptions or hostile environmental conditions in both positive and negative ways.

The literature significantly contributes to the conversation that will follow this study. Additionally, the researcher's viewpoint on the actual experiences of SME owner-managers with succession planning is expanded by this literature study. It's still unclear if family businesses have organized, standardized crisis management processes (Faghfour et al., 2015). These behaviors and organizations have less uncertainty as a result of interdependencies and shared understandings that help to keep them "taken-for-granted" (Carroll & Hannan, 2000). As companies get older, the initially high chance of failure decreases. But when internal inefficiencies and inertia emerge, the liabilities of age inevitably resurface, and the process of transformation restarts.

### K. Theories on Family-Owned Business

Lipana-Gomez (2018) asserts that the fact that families hold between 80% and 90% of the businesses in the Philippines underscores the significance of understanding how to manage and expand a family enterprise. Compared to (Davis & Harveston, 1998), even the largest corporations in the nation were once family-run small enterprises. Examples of these include the SM Group, Ayala Corporation, JG Summit, and Aboitiz Group. In any economy, businesses are the main engines of development and advancement. Academic focus should be paid particular attention to this specialty because it is particularly relevant to problems arising from unclear or partially adopted commercial and familial duties by their successors.

A 2019 study by Manala and Gerial revealed that Filipino and Chinese-Filipino households have different succession patterns. Chinese and Filipino culture places a high value on family customs and the family name, with the eldest son typically succeeding in controlling the company despite the presence of more capable female family members. It is crucial to uphold the route that a male family member will eventually take. In contrast, Filipino families support their children's dreams even if it means that after graduation, the children will look for work outside of the family business, even though the parents welcome their children's plan to join the business. This is because the children's happiness is the family's primary goal.

The results are consistent with those of Le-Bretton Miller et al. (2004) and Prior (2012), who found that characteristics connected to successors include outside job experience, formal education, training programs, motivation for the successor, and nurturing and development.

In the United States, a large number of family-owned enterprises are tiny enterprises. According to the Small Business Administration (2014), 48.5% of jobs in the private sector in the United States are held by small firms. Understanding how to preserve family-owned businesses during periods of generational transition is crucial given the vital role they play in the health of this nation's economy (Motwani, et. Al, 2016). They pointed out that choosing the next person in charge of a small to medium-sized family-owned business differs greatly from that of a large corporation. Family-owned firms have a considerably smaller talent pool to pick from, these kinds of changes don't happen very often, and the process is usually quite unstructured when it takes its place.

Furthermore, a family-owned firm needs to consider a lot of different things. In the first place, it gives the younger generation a chance to learn with the elder age. It also tackles the problem of adjusting to the industry that is changing as they prepare to start a career in it. Having different individuals in leadership roles at the same time is the greatest approach to guarantee that the company stays competitive. Innovation is vital for the success of the business, and it is necessary that they continue or become inventive (Hoch, 2013). Because of this, shared leadership is a crucial stage in the knowledge-sharing process that is a necessary component of any successful family-owned business.

According to Hauswald (2012), there is equivocal empirical evidence tying family influence to performance results, despite the theoretical justification for why family firms should vary from nonfamily enterprises (p. 10). According to this study's empirical data (Sundaramuthy, 2008), family businesses may operate better than nonfamily businesses because of their sense of identity and trust. Very few studies on family businesses have examined the effects of trust on the organization and the generational shifts in trust toward the family or management.

Regarding family businesses, there are gaps in our understanding of how one generation interacts with the next on an emotional level and if social identity and attachment play a role in the effective intergenerational transfer of the firm (Bjornberg & Nicholson, 2012). One issue that the business family has to overcome is trust between family members and management (Sundaramurthy, 2008). Family members who possess ownership in the company have voting rights on the board of directors, which raises trust concerns. When faced with the arbitrary evaluation of trustworthiness, succession planning concerns arise about whether or not to trust a nonfamily member or another family member to run the company. The perceived risk of trusting someone else to lessen uncertainty in a certain circumstance is known as trust (Nickel, 2009; Schoorman, Mayer, & Davis, 2007).

A business family may find the succession process challenging (Ward, 2004). Scholars have emphasized time and time again how important trust is in transferring ownership of the company, the leadership, and the assets to future generations (Eddleston, et al.). Particular to family-run businesses (Matherne, Ring, & McKee, 2011). is social identity and the importance of group behavior determined by shared experiences and emotional bonds.

For the shift to go well, there has to be a strong sense of trust between the family and the corporate system. Good transitions cannot occur in a family-owned firm when there is a lack of commitment from all family members, secrecy, lack of openness, and an inability to control emotions (Poza, 2010). This lack of competence breeds mistrust. The distinctive features of familial succession (siblings who don't succeed giving the to the heir and enduring implications for their own fortunes). (Whiteman et al., 2011) offer a perfect environment for researching how uneven results affect sibling relationships, family unity, and the possible repercussions for companies.

Lastly, disputes at the family-business-ownership interface involve a range of entangled parties (Harvey & Evans, 1994), and they frequently start or get worse throughout the process of succession planning for businesses (Malinen, 2012). Siblings, for instance, may vie to become company executives (Jayantilal et al., 2016); incumbents and successors may quarrel over the ownership of assets and the allocation of authority within the family (Meier & Schier, 2016); or family shareholders may debate over steady or rapid expansion.

#### *L. Organization of the Study*

This part offers a road map to help readers understand how the research is done, how the chapters are arranged, and how the study is structured so that the article is presented in a more thorough and logical manner.

The rationale for the research topic, the study's purpose statement, the research questions, the theoretical framework, the study's significance, term definitions, the study's delimitation and limitations, and the study's organization are all presented in Chapter 1, which serves as an introduction.

The Methodology, which describes how the study is carried out and the relevant steps to take, is presented in Chapter 2. The research participants, data sources, data collection, data analysis, thematic analysis, data presentation and visualization, data interpretation, study credibility, researcher role, and ethical issues are all well covered.

The detailed interview transcript of Case A—a manager who is physically incapable—the initial research participant, is provided in Chapter 3. The results of the in-depth interview with Case B—the female manager—the second research participant, are given in Chapter 4.

The third participant in this research, the middle-aged manager Case C, has detailed interview findings in Chapter 5. The detailed interview findings of the fourth research subject, the late Case D- Adult Manager, are provided in Chapter 6.

In-depth interview findings for Case E—the turnover manager's process—the fifth study participant—are covered in detail in Chapter 7. The cross-case analysis of this research is presented in Chapter 8. It also covers the numerous themes that arose from the informants' varied responses.

In Chapter 9, the study's findings, practical implications, directions for further research, and closing thoughts about the succession planning of Davao De Oro's family-owned businesses are discussed.

## CHAPTER TWO METHODS

This chapter includes information on the research design, participants, data collecting, data analysis, researcher role, study credibility, and ethical considerations.

### *A. Research Design*

The qualitative multiple-case study was used in this study. This design is appropriate to make sense of the lived experiences of the participants as well as synthesize their responses. According to Yin, stems from a need to comprehend complicated social phenomena. It allows me as the researcher to keep track of real-life happenings (Yin, 2014). Creswell (2013) defined case study research as the multiple case approach which it permits me to explore multiple bounded systems (a case) over time, through this detailed by (Zainal, 2007). in-depth data collection involving multiple sources of information can easily determine which include the wider discovery of research and profound indulgent of evidences and strong reliability of information gathered.

Meanwhile, the multiple case study approach allows more variability discovered, more relationships to be compared, and more opportunities for generalizations and testable theory developed. This is to address the complex issues that has already been explored in in-depth and to understand the behavioral conditions of such system, based on comments inputs and interpretative perspectives of the participants.

Additionally, a multiple case study methodology was used in accordance with Eisenhart and Graebner (2007) and Yin (1994). More variability can usually be found, more correlations may be studied, and more potential for generalizations and the development of testable theories are provided by these researches. Stake (2006) suggested that four to ten instances be examined while doing multi-case studies, whereas Yin (2003) argued that multi-case designs are time- and money-consuming, making them unsuitable for inexperienced and student researchers. According to Yin (2003), when given the option, a two-case research is preferable to a one-case study because of the increased analytical advantages and the increased generalizability of comparable results. Five instances that potentially provide comparable outcomes were selected in the current study in an effort to better understand the learning changes taking place in family-owned businesses and how they can impact organizational learning.

### *B. Participants*

The participants of this study were five managers/owners of selected family-owned merchandising businesses where planning process are implemented.

Wilson (2016) affirmed that there are no firm guidelines for the minimum sample size for multiple case studies, however, Creswell (2013) illustrated researchers typically choose no more than four or five cases in multiple case designs. This is confirmed by Robinson (2014) that a small number of participants proved to be valuable, while properly representing the population.

The five case units were identified purposively by their credible experiences. Marshall and Rossman (2014) defined purposive sampling as a process that involves selecting participants who can provide extensive practical knowledge of the phenomenon and is supported by the parsimonious principle, which allows simplicity over complexity, and necessity over the excessive information to describe a given phenomenon affirmed by Allen (2017). To attain homogeneity, the following inclusion criteria were established such as the participant is a Filipino owner-manager of merchandising family business located in Davao de Oro which was operating for ten years and above and which has experience in succession planning. The researcher excluded participants who do not meet the said criteria.

The study were the five businessmen of Davao De Oro who are managers of family-owned businesses. The participants' case units for this study are the following:

- Case Unit A: A Physically incapacitated who is businessman of Nabunturan and public servant suffering from illnesses of high blood pressure, which has resulted in stroke paralyzing his right hand and leg, and owner of the family-owned business.
- Case Unit B: Female Manager a tough mother of two, businesswoman and graduate of Bachelor of Computer Science and eldest of the three siblings of New Sibunga Nabunturan.
- Case Unit C: Middle Adult Manager 54 years of age, married and 3rd among the siblings and manage to operate the merchandise business for ten years until now, and she comes from a large family of businessmen. cautious to talk about how her family made their family-owned business at first, but as the conversation moved to a quiet spot she begun to share her journey.
- Case Unit D: Late Adult Manager 4th among the five siblings, a visionary woman eager and objective capitalist, and a businesswoman from Davao De Oro and has thirty years of experience to operate the business trained by their father who is half Chinese and who originally control their family business from Davao City.

- Case Unit E: On the process of Turnover Manager 35 years old 2nd to the eldest sibling who came from a huge family of merchants in Davao De Oro who is well-known Filipino Chinese family. She handled the operation of her Grandparents' family-owned business firm from 1950 to present. She graduated from a private institution in Tagum with the degree of Bachelor of Science in Accounting Management.

Each of these case units has its unique perspective on the challenges relating to succession planning.

### C. Data Collection

The researcher already followed the basic research processes set by the University of Immaculate Conception. First, permission from the Graduate School thru the Office of the Dean to conduct the study was sought. Second, the manuscript was submitted to the Research Ethics Committee (REC) for full board review and issuance of the certificate of ethical compliance before the data collection process. This was the prerequisite of form collection. Third, letter of permission was being sent to the concerned offices for signing followed by an invitation to the target research participants to carry out data collection. Fourth, engagement with the participants with field notes regarding the nature and the purpose of the study, their roles, and the responsibilities of the researcher, the confidentiality procedures to assure them that their identities remained confidential throughout the research and secure their written consent indicating that they agreed to participate in the study.

The primary source of information for the study was in-depth interviews from the selected five family-owned merchandising businesses in Davao de Oro. Semi-structured interviews with open-ended questions that would provide opportunities for flexible discussions and clarity of all information were utilized. The secondary source of information included review of literature as well as company documents such as succession plans. Multiple data sources would allow methodological triangulation as Yin (2014) emphasized that the most important use of documents is to augment and corroborate findings from other sources.

Upon receipt of the informed consent letter from the participants, interview schedule dates were communicated to the participants at their convenience to establish rapport, trust, and confidence. Specifically, the interview was conducted face to face at the physical location of each business with strict observance of the COVID-19 safety health protocols. Interviews are a common method of collecting data for case study design (Bryman & Bell, 2015) and semi-structured interviews provided participants with the opportunity to answer research questions in their own words and already provided an opportunity to elaborate on their experiences as well as the triangulation. (Seidman, 2013). Follow-up interviews also took place with some of the participants, via phone, to clarify initial findings and explore developing themes further.

By the end of the process, each participant was given a copy of the written interpretation of the interview to review and validate the information. The collected data remained in a safe and protected space, on a flash drive, and the researcher shredded and disposed the data five years after the completion of the study. The whole data collection procedure was expected to be completed in two months and the gathered information would be retained for five years to address potential future questions.

### D. Data Analysis

The interview questions were already analyzed based on the responses provided by the participants. The data analysis process can include data reduction, data display, conclusions, and verification (Yin, 2014). Triangulation is also implemented in data analysis for this multiple case study, according to Creswell (2017). In the same way, as a researcher, establishing that data analysis has been conducted in a precise, consistent, and exhaustive manner to establish credibility as suggested by (Nowell et al. 2017). For this reason, there are several steps were employed adopting Creswell's (2014) general procedures of data analysis in qualitative multiple case study. The involved transcribing interviews into a written document, typing up field notes, and sorting and arranging the data into different types, depending on the sources of information to organize and prepare the data for analysis. Creswell (2014) highlighted that this initial process would provide general sense of information and an opportunity to reflect on its overall meaning.

