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LEADERSHIP SUCCESSION PLANNING IN TALENT MANAGEMENT:

A GENERIC QUALITATIVE INQUIRY

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Abstract

Talent management strategy includes the identification of valuable human capital for attracting, developing, engaging, and retaining the organization's top performers. A definitive role for leadership succession planning in talent management lacks empirical research. The study research question asked: What is the role of leadership succession planning in talent management? The qualitative exploratory research method obtained data on the role of leadership succession planning in a firm's talent management strategy. The sample included nine senior human resources (HR) professionals with a minimum of 10 years of experience in either strategic workforce planning, organizational development, or HR director level experience. Data analysis included a manual hand analysis before using NVivo 12 for Mac computer software to categorize, classify, and extract themes. Four themes affiliated with the participants' perspectives and experiences with leadership succession planning and talent management emerged. The themes involved implementation differences, oversight of leadership succession planning and talent management, organizational culture, and employee engagement. The findings revealed that leadership succession planning has a role in talent management, dependent on the implementation activities and other influencers involving leadership succession planning as a part of a talent management strategy. Future research is recommended to examine additional constructs comprising organizational size and type. The role leadership development has in leadership succession planning, and talent management is another recommendation for future research. The final recommendation involves examining the current research question using a sample that includes partnerships among the HR owners and those outside the organization's HR department.

Dedication

This work is dedicated to the memory of my beloved mother, whose unwavering love, guidance, and sacrifices laid the foundation for my journey. Though she left us in 2014, her spirit continues to inspire me every day. Mom, your belief in my potential and your relentless encouragement have been my guiding light. I strive to honour your legacy with every step I take.

To my father, thank you for your steadfast support and for instilling in me the values of hard work and perseverance. Your strength has been a source of comfort and motivation throughout this journey. To my sisters, whose support and companionship have enriched my life, and to my brothers-in-law, who have embraced me as family, your love and encouragement have been invaluable. To my nieces and nephew, may you always chase your dreams with the same passion and determination that I have learned from our family.

I extend my heartfelt gratitude to all my cherished well-wishers, friends, mentors, and colleagues who have believed in me even when I doubted myself. Your faith has propelled me forward. As you read these words, remember that every challenge is an opportunity for growth. Embrace your journey with courage and resilience. Let your dreams guide you, for with dedication and hard work, anything is possible. May you find inspiration in your pursuits and never forget the power of love and support from those around you.

Finally, I dedicate this study to any researcher pursuing research in fulfilment of a doctoral degree and who is reading this page of my dissertation. I recall reading other researchers' dedication pages

while wishing for the day when I may write my page. I can tell you the sense of accomplishment is brighter than the sun! Keep moving, do not give up, and your time will arrive.

Acknowledgments

I would like to express my heartfelt gratitude to Andrea Haun, Dr. Perry, and Cesar Gonzalez for their unwavering support and guidance throughout my dissertation journey. Your insights and encouragement have been invaluable in helping me navigate the challenges of this process.

To anyone reading this, remember that perseverance and support from those around you can turn dreams into reality. Embrace your journey, seek help when needed, and never underestimate the power of collaboration. Thank you all for being a part of this significant milestone in my life.

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CHAPTER 1. INTRODUCTION

Research on issues of succession planning in higher education revealed a need for succession planning at leadership levels as part of managing talent (Cavanaugh, 2017). Cavanaugh (2017) noted why promoting internal talent and providing an overview of various types of succession planning is essential. The broader view of succession planning within the umbrella of talent management is deficient in organizations (Chaturvedi, 2016a). According to Chaturvedi (2016a), succession planning is significant for effective talent utilization under an organization's talent management strategy. No empirical evidence supports the assertion.

Sanjeev and Singh (2017) are talent management consultants who researched an organization within the information technology industry and explored relational aspects of succession planning within a framework of talent management. Sanjeev and Singh revealed a positive relationship between talent management and leadership development connected to organizational retention and reward strategy. The study was limited in scope to one organization in one industry. The strategy connects to organizational retention and reward incentives rather than a focused exploration regarding the role leadership succession has in talent management. The study explored the role of leadership succession planning in talent management to gain insight from a theoretical perspective involving the resource-based view of human capital theory (HCT).

Background of the Study

The constructs of leadership succession and talent management are found within the theory of human capital (Bae & Patterson, 2014; Kalaiselvan & Naachimuthu, 2016). Leadership succession and talent management correlates with investments in human capital that lead to increased wages for the individual and efficient performance for the organization (Bae & Patterson, 2014). Kalaiselvan and Naachimuthu (2016) provided a human capital theoretical approach to managing talent that included a recommendation for the inclusion of succession planning.

Research on talent management policies and strategies revealed a lack of consistency in talent management implementation among senior levels within the organization (Erasmus, Naidoo, & Joubert, 2017). Erasmus et al. (2017) recommended future research on the talent management strategy focused on leadership development connected to a leader's performance and leadership development return on investment. Analysis of talent management policies and practices revealed the need for organizations to prioritize leadership development for succession purposes (LeCounte, Prieto, & Phipps, 2017).

Rationale

The rationale for the study derived from the research literature. Connections exist among the study constructs. Cavanaugh (2017), Chaturvedi (2016a), and Sanjeev and Singh (2017) explored the interrelationship between talent management and succession planning. According to Cavanaugh, succession planning should have a focus on executive leadership succession within a talent management strategy focused on existing talent. Sanjeev and Singh recommended leadership development as part of an organization's talent strategy. Chaturvedi advocated for empirical research on the role of succession planning specific to leadership succession that results in a talent management strategy linked to organizational goals.

Organizations that gain a competitive advantage manage talent and prevent extended gaps in leadership employment (Wright & McMahan, 1992). HCT correlates talent management and succession planning with investments in an organization's human capital (Bae & Patterson, 2014; Kalaiselvan & Naachimuthu, 2016; Wright & McMahan, 1992). Empirical studies explored the study constructs independently. Erasmus et al. (2017) researched issues within leadership succession planning. LeCounte et al. (2017) explored talent management from an organizational perspective. The study provides empirical research that may uncover the role of leadership succession planning in talent management.

The study may catalyze additional empirical research on talent management and leadership succession planning. The theoretical lens of HCT explored the study constructs. The resource-based view of HCT associates talent management and succession planning with investments in an organization's human capital (Bae & Patterson, 2014; Kalaiselvan & Naachimuthu, 2016). The research literature regarding HCT does not address the role of

leadership succession planning within talent management. Erasmus et al. (2017) and LeCounte et al. (2017) suggested further research on the role of leadership succession planning in talent management.

Purpose of the Study

The study's purpose was to explore how senior human resource (HR) managers characterize and implement successful leadership succession planning concerning the strategic management of talent. The additional information gained from the study may lead to a definitive role for leadership succession planning within an organizational talent management strategy. A gap exists in empirical literature specific to leadership succession planning as a corporate talent management strategy. The study could provide evidence that would support organizations in developing a talent management strategy focused on planning for gaps in leadership.

Erasmus et al. (2017) found that HR professionals and organizational leadership lack a conception of talent management and the subparts of talent management. The study may provide evidence that assists HR professionals and organizational leaders in creating policies and practices focused on managing talent at the leadership level. Erasmus et al. defined organizational talent management culture as a "talent management mindset" (p. 88).

Erasmus et al. (2017) noted a misinterpretation over talent management at various employee levels, to include HR and organizational leadership, is a cause for organizations to adopt a talent management mindset. This mindset translates to an inclusive and transparent talent management strategy involving the creation, implementation, and preservation of strategies that support the management of a firm's human capital talent. Investigating the role of leadership succession planning in talent management may reveal approaches to creating a culture or talent mindset focused on the strategic planning for gaps in leadership within the broader responsibility of managing organizational talent.

A firm's leadership is critical to organizational success because leaders have the responsibilities of setting and leading the implementation of policies and practices outlined from

the organization's vision and goals (LeCounte et al., 2017). Debate exists over whether HR or the corporate board of directors has the responsibility for leadership succession planning and for managing talent management strategy (LeCounte et al., 2017). An exploration regarding the role of leadership succession planning in talent management may reveal evidence that suggests ownership of study constructs involving leadership succession planning and talent management.

Significance of the Study

The 20th century workforce and beyond need to manage talent as a resource (Wright, McMahan, & McWilliams, 1994). Organizational leaders who manage talent may gain a competitive advantage. Within the framework of managing talent, the need for ensuring continuity in organizational leadership is paramount for the identification of talent reserves and building competencies within the talent reserves. The purpose behind these processes connects to leadership succession planning. An evaluation regarding the study significance from three different perspectives involving scholars, practitioners, and organizations follows:

Significance to Scholars

The study intent provides researchers with empirical data that may catalyze additional research on the constructs of leadership succession planning from the perspective of developing a talent management strategy for organizations. Recent studies call for additional empirical research related to the study constructs (Erasmus et al., 2017; LeCounte et al., 2017). The study may provide an informed argument regarding leadership succession planning and the potential interconnections to talent management, which may lead to an expanded topic for further research.

Significance to Practitioners

The study may assist HR professionals and organizational leaders with the responsibility of developing policies and implementing practices that support organizational effectiveness using leadership succession planning and talent management strategy. The study findings may result in the future creation of tools for managing talent specific to leadership development that support leadership succession planning as part of a talent management strategy. For example, the study may help the HR practitioner decide the best use of leadership

succession and talent management policies and practices tailored to various organizations and industries.