Coding of all the data. Rossman and Rallis (2012) as cited in Creswell (2014) defined coding as the process of organizing data by bracketing chunks, text, or image segments and writing a word representing category in margins. Geiman (2016) emphasized coding the data happened by pattern coding as Gibson et. al (2013) recommended coding the interviews will help provide a true perspective of the analysis and preserve data integrity. Under the coding process, it was used to create description of the setting or people as well as categories or themes for analysis. According to Creswell (2014) description is a detailed rendering of information within the context of the setting of the people, place, or event and it plays a central role in case studies.

The involvement thematic analysis. Braun and Clarke (2006) as cited in Nowell et al. (2017) defined thematic analysis as a method for identifying, analyzing, organizing, describing and reporting themes found within a data set. Using thematic analysis, I used to reorganize and reanalyzed the data. As described by De Castle et al. (2012), a diligent and repetitive process of reviewing data from each interview will enable categorization into units, grouping into subcategories, and summarization of common headings into final categories. For case studies, as discussed by Creswell (2013). the categorical aggregation will be used to establish themes or patterns.



The researcher utilized the Nvivo software to aid the data analysis in organizing, analyzing information, and developing scalable research to identify emerging patterns and themes as suggested by Geiman (2016). The fourth step involved how the description and themes were represented in the qualitative narrative. As stated by Creswell (2014), the most popular approach is to use a narrative passage that might be a discussion of the chronology of events, detailed explanation of several themes however in case studies, I used to present an in-depth picture of the cases using narrative tables and figures. In addition, cross-case analysis was utilized as suggested by Yin (2014) to look for the similarities and differences among the cases.

#### *E. Trustworthiness of the Study*

- Lincoln and Guba (1985) as cited by Nowell, et al, (2017) stated that trustworthiness is one-way researchers can persuade themselves and readers that their research findings are worthy of attention and refined the concept of trustworthiness by introducing the criteria of credibility, transferability, dependability, and confirmability to parallel the conventional quantitative assessment criteria of validity and reliability.
- Credibility.** Knowledgeable members of the business, especially family members, are tied to one another in emotionally laden ways, are interdependent on multiple dimensions. Family businesses often have intergenerational histories and experiences. By definition, the ownership of the business is highly correlated with family status and thereby is also correlated with family identities, that are also likely to be strongly tied management positions (Guba and Lincoln 1989) and (Nowell, et al, 2017) claimed that the credibility of a study is determined when researchers or readers are confronted with the experience, they can recognize it. Credibility addresses by (Tobin & Begley, 2004). the “fit” between respondents’ views and the researcher’s representation of them.

I address the credibility of this study and used it to adopt a well-established research method and credible source of the data to enhance the validity of the study design, like triangulation using multiple sources of data and collection strategies, all of which converged. Member checking also known as participant validation, is a technique for exploring the credibility of results and is often mentioned as one of the validation techniques employed, that is, data or results are returned to participants to check for accuracy and resonance with their experiences. The researcher already ensured the honesty of the participants by giving them a chance to refuse to participate in the study. Through the use of these appropriate methods, the reliability of the results was expected.

- Confirmability** is concerned with establishing that the researcher’s interpretations and findings are derived from the data, requiring the researcher to demonstrate how conclusions and interpretations have been reached (Tobin & Begley, 2004). Polit and Beck (2012) highlighted that confirmability of findings means that the data accurately represent the information that the participants provided and the interpretations of those data are not invented by the inquirer.

To safeguard the accuracy of the transcription and initial interpretation of the data, IDIs were recorded and subjected to the participant’s review through member checking. The process included in Creswell’s (2017) steps and procedures in analyzing qualitative data is known as the last stage in validating the accuracy of information. Through this method, the researcher will assure confirmability of the findings of the study (Creswell, 2017).

- Transferability** refers to the generalizability of inquiry. In qualitative research, this concerns only case-to-case transfer (Tobin & Begley, 2004), and to Creswell (2013) it is concerned with the extent to which the findings of the study can be applied to other situations. According to Bitsch (2005), the researcher facilitates the transferability judgment by a potential user through thin and thick descriptions by providing the background information necessary for understanding the relevance, meanings, and intentions that underpin behavior (Drew, 2020). The researcher provided a detailed description of the inquiry that will facilitate the transferability of the investigations.
- Dependability.** Dependability refers to the stability of data over time and under different conditions. Therefore, it is important to state the principles and criteria used to select participants and detail the participants’ main characteristics (Moretti et al., 2011). In addition, Tobin and Begley (2004) emphasized that dependability involves participants evaluating the results and the interpretation and recommendations of the study to make sure that they are all supported by the data received from the informants of the study, and to achieve dependability, I am ensuring that the research process is logical, traceable, and documented. To address the dependability issue more directly, as a researcher I made sure that the process within the study was discussed in detail, as Creswell (2017) stressed that the researcher described the operational detail of data collection, addressed the details of what has been done in the field; and provided a reflective appraisal of the project, evaluated the effectiveness of the process of the inquiry that was undertaken to pave the way for future researchers to conduct similar investigations.

#### *F. Role of the Researcher*

The researcher explores and conduct substantial data for the study on the succession planning of family-owned business owner-managers in Davao de Oro. With this, the researcher also took the responsibility and chose the appropriate methodology, formulating semi-structured interview guide questions and remained unbiased in identifying the participants, conducting face-to-face interviews, establishing data collection procedures, gathering and analyzing data using field notes and recordings for this multiple case study.

Hence, it is the role of the researcher to enhance their interpersonal skills to communicate productively to achieve the goal of capturing quality data as cited obtaining detailed responses from the participants about their experiences that helps reduce research bias. Further, the researcher adhered to the research basic processes and ethical standards set by the University of Immaculate Conception Research Committee. According to Seidman (2013), researchers must thoroughly develop interviewing skills to employ techniques effectively during the study.

#### G. Ethical Consideration

This research protocol was submitted to the UIC-Research Ethics Committee (REC) for full-board review. The researcher observed 10 dimensions of research ethics such as social value, informed consent, vulnerability issues, risk-benefit ratio, privacy and confidentiality of information, justice, transparency, qualification of the researcher, adequacy of facilities, and community involvement.

- **Social Value.** The result of this study will assist the Family-owned business Merchandize to realize the significance of quality of work-life in the respective job. In our current situation, most individuals are working from home. The results of this research will assist the manager/owner of family-owned business merchandise in understanding what they need to do to have an ex-work life even if they are working at their establishment. First and foremost, distribution goals and objectives must be identified and clearly articulated. Appropriate communication channels for target audiences must also be established. Participants in the study, other researchers, media sources, common group members, and the government are all possible audiences to consider. Each audience requires customized messages and educational items. For the information to reach different categories of individuals through different types of venues, several types of dissemination channels must be employed. It's also critical to make use of what's already available in a certain region or group.
- **Informed Consent.** The researcher already acquired both the written and verbal consent in this study from the participants by letting them sign the consent form before the administration of the survey questionnaire and the conduct of the IDI. The researcher prepared two sets of informed consent, one for the survey questionnaire and one for the interview guide questions. This informed the participants about the nature and purpose of the study. The inclusions in the informed consent were the following: first, the participant's involvement in the study which was voluntary, and the participant may withdraw from the study and the participant has the right to decline to answer any of the questions or to end the interview. Second, there were audio recorders during the interview, and dialogue was made upon the approval of the participants. Third, the participant was identified by name in any report using the information obtained from the interview, and the confidentiality of the participant in this study will remain secured and protected. Subsequent uses of records and data was subjected to standard data use policies, which was protected by the anonymity of individuals and institutions. Fourth, administrators and faculty from the Graduate School were present at the interview nor have the raw notes or transcripts. This precautionary measure was done to prevent the participant's comments from having any negative repercussions. Fifth, the participants read and understood the explanation that was provided and have all or their questions be answered based on personal satisfaction. The informed consent procedure's main purpose is to keep people safe. A consent form is a legal instrument that ensures that you and the participants are in regular communication with reserved data rights and confidentiality.
- **Vulnerability of Research Participants.** In this study, permission from appropriate individuals was sought to ensure the objective conduct of this study and that it followed prescribed parameters. In addition, the researcher considered the vulnerability of the participants and were given the capacity to decide for themselves whether they became involved or not in this study. The participants were no longer vulnerable because they were above eighteen years old and they were also managers/owners. In addition, they were given the freedom to withdraw from being part of the study if they prefer to. Further, the researcher assured that the identities of the participants were kept confidential and guaranteed that they were protected from the possibility of being identified.
- **Risks, Benefits, and Safety.** The researcher has not identified any risk associated with the involvement of the participants in this research except for the risk of Covid 19 infection. The researcher ensured to follow standard health protocols under the IATF RESOLUTION NO. 106-A Series of 2021 March 27, 2021, the National Task Force (NTF) Against COVID-19, relevant national government agencies, and local government units are to implement the following measures: On Prevention - strictly comply and monitor adherence to public health standards and safety protocols: a. Enable adherence to minimum public health standards even at home; b. Distribute and promote the use of personal protective equipment such as face masks and face shields and; c. Retrofit workplaces, establishments, and public places to ensure adequate ventilation, and compliance with engineering and administrative controls developed by the government.

The reputational risk of the participants and the business establishments were among the risks controlled in this study. It was included the information breach risk in the debate of the firm's strategic management decisions, as well as a guarantee to all participants of this study on high secrecy that no information leak will occur during or after the study time. The researcher conducted the interviews at the participant's most convenient time to prevent discomfort. To prevent delays throughout the conduct, the researcher ensured that he is technologically, emotionally, and physically prepared at all times. The researcher conducted the interviews following the protocols to avoid the possibility of participants contracting the COVID-19 virus, which might be harmful to their health. The researcher conducted in-depth interviews through face to face.

Although they recognize the possible inconvenience that the participants might feel in accomplishing the survey tool considering that they are very busy in the fulfillment of their obligations amidst the "new normal." Hence, each of them was requested to accomplish the survey tool during one's free time.

- **Privacy and Confidentiality.** The participant's privacy and confidentiality were ensured. To ensure the protection of the research participants, coding was used. The manner of the storage of data was done electronically thru emailing so as not to lose the data can be retrieved anytime needed. The researcher safeguarded and stored all answered questionnaires in a steel file cabinet or wooden filing cabinet with a padlock. The data notebook, audiotapes tapes, or field notes were kept in a secured place to avoid fabrication. The researcher made sure that formal permission from the respective study sites was secured and an adequate level of confidentiality of the research data was applied and done. Lastly, the researcher made sure that Republic Act 10173 or The Data Privacy Act of 2012 (Official Gazette, 2018) was strictly followed by informing the participants about the policy of the state to protect the fundamental human right of privacy, and communication while ensuring free flow of information to promote innovation and growth. The state recognizes the vital role of information and communications technology in nation-building and its inherent obligation to ensure that the personal information and communication systems in the government and the private sector was secured and protected.
- **Justice.** The researcher warrants the appropriateness of the study participants. They were also asked to be honest and sincere in the accomplishment of the survey tool and in sharing their experiences that may cause stress and anxiety. The researcher was inclusive in the participant selection, taking into account the scope and aims of the research. Unless there is a compelling cause for the exclusion, researchers shall not exclude participants from participation in research based on traits such as culture, language, religion, race, disability, sexual orientation, ethnicity, linguistic proficiency, gender, or age. During the study, the researcher made sure that the participants didn't have to pay anything for the interview, and that their comfort was my top focus. They were also given tokens of gratitude for their efforts, and their contributions would leave a legacy since it is through them that people, particularly teachers, benefit from the study, and it would release the participants from the shadow of their terrible history in some way. Bloom and Crabtree (2006) argue that research should enhance the participants' freedom more than the author's career.
- **Transparency.** The collaborators discussed the technical merit of the research through a virtual meeting on October 30, 2021. The researcher also addressed the suggestions of the technical panel and the REC for the enhancement of this research undertaking. They guaranteed that the participants were informed about the study's findings through a research forum and the publication of the research article. While collecting, analyzing, and reporting data, confidentiality, and anonymity are ethical procedures aimed to preserve the privacy of research participants. The term "confidentiality" refers to the separation or modification of any personally identifiable information submitted by participants from the data. Anonymity, on the other hand, refers to data collection without getting any personally identifiable information. In most cases, anonymity is used in quantitative research, whereas confidentiality is used in qualitative investigations. The researcher collected information from participants in both circumstances, and this information became the data to be evaluated.
- **Qualification of the Researcher.** The study itself was in line to the field of practice of the researcher teaching Entrepreneurship and other business-related courses in Davao De Oro state College and that made him qualified to undertake the study. The researcher also extended effort to read various articles, studies, and journals related to the topic and methodologies in research to get additional insights and information to the topic of the study. Having business background and being in the academe, the researcher had gained experience that helped him in exploring the study.
- **Adequacy of Facilities.** The university has the resources, such as books, research journals in print and online sources, computer and printing equipment, recording equipment, and other facilities, that are required for the implementation and completion of this research endeavor. The resources include books, research journals in print and online sources, computer and printing equipment, recording equipment, and other facilities. Furthermore, the proponents will call on the expertise of accessible research specialists when the situation calls for it. All of the running expenditures for this research endeavor were covered by the researcher's funds.
- **Community Involvement.** It is the involvement of certain Human Resource Professionals from the Virtual Industry that has led to the creation of this study's research topics. This was done to determine whether or not the research questionnaire is appropriate for the industry in which the study will be carried out. The researcher's goal was to provide insight into family-owned merchandise business long-term planning, which was particularly beneficial in designing interventions to help management improve their planning approach. Management and other authorities were able to create a framework and strategy for increasing the quality of managers. The conclusions of this study allowed family-owned business owners to develop training and improve their quality of life at work. As a result, the communities are important in this study since they are the fundamental reason why individuals working in family enterprises need to have a great quality of life. Finally, the researcher verified that the study was conducted with ethical principle.



## CHAPTER THREE (RESULT)

### A. Case A—A Physically Incapacitated Manager

A physically incapacitated manager (pseudonym) is 65 years old graduate with an engineering degree in the private school and previously a draftsman to owner/manager of the business. He is the second from the 9th siblings raised by a self-employed businessman father and mother from Nabunturan who later married and resided in Poblacion Nabunturan Davao De Oro. He then started the business thirty years ago with three children who are also hands-on with their family-owned business.

He was given this pseudonym since he is a disabled person suffering from illnesses such as high blood pressure, which has resulted in stroke paralyzing his right hand and leg, and he has been managing the family-owned business with the support of his wife and children from 1999 to the present.

#### ➤ *Experiences of Merchandise Business Owners as to Succession Planning*

The informant shared attentively expressed his idea in terms of Business longevity stating that:

All can say that implementing the business succession planning is the preparation of the successor for the next management where the Businessmen implement the business succession planning for long-term visions. [...] Finding helpful resources in succession planning is that he continues to pray that his children will easily adapt his style to his guidance, and control all the means for long-term operation while keeping expenses low and high income. P1\_CQ1

Moreover, the admiring strategy of this manager is that he is pro-active in training his successor as he progressively narrated:

I wanted to level up in different businesses as a source of additional income by changing the management system to allow his children to manage [...] as he stated that he is a visionary person looking at the next plan for his family's future. P01\_CQ1.3

Further, he was also inspired to start a business because he wanted his children to have formal learning and preparation, as he explained:

My parents urge me to go to school in order to be effective and because of my ambition to be successful, I work hard to graduate as becoming professional is also a benefit with God's help.[...] In order to become more effective, I use to take my children to school and complete various courses in order for them to develop the skills and confidence to face any challenges that may arise while setting up a business for P01\_CQ1.2,CQ1.5

This type of leader is a visionary who is looking ahead to the next plan for his family's future while encouraging his successor to succeed him and he reasonably explained:

I convenient allow them directly manage democratically delegating the task and coaching them. The process of being a coach and mentor to my children is not easy, but that perseverance is one of my positive attributes. P01\_CQ1.6

He further said that while writing work representations, he stated:

I identify critical jobs that require succession strategy in such formulating job that adding income to the family such as changing management system to allow his children to operate in building up income. P01\_CQ1.8

#### ➤ *Coping Strategies on Succession Planning Challenges*

Also, when I ask him setting his children to literacy by doing, as we continued the dialogue, he perceptively stated that:

I educate my children but it takes time since some of them are difficult to convince because of distinct focuses and interests, and they all face the same challenges [...] So I mentor them, enabling them to take charge of the situation. hands-on with the operation, providing them with incentives in order for them to collaborate. P01\_CQ2

Moreover, as he gives emphasis to the carefulness of the learning process, he contentedly explaining that:

Using my children as my successor I most likely to provide details on business from investments and the importance of obligation towards your objectives and I think the vital strategy is the involvement of the family successor in order for them to see through the operation P01\_CQ2.2

Additionally, when questioned about his emergency supervision Strategy, he assertively stated that:

When I talk about uncertainties and the necessity for quick direction-finding, learning, and experimenting, I believe that future businesses' reactions cannot be delayed if they are used efficiently and starting planning for advanced study. [...] Since it has a fundamental role in the family business planning it is important that he or she understands the values and attitudes that the family has. P01\_CQ2.6

In some other views, conversation with his family revealed how he dealt with the difficulties he had while working as a physically incapacitated manager in the triangulation. The following were some of their comments:

In terms of business, he is focused and responsible, and he works hard to achieve his objectives. Regardless of his condition, he never stops fighting for his family's survival. TP01\_CQ1.2

He used to actualize any of his assets to generate money for his siblings, as he continues to train and focus the family business for the long run. TP01\_CQ1.9

#### *B. Case B— Female Manager*

Female Manager (pseudonym) is the eldest among the three siblings and was taught how to operate a business by her mother when she was 10 years old and was driven from the start. A businesswoman from New Sibunga, Nabuturan, Davao De Oro, where she obtained her bachelor's degree in Computer Science in a private School of Tagum, a woman with a strong personality and is self-assured.

The female manager is capitalist from the family of businessmen who overcame adversity to progress. When she was left alone to manage the business after her father married for the second time, her father told her to take over the business with the help and assistance of her brother and sister where their business started in 1983.

#### ➤ *Experiences of Merchandise Business Owners as to Succession Planning:*

The informant had some strategy on longevity of business as she definitely detailed that:

As for myself implementing succession planning for the future of my family continuing their livelihood by getting potential family members as the prospect. [...] Perseverance is one of the keys to supporting the longevity of the family business P02\_CQ1

Also, one thing that really attracts is her idea of Formal learning and preparation when she truly responded;

At least a bachelor's and it is advantageous for the organization to be competent enough to manage in business. [...] it is advantageous for the organization to be competent enough to manage in business. to strengthen the family-owned business during the unexpected events. P02\_CQ1.S2

Accordingly, there are several encouraging managements combined as she naturally answered that:

As for me, I partly motivate my siblings and family to take charge of the position. Family considers that the business is for their benefit they divided their authority to hold of some other position [...] become significant for them to organize taking all the responsibilities and prepare the people belongs to their family for succession. P02\_CQ1.6

In addition, she provided the subsequent response when she talked about preparing for Presentation assessment when she gradually indicated that:

The successor must be identified by [...] determining whether the candidate is interested in future position through training and monitoring of output. P02\_CQ1.8

#### ➤ *Coping Strategies in Succession Planning Challenges*

Relatively, she connoted that her family finds strategy on literacy by doing and she positively said:

I usually desire more guidance, not less, in uncertain times for a successful transfer as clear, well-defined succession plan is required become significant for them to organize taking all the responsibilities and prepare the people who belongs to the family for succession and consistency of the operation as part learning process. P02\_CQ2

Aside from the carefulness of the learning process that come across, she has taken essential process effectively as she pointed out that:

Family disruption such as rivalry and favoritism seriously happening but she manages to control her emotions because she still considers her family regardless of material and established family values keeping the goal of business succession she's sharing the purpose and objectives P02\_CQ2.S1

However, to emergency supervision Strategy, it is important that methods and system must be specified as she utterly answered that;

I think; the business also needs techniques [...] Since analysis cannot predict which event will occur, it can assist in establishing possibilities. Most importantly, if the outcome was foreseeable, some mechanisms of the approach would transform the family business. P02\_CQ2.S6

Additionally, the family and sibling certainly expressed how she deals with the challenges she faces as a female manager, with some of them precisely stated that;

She is undoubtedly a powerful and dignified woman in action, urging her siblings to do their part in achieving the family business's goal. TP02\_CQ1.6

She reconsiders all families participating in the family business to participate and become contributors to success because of her desire to enhance the business regardless of previous family problems. TP02\_CQ2.1

### C. Case C—Middle Adult Manager

**Middle adult manager** ( pseudonym) is 54 years of age, married and 3<sup>rd</sup> among the siblings and manage to operate the merchandise business for ten years until now, and she comes from a large family of businessmen in Davao De Oro, with a self-employed father. She completed a Bachelor of Science in Accountancy in a private school in the City of Tagum, and she was introduced to me by another capitalist here in Mawab.

She was cautious to talk about how her family made their family-owned business at first, but as the conversation moved to a quiet spot where she felt at ease, she began to share her stories of how she handled the long journey of trials and success of their family-owned business.

#### ➤ *Experiences of Merchandise Business Owners as to Succession Planning*

The informant specified in terms of business longevity passed on the family business to the children and grandchildren as she absolutely explained that;

As for me, I think that the implementation of succession planning is for my children and grandchildren to live the legacy of the family-owned business P03\_CQ

On the same annotation, given attention to her response of having a family business related to the interest of pro-active preparation, she systematically indicated that;

She trained her family members, particularly her two children to be hands-on with their business, which she referred to as "extra time" reinforcing or assisting the business and giving them incentives as part of the succession planning [...] encouraging younger individuals to participate is vital role to the organization's long-term viability, looking at where your organization is today, where it needs to go as to the plan P03\_CQ1.3

On the other hand, it is essential for Formal learning and preparation in family owned business to consider, as she precisely specified that:

While being a graduate of any business course is not essential to be deemed competent to start a business, having a background, [...] is a plus factor, especially if you are a graduate of business-related degree. P03\_CQ1.2

Meanwhile, considering that driving strength leadership is another focus for having a good structure in place, she actively replied that;

I should pass on the responsibilities to the next generation by educating and coaching them on the actual business would be beneficial to the next group to be involved in developing leadership skills and handling workers in critical positions, P03\_CQ1.5

Moreover, looking at the individual vantage point as she identified specific successors for job representation origination with different experiences, she devotedly described:

I'm creating each prospective successor through a development plan like continuous education P03\_CQ\_1.7. In addition, by identifying the position description of the successor P03\_CQ1.8

Further, with regards to presentation assessment in selecting the best successor for the position, she considerably expressed that:

Create a succession plan for each prospective successor through a development plan like continuous education. I assign some family members to the store stock inventories and warehouse rather than hiring other personnel in order to save money on salaries and other expenses as they continue with the process and shift with the strategies to maintain management development even in serious situations P03\_CQ1.9

#### ➤ *Coping Strategies in Succession Planning Challenges*

The participant confessed that her family used a literacy by-doing technique for successor as she favorably stated:

I think, family members must participate particularly in the business decision making and that the family has the control over the strategic part of the operation P03\_CQ2

Aside from the clear assortment procedure, the middle adult manager has efficiently handled the process, as she pointed out:

Keeping an eye on your team to see who becomes more active and takes on the mission to satisfy their obligations. P03\_CQ2: In some cases, is that the family business can be more open-minded regarding the crucial issue P03\_CQ2.4

Though, it is critical to specify procedures and systems when it comes to Crucial Managing Strategy. As she seriously indicated that;

Family companies, in my opinion, may help to reverse this trend by ensuring that they are well-planned, especially for the most vulnerable scenarios. Family-owned enterprises might be more adaptable in their company plans and operations. P03\_CQ2.6

On the other side, researcher questioned some of her siblings as a kind of triangulation, wondering how she was doing with his role as Middle Adult manager. The following were some of their comments and consistently stated that;

I can tell that she is extremely obliging with her plan, and that when it comes to succession planning, she views her family as a probable successor. (TPO3\_CQ1).

She is now able to accomplish her work because she is focusing on educating her children about the value of the family business. TPO3\_CQ2

#### *D. Case D— Late Adult Manager*

Late adult manager ( pseudonym ) was the 4<sup>th</sup> among the five siblings, a visionary woman eager and objective capitalist, and a businesswoman from barangay Andili Mawab Davao De Oro and has thirty years of experience to operate the business trained by their father who is half Chinese and who originally control their family business from Davao City and Davao De Oro province. She obtained her bachelor's degree in Business Management in a private school in Davao City.

Late adult manager is an entrepreneur from a family of Filipino-Chinese businessmen who has different rivalry to progress. The family business started in the 1970s to present.

#### ➤ *Experiences of Merchandise Business Owners as to Succession Planning*

The Late Adult Manager stated his thoughts on trading stability, gratefully commenting;

She is motivated to start a family-owned business for two reasons: first, she wants to provide for her family's fundamental necessities, and second, she wants to establish the business for the future of his children and grandchildren seeing herself as the main contributor to the legacy and family's success. P04\_CQ1.1

With regards to her comment about having family business and her desire for practical exercise, she tearfully stated:

"I urge my children to be hands-on in business, preparing them for the succession plan." she added P04\_CQ1.4

From a similar standpoint, when Prescribed instruction and coaching issues, she absolutely clarified that;

Since our parents provide us with the appropriate training and education [...] We are also encouraging our children to be educated and train also for the transition because there are so many adversities and trials we face in planning for so many unpredicted events. P04\_CQ1.3

Undoubtedly, she revealed that describing encouragement supervision within the organization for family members to develop solid goals as she confidently identified that;

I even put them in charge of vital issues such as planning, directing, managing, purchasing, and inventory to ensure that they are reassembled in terms of dealing with family businesses. It's difficult to find a suitable candidate to be our successor, so I provide them with my advice based on my business experience and the assistance they'll need to reach our family business goals P04\_CQ1.5 and Continuous directing, leading, and coaching she stated P04\_CQ1.7

Additionally, she was concerned by the task of creating presentation evaluation as she narrated that;

Family members included in the succession plan's abilities are being developed, and their development is being evaluated. P04\_CQ1.8

#### ➤ *Coping Strategies in Succession Planning Challenges*

On the other hand, she noted that her family adopted Experiential learning method which she valued;

They will not be ready for jobs when they become vacant due to development actions for successor candidates, and the business will most likely train aspirants and implement the strategy. P04\_CQ2.1

Further, apart from the transparent selection process, the manager has managed the process effectively, as she gratefully specified:

In the condition when family members regularly occupy important roles in the family business, I should challenge that family members experience is the right step of family management to the business to meet the goals of succession planning. P04\_CQ2.3

Furthermore, with regards to the difficulty that family businesses have in terms of Disaster recovery plan, she stated definitely;

For me, unforeseen crises are complicating the problem, stability is a key, businesses have long had various responses like plans in place for business continuity, crisis recovery, and crisis management are all preparations helpful for variety of economic disruptions. P04\_CQ2.6

As a type of inversion, the researcher questioned some of her family and siblings to see how she was doing in her job as late adult manager. Some of their comments were as follows:

Despite the fact that she is old for the family business, she is completely driven to contribute to the success of her family business with the support of her family, witnessing her family members play key roles in the family business. TP04\_CQ 1.3

She invites younger people to join the group in the hopes of survival. Succession planning is evaluating where your company has been, where it needs to go based on the strategy, and what you're doing to get there of which she aims to continue the development TP04\_CQ 1.4

*E. Case E—On The Process Of Turn Over The Manager*

On the process of turn over manager (pseudonym) is a 35 years old 2nd to the eldest sibling who came from a huge family of merchants in Davao De Oro who is well-known Filipino Chinese family. She handled the operation of her Grandparents' family-owned business firm from 1950 to present. She graduated from a private institution in Tagum with the degree of Bachelor of Science in Accounting Management.