Organizational culture may determine how succession planning and talent is managed. Gallardo-Gallardo, Nijs, Dries, and Gallo (2015) recommended that practitioners educate themselves with the psychometric qualities of different talent management tools and metrics. Findings from the study may provide HR professionals information to narrow the gap between the empirical investigation on the phenomenon regarding the study constructs and solving strategic issues involving a firm's strategic management of talent.

Significance to Organizations

The research is significant to the field of business and specialization of human resource management (HRM) as succession planning is a recurring corporate issue (Erasmus et al., 2017). Exploring the role of leadership succession planning in talent management could lead to improved organizational strategies involving the prevention of leadership gaps. Leadership gaps hinder a firm and could cause a catastrophic loss of talent (Rothwell, 2011). The study may lead to the development of a more inclusive talent management strategy.

Research Question

For exploring the relationships among leadership succession planning and talent management, the following research question was developed: What is the role of leadership succession planning in talent management strategy?

Definition of Terms

Creating a context of cognizance is the aim of defining the study terms. The critical constructs of succession planning, leadership succession planning, and talent management

strategy follow. A broader discussion regarding the definitions within the contextual research framework is included.

Leadership succession planning. Involves the identification and development of human capital with a developmental target on human capital, which will eventually assume leadership roles (Desai, Lockett, & Paton, 2016). The observation of leadership succession planning within the study involved interviews and a review of organizational policies and processes involving leadership succession planning.

Senior human resources managers and leaders. Senior human resources managers and leaders are "responsible for identifying core competencies necessary for organizations to attain leadership positions" (Kalaiselvan & Naachimuthu, 2016, p. 5). Participants self-selected and confirmed at least 10 years of strategic planning experience.

Succession planning. An organizational strategy of planning for gaps in human capital, often involving the development, mentoring, and recruiting of specific human capital (Rothwell, 2011). Participants characterized succession planning as planning for gaps in employment below that of leadership.

Talent management strategy. An organizational strategic plan of action designed to identify human capital talent and critical functions to gain a competitive advantage (Erasmus et al., 2017). The study observed talent management strategy from the participants' experiences involving the practices of identifying and developing a specific group as a potential for other roles in the organization.

Research Design

According to Merriam and Tisdell (2016), interpretive research is a common type of qualitative research connected to discovering an observable reality that varies by study. The qualitative methodology is ideal for research on exploring the role of leadership succession planning in talent management. The exploratory nature of qualitative is aligned with the research topic. The research results may provide evidence related to the underlying reasons, opinions, and motivations of leadership succession planning in talent management.

Exploratory qualitative inquiry is a method used to understand study participants' meaning of specific experience (Anderson & Holloway-Libell, 2014). Solicitation of participants' experiences contributed to a determination for the role of leadership succession planning in a talent management strategy. Percy, Kostere, and Kostere (2015) suggested that an exploratory qualitative inquiry approach is appropriate when participants' perceptions of events and actual external happenings may be subjective. Qualitative research was suitable for the study because participant experiences are unique to the individual.

The method included in-depth interviews to collect data. Crouch and McKenzie (2006) posited in-depth interviews could generate new knowledge or detail the participants' experience. Crouch and McKenzie described the lived experiences among senior HR managers utilizing an inductive exploration of a segment of human capital development activities. The study used open-ended questions during semistructured interviews. The study documents included policies on leadership succession planning and talent management. The research design aligned best with a qualitative study involving the discovery of an unexpected phenomenon (Cowan, 2012). Figure

1 illustrates the study constructs regarding the gap in the literature on the role leadership succession planning has in talent management strategy.

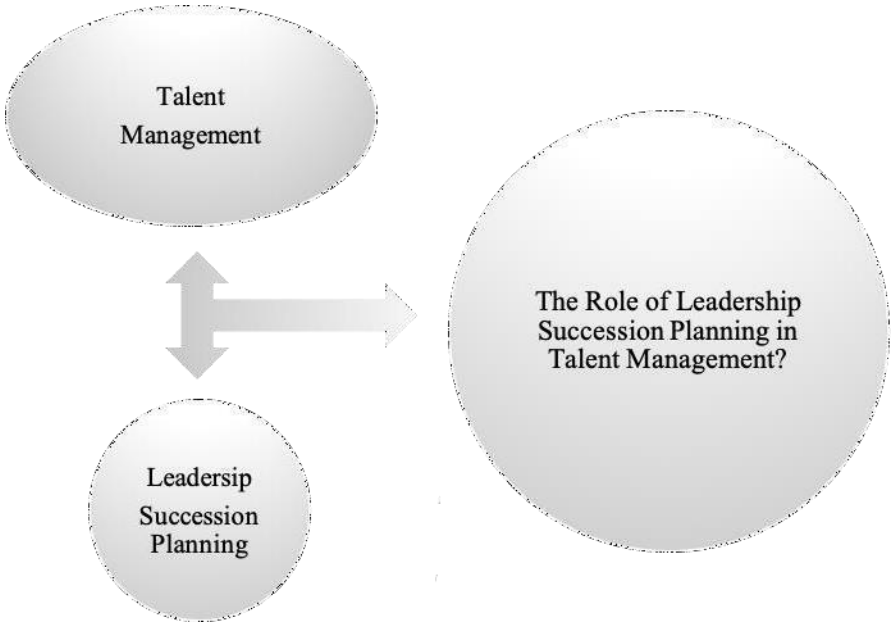


Figure 1. Conceptual constructs of the study.

Assumptions and Limitations

Qualitative research identifies a set of parameters that serve to disclose certain beliefs and weaknesses critical for assessing the study integrity. These beliefs and weaknesses are identified as assumptions and limitations in research. Beliefs and weaknesses in empirical research were made prominent with Lazarsfeld's (1972) work. Cowan (2012) noted that assumptions in qualitative research are concluding statements assumed to be true. Limitations may be characterized as areas in the study where limited control exists (Cowan, 2012). Assumptions and

limitations are broad. This section includes content focused on the various subcategories of assumptions and limitations.

Assumptions

An assumption includes that the study would create an opportunity for the participants to share work experiences related to the topic. The nature of knowledge gained from the study interview depends on the interviewer's mutual influence and the participant relationship. Assumptions address theoretical, topical, and methodological perspectives.

General methodological assumptions. The qualitative exploratory inquiry entailed general methodological assumptions. A population of HR leaders with 5 to 10 years of experience among a variety of specialties may be appropriate to answer the research question. Honest answers from the participants was another assumption. Establishing a good rapport with the participants at each study phase, including the interview, was another assumption. The process aimed to elicit truthful and frank answers from the participants' experiences. The participants responded to a semistructured interview process targeted to the research question. The study was supported by the use of field testing, expert panel review, and practice interviews.

Theoretical assumptions. The theoretical foundation for the study involved the resource-based view of HCT. Wright et al. (1994) noted the resource-based view of human capital could serve as a bridge from the utilization of human capital to include skill and abilities to strategies that promote an organization's competitive advantage. The study may reduce the theoretical gap by exploring the participants' experiences, which could lead to policies, practices, and tools that encompass the interrelationships among the study constructs. The study may

strengthen the HCT resource-based view with findings that could assist organizations in gaining and maintaining a competitive advantage.

Topic specific assumptions. The participant's experience in leadership succession planning and talent management strategy was verified. Leadership development activities within organizations might coexist with leadership succession planning. Human capital engagement in leadership succession planning and talent management strategy may support sustaining a competitive advantage for organizations.

Limitations

Limitations are provided to show the limits and factors that may affect the study findings. The study included an examination of two types of limitations. The first type of limitation is design flaw limitations regarding credibility and generalizability. The second type of limitation includes items purposely not explored within the research study.

Design flaw limitations. The lived experience descriptions among senior HR managers matched that the exploratory qualitative inquiry method. Uncertainty existed over whether the design would yield the data necessary to conclude the role of leadership succession planning in talent management. Shortcomings in the knowledge, skills, and study participants' abilities regarding the study constructs could have been a limitation. While the study used screening questions to solicit the most experienced study participants, an assumption existed over whether the participants were honest regarding experiences. A concerted effort to eliminate personal bias was necessary.

Delimitations. Three areas were identified as delimitation: the participants' work industries, organizational setting and location, and whether the participant's organization has a

competitive advantage. While the participants' experiences included a blend of industries and organizational settings, the study purpose did not investigate work industries and organizational settings.

An exploration of differences in the role of leadership succession planning in talent management among private and public organizations across industries was not a study aim. Exploring the role of leadership succession planning in talent management required a focus on gaining the lived experiences from the study participants. The study focus was not on the international differences that may exist among the study constructs or the participants themselves.

Wright et al. (1994) noted the theory of human capital resource-based view could link attributes to a firm's competitive advantage. Wright, Dunford, and Snell (2001) suggested the policies and practices involving a talent management strategy could support competitive advantage for the organization. Establishing a competitive advantage among the organizations represented by the current study participants was not an aim for the current study. Wright et al. provide conceptual clarity on the motivation that organizations have to achieve a competitive advantage. Leadership succession planning and talent management are areas businesses measure for achieving a competitive advantage.