Because her father died of natural causes last year, and her father was the appointed manager in their family-owned business and was the second to the ninth sibling of the family, the process of turnover manager was immediately appointed because she was also trained by her father and family members during the transition period, even though she was guided by her family, she strongly accepted the position to continue her father's inheritance helping the family business.

➤ *Experiences of Merchandise Business Owners as to Succession Planning*

On the process of turn over manager expressed her opinions on trade stability, stating that her father's inheritance was beneficial to the family business by sensitively stating that;

I should say, business succession planning is gathering potential leaders among your family members for continuous transition 05\_CQ1

Aside from that, she expressed the following in response to her statement about having a family business and her desire for direct preparation. As she absolutely specified;

The importance of family business succession plan passing through the family successor using training, anticipating unexpected family loss. P05\_CQ1.1

Clearly, when she is referring to Prescribed Learning and Coaching inside the business to help family members to set and achieve good goals. She stated distinctly that;

I used to educate their children and encourage them [...] This will serve as a result of preserving and preparing for the future obligations and tasks. Family members, especially children, should be included in important events so that they are aware of how and what is going on, as well as the state of the business, and train them to be helpful in business, P05\_CQ1.3

Further, this woman is conversing openly with her successors. She made a point about inspiring headship as she completely indicated that;

I am motivated to pursue the business transition because [...] family-owned business who truly gives life to our future of which I owes it to my parents, and I accept the challenges to become the next coach to help siblings to continue the business P05\_CQ1.4

Furthermore, as she expressly said, Job Depiction Preparation is well discussed as she purposely indicated;

By preparing for future obligations and tasks family members, especially children, should be included in important events so that they are aware of how and what is going on as well as the business operation. P05\_CQ1.5

However, she kindly revealed her production assessment technique as she considerably stated;

The assessment of the present incumbent of this post is quite important to review for improvement. P05\_CQ1.8

➤ *Coping Strategies in Succession Planning Challenges*

The informant presented how to acquire Complete knowledge, understanding, or skill in technique, which she asserted emphatically;

Through development actions for successor candidates, they will not be ready for positions when they become vacant, and the organization will likely then train candidates and implement the planning. P05\_CQ2.1

Moreover, she willingly disclosed her translucent preference process technique, as she definitely talks about:

Given my basic idea behind succession planning is to discover the appropriate individuals from the family for the right jobs. It plays role in assuring our family business leaves longer beyond all challenges. P05\_CQ2

Besides, she also explained her exigency controlling strategy in detail. As she revealed that;

The unforeseen crises are complicating the problem, stability is a key, businesses have long had various responses like plans in place for business continuity, crisis recovery, and crisis management are all preparations helpful for variety of economic disruptions. P05\_CQ2.6

As a sort of transference, the researcher looked into some of her family and siblings to see how she was doing as on the process of turn over the manager role. Here are few of their observations:

We are more specific about enabling her siblings to be more hands-on in the family company, allowing us to inspect our products and supplies in order to preserve the clients' services. TP05\_CQ1.3

She devotes particular attention to include family members in crucial moments and allows them to solve difficulties via training and growth. TP05\_CQ1.7



## CHAPTER EIGHT CROSS-CASE ANALYSIS

The experiences of merchandise business owners as to succession planning is highlighted in this study. Chapters 4 to 8 contains with-in-case analysis of each of the five participants who qualified as the informants in accordance with the inclusion criteria set in this study. Their profile is reflected in Table 1.

Table 1: Profile of the Participants in In-Depth Interview

	<b>Physically incapacitated Manager</b>	<b>Female Manager</b>	<b>Middle Adult Manager</b>	<b>Late adult Manager</b>	<b>On the process of turnover manager</b>
Age	63	38	54	65	35
birthplace	Pampanga	Nabunturan Davao De Oro	Mawab Davao De Oro	Davao City	Mawab Davao De Oro
Family #	2 <sup>nd</sup> to the eldest	Eldest	3 <sup>rd</sup> from the Eldest		2 <sup>nd</sup> to the Eldest
Father and Mother's Work	Businessman retired	Businessman Retired	Businessman retired	Businessman retired	Businessman Retired
Age Started business	30 yrs old to present	18yrs old to present	30yrs old to present	25 yrs old to present	20 years old to present
No. of year Experiences in Business	33	20	24	40	15
Income	60,000/mos	50,000/mos	60,000/mos	50,000/mos	35,000/mos
School	Private	Private	Private		Private
Business Type	Merchandise Store and Pharmacy	Merchandise and Restaurant	Merchandise and wholesale store	Merchandise and wholesale	Merchandise and Wholesale

The Profile of the Family-owned business merchandise managers indicates that aside from the face-to-face interview with the participants, the researcher also asked the participants to fill up information regarding their family background and data concerning the subject of the study. It was found out that, all of them started the work in their family business and they got educated because of the said business also among the five participants they have different experiences and distinctive situations when it comes to experiences in business.

It was also opened that these five participants have high monthly income from business even though it was confidential, and they were hesitant to share. It was realized also on the table that all of them are professionals in related business courses who have a degree in Business Commerce except for the Physically incapacitated manager who had finished engineering and Female Manager is a Bachelor of Computer Science. They all finished in private institutions and most of their parents were businessmen. Aside from they are all married, on the process of turn over manager is working as a single mother with two children, and late adult manager is separated from her husband.

The data on succession planning of family-owned business merchandise in Davao De Oro are summarized into six essential themes in Table 2. This presentation of table forms is patterned after the study of Smith et al. (2009). The process of numeration was adopted in determining thematic themes. Among the essential themes were Business continuity, Hands-on Training, Formal Education and Coaching, Motivational Leadership, Job description, and Performance Evaluation.

### A. Experiences of Merchandise Business Owners as to Succession Planning

Participants of the in-depth interview revealed that Business Continuity particularly, for female manager expressively understood that:

As for myself implementing succession planning for the future of my family continuing their livelihood by getting potential family members as the prospect. [...] Perseverance is one of the keys to supporting the longevity of the family businessP02\_CQ1

On other hand, in terms of experiences of Merchandise Business Owners as to Hands-on Training he gladly remarked:

I wanted to level up in different businesses as a source of additional income by changing the management system to allow his children to manage [...]as he stated that he is a visionary person looking at the next plan for his family's future. P01\_CQ1.3



Specifically, according to the Middle Adult Manager, the Experiences of Merchandise Business Owners as to Succession Planning through Formal Education and Coaching she gratefully mentioned that:

Since our parents provide us with the appropriate training and education [...] We are also encouraging our children to be educated and train also for the transition because there are so many adversities and trials we face in planning for so many unpredicted events. P04\_CQ1.3

Relatively, for middle adult manager said that Motivational Leadership is another focus for having a good structure in place, she favorably detailed that;

I should pass on the responsibilities to the next generation by educating and coaching them on the actual business would be beneficial to the next group to be involved in developing leadership skills and handling workers in critical positions, P03\_CQ1.5

Table 2: Experiences of Merchandise Business Owners as to Succession Planning

Essential Theme	Core Ideas
Business continuity	Continuity of the livelihood of the family
	Kins carrying on their ancestors' business legacy
	Preparation towards a long-term vision
Hands-on training	Capacitating the family's business successor through hands-on training
	Allowing children to manage a business
	Immersion of children in all aspects of business
Formal Education and Coaching	Sending them to school for formal education
	Honing through real involvement in all business aspects
	Involvement of children in significant business events
Motivational leadership	Delegating tasks
	Motivating kins/siblings to perform certain functions
	Motivating children to participate in significant events
Job description Formulation	Identifying jobs that require succession
	Preparation of job description of the successor
Performance Evaluation	Selecting the successor through evaluation
	Capability building and evaluating the progress for improvement

However, middle adult manager identifies the position for the Job description of the successor as she toughly indicated:

I'm creating each prospective successor through a development plan like continuous education PO3\_CQ\_1.7 By identifying the position description of the successor P03\_CQ1.8

In terms of Performance Evaluation, the female manager definitely determines whether the candidate is interested in future position through training and monitoring of productivity as she logically mentioned:

The successor must be identified by [...] determining whether the candidate is interested in future position through training and monitoring of output. P02\_CQ1.8

### B. Coping Strategies in Succession Planning Challenges

On the coping strategies of Family-owned managers, for every challenges that they encountered as shown in the column of Table 3, three themes were presented: Learning by doing, Transparent Selection Process, and Crisis Management Strategy. Family-owned business managers. Life was not always pleasant for the participants, some are challenging encounters; they had also experienced the opposite in terms of family and family and businesses, and they all had distinct experiences. There are wide range of responses among the five participants on coping strategies in succession planning which converted into core ideas on coping on column 2 of Table 3. These core ideas resulted to three themes as earlier mentioned.

To become more effective in Learning by Doing, the physically incapacitated manager optimistically indicated that:

His modification that he wanted to level up in different businesses as a source of additional income by changing the management system to allow his children to manage Q1.3

However, determination is one of the secrets to the family business's existence, even though she was inundated with several difficulties in transparent selection process as middle adult manager toughly responded that:

Table 3: Coping Strategies in Succession Planning Challenges

Essential Theme	Core Ideas on Coping	Challenges
Learning by Doing	- Hands-on training - Providing details of all aspects of the business	Having different focus & interests of the children
	develop commitment to the business Involvement of the prospect to the decision-making process	Unprepared successor
Transparent Selection Process	- Calmness until the right successor is chosen - Having transparent selection criteria for a successor - Close monitoring of the progress of the prospective successors - discovering the appropriate individuals	Rivalry & favoritism issues; differences/conflicts between & among family members
Crisis Management Strategy	Flexibility of business strategies and operations	Business uncertainties—economic or health crises, fraudulent acts of a family member in the business;
	Solidarity of the family	
	Crisis management & recovery plan	
	Direction finding, learning & experimenting	

Keeping an eye on your team to see who becomes more active and takes on the mission to satisfy their obligations. P03\_CQ2: In some cases, is that the family business can be more open-minded regarding the crucial issue P03\_CQ2.4

Further, in preparation for future commitments and tasks particularly in crisis management strategy the physically incapacitated manager firmly answered that:

When I talk about uncertainties and the necessity for quick direction-finding, learning, and experimenting, I believe that future businesses' reactions cannot be delayed if they are used efficiently and starting planning for advanced study. [...] Since it has a fundamental role in the family business planning it is important that he or she understands the values and attitudes that the family has. P01\_CQ2.6

The data on the similarities and differences of Business Owners' Experiences and Coping Strategies for Succession Planning is summarized in Table 4, which can be found at the bottom of this page, based on six key themes that emerged from the respondents' Themes on Experiences and Coping Strategies. In addition, general notes are presented to highlight the comments supplied by the business owners/managers.

### C. Similarities and Differences between Cases

Emphasized in Table 4 are similarities and differences of the five cases in the context of the Experiences of Merchandise Business Owners as to Succession Planning.

**Experiences of merchandise business owners (MBO).** It could be seen in the table that all of the five cases believed that business continuity is a long-term vision of the business' sustainability through the sustainability through replacement of capable family members in management: Among the five cases Case A was stand out as regards to business continuity. Aside from the preparation of the successor. It could be knowledgeable from his narrative:

All can say that implementing the business succession planning is the preparation of the successor for the next management where the Businessmen implement the business succession planning for long-term visions. [...] Finding helpful resources in succession planning is that he continues to pray that his children will easily adapt his style to his guidance, and control all the means for long-term operation while keeping expenses low and high income . P1\_Q1

The five cases similarly revealed the Hands-on Training, all five MBOs unanimously recognize that hands-on training involvement in all aspects of the business is beneficial in preparing their successors, especially the case of C as she affirmed:

Table 4: Similarities and Differences of Experiences and Coping Strategies of Business Owners as to Succession Planning

Themes on Experiences and Coping Strategies	Case Unit		Remarks
	Similar	Different	
Experiences:			
Business continuity	A, B, C, D, E		All merchandise business owners (MBO) of the five cases believe that succession planning is a long-term vision of the business's sustainability through the replacement of capable family members in management.

Hands-on training	A, B, C, D,E		- The five MBOs unanimously recognize that hands-on training—involvement in all aspects of the business—is beneficial in preparing their successors.
Formal Education and Coaching	A, C, D, E		Four MBOs develop their successors (children) as part of their succession plan through formal education and mentoring in real-world business situations.
		B	Case B is in a different situation, where her main concern is sibling rivalry, so for her, persevering to unify the family is one of the strategies for long-term business sustainability.
Motivational Leadership	A,B,C,		MBOs in the three cases empower their successors by delegating certain functions and engaging them in significant organizational events
		D	Case D's management style is centered on advising and assisting his successors.
		E	Case E demonstrates leadership by example for his successors to follow.
Job description Formulation	A& C		A & C identify jobs for succession and develop job descriptions
	B,D,E		MBOs, in three cases, assess the successors' performance for potential improvement.
Coping Strategies:			
Learning-by-Doing	A, E		MBOs in two cases use the learning-by-doing approach to address their children's diverse interests and unpreparedness as successors.
Transparent Selection Process	A,B,C,E		Four MBOs developed a selection process known to the family to address the rivalry and favoritism issues and conflicts between and among family members.
		D	D deals with siblings' differences by finding ways to keep good relationships between and among potential successors.
Crisis Management Strategy	A,C, D, E		These four MBOs implement some crisis management steps in order to deal with business uncertainties caused by economic and health crises, as well as family member sabotage in the business.

She trained her family members, particularly her two children to be hands-on with their business, which she referred to as "extra time" reinforcing or assisting the business and giving them incentives as part of the succession planning [...] encouraging younger individuals to participate is vital role to the organization's long-term viability, looking at where your organization is today, where it needs to go as to the planP03\_-CQ1.3

Meanwhile, in terms of Formal Education and Coaching four MBOs develop their successors (children) as part of their succession plan through formal education and mentoring in real-world business situations. Among the four cases similarly mentioned Case D, a single mother professed that:

Since our parents provide us with the appropriate training and education [...] We are also encouraging our children to be educated and train also for the transition because there are so many adversities and trials we face in planning for so many unpredicted events. P04\_-CQ1.3

One of them on the other hand, which is Case B is in different situation, where her main concern is sibling rivalry, so for her, persevering to unify the family is one of the strategies for long-term business sustainability. As Case B affirmed of her testimonial that:

Family disruption such as rivalry and favoritism seriously happening but I manages to control emotions because as I still considers my family regardless of material and established family values keeping the goal of business succession just for sharing the purpose and objectives P02\_-Q2.1

Further, Motivational leadership, Merchandise Business Owner's in the three cases empower their successors by delegating certain functions and engaging them in significant organizational events. As Case A thoughtfully mentioned that:

It is convenient to allow them directly manage democratically delegating the task and coaching them. P01\_CQ1.6

Furthermore, aside from Case D's management style is centered on advising and assisting her successors. It could be definite from her narrative that:

I even put them in charge of vital issues such as planning, directing, managing, purchasing, and inventory to ensure that they are reassembled in terms of dealing with family businesses. It's difficult to find a suitable candidate to be our successor, so I provide them with my advice based on my business experience and the assistance they'll need to reach our family business goals P04\_CQ1.5

Continuous directing, leading, and coaching she stated P04\_CQ1.7

In a different way, Case E demonstrates leadership by example for his successors to follow. She revealed that:

Leading them by displaying that I am involved in the family business so that they will follow me, as well as being involved in the planning to demonstrate the importance of having a business successor. P05\_Q1.6

In addition, the job description formulation A & C, to some extent, identify occupations for succession and create job descriptions. MBOs evaluate the successors' performance in three ways. This was revealed as Case C asserted that:

I'm creating each prospective successor through a development plan like continuous education P03\_CQ\_1.7

Additionally, Performance Evaluation MBOs, in three cases, assess the successors' performance for potential improvement. They similarly mentioned particularly, Case E as she simply stated that:

The assessment of the present incumbent of this post is quite important to review for improvement. P05\_CQ1.8

#### *D. Experiences Coping Strategies of Business Owners as to Succession Planning*

Mainly, participants indicated the situations when it comes to coping strategies where MBOs in two cases use the learning-by-doing approach to address their children's diverse interests and unpreparedness as successors. From a similar standpoint, Merchandise business owner/manager Case B-Female manager enthusiastically stated that:

I educate my children but it takes time since some of them are difficult to convince because of distinct focuses and interests, and they all face the same challenges [...] So I mentor them, enabling them to take charge of the situation. hands-on with the operation, providing them with incentives in order for them to collaborate. P1\_CQ2

Typically, with regards to the Transparent Selection Process, four MBOs developed a selection process known to the family to address the rivalry and favoritism issues and conflicts between and among family members and participants asserted and honestly specified that:

I most likely to provide details on business from investments and the importance of obligation towards your objectives and I think the vital strategy is the involvement of the family successor in order for them to see through the operation P01\_CQ2.2

On the other hand, Case D on transparent selection process deals with siblings' differences by finding ways to keep good relationships between and among potential successors as she toughly indicated that:

In the condition when family members regularly occupy important roles in the family business, I should challenge that family members experience is the right step of family management to the business to meet the goals of succession planning. P05\_CQ2.3

Lastly, in Crisis Management Strategy four of these MBOs implement some crisis management steps in order to deal with business uncertainties caused by economic and health crises, as well as family members' anomalies in the business. But Case E also told me how she hurdles many obstacles in her operation through her leadership skills. That is what she emphasized:

The unforeseen crises are complicating the problem, stability is a key, businesses have long had various responses like plans in place for business continuity, crisis recovery, and crisis management are all preparations helpful for variety of economic disruptions. P05\_Q2.6

## CHAPTER NINE

### DISCUSSION

This chapter presents the discussion, conclusion, implication for practice, and implication for future research based on the themes established during the data analysis.

The purpose of this multiple case study was to understand the succession planning of family-owned business merchandise of Davao De Oro. This case study also pointed out succession planning, based on the foregoing results of the analysis. This also enumerates the aspirations of the business owners as they have gone the forward-looking approach through the number of in-depth interviews.

In business, family members are more likely to show devotion to one another and the business. They are also more dedicated to the business' success and are more enthusiastic about its mission. Families involved in business have the chance to leave legacy that provides sense of success and pride. Building on their predecessors' work is a powerful drive for future generations to become stewards of the family business and take it to new heights in the family's name. Family businesses with several generations have access to a labor pool of relatives who, as previously said, are more loyal and devoted to the company.

On the other hand, family members are also more adaptable when it comes to taking on new employment roles and stepping in for others. Short-term financial success is less important to family organizations, and they are willing to forego short-term benefits to attain longer-term goals. This helps establishments to connect their resource deployment with their strategic goals. Family-owned businesses have the chance to teach and pass on their business and personal beliefs to the next generation of family managers/owners by using a long-term investment strategy known as "long-term capital."

Family members take pleasure in sustaining these ideals, which they incorporate into their daily professional and personal lives. Workplace culture is frequently a mirror of family values. Family company entrepreneurs take delight in being able to offer job possibilities to their children and grandchildren. Family members that choose to pursue business careers outside or inside the family business might benefit from working in the family business. Family members are also given the option to become managers and owners of the company. Working with family members to achieve mutual business objectives may be a highly gratifying experience. Years of familial connection may foster a strong sense of belonging and interdependence.

Long-term family and business harmony can be achieved by effectively managing these familial ties. Both active and non-active family members can benefit financially from successful family companies. It is fairly unusual for family firms to provide their employees more benefits than they might get elsewhere. As a matter of fact, this is frequently seen as one of the benefits of being a family member. Family companies advocate handing the business down to the next generation of family members in addition to giving job opportunities. Therefore, being a part-owner of a family business, or any business for that matter, can be both stimulating and gratifying.

#### *A. Experiences of Merchandise Business Owners as to Succession Planning*

There were six essential themes that emerged from the analysis of data from the research question number. The primary essential theme on the experience of the merchandise business owners as to succession is the Business Continuity, wherein continuity of the livelihood of the family, Kins carrying their ancestors' business legacy, and preparation towards a long-term vision. These efforts will assist the family business in extending its existence by assisting each family member in carrying out the interests of the business' remaining heirs. These findings are in consonance with the statement of Cabrera-Suárez, et al. (2001), Morris, et al. (1996), and others since predecessors intend to prepare successors by passing on the knowledge and skills required to lead a business to success and ensure its longevity.

Secondly, the essential theme that emerged in this research question is that Hands-on training existed with capacitating the family's business successor through hands-on training, allowing children to manage a business, and Immersion of children in all aspects of the business were in fact family business successors present a high level of involvement and integration in the family business, supported by strong practices of family governance, knowledge of the business and the ability to adapt to markets. (Venter et al., 2005).Cabrera-Suárez (2005) also considered successors' willingness to take over the business, and the relationship with and contiguity to the business organizer (predecessor) as factors influencing the succession process and business success.

The third, essential theme is formal education and coaching were sending them to school from formal education, honing through real involvement in all business aspects and involvement of children in significant business events. This conforms with (Lansberg and Gersick, 2015) that education is an important prerequisite to successful sustainability and succession planning. It provides understanding, language, leadership, and confidence for planned organizational change. Sending them to school for formal education, Honing through real involvement in all business aspects and involvement of children in significant events. Further, these findings are in line with Le-Bretton Miller et al. (2004) and Prior (2012) that successor-related factors are successor motivation, nurturing and development, outside work experience, formal education and training programs.



Meanwhile, in Motivational leadership task delegation, encouraging the family to do particular functions, and even motivating youngsters to participate in key events is the fourth essential themes. This is in the corroboration statement of Groves (2007) where it represents an integration of leadership development and succession planning process with specific steps required by top management to follow. The first step involves the development of pervasive mentoring relationships between upper management and the personnel in the business. At this stage, the mentor-mentee network is established, with the mentor starting to identify high potentials at lower levels of engagement. The identified talents are subsequently exposed to aspects of career planning, in which the mentor helps to work on the strengths and necessary areas of improvement of the mentees. This is followed by leadership competency development program which prepares the potential leader with leadership-based skillset through developmental leadership activities, to familiarize the candidates with leadership tasks. Finally, the best candidate is selected by the top management team to be the next leader through and thorough deliberation process.

The fifth essential theme, on the other hand, is Job Description Formulation, which entails identifying positions that require succession and creating job descriptions for successors. This is in concurrence with the statement of (Zumilah 2008) that while family businesses' operational and functional procedures are often comparable to those of other organizations, they face challenges in terms of successor training, relationships between family members and partners, and succession experience. For example, in addition to profit and commercial sustainability, a family business needs compassion and affection for youngsters (particularly in succession planning) and high regard for senior family members, whose prominent presence might aid a family business' success.

Lastly, the sixth essential theme is Performance Evaluation, which involves selecting a successor based on evaluation and capability, as well as evaluating progress to improvement. In connection to the statement of Cabrera-Suárez (2005) that successors' willingness to take over the business and the relationship with and contiguity to the business organizer (predecessor) as factors influencing the succession process and business success.

#### *B. Coping Strategies in Succession Planning Challenges*

There were three essential themes that emerged from the analysis of data for research question number two. The first essential theme is Learning by Doing where hands-on training, providing details of all the aspects of business and having the different challenges and interests of the children are highlighted. Sharma (2004) emphasizes the strategic necessity of passing on implied knowledge to the next generation to retain and grow a family business once the next generation takes charge on the process. However, not just the transmission of implicit knowledge from one generation to the next but also the next generation must contribute fresh knowledge to the business's performance and competitiveness during and after the transition of leadership.

However, the transparent selection process is the second essential theme where calmness until the right successor is chosen, having transparent selection for the successor, close monitoring of the progress of the prospective individuals, rivalry and favoritism issues differences and conflicts among families came out. This study follows family system theory, which emphasizes the importance of sibling relationships in understanding family dynamics and the entire family system.

According to (Bruce and Picard 2006), the size of a family might affect the amount of conflicts, rivalries, and competitiveness among family members. This event may result in problems if the number of family members engaged exceeds the capacity of the business. If the firm has expanded with a small number of family members joining, a disagreement may arise. According to the findings of four case studies, three of the families' businesses grow at the same rate as the family members who wants to join the company. The findings show that professionalization may be a disadvantage to some organizations because they desire to remain structurally free in order to make decisions with more flexibility.

In conclusion, the essential theme that appeared in Crisis Management Strategy were flexibility of business strategies and operations, Solidarity of the family, Crisis management and recovery plan, Direction finding, learning & experimenting and Business uncertainties economic or health crises, dishonest acts of a family member in the business. The study of (Haag and Sund 2016) supports on crisis management which is more challenging for family business because having families who are not willing or able to discuss or even admit a crisis situation in public, which concerns the owning family.

Further, according to Gupta et al. (2010), the diversity of family business models suggests that we should look closely at the perspective in which family businesses dwell because of the intrinsic relationship between the owning family, its business, and the context because environmental hostility that causing crisis and uncertainty or external disruptions affect family firms both positively and negatively. (Smallbone & Welter, 2001) An uncertain environment is more common in developing and transitional economies where turbulent social, economic, and political environments influence the nature and place of business and entrepreneurship.