Organization of the Remainder of the Study

The problem background, rationale, purpose, study significance, research questions, definitions, design, assumptions, limitations, delimitations, and organization of the remainder of the study sections were addressed in Chapter 1. Chapter 2 provides a methods overview search, theoretical foundation, and literature review regarding the study constructs. The synthesis of research findings, a critique of previous research methods, and the summary are addressed in

Chapter 2. Chapter 3 includes a discussion on the study purpose, research question, and research design. The target sample population and sample are discussed, as well as procedures, instruments, ethical considerations, and a summary. Chapter 4 provides further information on the study, researcher, sample description, and applied research methodology to the data analysis. Chapter 5 encompasses the study results, discussion, and conclusions drawn from the results. Previous literature compared with the study findings are included. Interpretations of findings are provided, including a focus on the study's implications, limitations, conclusions, and recommendations for future research.

CHAPTER 2. LITERATURE REVIEW

The study explored the experiences of senior level HR managers to discern the role of leadership succession planning within a talent management strategy for an organization. Chapter 2 encompasses a literature review regarding the study constructs beginning with the methods of searching. The chapter includes an overview of the literature on the study's theoretical foundation and details HCT specific to the resource-based view. The section consists of a review of literature that informed talent management and strategic implications for an organization. Assessed are peer reviewed journal articles that informed leadership succession planning and substantiated the constructs of leadership succession planning and talent management. Included is the synthesis of research findings, a critique of previous research methods, and a summary. The scholarly literature reviewed supports the research topic regarding the role of leadership succession planning in talent management.

Methods of Searching

A search for studies on talent management with connections to leadership succession planning started with a review of empirical studies on the study constructs. The Capella University library was the starting point. The first search yielded studies that served as foundational sources. Searching for recent studies on the constructs used the filter option of studies published within the last 3 years. From this point, the search for literature took place within the following databases: ABI Inform Global, Sage Journals Online, Business Source Complete, Google Scholar, and Business Expert Press.

A search and review of websites from professional organizations such as the Society for Human Resource Management (SHRM) and the Human Capital Institute (HCI) commenced. As a member of these HR professional organizations, access to a wide selection of research sponsored by these organizations exist. Membership in SHRM and professional affiliation with HCI provided access to white papers related to the study constructs. The research found within these sources focused on business practices and the role of HR practitioners in the strategic HRM profession.

Listings of books and case studies referenced in the scholarly works reviewed provided additional sources on talent management implementation and leadership succession planning development. The bibliographies reviewed served to link authors and provided a contextual overview of sources found. For example, one source provided a timeline of research conducted in the past that supported the foundational awareness of talent management. The process contributed to uncovering frequently cited authors and original research.

The first search resulted in a broad range of information. Such phrases as *what is organizational talent management*, *leadership succession planning in organizations*, *talent management in leadership succession planning*, and *leadership succession in talent management* were searched. The search phrases developed from connections and alignments among the constructs. Peer reviewed articles led to the need for narrower search phrases. Talent management is a broad concept containing organizational attributes. The revamped database search concluded with search phrases that included *leadership succession planning in talent management* and *the role of leadership succession in talent management strategy*.

These results provided foundational and recent sources for examining research related to the study constructs. The sources vaguely linked the study constructs of leadership succession and talent management strategy with improvements in organizational effectiveness and individual employee development. Specifically, the conceptual practice of talent development provided strong support for using the human capital resource-based theoretical lens for exploring the role of leadership succession planning in talent management.

The seminal works found regarding talent management and leadership succession planning helped inform the broader phenomenon of HRM. Seminal works used included books, trade magazines, and white papers accessed using the SHRM and HCI libraries. The *Journal of Human Resources, TalentEd*, *Talent Development and Excellence*, and *Leadership & Organization Development Journal* assisted in filling the gap of scholarly sources not readily available from the academic databases.

Theoretical Orientation for the Study

Strategies, objectives, and tactics involving the management of people in organizations are linked to the HRM specialization. Useful functions of HRM, such as recruitment, benefits, and training, have evolved into broader responsibilities of HR oversight of leadership succession, knowledge management, and the creation of a learning culture, among other strategic HR functions. Wright and McMahan (1992) provided a foundational review on the evolution of HRM using theory development that enhances HRM utilizing the event of a strategic role critical for organizational success.

The strategic perspective of HRM is gained through HRM theories, which provided a framework for the development of policies and practices that transports the HR function from the

micro practitioner role to the macro strategic partner role. Strategic HRM theory shapes the political and institutional management of human resources. Measurement of policies and practices developed from the HRM theory contributed to the creation of competitive advantage for the organization (Wright & McMahan, 1992). Within the 21st century, significant empirical research that tests the development of HRM theories grew (Yusliza, Choo, Jayaraman, Rimi, & Muhammad, 2019).

The constructs of leadership succession and talent management are within the theory of human capital (Bae & Patterson, 2014; Kalaiselvan & Naachimuthu, 2016; Wright & McMahan, 1992). Bae and Patterson (2014) correlated leadership succession and talent management with investments in human capital. Human capital investments may result in increased wages for the individual that stimulates individual motivation, which translates into improved performance for the organization. These factors could assist the organization in gaining and sustaining competitive advantage (Wright & McMahan, 1992). Kalaiselvan and Naachimuthu (2016) provided an additional human capital theoretical perspective on managing talent through the inclusion of succession planning. Kalaiselvan and Naachimuthu noted talent management as the catalyst for an organization seeking a competitive advantage. Kalaiselvan and Naachimuthu concluded that HRM processes should include staffing, compensation, and performance management, and other HRM processes should develop through talent management activities. A matrix should be included that encompasses succession planning along with other HRM processes as elements within talent management necessary for operational success (Kalaiselvan & Naachimuthu).

The resource-based view provides a foundational examination of HCT. Wright et al. (1994) posited a resource-based view of HCT necessitates internal firm management of assets to

include human capital assets. Intangible assets, such as intellectual property, were included as valuable resources for a firm in gaining a competitive advantage. These theoretical perspectives support the idea that a firm's efficient and effective strategies focused on managing resources endorses the significance of organizational competitive advantage.

The purpose of this literature review is to summarize the history of HCT and condense the parallel origins from the resource-based view (RBV) perspective for exploring the role that leadership succession planning has in an organization's talent management strategy. A review of empirical studies in human resource development (HRD) and human capital planning show alignment between the current study constructs and the theoretical aspects of human capital.

The examination includes the resource-based view of HCT and the link to the concept of competitive advantage for an organization. How to create a sustained competitive advantage for a firm was the context of the literature reviewed. Characteristics of an organizational resource are highlighted to show the conjunction from the study constructs within from functional role of strategic HRM. The dynamic capabilities framework and the implications for organizations in managing resources are included in this discussion as the last point in the need for exploring the role of leadership succession planning in talent management. Figure 2 captures the connection the study constructs have within HCT from the RBV perspective.

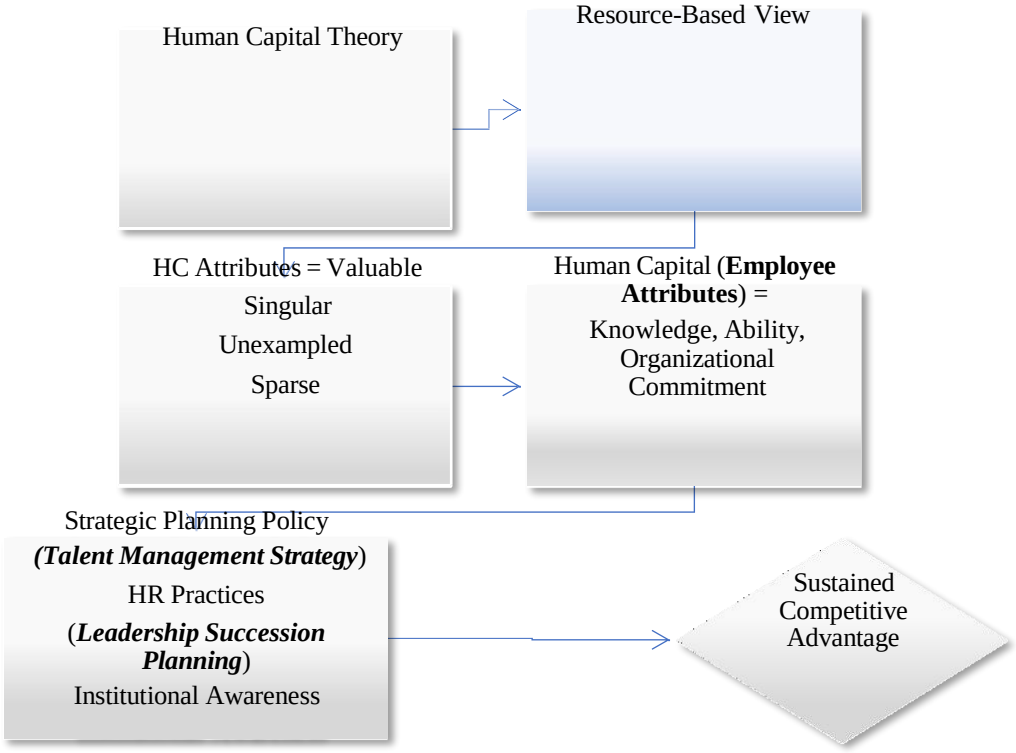


Figure 2. Study constructs illustrated within the theoretical orientation.