#### *C. Similarities and Differences between Cases*

**Experiences and Coping Strategies of Business Owners as to Succession Planning.** All Case A,B,C and D merchandise business owners (MBO) in the five examples feel that succession planning is a long-term vision for the organization's viability through the turnover of skilled family members in management. This was supported by (George 2013) which discusses that

succession planning provides the long-term continuity and sustainability of an organization. Effective succession planning can have a positive effect on business performance and practice as added by Al-Dajani, et.al (2014). These challenges, if not addressed, may hinder family harmony, business prosperity, and the longevity of the business.

Consequently, in Hands-on Training, the five MBOs were participant Case A,B,C and D unanimously recognize that hands-on training involvement in all aspects of the business is beneficial in preparing their successors. Family business successors demonstrate a high level of involvement and integration supported by strong practices of family governance, knowledge of the business, and the ability to adapt to markets were hands-on training, allowing children to manage a business, and immersing children in all aspects of the business. (Venter et al. 2005) and (Sharma 2004) emphasized on the strategic necessity of passing on implied knowledge to the next generation in order to retain and grow a family business.

Therefore, in Formal Education and Coaching, four MBOs A,C, D, and E use formal education and mentorship in real-world business circumstances to train their successors (children) as part of their succession strategy. Unlike Case B, on the other hand, is in a different circumstance, where her major concern is sibling rivalry, therefore continuing to reconcile the family is one of her long-term company sustainability strategies. This is in line with Lansberg and Gersick's (2015) assertion that education is a critical component of long-term sustainability and succession planning. For intentional organizational transformation, it gives understanding, language, leadership, and confidence. In addition, these findings are consistent with those of (Le-Bretton Miller et al. 2004) and (Prior 2012), who found that successor motivation, nurturing and growth, outside work experience, formal education, and training programs are all important determinants.

Meanwhile, Motivational leadership on the other part empowers their successors in all Case A, B, and C scenarios by delegating some duties and involving them in major organizational events. Contrasting to Case D's leadership style is around advising and aiding his successors. Same as Case E leads by example, setting a good example for his successors. (Roback, 2014) stated that motivating successors with equity can be a positive solution for organization stability and growth.

Consequently, Job Description Formulation as A & C, to some extent, identify occupations for succession and create job descriptions. MBOs evaluate the successors' performance in three ways. While the operational and functional processes of family businesses are typically identical to those of other organizations, as stated by (Zumilah, 2008) they confront challenges in terms of successor training, relationships between family members and partners, and succession experience.

Additionally, Performance Evaluation MBOs, in three cases, assess the successors' performance for potential improvement. In agreement with the assertion of Cabrera-Suárez (2005) performance evaluation entails selecting a successor based on assessment and capability, as well as assessing progress in order to improve. Moreover, participants indicated the situations when it comes to coping strategies where MBOs in A and E cases use the learning-by-doing approach to address their children's diverse interests and unpreparedness as successors.

Further, four MBOs were ABC and E develop the family-known selection procedure to manage competition and favoritism concerns as well as disputes between and among family members, despite the fact that opposing scenario of Case D, sibling differences by identifying methods to retain good ties between and among possible successors. In a family-held business (Poza, 2010) indicated good transitions cannot take place when there is secrecy, lack of transparency, lack of ability to manage emotions, and lack of commitment by all family members.

Furthermore, Crisis Management Strategy was used by these four MBOs to cope with company uncertainties induced by economic and health crises, as well as family members' anomalies in the business. In the retention stage, long-term survival of entities occurs, and the environment is stable. A relatively few selected variations gain stability and reach the retention stage. Uncertainty is reduced for these organizations and practices, and they become "taken-for-granted" and held in place by shared understandings and interdependencies (Carroll & Hannan, 2000). The risk of failure that was so high initially declines as organizations age. However, liabilities of aging eventually recur due to internal inefficiencies and inertia that arise, and the process of change begins anew.

#### *A. Implication for Educational Practice*

On Experiences of Merchandise Business Owners as to Succession Planning there were six essential themes to wit; Business Continuity, Hands-on Training, Formal Education and Coaching, Motivational leadership, Job description and Performance Evaluation. The result of Merchandise Business Owners' Succession Planning Experiences indicates continuity, kin carrying on their ancestors' business legacy, allowing children to manage, and even immersion of children in all aspects of business, sending them to school, honing through involvement in all business events, delegating the task, preparing job descriptions for successors, capability building, and evaluating progress improvement is raised awareness of the practices through literature review.

Accordingly, implementing succession planning in family-owned businesses has the potential to benefit societal change leaders. Contributing to public stability and continuing economic progress are two of the study's social implications. According to the findings of this study's data analysis may have effective programs in place to prepare future cream of crop to accept leadership responsibilities. Despite the fact that the family-owned business had interim succession plans in place, there were no official written plans in place at the time of the survey; nonetheless, preparations were in the process of being finalized.

The benefits of succession planning in family-owned businesses were the study's main contribution. The information provided by the participants might be utilized to validate family-owned company succession planning strategies. Because succession events might have an impact on a family's long-term survival, it's vital to assess potential successors' skill levels and competencies before assigning them to management positions. Managers should consider the findings of this study as they continue to monitor and characterize the scenario where successors are involved in family-owned businesses where succession planning seems to be considered. As stated by Dalpiaz, Tracey and Phillips (2014) that the most meaningful challenge this organization faced was how to manage successful transitions effectively and efficiently for one generation of leadership to the next.

#### *B. Recommendations for Future Research*

The findings of this study may be utilized to better future research. Future challenges would be examined that were not covered in this study. Additional similar inquiries and queries may be addressed in future research due to the consideration and solution to get more data for analysis. Something needs to be always done. Based on the outcomes of this study, future researchers may enhance the method and strategies for gathering, analyzing, and evaluating data. The next researcher may examine how succession planning in family-owned businesses uses various techniques and approaches to ensure that the business is passed down to successors through various forms of training and education, preparing them for the future of the business. Since this study is conducted in the Davao De Oro province, there are also inevitabilities to consider for various research possibilities in terms of the research participants' preferences.

#### *C. Concluding Remarks*

According to the study's findings, the researcher established several remarks;

Mainly, in the Succession Planning Experiences of Merchandise Business Owners, the majority of the participants preferred to implement succession planning in order for the business to maintain its longevity, which included educating and coaching all successors to be motivated to participate in various events for long-term succession.

Subsequently, Coping Strategies in Succession Planning Challenges are affected by combination of things. Thus, the researcher believe that family difficulties such as competition, disputes, uncertainty, and economic crises may be determined if the family is strong and attentive during the succession planning process.

To teachers, any successful individual must be able to offer not just information, but also leadership responsibilities, education, great communication, and willingness to teach new things. The opposing viewpoints will frequently face obstacles in the future, but if time and effort are invested by all parties engaged in the definite plan, successful transference in perspective may be achieved if the mind is open to new learning opportunities. If generations are able to collaborate and learn from one another, they will discover new opportunities that will alter current success methods.

To the business owner, the researcher admires people who go above and beyond to serve our consumers and support the government in contributing to our society's progress. He would also like to congratulate you on doing such noble job; entrepreneurs give life to our country by expanding our economy which is primarily based on our exchange dealings with other countries; as we work together to achieve our common goal of building our nation, we should develop and teach the next generation how and when to achieve their goals for success.



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- [128]. POPCEN 2015 Regional Data Dissemination Forum – Philippine Statistics Authority (October 30, 2017)
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- [130]. ETEEAP Benchmarking – University of Southeastern Philippines (September 26, 2017)
- [131]. ISO 9001:2015 Internal Quality Audit – University of the Immaculate Conception (April 24- 26, 2017)
- [132]. In-service Forum for Middle Administrators – University of the Immaculate Conception (January 31, 2017)

- [133]. Outcomes-Based Education Icon 2016- Spady and Uy Center for Transformational Learning and Leadership Inc. (November 3-4, 2016)
- [134]. Safety and Disaster Management Training/Workshop – University of the Immaculate Conception (September 10 & 24, 2016)
- [135]. Training on Converting Research into the Publishable Paper – UIC Research, Publication and Innovation Centre (August 02, 2016)
- [136]. In-Service Training for the Experienced and Expert Teachers – University of the Immaculate Conception (July 27, 2016)
- [137]. Blended Learning Seminar – University of the Immaculate Conception – June 26, 2016
- [138]. Foundation Course on Intellectual Property – Intellectual Property Office of the Phils. and UIC (May 26-27, 2016)
- [139]. In-Service Training: Designing Assessments for Student Learning Outcomes – University of the Immaculate Conception (May 6-7, 2016)
- [140]. Training Workshop on Ethnography as an Approach to Qualitative Research – Philippine Association of Institutions for Research, Inc. (November 30 – December 03, 2015)
- [141]. Seminar on Intelligent Investing – Finance Department, SBG, ADDU and Association of Finance Educators in Mindanao (April 24, 2015)
- [142]. Seminar-Workshop on Structural Equation Modeling (SEM) – University of the Immaculate Conception (February 04, 2015)
- [143]. Training on Research Pedagogy: Trends and Best Practices – Philippine Association of Institutions for Research, Inc. (November 6-7, 2014)
- [144]. Hands-on Session of the Geographical Information System (GIS Seminar-Workshop – UIC Research and Publication Center (July 09, 2014)
- [145]. Faculty Formation Session – University of the Immaculate Conception (February 19, 2014)
- [146]. Emotional Quotient and Psycho-Spiritual Integration Program – University of the Immaculate Conception (February 09, 2014)
- [147]. National Academic Conference on Multidisciplinary Research – Philippine Association of Institutions for Research, Inc. & Davao Colleges and Universities Network (February 6-7, 2014)
- [148]. Seminar on New Challenges in Business and Management – UIC Doctor in Business Management Program and Accountancy and Business Administration Program (February 02, 2014)
- [149]. Seminar/Writeshop on Table of Specifications – University of the Immaculate Conception (November 06, 2013)
- [150]. Professional Selling Skills – Spearhead Training (July 09-10, 2013)



## APPENDIX A INTERVIEW GUIDE

### Interview Guide Questionnaire

#### INTRODUCTION

I am Julius C. Getigan, a University of the Immaculate Conception student, Davao City. I am presently enrolled in the degree of Doctoral of Business Management and I am writing my dissertation titled, **“THE SUCCESSION PLANNING OF FAMILY OWNED MERCHANDISING BUSINESS IN DAVAO DE ORO: A MULTIPLE CASE STUDY”**. I humbly wish to appreciate your effort and acceptance to be a participant in this interview. The primary purpose of this study is to ascertain The succession planning of Family-owned businesses, particularly in Davao De Oro. The duration of this interview will be probably 1 hour 30 minutes.

During this interview, I would like you to share your opinions and experiences respectively about how you have been motivated. There is no right or wrong answer, nevertheless, your honest responses are needed. Kindly ask questions for clarification if there is any to enable us to proceed further. Be assured that you have full anonymity as a respondent of this study. If there is any question you do not wish to respond to, please, let me know.

Let's start.

#### MAIN QUESTIONS

➤ *How Does the Merchandise Business in Davao De Oro Implement Succession Planning?*

- What was your motivation to create a Family-owned business?
- What training or education has prepared you to become a business owner?
- How often do you modify your succession plan within the 5 year period? What modifications did you make to your succession plan?
- What community resources did you use in coming up with the succession plan?
- What are the things that you find helpful in implementing your succession planning initiative?
- Being the owner, how would you describe your leadership and management styles in the aspect of implementing succession planning?
- What actions did you employ to identify appropriate strategies for succession planning?
- How did you develop your succession planning? What are its key components?
- What were the significant changes in your operational strategies in response to the challenges brought by the pandemic, particularly in the aspects of succession planning? How do you find these changes?

➤ *How do you Cope with the Challenges of Implementing Succession Planning?*

- What were the most challenging obstacles you had to overcome in implementing succession planning?
- How did you address the challenges related to succession plan implementation?
- What strategies have you found most effective in succession planning to perform better in family-owned businesses?
- How does planning for an unexpected crisis contribute to long-term business success?
- What advice would you give people who wish to start a family-owned business about implementing succession planning?
- Can you share additional insights on how to operationally succeed amidst unforeseen crises?

➤ *What Explains the Similarities and Differences of Each Case?*

- How will you compare your succession plan to other family-owned business owners with whom you are acquainted in terms of similarities and differences?

➤ *Closing*

I appreciate your participation in the research. As previously said, I will supply you with a copy of the transcription for your review and input. I'd appreciate it if you could return it, together with any additional comments, by the agreed-upon period. I will gladly send the results once my study is concluded.

The project's findings will be presented at local and international research conferences. It is also my ambition to publish the findings in an online peer-reviewed academic publication.

I'd want to express my gratitude once more for investing your time and faith in me as you shared your unique perspectives and experiences. Thank you for your kind words, and may God continue to bless you.