Review of the Literature

The literature on HCT provided an overarching perspective for examining the interrelationships between the study construct of leadership succession planning and talent management. Exploring associations between the constructs from the human capital theoretical perspective may lead to policies and practices that promote organizational success. HCT has a foundation linked to the school of economics (Bae & Patterson, 2014). From a broad view, HCT may be associated with analyzing the collected attributes of human capital for measuring value and potential development (Barney, 1991). A narrower view of HCT uses the outcome of investments as a means for determining intended success at the individual and organizational

levels (Yang, 2014).

Leadership succession planning and talent management are HR activities that originated from the economic realities for a firm to create a competitive advantage and maintain positioning among competitors through a sustained competitive advantage (Kalaiselvan & Naachimuthu, 2016). The review of literature revealed how human capital planning and human capital development might be viewed as subordinate concepts within HCT (Wright & McMahan, 1992). Analyzing the depths to which a connection between leadership succession planning and talent management from the human capital theoretical perspective was the literature aim. The review begins with an over of foundational research. An analysis of literature from various subordinate HCT themes led to a review of literature within the resource-based view of HCT. The literature provided a contextual focus on the study constructs. The literature on human capital as a resource ends the review with an assessment of how human capital may be measured.

Human Capital Theory

In the 1950s, production priorities within firms focused on acquiring physical capital, labor capital, and land (Becker, 1993). The U.S. economy grew steadily in the 1960s and was the source of various studies examining economic production activities (Denison, 1962; Krueger, 1968; Schultz, 1961). The most notable gap among these studies was the *residual factor* (Nafukho, Hairston, & Brooks, 2004), which Schultz (1961) renamed *capital*.

In subsequent years, advancements in technologies led to improved methods of production that required firms to focus on worker knowledge as a means for higher productivity. A more specific measurement of labor costs associated with investments in developing employee skills became strategically important. The evolution closely aligned with the RBV tenets with an emphasis on the strategic reliance on core knowledge competencies of a firm's employees to

achieve a competitive advantage that leads to a sustained competitive advantage. Empirical roots of HCT and the RBV perspective are reviewed next.

Human capital theory history. The concept of human capital began with Smith's *Wealth of Nations*, in which the country's population was identified as an essential asset for managing growth and development (Manuelli & Seshadri, 2014). Human capital has served as a theoretical foundation for a broad base of empirical study. The roots of human capital are from labor economics. HCT correlates with worker knowledge (inherent or acquired) that supports employee productivity and organizational profits. Human capital is defined in a broad term to uncover the advantages and disadvantages of human capital as a theoretical lens for empirical study.

Becker, Murphy and Tamura (1990) credited the economic realities of managing scarce resources as a cause for the creation of the human capital theory. Choices organizations make regarding how best to manage human capital resources require decisions on how best to train, develop and manage at all levels, especially leaders (Cooper & Davis, 2017). The theory of human capital provides that increases in education and other developmental activities will result in higher productivity levels for the organization and increased wages for the individual. The opposite view is that the investment in human capital may have a short term lost in forgone wages for the individual with a depletion of productivity for the organization.

While neoclassical economics catalyzed the founders and the contributions made during the 17th century, an acknowledgement on the relevancy of human capital theory to the current study is essential. Bernstein and Beeferman (2015) suggested that leadership succession

planning ensures a plan for leadership gaps that may occur at any moment in an organization's life cycle.

Talent management allows organizations to identify, attract, develop, and retain the best human capital that human capital is determinate. Bernstein and Beeferman suggested that human capital theory has planning usefulness and measurement usefulness. The human capital theory supports individual decisions over the cost of future opportunities. The human capital theory allows organizations to calculate investment risk for creating opportunities. Leadership succession planning and talent management involve investments in human capital. An advantage of using the HCT as a theoretical lens involves enabling researchers to examine characteristics of human capital, such as education and training, as investments that may increase productivity for the employee and profits for the organization. Potential study constructs for empirical study may include training, quality of formal education, worker attitudes toward training, among other constructs, to explore the differences in human capital investments in firms that result in creating a sustained competitive advantage. In contrast, a disadvantage in examining human capital as a theoretical lens for the empirical study assume that wage differences among men and women may be linked to a less skilled, less trained human capital pool. The assumption may apply to firms that fail at achieving a sustained competitive advantage. The HCT has served as a foundation for empirical study among notable economic scholars. The contributions are summarized as follows.

Foundational studies on human capital theory. Schultz (1961) studied organizational investments in human capital for profits. The study defined *human capital* as knowledge and skills obtained from training and formal education for the sole purpose of

profits. An issue of workforce quality improvement was examined by Mincer (1962) and Denison (1962). The studies proposed organizational investments for improving quality, with firm profits being secondary. The ideas of social improvements and individual improvements were determined through Becker (1993). Becker suggested that investments in human capital may have broader benefits for the society in which the human capital lives and may benefit human capital privately. Less focus was placed on firm profits. Bowman (1969) studied organizational investment in human capital specific to improvement in social services such as health care.

Psacharopoulos and Woodhall (1985) examined worker productivity using HCT, and found that investments in human capital through formal and informal education and training provided expanded individual productivity and improved knowledge, skills, and abilities that lead to the motivated workforce and high productivity levels. Romer (1986) examined firm profits and found that human capital investments linked to market incentives that improve a firm's prospects for increasing profits. Becker et al. (1990) examined the speed of economic growth for communities.

The term *human capital* faced early criticism in the academic field. Academic professionals warned against describing the employee labor output as *capital* (Nafukho et al., 2004). The impersonal nature of other *capitals*, such as physical capital, copyright capital, or intellectual capital, seems logical to face initial skepticism. An analysis from the HCT at the supply side, demand side, and combined has provided economic implications for organizations.

The foundational studies reviewed provide a contextual frame of reference for the applicability of leadership succession planning and talent management. The current study

constructs provide a link to the foundational studies reviewed over the concepts involving investment, worker productivity and profits. These concepts, among others, may be factors relevant for determining correlations among leadership succession planning and talent management.

Human capital theory and the implications at the individual, organizational, and societal levels. Two themes central to the science of human capital is that labor participation is not solely quantifiable. First, labor participation is inclusive of labor knowledge and skills, and the judgment applied. Second, the ability of labor obtained from formal education, training, and on-the-job training has a cost. The cost is new capital and is quantifiable in the future (Zula & Chermack, 2007). Quantifying cost at the individual, organizational, and societal levels is a consideration for making investment decisions. Bae and Patterson (2014) examined issues of efficiency, wage setting, and labor market analysis as applied to human capital. The findings provided a contextual basis for organizations and supported decision-making choices for human capital investments.

Bae and Patterson (2014) proposed HCT as a theoretical lens for examining issues at the individual, organizational, and community levels. At the individual human capital level, the HCT may be a lens for examining investments specific to an analysis of accumulation cost, projections on investment returns, and human capital earning potential. At the organizational level, the HCT may be a lens for examining productivity, labor environment, accession rates, and investment risk. Community benefits, community involvement, and environmental influences are issues at the societal level that may benefit from examining investments using the HCT. The logical conclusions from Bae and Patterson provided a contextual view from three levels of

stakeholders most affected by investments in human capital. HRD activities involve in the practical aspects of decision making regarding human capital investment.

Empirical research through the lens of HCT exposed the connection between investing in human capital and the development of human capital (Zula & Chermack, 2007). As the U.S. economy moved from a focus on manufacturing to service, human capital planning became important for organizations in achieving a competitive advantage. The theoretical phenomenon of HCT became practical in organizations through an emphasis on HRD.

Human capital theory and the human resource development connection. Investment in people from the organization may be measured at the individual level in the form of improved performance. The measurement extends to the organizational level with improved profits. The measurement extends to society through the level of improvements in the community inclusive of employees and the firm (Nafukho et al., 2004). According to Cooper and Davis (2017), HCT is operationalized at the organization level with the inclusion of HRD. Wang, Werner, Sun, Gilley, and Gilley (2017) suggested that while empirical research using HRD maturated, inconsistencies in a general definition for HRD still exist. Human resource development may include opportunities such as training, mentoring, and any activity that results in highly qualified employees and a superior workforce. The research reviewed by Nafukho et al. (2004) and Wang et al. (2017) tangentially correlate leadership succession and talent management along the lines of development of human capital for the benefit of filling leadership gaps and ensuring a talented workforce capable of providing the organization a competitive advantage.

According to Wang et al. (2017), HRD in organizations has a four criteria approach.

HRD's unique characteristic as an HR practice must be acknowledged. HRD activities should be developmental and be able to show continual developmental processes where appropriate. The definition must include levels of HRD relevant to the workforce. The definition must be multifaceted and relevant to the organization and the broader society in which the firm operates. HRD proposes that investments in education and training for the workforce in total yield increased productivity at the individual, organizational, and societal levels (Holton & Naquin, 2002). Scholars attempted to explore the connections and make recommendations for additional research. Results of empirical research created an evolution of HRD in organizational leadership succession planning specific to identifying leadership competencies and developing a plan for managing leaders as a part of talent management strategy (Wright & McMahan, 1992). HRD may serve as a link between leadership succession planning and the organizations strategic management of talent.

To explain HRD value in organizations, Psacharopoulos (1985) suggested more definitions of quantifying returns on investment education and training. The criticisms of HRD were generated through empirical research that focused on the organization, community, and society well-being. Concerns were made about making assumptions that support only stakeholder interests from the HRD perspective. The influence of intangible assets on productivity and growth at the individual and organizational levels is difficult to measure through the HRD theory (Cho & McLean, 2000). Cho and McLean suggested a concentrated effort to use human capital as a study construct as opposed to intangible assets such as organizational policies. Cho and McLean (2000) study provides a perspective on how HRD may

tangentially merge leadership succession planning and talent management. The HRD perspective includes interest at the unit, organizational, and societal levels.

The four criteria for defining HRD suggested by Wang et al. (2017) may include activities for developing succession planning and managing talent. For example, the first approach to HRD from Wang et al. established HR with oversight of developmental activities, which may include succession planning at all levels. The second criteria require the continued workforce development. The second criteria match the aims of talent management. Holton and Naquin (2002) provide relevancy to the concept of talent management specific to the organization. Holton and Naquin suggested investment made at various levels, most applicable to the current study, investment at the organization. Wright and McMahan (1992) suggest investments at the organizational level are ultimately for achieving a competitive advantage.

Human capital development. Various organizational systems for managing human capital and planned HR practices aimed at developing the competencies of human capital have fallen within the HRD category. Such practices as the development of an organizational talent management strategy and leadership succession planning are considered a part of HRD. Jacobs (2014) and Swanson and Holton (2009) took a system view in defining HRD. Banathy (2013) and Yawson (2013) viewed HRD as a complex dynamic that addresses the organization and broader society. The studies are relevant to the current study because the findings provide empirical evidence of correlations among the broader concept of succession planning and talent management.

While research has contributed to the theoretical perspective of HRD, Wang et al.'s (2017) definition is most applicable to the current study. Wang et al. (2017) viewed HRD from

the practical aspects of performance and the relationship to benefits at the individual and team levels. The definition provides room for organizations to develop human capital while managing the changing dynamics of an organization for creating and maintaining a sustained competitive advantage. HRD in practice is vast and in instances, HRD links to strategic HR practices involving planning for leadership succession and the development of talent management strategy.

Human capital theory and talent management. A review of empirical research that link organizational talent management strategy with human capital theory provide contextual perspectives, which informs the current study. Santhoshkumar and Rajasekar (2012) examined the automobile industry in India to determine talent management factors for measuring human capital employment and investment decisions. The study provided HRD professionals with a process for measuring and managing talent. Nilsson and Per-Erik (2012) analyzed challenges for HRD professionals connected to how talent is defined and identified. Nilsson and Per-Erik (2012) recommended a model for employing human capital based on considerations of individual, institutional, and organizational social factors. These perspectives provided a wide lens for further examination.

Kucherov and Zavyalova (2012) recommended that HRD focus on the firm's brand for identifying and deciding on actions related to the human capital turnover rate, the average cost of hiring human capital, training budget, and labor compensation. Bolander, Werr, and Asplund (2017) examined the theoretical and empirical outlines of talent management, and suggested four talent management perspectives for HRD in quantifying human capital investment decisions: humanistic, competitive, elitist, and entrepreneurial. The definitions are less important than the fact that HRD researchers and practitioners alike have a model for making human capital

investment decisions based on the industry and firm life cycle. The subject of HRD has a solid execution through human capital planning. The topic of leadership succession planning was lacking. Talent management was featured prominently with evidence that show HRD connections.

Human capital theory and human capital planning. The idea of human capital competencies as a means for gaining a competitive advantage transfers the practicality of HCT and HRD to planning for the organization. Fahed-Sreih (2009) provided an HR scorecard model for organizations attempting a strategic approach to planning strategically for utilizing human capital. The organization's operational goals should be aligned with the strategic approach to human capital planning. Fahed-Sreih suggested models for ensuring human capital planning aligns with the firm mission. Zula and Chermack (2007) suggested that strategy focused on capitalizing on the organization's human capital core competencies lead to strategic planning for achieving a competitive advantage. Zula and Chermack classified strategic planning into perspectives. Those perspectives include the rationalist, evolutionist, and processual categories. The literature reviewed shows aspects of leadership succession planning and talent management as independent concepts. The relevance of reviewing empirical studies are to show gaps in the literature specific to the role that leadership succession planning has in talent management.

The rationalist perspective on strategic planning suggests one solution is superior to others. An example involves a firm employing a single strategy for developing a strategic plan for the firm. The evolutionist perspective on strategic planning looks back at strategic plans that were successful and unsuccessful in developing strategic plans. Zula and Chermack (2007) described the process as acknowledging the organization's memory. The processual perspective

of strategic planning involves creating alternative outcomes for strategic planning. Strategic planning may provide flexibility to firms that result in forward leaning change when human capital circumstances change suddenly. An example includes developing a strategic plan for a leadership gap that occurs without warning. Leadership succession planning is a construct within the current study and aligns with three strategic planning perspectives. Zula and Chermack (2007) relevance to the current study exist in the operational level descriptions of organizational planning specific to planning for leadership gaps.

Human capital moved from being viewed as an inanimate object within the company to resources critical to a firm's success (Becker, 1993). The human capital transformation supported the evolution of HRD and human capital planning. The HCT suggests that organizational investments in individuals through education and training may lead to higher wages for the individual and profits for the firm. The HCT does not encompass the intricacies of resources and influences on the firm's sustained competitive advantage. The evolution of HCT theory as described in the literature reviewed provides a framework for illustrating the economic origins as a lens for exploring connections among leadership succession planning and talent management.

The resource-based view of human capital theory. Wright and McMahan (1992) suggested the RBV perspective involves internal firm management of assets, and that the human capital resource-based view includes tangible and intangible assets, human capital, and any remaining assets, including intellectual property, for gaining a competitive advantage. The theory supports the idea that efficient and effective strategies focused on applying every resource within a company help determine the company's competitive advantage. Wright and McMahan

(1992) inferred human capital as resources. The management of human capital may involve planning for succession at all levels including leadership. Talent management involves the management of human capital resources. The resource based perspective of human capital serves as lens to explore the current study constructs.

Chun (2016) reviewed literature within the human capital resource-based view to examine partnerships that led to sharing resources among organizations outside the firm. Specifically, the research aimed to explain the factors that support sharing resources among organizations external to the firm. Chun used literature from the organizational learning theory to determine that organizations with a shared culture and background are open to the idea of sharing resources. If not viable, the organization may look beyond a shared cultural background. The study was limited by a lack of empirical testing on the idea of a shared culture being open to sharing resources. The study provided a theoretical proposition that may add to the HRM theory involving the RBV perspective. Davis and Simpson (2017) studied HR managers in 17 Sub-Saharan African countries to compare internal knowledge based strategy to a product based strategy for determining which strategy produced a more significant competitive advantage. Firms within the continent of Africa present a wealth of potential for additional research because of emerging markets in Africa. Davis and Simpson found that HR managers view the resource-based view's practical value of focusing on internal human capital resources more favorably than focusing exclusively on the product. The research could lead to African firms' executives focusing on the resource-based view in the development of policies and practices aimed at promoting competitive advantage. Galbreath (2016) examined the role of corporate social responsibility in firms using resource-based view and complementary asset theories. The study

sought a determining factor for when a firm's board of directors and managerial resources complement one another. Complementary asset theory was categorized within the resource-based perspective. The theory involved an organization investing in one asset that leads to a marginal return on investment for the asset.

The findings revealed that external board members and internal female managers were complementary in influencing corporate social responsibility using the resource-based view as a lens. A limitation involves the fact that the study was conducted during the recent global financial crisis, so the firms' corporate social responsibility may have been restrained. Hayibor (2017) studied issues of fairness and equity as related to the behavior of firm stakeholders. Stakeholder theory falls within the human capital resource-based view and suggests that business aims are to create value for stakeholders including customers, suppliers, and employee communities, among others. The stakeholder theory was used to predict the influences of stakeholders' equity choices and exchange beliefs that lead to supporting the firm. If managed well, the theoretical implications could add to a firm's competitive advantage. The findings revealed a stakeholder is likely to move against the firm based on perceptions of fairness and equity. More empirical research is needed to confirm the findings. The role of stakeholders as an internal resource that should be managed by organizations was examined. All the researched reviewed provide illustrations and intricacies that shape exploring the role of leadership succession planning in talent management using the RBV theoretical perspective.

Nason, Mckelvie, and Lumpkin (2015) studied organizational size and correlations with corporate entrepreneurship using the RBV theoretical perspective and found that size influences corporate entrepreneurship competitive advantage. The expansion of new designs and

possibilities within well established businesses, which creates improved organizational profits and competitive advantage, is traditionally associated with big organizations. The study aimed to understand how firm size influences the firm's success at engaging in corporate entrepreneurship. Small firms that engage in corporate entrepreneurship may enjoy growth. Large firms that engage in corporate entrepreneurship may enjoy more learning and create a learning culture that supports competitive advantage. Teamwork may lead to another competitive advantage.

Riaz (2016) used high performance work systems to analyze employee performance attitudes that lead to a competitive advantage. The study findings revealed that HR practices that increase organizations' productivity are linked to high performance work systems. The study proposed a framework for analyzing resources under the resource's value, rareness, imitability, and organizational (VRIO) ability. The VRIO framework provided a context measuring an organization's competitive advantage. The study population was created from 17 manufacturing plants in Pakistan. The study was limited by the use of a subjective topic of organization performance within one industry. A comparative analysis involving a VRIO and return on investment among a broader population may have revealed a more useful conclusion on the resource-based view within HRM theory.