JULIUS C. GETIGAN  
Researcher

## **APPENDIX B**

### **PERMISSION LETTER**

Dear Miss Duag,

I am JULIUS C. GETIGAN a Doctor in Business Management(DBM) student at the University of the Immaculate conception, Bonifacio St. Davao City. I am currently writing my dissertation entitled: **“Succession Planning of Family –Owned Merchandising Business In Davao De Oro: A Multiple Case Study”**

As a requirement for the degree of Doctor in Business Management, I am humbly asking for a few minutes of your time to attend an in-depth interview. Your participation in this study is voluntary and you can withdraw anytime. Rest assured that personal information and all responses gathered would be kept with the utmost confidentiality. If you have any questions. please do not hesitate to ask the undersigned

You may contact me at phone number 09100221045 or email address [juliusgetigan@gmail.com](mailto:juliusgetigan@gmail.com)

Your participation is highly appreciated. Thank you very much and God bless.

Truly yours,



JULIUS C. GETIGAN,MM  
DBM Candidate



DUNHILL Z. BILO,DBA  
Adviser

DR. AVEE JOY B. DAGAYANON  
Dean, Graduate School

**VALIDATION FORM C**

University of the Immaculate Conception  
GRADUATE SCHOOL

**VALIDATION FORM FOR THE  
QUALITATIVE RESEARCH GUIDE  
QUESTIONNAIRE**

DGS – FO – 022  
Rev. 01 / 10/01/2016  
Approved by: IQAC

Control No.: \_\_\_\_\_

Name of Evaluator: DR. GLORIA P. GEMPES

Degree: \_\_\_\_\_

Position: \_\_\_\_\_

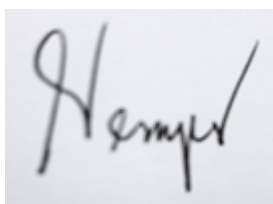
Number of Years in Teaching and Research: \_\_\_\_\_

To the Evaluator:

Using this assessment form, kindly determine the validity of the attached instrument in relation to the purpose of the study; specifically with regard to the research questions as stipulated (See also the attached documents revealing the Title and Purpose of the Study). There are three areas to be examined, namely, Introduction Key Components, Questions, and Closing Key Components. The question items must be evaluated in terms of their clarity, suitability, understandability, and ability to elicit personal narratives, comments, opinions, and insights from the research participants. Please check the corresponding rating and write the necessary remarks.

SECTIONS	ITEMS	EVALUATION		
		YES	NO	REMARKS
<b>Introduction Key Components</b>	1. Is there an opening statement expressing gratitude to the research participant for his or her willingness to join the session?	/		
	2. Does this section of the questionnaire reveal the name of the researcher? (i.e the researcher introducing himself or herself)	/		
	3. Is the purpose explicitly stated?	/		
	4. Is the duration of the session clearly stipulated?	/		
	5. Is there a statement assuring the research participant of the confidentiality of his or her responses?	/		
	6. Does this section explain how the in-depth interview or the focus group discussion be conducted?	/		
	7. Does this section include a statement assuring the research participant of his or her opportunity to be clarified further before proceeding to the intended activity?	/		
	8. Does this section provide spaces for the signature of the research participant?	/		
	9. Does it require a witness to sign?		/	
	10. Does this section stipulate the need for a legal guardian to sign as in the case of a research participant under 18 years of age?		/	
<b>Questions</b>	11. Are there no more than 15 questions (i. e. no more than 3 research questions with no more than 5 probing questions each)?	/		
	12. Are factual questions asked first before the probing questions?	/		
	13. Are there questions requiring the participant to describe his or her experiences?	/		
	14. Are there questions requiring the participant to explain the meaning of his or her shared experiences?	/		
	15. Are the vocabulary level and language structure of the questions appropriate to the age and capability of the research participant?	/		

<b>Closing Key Components</b>	16. Are the questions clear and understandable?	/		
	17. Do the questions possess the ability to elicit qualitative data relevant to the attainment of the objectives of the study?	/		
	18. Does this section guarantee the participant of his or her chance to give additional comments?	/		
	19. Does this section inform the research participant of the researcher's plan regarding the data being collected, its analysis, and the corresponding report and what the researcher would do next?	/		
	20. Does this section of the questionnaire express gratitude to the research participant?	/		



GLORIA P. GEMPES, EdD, DM, PhD

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 Evaluator's Name and Signature



University of the Immaculate Conception  
GRADUATE SCHOOL

## VALIDATION FORM FOR THE QUALITATIVE RESEARCH GUIDE QUESTIONNAIRE

DGS – FO – 022  
Rev. 01 / 10/01/2016  
Approved by: IQAC

Control No.: \_\_\_\_\_

Name of Evaluator: Dr. Joel Tan  
Degree: DBA  
Position: Research Coordinator  
Number of Years in Teaching and Research: 12 years

To the Evaluator:

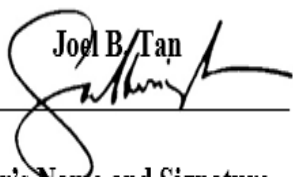
Using this assessment form, kindly determine the validity of the attached instrument in relation to the purpose of the study; specifically, with regard to the research questions as stipulated (See also the attached documents revealing the Title and Purpose of the Study). There are three areas to be examined, namely, Introduction Key Components, Questions, and Closing Key Components. The question items must be evaluated in terms of their clarity, suitability, understandability, and ability to elicit personal narratives, comments, opinions, and insights from the research participants. Please check the corresponding rating and write the necessary remarks.

SECTIONS	ITEMS	EVALUATION		
		YES	NO	REMARKS
<b>Introduction Key Components</b>	21. Is there an opening statement expressing gratitude to the research participant for his or her willingness to join the session?		/	Please provide.
	22. Does this section of the questionnaire reveal the name of the researcher? (i.e the researcher introducing himself or herself)	/		
	23. Is the purpose explicitly stated?	/		
	24. Is the duration of the session clearly stipulated?	/		
	25. Is there a statement assuring the research participant of the confidentiality of his or her responses?	/		
	26. Does this section explain how the in-depth interview or the focus group discussion be conducted?	/		
	27. Does this section include a statement assuring the research participant of his or her opportunity to be clarified further before proceeding to the intended activity?	/		
	28. Does this section provide spaces for the signature of the research participant?		/	Please provide.
	29. Does it require a witness to sign?		/	Please provide.
	30. Does this section stipulate the need for a legal guardian to sign as in the case of a research participant under 18 years of age?		/	Please provide.
<b>Questions</b>	31. Are there no more than 15 questions (i. e. no more than 3 research questions with no more than 5 probing questions each)?		/	You may just retain the following questions 1.3;1.4;1.6;1.8;1.9 2.1;2.2;2.3;2.5;2.6
	32. Are factual questions asked first before the probing questions?	/		
	33. Are there questions requiring the participant to describe his or her experiences?	/		
	34. Are there questions requiring the participant to explain the meaning of his or her shared experiences?	/		



	35. Are the vocabulary level and language structure of the questions appropriate to the age and capability of the research participant?	/		
	36. Are the questions clear and understandable?	/		
	37. Do the questions possess the ability to elicit qualitative data relevant to the attainment of the objectives of the study?		/	You may add: <b>What motivated you to continue driving amid the pandemic?</b>  <b>What lessons have you learned in the course of your driving amid pandemic?</b>
<b>Closing Key Components</b>	38. Does this section guarantee the participant of his or her chance to give additional comments?	/		
	39. Does this section inform the research participant of the researcher's plan regarding the data being collected, its analysis, and the corresponding report and what the researcher would do next?	/		
	40. Does this section of the questionnaire express gratitude to the research participant?	/		

Joel B/Tan



Evaluator's Name and Signature



University of the Immaculate Conception  
GRADUATE SCHOOL

**VALIDATION FORM FOR THE QUALITATIVE  
RESEARCH GUIDE QUESTIONNAIRE**

DGS – FO – 022  
Rev. 01 / 10/01/2016  
Approved by: IQAC

Name of Evaluator: DR. EMMA SAGARINO

Control No.: \_\_\_\_\_

Degree: DBM

Position: Research Director

Number of Years in Teaching and Research: 24 yrs

To the Evaluator:

Using this assessment form, kindly determine the validity of the attached instrument in relation to the purpose of the study; specifically with regard to the research questions as stipulated (See also the attached documents revealing the Title and Purpose of the Study). There are three areas to be examined, namely, Introduction Key Components, Questions, and Closing Key Components. The question items must be evaluated in terms of their clarity, suitability, understandability, and ability to elicit personal narratives, comments, opinions, and insights from the research participants. Please check the corresponding rating and write the necessary remarks.

SECTIONS	ITEMS	EVALUATION		
		YES	NO	REMARKS
Introduction Key Components	1. Is there an opening statement expressing gratitude to the research participant for his or her willingness to join the session?	<input type="checkbox"/>	<input type="checkbox"/>	
	2. Does this section of the questionnaire reveal the name of the researcher? (i.e the researcher introducing himself or herself)	<input type="checkbox"/>	<input type="checkbox"/>	
	3. Is the purpose explicitly stated?	<input type="checkbox"/>	<input type="checkbox"/>	
	4. Is the duration of the session clearly stipulated?	<input type="checkbox"/>	<input type="checkbox"/>	
	5. Is there a statement assuring the research participant of the confidentiality of his or her responses?	<input type="checkbox"/>	<input type="checkbox"/>	
	6. Does this section explain how the in-depth interview or the focus group discussion be conducted?	<input type="checkbox"/>	<input type="checkbox"/>	C/O ICF
	7. Does this section include a statement assuring the research participant of his or her opportunity to be clarified further before proceeding to the intended activity?	<input type="checkbox"/>	<input type="checkbox"/>	
	8. Does this section provide spaces for the signature of the research participant?	<input type="checkbox"/>	<input type="checkbox"/>	
	9. Does it require a witness to sign?	<input type="checkbox"/>	<input type="checkbox"/>	
	10. Does this section stipulate the need for a legal guardian to sign as in the case of a	<input type="checkbox"/>	<input type="checkbox"/>	NA
	research participant under 18 years of age?	<input type="checkbox"/>	<input type="checkbox"/>	

Questions	11. Are there no more than 15 questions (i. e. no more than 3 research questions with no more than 5 probing questions each)?	<input type="text"/>	<input type="text"/>	<input type="text"/>
	12. Are factual questions asked first before the probing questions?	<input type="text"/>	<input type="text"/>	<input type="text"/>
	13. Are there questions requiring the participant to describe his or her experiences?	<input type="text"/>	<input type="text"/>	<input type="text"/>
	14. Are there questions requiring the participant to explain the meaning of his or her shared experiences?	<input type="text"/>	<input type="text"/>	Add a question (2.9)
	15. Are the vocabulary level and language structure of the questions appropriate to the age and capability of the research participant?	<input type="text"/>	<input type="text"/>	<input type="text"/>
	16. Are the questions clear and understandable?	<input type="text"/>	<input type="text"/>	<input type="text"/>
	17. Do the questions possess the ability to elicit qualitative data relevant to the attainment of the objectives of the study?	<input type="text"/>	<input type="text"/>	<input type="text"/>
Closing Key Components	18. Does this section guarantee the participant of his or her chance to give additional comments?	<input type="text"/>	<input type="text"/>	<input type="text"/>
	19. Does this section inform the research participant of the researcher's plan regarding the data being collected, its analysis, and the corresponding report and what the researcher would do next?	<input type="text"/>	<input type="text"/>	<input type="text"/>
	20. Does this section of the questionnaire express gratitude to the research participant?	<input type="text"/>	<input type="text"/>	<input type="text"/>




---

**Evaluator's Name and Signature**



University of the Immaculate Conception  
GRADUATE SCHOOL

## VALIDATION FORM FOR THE QUALITATIVE RESEARCH GUIDE QUESTIONNAIRE

DGS – FO – 022  
Rev. 01 / 10/01/2016  
Approved by: IQAC

Control No.: \_\_\_\_\_

Name of Evaluator: **MARY JANE B. AMOGUIS, DBM**

Degree: **Doctor in Business Management**

Position: **Graduate School Faculty**

Number of Years in Teaching and Research: \_\_\_\_\_

To the Evaluator:

Using this assessment form, kindly determine the validity of the attached instrument in relation to the purpose of the study; specifically with regard to the research questions as stipulated (See also the attached documents revealing the Title and Purpose of the Study). There are three areas to be examined, namely, Introduction Key Components, Questions, and Closing Key Components. The question items must be evaluated in terms of their clarity, suitability, understandability, and ability to elicit personal narratives, comments, opinions, and insights from the research participants. Please check the corresponding rating and write the necessary remarks.