Beal (2016) took a resource-based view of HCT to examine the qualifications of hires on a business's ability to manage human capital performance that leads to a competitive advantage. Beal reviewed other studies that informed the RBV theoretical origins and provided a framework for resource-based view within an organizational setting. The findings revealed that organizations that bypass hiring overqualified employees run a risk of not acquiring an untapped

reserve of human capital resources to fill unforeseen gaps. Those organizations may need to invest more financial resources on human capital if unplanned organizational deficiencies occur. Beal defined the human capital resource-based view contextually and suggested that organizational performance is linked to employees. The higher the knowledge, skills, and abilities among the employees, the better the potential for a higher performing organization, which leads to higher profits. The strength of Beal's research is the critical literature review on the human capital resource-based view. The study is weakened by excluding an empirical investigation to prove the hypothesis. The findings are based on analyses of other research. The study's weakness did not invalidate the findings, as Beal provided a thorough human capital resource-based view recap that will serve as a lens for the study topic.

The resource-based view of HCT was the lens for Patidar, Gupta, Azbik, and Weech-Maldonado (2016) to study the link between succession planning and organizational performance using a population of hospital employees. The findings revealed a positive relationship between organizations that conduct succession planning and financial growth. The study's strength is the detailed explanation regarding the quantitative method and large sample size. The study was weakened by not showing a causal relationship between succession planning and organizational financial performance. The weakness did not detract from the findings, as contextual evidence suggested that succession planning involves employee development and has a potential catalyst for improved financial performance.

Patidar et al. (2016) suggested the RBV perspective supports organizations gaining a competitive advantage if those organizations manage resources efficiently. Organizational leadership succession theory was the catalyst for Zepeda, Bengtson, and Parylo (2012) to study

leadership succession among four Georgia school systems. The qualitative case study used semistructured interviews and analyses. The findings revealed that mentoring has a significant role in leadership succession planning. Internal and external partnerships influence leadership succession and should be a part of an organizational talent management strategy. The study's strength is in providing an alternative theoretical lens to the resource-based view. The findings were applied to the Georgia school systems only, which weakened the study. The study would be difficult to duplicate in another organization because the research was developed from contextual assumptions. Potential exists for these findings to be invalid within other organizational contexts.

Theoretical perspectives within the human capital resource-based view have served as a catalyst for research that attempts to expose and clarify growing strategic HRM challenges. Whether a competitive advantage in firms transfers to the individuals in firms was studied by Arik and Dunne (2014). A similar study was conducted by Ezuma and Ismail (2017). Strategic HRM concepts involving human capital development, high performance work systems, and organizational culture were analyzed for influencing international trade among firms operating in a global environment (Fareed, Noor, Isa, & Salleh, 2016). Investment practices of firms were researched to define the optimum investment that leads to firm success (H. Yang, 2014). Intellectual property as a resource was compared to other resources required for firm success (Radjenovic & Krstic, 2017). Issues regarding the organization or governance of a firm were studied using the human capital resource-based perspective to determine the optimum structure for achieving a competitive advantage. The review of literature continues with an expanded discussion on how the human capital RBV perspective was used to clarify various strategic HRM topics.

Dynamic capabilities and resource-based view. Empirical research using the resource-based view may lead to an assumption that resources, including human capital competencies, are static. Barney's (1991) classification of resources as valuable, rare, inimitable, and not substitutable as sources for creating a sustained competitive advantage is silent on how resources change and grow. Dynamic capabilities within firms address the need for firms to plan strategically for changes in resources. The changes may be the result of product evolution, worker skill growth or decline, or organizational expansion or retraction. Wright et al. (2001) summarized the dynamic capabilities under the hypothesis for the firm to establish processes and procedures that support firm growth in aspects of change and decline. Product development will go through various cycles. Depending on the product development cycle, human capital, in its capacity for product development, may require new and alternative competencies. Teece, Pisano, and Shuen (1997) suggested a firm's control of resources is a strategic matter that requires strategy regarding the evolution of resources.

Historical overview of resource-based view. Wright et al. (1994) suggested the strategic management of human capital acknowledges employees' importance within firms. The 1990s ushered in a period in which strategic organizational management moved from an external focus to an internal focus (Wright et al., 1994). The external focus was based on the industry strengths, weaknesses, opportunities, and threats under which the firm operated (Wright et al., 1994). The internal focus moves managerial attention to the internal resources by identifying the assets, competencies, and capabilities that will create a competitive advantage.

Literature within organizational economics was a catalyst to the RBV perspective (Bae & Patterson, 2014). Profit, competition, and the connections to firm success led the transformation

for firms to look inward toward resources to develop a strategy to maximize value (Wright et al., 1994). Critical concepts for comprehending the resource-based view are the definitions of *resources*, *competitive advantage*, and *sustained competitive advantage*.

Foundational studies on resource-based view. Barney (1991) created four measures for achieving sustainable competitive advantage. The contributions from Barney led to additional empirical research using the resource-based view (Wright & McMahan, 1992). Other studies by Wright and McMahan (1992) and Cappelli and Singh (1992) concluded that the resource-based perspective might provide a purpose for HR possessing a strategic formation and implementation role.

In contrast, Lado and Wilson (1994) suggested the human capital pool as developing more possibilities for creating a sustainable competitive advantage. The assumption for the argument is the human capital pool, as a highly skilled workforce, has more motivation to perform well. Lado and Wilson examined HR strategic management practices defined by Wright et al. (1994) and suggested the practices may be duplicated. The finding eliminates one of four criteria for creating a sustainable competitive outlined by Barney (1991). Limited empirical research substantiates the finding conclusively from Lado and Wilson.

Wright et al. (2001) proposed empirical research within strategic HRM during the late 20th century using the RBV lens. The findings follow to show influence. Huselid (1995) argued that HR practices aligned with the firm's business goals might connect to performance measures that create a competitive advantage. Academic research from the RBV perspective has focused on the requirements for creating a competitive advantage and sustained competitive advantage. Wright et al. postulated the resource-based view has two significant influences in strategic HRM.

First, empirical research using the resource-based view as a lens has provided a macro contextual basis for examining the historical perspectives on how firms create success. Second, empirical research has refuted the premise that the resource-based view does not have an ideal place in academic research. Organizations grow, and change and priorities shift. Human capital is in a perpetual state of change achieved through the departure and addition of people within the organization. Human capital growth is influx created through development from formal and informal means. The dynamic capabilities may facilitate a firm's changing nature.

Resource-based view and human capital development. Ndinguri, Prieto, and Machtmes (2012) examined recent human capital development regarding influence on firms' strategic competitive advantage. The research attempted to answer the question of how a company develops knowledge that leads to a strategic advantage for the firm. The resource-based view was a theoretical lens to examine knowledge characteristics of impartibility, ability to consolidate, measurability, acquisition generality, and the productivity of knowledge. Ndinguri et al. compared the human capital development approach to a bridge for allowing integration, coordination, and knowledge. The firm that focuses on human capital development and institutes strategic approaches through various factors may achieve a strategic competitive advantage. The research was theory focused, and proposition testing with further empirical research is necessary.

Human capital modeling was used by H. Yang (2014) as a means for emphasizing methods for firms to measure the appropriate human capital investment. Two scales were measured: one involving staffing policies, training, performance pay, and employee commitment and the other involving the knowledge and experiences of human capital. While the pros and cons were provided, the importance of developing scales to measure human capital investment

was the broader theme. More critical, strategy on how the resource-based view can serve to explain why human capital can set a firm up for success was provided. The study findings revealed that human capital investment practices positively affect human capital through the practice of using structural equation modeling. The causal models for a firm are unique to the firm, while models will not lead to a firm's success. Most important, firms that prioritize the development of human capital investment practices through causal models have opportunities that may create success and unique competitive advantage. The research was limited by using a limited population within the hospital setting. A broader population across industries would validate the findings further.

A firm's goal of gaining a competitive advantage cannot rely on product and market differences. While the management of human capital has received attention as a source for firm success, intellectual capital management is looked upon as another factor for firm success. Radjenovic and Krstic (2017) used the dynamic theory of intellectual capital that may serve to link human capital and intellectual capital through practices that promote the efficient usage of resources. Any sole resource may not be what brings firm success. A firm's capability through the development of policies and practices linked to human capital and intellectual capital may lead to a competitive advantage. Radjenovic and Krstic's research provided a foundational overview regarding the resource-based view perspective, but failed to provide empirical evidence that supports the dynamic theory of intellectual capital premises.

Barney (1991) expanded the conceptual view of resources from an external focus by including the firm's assets, tangible and intangible, firm capabilities, organizational processes, and property, information, and knowledge as resources. Barney classified resources into three

categories: physical capital resources, human capital resources, and organizational capital resources. The firm building, equipment, technology, and physical location are examples of physical capital resources. Human capital resources include workers' judgment, experience, and knowledge. Organizational capital resources may include structural hierarchy, strategic planning activities, informal relations, and the firm's capabilities to coordinate and oversee internal systems (Wright et al., 1994). The identification of resources and developing strategies for maximizing value may lead to a firm's competitive advantage. The concept of competitive advantage is a driving force within the RBV perspective.

Competitive advantage within the RBV perspective. Value creation through the development of strategy linked to maximizing firm resources and is not duplicated among competitors, is a factor for defining the conceptual view of competitive advantage (Barney, 1991). The characteristics of resources are essential for achieving a competitive advantage. Before RBV development as a strategic management phenomenon, resources were managed the same, without an effort to manage them for the unique contributions they bring to the organization (Wright et al., 1994). The RBV internal focus perspective involves resources as heterogeneous possessing an ability to differentiate at levels within the firm. Creating a competitive advantage for the firm may be achievable. The formula for maintaining and creating a long and sustained competitive advantage requires a meticulous focus on resources internally while simultaneously analyzing the environment in which the firm competes with competitors.