SECTIONS	ITEMS	EVALUATION		
		YES	NO	REMARKS
<b>Introduction Key Components</b>	1. Is there an opening statement expressing gratitude to the research participant for his or her willingness to join the session?	/		
	2. Does this section of the questionnaire reveal the name of the researcher? (i.e the researcher introducing himself or herself)	/		
	3. Is the purpose explicitly stated?	/		
	4. Is the duration of the session clearly stipulated?	/		
	5. Is there a statement assuring the research participant of the confidentiality of his or her responses?	/		
	6. Does this section explain how the in-depth interview or the focus group discussion be conducted?	/		
	7. Does this section include a statement assuring the research participant of his or her opportunity to be clarified further before proceeding to the intended activity?	/		
	8. Does this section provide spaces for the signature of the research participant?		/	
	9. Does it require a witness to sign?		/	
	10. Does this section stipulate the need for a legal guardian to sign as in the case of a research participant under 18 years of age?		/	

<b>Questions</b>	11. Are there no more than 15 questions (i. e. no more than 3 research questions with no more than 5 probing questions each)?	/		
	12. Are factual questions asked first before the probing questions?	/		
	13. Are there questions requiring the participant to describe his or her experiences?	/		
	14. Are there questions requiring the participant to explain the meaning of his or her shared experiences?	/		
	15. Are the vocabulary level and language structure of the questions appropriate to the age and capability of the research participant?	/		
	16. Are the questions clear and understandable?	/		
	17. Do the questions possess the ability to elicit qualitative data relevant to the attainment of the objectives of the study?	/		
<b>Closing Key Components</b>	18. Does this section guarantee the participant of his or her chance to give additional comments?	/		
	19. Does this section inform the research participant of the researcher's plan regarding the data being collected, its analysis, and the corresponding report and what the researcher would do next?	/		
	20. Does this section of the questionnaire express gratitude to the research participant?	/		

Remarks:

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Signature over Printed Name



**APPENDIX D**  
**UNIVERSITY OF THE IMMACULATE CONCEPTION-RESEARCH ETHICS COMMITTEE**  
**ETHICAL CLEARANCE**

April 11, 2022

**JULIUS C. GETIGAN**

University of the Immaculate Conception  
Fr. Selga Street, Davao City

Re: **THE SUCCESSION PLANNING OF FAMILY-OWNED MERCHANDISING BUSINESS IN DAVAO DE ORO: A MULTIPLE CASE STUDY**

Protocol Code: **JE-GS-121-03-2022**

Subject: **Ethical Clearance**

Dear **MR.GETIGAN**:

This is to acknowledge receipt of your **revised protocol and informed consent form (ICF)** on April 8, 2022. These new documents have incorporated the recommendations of the UIC-REC, as stipulated in the DECISION LETTER emailed to you, to improve the initial protocol and ICF that you submitted earlier for the **FULL BOARD** review, which took place on March 23, 2022.

Upon further scrutiny of and deliberation on the revised document on April 10, 2022, the UIC-REC is convinced that your research/investigation embodies a process that is responsible and ethically accountable; thus, **ETHICAL CLEARANCE** with a validity period of **one year**, i.e. April 11, 2022 to April 10, 2023, has been granted.

Please be advised that UIC-REC needs to be informed should any part of your research methodology and ICF as outlined in your submitted approved documents, change in any way.

The UIC-REC wishes you all the best with this research undertaking.

Very truly yours,

Renan P. Limjuko, PhD

Chair, UIC-REC



**APPENDIX E**  
**CERTIFICATE OF ORIGINALITY**



**University of the Immaculate Conception**  
**GRADUATE SCHOOL**

**CERTIFICATE OF ORIGINALITY**

DGS – FO – 021  
Rev. 01 / 10/01/2016  
Approved by: IQAC

Control No.: \_\_\_\_\_

June 20, 2022

I hereby declare that this submission is my own work and that, to the best of my knowledge and belief, it contains no material previously published or written by another person nor material to which to a substantial extent has been expected for award of any degree or diploma of a university or other institute of higher learning, except where due acknowledgement is made in the text.

I also declare that the intellectual content of this thesis/dissertation is the product of my work, even though I may have received assistance from others on style, presentation and language expression.

**JULIUS C. GETIGAN**

June 20, 2022

Doctor of Business Management

**DR. DUNHILL Z. BILOG**

June 20, 2022

Name of Adviser

## APPENDIX F INFORM CONSENT

University of the Immaculate Conception **Research Ethics Committee (REC)**  
Bonifacio Street, Davao City, Philippines



REC\_FO\_0057  
Control No.: \_\_\_\_\_



RESEARC

### H PARTICIPANT'S CONSENT

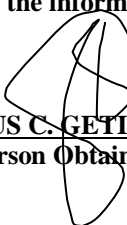
I have read the information provided above. I have been given a chance to ask questions. My questions have been answered to my satisfaction, and I agree to participate in this study. I have been given a copy of this form. I can withdraw my consent at any time and discontinue participation without penalty.

\_\_\_\_\_  
Signature above Printed Name of Participant

\_\_\_\_\_  
Date Signed

To be accomplished by the Researcher Obtaining Consent:

I have explained the research to the participant and answered all of his/her questions. I believe that he/she understands the information described in this document and freely consents to participate.

  
**JULIUS C. GETIGAN**

\_\_\_\_\_  
Name of Person Obtaining Consent

2-12-2022

\_\_\_\_\_  
Date Signed

## APPENDIX G

### CERTIFICATE OF DEBRIEFING

This is to certify that the research entitled “**SUCCESSION PLANNING OF FAMILY-OWNED MERCHANDISING BUSINESS OF DAVAO DE ORO: A MULTIPLE CASE STUDY**” has undergone peer debriefing. The researcher observed and employed enough information to establish credibility, transferability, dependability, and conformability in this research study.

In detail, the researcher observed strict process in gathering the necessary information. Likewise, the researcher sought permission from the experts for their competent validation of the study.

As observed, the researcher employed rich source of data, validated to established credibility. Also, the researcher provided comprehensive description and discussion allowing other researchers to make reasonable judgments about the transferability of the result to a different setting or context.

Finally, the researcher's gathered information were classified and categorized. All information was kept and was secured for confidentiality.

Signed by:



**EDUARDO M. TEJEROS III, LPT, MAED**

Signature over printed name

## APPENDIX H CERTIFICATE OF EDITING

July 20, 2022

To whom it may concern:

This is to certify that the thesis titled “**SUCCESSION PLANNING OF FAMILY-OWNED MERCHANDISING BUSINESS IN DAVAO DE ORO: A MULTIPLE CASE STUDY**” prepared, submitted, and defended by **JULIUS C. GETIGAN** from the **Doctor of Business Management** program, has been reviewed, proofread, and edited in accordance with the accepted rules and conventions of English language for academic use, hence guaranteeing the quality of this paper in terms of grammar, composition, and presentation.

Signed this 21<sup>st</sup> day of July in the year of our Lord, 2022 at the University of the Immaculate Conception, Davao City, Philippines.



**DANILO G. BARADILLO, PhD, FRIRes**  
Graduate School Professor  
University of the Immaculate Conception  
Davao City

## APPENDIX I ARCHIVAL LOG

Archival #	Type	Interviewer/Facilitator	Transcriber	Date
<b>Case A</b>				
PO1_CQ1	IDI	Julius C. Getigan	Julius C. Getigan	April 27,2022
PO1_CQ1.S3	IDI	Julius C. Getigan	Julius C. Getigan	April 27,2022
PO1_CQ1.S2	IDI	Julius C. Getigan	Julius C. Getigan	April 27,2022
PO1_CQ1.S5	IDI	Julius C. Getigan	Julius C. Getigan	April 27,2022
PO1_CQ1.S6	IDI	Julius C. Getigan	Julius C. Getigan	April 27,2022
PO1_CQ1.S8	IDI	Julius C. Getigan	Julius C. Getigan	April 27,2022
TPO1_CQ1.S2	IDI	Julius C. Getigan	Julius C. Getigan	April 27,2022
TPO1_CQ1.S9	IDI	Julius C. Getigan	Julius C. Getigan	April 27,2022
PO1_CQ2	IDI	Julius C. Getigan	Julius C. Getigan	April 27,2022
PO1_CQ2.S2	IDI	Julius C. Getigan	Julius C. Getigan	April 27,2022
PO1_CQ2.S6	IDI	Julius C. Getigan	Julius C. Getigan	April 27,2022
PO1_CQ2.S4	IDI	Julius C. Getigan	Julius C. Getigan	April 27,2022
PO1_CQ2.S5	IDI	Julius C. Getigan	Julius C. Getigan	April 27,2022
PO1_CQ2.S3	IDI	Julius C. Getigan	Julius C. Getigan	April 27,2022
TPO1_CQ2	IDI	Julius C. Getigan	Julius C. Getigan	April 27,2022
TPO1_CQ2.S1	IDI	Julius C. Getigan	Julius C. Getigan	April 27,2022
TPO1_CQ2.S5	IDI	Julius C. Getigan	Julius C. Getigan	April 27,2022
<b>Case B</b>				
PO2_CQ1	IDI	Julius C. Getigan	Julius C. Getigan	March 30,2022
PO2_CQ1.S2	IDI	Julius C. Getigan	Julius C. Getigan	March 30,2022
PO2_CQ1.S6	IDI	Julius C. Getigan	Julius C. Getigan	March 30,2022
PO2_CQ1.S8	IDI	Julius C. Getigan	Julius C. Getigan	March 30,2022
PO2_CQ2	IDI	Julius C. Getigan	Julius C. Getigan	March 30,2022
PO2_CQ2.S1	IDI	Julius C. Getigan	Julius C. Getigan	March 30,2022
PO2_CQ2.S6	IDI	Julius C. Getigan	Julius C. Getigan	March 30,2022
TPO2_CQ1.S6	IDI	Julius C. Getigan	Julius C. Getigan	March 30,2022
TPO2_CQ2.S1	IDI	Julius C. Getigan	Julius C. Getigan	March 30,2022
<b>Case C</b>				
PO3_CQ	IDI	Julius C. Getigan	Julius C. Getigan	March 26,2022
PO3_CQ1.S3	IDI	Julius C. Getigan	Julius C. Getigan	March 26,2022
PO3_CQ1.S2	IDI	Julius C. Getigan	Julius C. Getigan	March 26,2022
PO3_CQ1.S5	IDI	Julius C. Getigan	Julius C. Getigan	March 26,2022
PO3_CQ1.S5	IDI	Julius C. Getigan	Julius C. Getigan	March 26,2022
PO3_CQ1.S7,S8	IDI	Julius C. Getigan	Julius C. Getigan	March 26,2022
PO3_CQ1.S9	IDI	Julius C. Getigan	Julius C. Getigan	March 26,2022
PO3_CQ1.S2	IDI	Julius C. Getigan	Julius C. Getigan	March 26,2022
PO3_CQ2	IDI	Julius C. Getigan	Julius C. Getigan	March 26,2022
PO3_CQ2.S2	IDI	Julius C. Getigan	Julius C. Getigan	March 26,2022
PO3_CQ2.S4	IDI	Julius C. Getigan	Julius C. Getigan	March 26,2022
PO3_CQ2.S6	IDI	Julius C. Getigan	Julius C. Getigan	March 26,2022
TPO3_CQ1	IDI	Julius C. Getigan	Julius C. Getigan	March 26,2022
TPO3_CQ2	IDI	Julius C. Getigan	Julius C. Getigan	March 26,2022
<b>Case D</b>				
PO4_CQ1.S.1	IDI	Julius C. Getigan	Julius C. Getigan	March 28,2022
PO4_CQ1.S4	IDI	Julius C. Getigan	Julius C. Getigan	March 28,2022
PO4_CQ1.S3	IDI	Julius C. Getigan	Julius C. Getigan	March 28,2022
PO4_CQ1.S5	IDI	Julius C. Getigan	Julius C. Getigan	March 28,2022
PO4_CQ1.S7	IDI	Julius C. Getigan	Julius C. Getigan	March 28,2022
PO4_CQ1.S8	IDI	Julius C. Getigan	Julius C. Getigan	March 28,2022
PO4_CQ2.S1	IDI	Julius C. Getigan	Julius C. Getigan	March 28,2022
PO4_CQ2.S2	IDI	Julius C. Getigan	Julius C. Getigan	March 28,2022
PO4_CQ2.S3	IDI	Julius C. Getigan	Julius C. Getigan	March 28,2022

PO4_CQ2.S6	IDI	Julius C. Getigan	Julius C. Getigan	<b>March 28,2022</b>
TPO4_CQ1.S3	IDI	Julius C. Getigan	Julius C. Getigan	<b>March 28,2022</b>
TPO4_CQ1.S4	IDI	Julius C. Getigan	Julius C. Getigan	<b>March 28,2022</b>
<b>Case E</b>				
PO5_CQ1	IDI	Julius C. Getigan	Julius C. Getigan	<b>March 26,2022</b>
PO5_CQ1.S1	IDI	Julius C. Getigan	Julius C. Getigan	<b>March 26,2022</b>
PO5_CQ1.S3	IDI	Julius C. Getigan	Julius C. Getigan	<b>March 26,2022</b>
PO5_CQ1.S4	IDI	Julius C. Getigan	Julius C. Getigan	<b>March 26,2022</b>
PO5_CQ1.S5	IDI	Julius C. Getigan	Julius C. Getigan	<b>March 26,2022</b>
PO5_CQ1.S8	IDI	Julius C. Getigan	Julius C. Getigan	<b>March 26,2022</b>
PO5_CQ2	IDI	Julius C. Getigan	Julius C. Getigan	<b>March 26,2022</b>
PO5_CQ2.S1	IDI	Julius C. Getigan	Julius C. Getigan	<b>March 26,2022</b>
PO5_CQ2.S6	IDI	Julius C. Getigan	Julius C. Getigan	<b>March 26,2022</b>
PO5_CQ2.S5	IDI	Julius C. Getigan	Julius C. Getigan	<b>March 26,2022</b>
TPO5_CQ1.S3	IDI	Julius C. Getigan	Julius C. Getigan	<b>March 26,2022</b>
TPO5_CQ1.S7	IDI	Julius C. Getigan	Julius C. Getigan	<b>March 26,2022</b>