Business assets, capabilities, or other attributes such as patents, trademarks, or copyrights that cannot be duplicated and provide a superordinate and long-term position beyond the competitor's duplication efforts are elements that create sustained competitive advantage. Wright

et al. (1994) suggested that duplication efforts by the competitor must be exhausted for achieving a competitive advantage. Businesses are segmented into industries in which products adapt and change based on the market factors of supply and demand. Wright et al. outlined measurements for resources with potential in creating a sustained competitive advantage. Four criteria for measuring resources are (a) resources must create or add value, (b) resources should be rare or unique, (c) resources must not be duplicable, and (d) resources cannot be interchanged. Competitive advantage and sustained competitive advantage are achieved through policies and practices focused on the identification and enhancement of resources. The means to accomplish a competitive or sustained competitive advantage is made through strategic HRM.

Rodgers and Hunter (1992) analyzed the HR function within organizations and concluded the need for the HR function to justify the worth. The 20th century HR departments traditionally were structured to manage the recruitment, employee, and labor functions as well as employee benefits. Firms that focus on creating a sustained competitive advantage use human and organizational capital for promoting a new role for HR departments. The strategic approach has focused on soliciting, developing, and retaining the best employee competencies for the organization. The HCT provides that those competencies have the potential for increased wages and organizational success by gaining a competitive advantage. The RBV perspective has increased within theoretical and empirical studies involving strategic planning activities within HR (Wright & McMahan, 1992). The development of strategic planning within organizations has led to the importance of talent management strategy and HRD activities. Finding where leadership succession planning fits in the broader talent management strategy may influence business competitiveness. Snell, Shadur, and Wright (2001) noted the RBV application within

organizations has contributed to putting the employee upfront as a resource valuable to firm success. Empirical studies have attempted to extend clarity on how the resource-based view influences strategic HRM in firms.

Managing the changing nature of resources under the dynamic capabilities perspective may become practical through the business analysis framework of VRIO. Barney's (1991) four elements necessary for a sustained competitive advantage have been examined in various empirical studies. The author assessed that resources must be valuable, rare, inimitable, and organized in a way that exploits the resources to the fullest potential, provided these four characteristics are evident in total. Figure 3 illustrates the VRIO framework. The four characteristics are necessary for sustained competitive advantage.

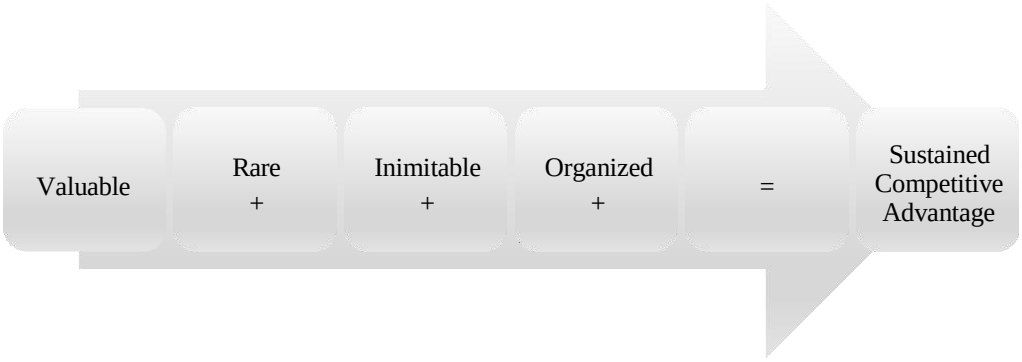


Figure 3. Valuable, Rare, Inimitable, Organized (VRIO) framework for assessing and managing resources.

Resources must be valuable. The RBV perspective provides that value be achieved for resources that lead to implementing strategies that improve efficiency and effectiveness by

capitalizing on opportunities and reducing threats. Various ways of determining resource value are available. Net present value is one such method. The method provides that if the cost of involvement in the resource is lower than the expected future benefit, the resource is valuable (Wernerfelt, 1984).

Barney (1991) suggested if one or two firms can acquire resources, the resource might be considered rare. A rarity in a resource could occur within a specific region, such as the telecom industry. The example creates a common strategy that does not equate to a competitive advantage. A short-term competitive advantage may result. A sustained competitive advantage may not be achieved.

Firms with valuable and rare resources alone may achieve a first mover reward. The RBV perspective provides that resources can be faulty in the ability to be copied, provided the resources are unique, ambiguous, and complex. The combination of these associations to resources makes them inimitable for firms desiring to copy. Barney (1991) suggested if a firm's resources are valuable, rare, and inimitable, a moderate chance exists for the firm to achieve a competitive advantage, and the competitive advantage may become sustainable in time. For resources to attain a full sustained competitive advantage, the organization must be prepared and organized in a way that strategically manages resources.

The organizational theory involving the dynamic capabilities phenomenon prescribes that the organization must purposely strategize on the ability to adapt to the changing nature of resources (Wright et al., 2001). The final characteristic for firms to achieve a sustained competitive advantage has to do with the firm being organized. Resources alone cannot create a competitive advantage without the firm being organized in a way that exploits the resources in a

manner that extracts value. Organizational component examples for exploiting resources may include a formal reporting hierarchy; strategic planning; and budget planning, management, and compensation policies.

The study constructs of talent management and leadership succession planning are strategic HRM activities that position the organization for change, as described in the dynamic capabilities phenomenon. The phenomenon provides the capability to the organization for assembling and coordinating human capital resources effectively. Absent organizational preparation for acquiring, using, and monitoring valuable, rare, and imperfectly imitable resources, the firm will not achieve a sustained competitive advantage.

Arik and Dunne (2014) used the resource-based view of human capital to explain the concept of competitive advantage for the individual by utilizing human capital development. The research further extended the resource-based view of human capital to explain how communities and regions gain competitive advantage. Arik and Dunne proposed that investing in education and developmental activities may have positive results. The individual (resource) can develop a value for the self and the firm. Arik and Dunne noted that human beings are essential to the firm and suggested the employment of humans is linked to value. As such, the value must be nurtured through training and policies that promote firm value. The findings revealed that investments at the individual level through human capital development promote a competitive advantage for the individual. The resource-based view of human capital can be extended to understand how communities in geographic regions may gain a competitive advantage just as a firm can gain a competitive advantage. The research was limited by not including industries where the individual may gain a competitive advantage through human capital development. Differences

were acknowledged among industries in valuing individual development as a source for organizational competitive advantage. Applying the RBV view beyond the firm may help in examining human capital value. The takeaway from the research suggests that managing human capital begins before employment in the organization. The individual human capital asset has a responsibility. Firms seeking a competitive advantage may have a role in managing individual development before employment.

Network viability from a competence view, which includes resource availability, managing resources, and developing a whole corporation network structure, was examined by Ezuma and Ismail (2017) through a literature. A firm's use of resources was linked to networks in managing human capital could achieve growth that provides a competitive advantage. A review of literature regarding the study constructs follows.

Leadership Succession Planning

Desai et al. (2016) provided a realistic view of leadership succession planning and proposed that leadership succession planning involves the identification and development of human capital. The role of leadership within a business is involved with setting performance goals, executing strategies aimed at building the firm's capabilities, and planning for the changing environment in which the organization operates (Garman & Glawe, 2004; Hills, 2009). Such practices may lead to a sustained competitive advantage (Barney, 1991). While the list is not inclusive of leadership activities, the list points to the importance of preventing gaps in leadership for the organization. Hagerty and Tita (2010) reported the rise of 3M stock on the mention that the company was involved in a leadership succession planning effort on the anticipated retirement of 3M's chief executive officer (CEO), making a connection to the

importance of leadership succession planning. The rationale for leadership succession planning, including the design and implementation of leadership succession planning within the broader context of talent management strategy, was the topic examined prominently in the literature review. Leadership succession planning has a history produced from empirical studies from the late 20th century.

Leadership succession planning history. Giambatista, Rowe, and Riaz (2005) reviewed empirical research regarding leadership succession planning from the late 20th century. The origins of leadership succession began through empirical studies within the category of succession management (Kesner & Sebora, 1994). Organizational factors such as the inevitability of human capital turnover, organization size, and leadership organization fit created the need for a narrower succession strategy for organizations concerned about the influence of leadership changes. Earlier names for leadership succession planning included *chief executive officer succession* and *chief executive succession* (Giambatista et al., 2005). *Leadership succession planning* is a common name that encompasses various organizational types.

Leadership succession influence on firm performance in the short and long term was the focus for Schepker, Kim, Patel, Thatcher, and Campion (2017). The research focused on the conditions of leadership succession as a way to prepare for leadership succession and predict leadership succession success. In contrast, Giambatista et al. (2005) supported the reason for conducting leadership succession planning. Schepker et al. suggested that firm outcomes should be predicted and used within the activities involving leadership succession planning. Subjects of empirical study includes various organizational types such as profit organizations, publicly traded, family owned businesses, nonprofit and government organizations.

Farah, Elias, De Clercy, and Rowe (2019) suggested that leadership succession planning has distinct characteristics based on the organizational model. Leadership succession planning may be different among the various types of organizations, such as profit, nonprofit, political, and government organizations. From a researcher's perspective, possibilities exist for expanding previous studies. Farah et al. categorized empirical studies on leadership succession planning, providing a framework that lists empirical studies in leadership succession planning. The frame may become useful for future researchers as previous studies were categorized based on the purpose, organizational type, and outcomes of leadership succession planning. Absent from the comprehensive list was the role leadership succession planning has in a corporate talent management strategy.

Leadership succession planning purpose. Garman and Glawe (2004) explored firm stability connected to leadership for emphasizing the importance of leadership succession planning by reviewing empirical research on leadership succession planning implementation from the mid to late 20th century. The research led to the development of a tool for assessing the legitimacy of leadership succession planning activities. The research revealed that placing a priority on firm profits over human capital development, as a purpose for firms to conduct leadership succession, may not constitute a complete cause for the organization to invest in leadership succession planning.

The development of potential leaders was the focus of Hills (2009). The author examined practical aspects of succession planning and sought to identify the benefits and drawbacks of adopting succession planning for developing talent. Hills tested a hypothesis concerning decisions on whether developing talent within the organization or recruiting outside talent for

filling future gaps in leadership is best. The central idea was to determine if leadership succession planning is the only factor in organizational effectiveness or if talent management through talent development is the key to organizational effectiveness. The findings revealed a five point strategy for forecasting the benefits of succession planning. While leadership succession was not directly separated from succession planning among every organization level, the research from Hills connected the concepts of talent management and talent development as activities within leadership succession planning.

Appelbaum et al. (2012) explored the topic of succession planning and the need for organizations to create succession planning strategies at organizational levels. Potential gaps in leadership received specific emphasis for organizations to avoid. Rothwell (2011) provided a rationale for leadership succession planning. The author used a four phase approach for evaluating the viability of successful leadership succession planning. Background information on the leader's role in the organization must be reviewed to clarify roles and responsibilities and assess potential gaps. The process of performing leadership succession planning should be drafted and assessed for the plan's execution potential. An assessment of present and future workforce must take place. A strategy for closing developmental gaps within the organization should be identified. Rothwell's argument for leadership succession planning may not transfer to every type of organization. The importance of gaining information regarding why leadership succession planning is necessary is the more significant point. How leadership succession planning is implemented is as important as the rationale behind implementing a leadership succession strategy.

Leadership succession planning implementation. The design and implementation of leadership succession planning were evaluated using empirical research by Hall-Ellis (2015). The author developed a four step approach to succession planning among organizational levels. The approach involved identifying a champion, evaluating the talent pool, and developing a talent development process. In contrast, Peters-Hawkins, Reed, and Kingsberry (2018) created a more complex implementation process using the dynamic leadership model. The model matched leader attributes to the evolving organization nature. Model specifics are not as important as the flexibility the model provided to various organization types. An implementation strategy using the leader's age and years of experience was analyzed by Pandiyan and Jayalashmi (2016). The findings revealed that the attraction of capable and competent motivated leaders should be a component of a successful leadership succession strategy.

How to ensure these results for every leadership succession planning activity lacked in the research from Pandiyan and Jayalashmi (2016). The research provided information on succession planning specific to the benefits of organizational leadership involvement. Leadership succession planning as a functional role for HR was the finding from Rao (2010). The author examined leadership succession planning activities within the context of other HR practices, such as strategic planning and succession planning at levels below the leader. Rao's study examined a population that was isolated to five software firms in India. A broader population across industries would strengthen the viability of conducting implementing leadership succession in concurrence with other HR strategic activities.

A multiapproach implementation strategy was the focus of Taylor and McGraw (2004), who proposed that performance management systems and talent development should be linked

in succession planning at every organizational level, including leadership levels. An organization gaining a competitive advantage was the motivation prescribed for the implementation of leadership succession planning. As with the findings from Rao (2010), the population from Taylor and McGraw was not diverse enough to link leadership succession with performance management.

Huang (2001) examined leadership succession implementation as a role for HR. The study question sought whether successful succession planning at every level, including leadership, leads to improved HR practices in other functional roles of HR. Research from Huang was limited to Taiwan firms. The author found a positive relationship among organizations that implement leadership succession planning and view it as an effective HR operation.

Santora, Sarros, Bozer, Esposito, and Bassi (2015) examined nonprofit organizations across five countries: the United States, Brazil, Australia, Italy, and Russia. The study sought to identify success factors involving executive selection because of leadership succession planning with a formal and informal strategy of managing talent. A contribution from the research included a discussion on the influence of talent management linked to succession planning for leaders. Comparisons among nations within the study population revealed differences specific to whether the countries used informal or formal succession planning for leadership. While the role of leadership succession was vague, the practical implementation of a talent management strategy supports additional research on the link between leadership succession and talent management. These developments align with the study question.

Bogdány, Balogh, and Csizmadia (2014) analyzed the leader's role in implementing an organizational leadership succession plan using a mixed method study design to compare and contrast leadership successor candidates with the inevitable transfer to the leadership position. The findings revealed that small to medium sized enterprises with proper leadership succession planning processes, not attached to the founder or owner, are rare. Similar to Peters-Hawkins et al. (2018), the study revealed that the leader has a significance in implementing leadership succession planning. A summary of various foundational and empirical definitions of succession planning strengthened the study.

Leadership succession planning and talent development. Harris, McMahan, and Wright (2012) examined the performance of a sports team in the context of rotating leaders who were developed to value the organizational goals of a changing environment. Leaders with high levels of skills and abilities, which remain with the firm, may be essential to a firm achieving a competitive advantage. The study was limited by including participants from one sport, basketball. A more diverse population among sports teams or other industries would have provided more support to the study findings. What is important in the study is that talent development for leadership was focused on abilities specific to the organization.

Cavanaugh (2017) examined succession planning, including leadership levels, in higher education, and proposed two reasons for developing succession plans in higher education. The author suggested that emergency planning and leadership accession are the driving forces behind succession planning. The author provided an overview of various succession planning approaches. Most approaches involved inclusion in talent development at every organizational

level. Data on the practical elements of developing leadership succession planning connected with talent development were the strengths for Cavanaugh.

Sanjeev and Singh (2017) examined an organization in the information technology industry and explored relational aspects of leadership succession planning and talent development. The findings revealed a positive relationship between talent management and leadership development connected to the organizational retention and reward strategy. A link was made between leadership development and succession planning at the leadership level. Talent development, as a critical step of leadership succession planning, was the aim of Meng et al. (2016) in the design of a framework for managing leadership talent based on development propensity. Meng et al proposed that talent development should link with an organization's retention strategy to manage talent. The study contributions from Meng et al., hint at managing leadership succession within the talent management strategy. Tafti, Mahmoudsalehi, and Amiri (2017) suggested that talent development has a role in planning for leadership succession. Talent development as a component in leadership succession planning involves organizational investments. Organizational profit forecasts often determine the role of talent development in leadership succession strategy and implementation.

Burkett (2008) examined the concept of organizational return on investment as a means for measuring talent management specific to investments in leadership career development and succession planning. The author studied international manufacturing organizations in the United States, Ireland, and Singapore using the quantitative case study method. The findings revealed the on-the-job application of learned knowledge, skills, and abilities linked to business goals is the key factor in investment decisions for talent development and leadership succession planning.

The study defined an efficient process for talent management, whereby success or competitive advantage for the organization is measured by the return on investment in talent development. The methodological approach strength came from a comparison of talent management specific to leadership and career development across three countries. The weakness came from assuming that talent development activities in the United States, Ireland, and Singapore are equal. A smaller focus, perhaps by specific industries in the identified countries, would have resulted in more insightful findings.

The literature reviewed for the study construct of leadership succession planning has begun to make a shift to broader themes of talent management. While various authors made minor references correlating leadership succession planning and talent management, gaps were found specific to how leadership succession fits within the broader talent management phenomenon. A discussion on talent management as a study construct follows.

Talent Management

Obtaining and sustaining a competitive advantage is an essential goal of a firm or organization (Barney, 1991). The conceptual view of human capital notes that human capital is managed in a way that leads to success for the organization (Stevens, 2010). From a practical view, talent management correlates with an organization's commitment to hire, manage, develop, and retain talented employees. A strategic view of talent management may involve an organizational assessment of identifying talented human capital, deciding what workflow systems or processes to include within a talent management strategy, and implementing a talent management program inclusive of organizational goals. The literature reviewed explored strategic aspects of talent management. The evolution of talent management, investment

implications, and implementation practices of talent management are themes that evolved from the literature.

Talent management evolution. The practice of talent management was explored by Lewis and Heckman (2006). Managing human capital has evolved as a critical priority for organizations. Research on talent management included various identifications for talent management, such as employee management, workforce management, and human capital management (Lewis & Heckman). A gap in the literature on the strategic aspects of talent management was found. The gap may reflect the recent evolution of *talent management* as a strategic planning activity. Lewis and Heckman reviewed the literature on the definition of *talent management* and provided a foundational starting point for more talent management research. The literature review weakness came from a focus on the HR practitioner perspective. The weakness does not outweigh the study's strength regarding the review of literature, which provided seminal definitions of *talent management*.

Empirical research involving quantitative biometrics and content analysis to examine talent management concepts and underexplored areas of talent management were conducted by Gallardo-Gallardo and Thunnissen (2016) which provided a foundational overview of empirical literature in talent management. The findings revealed that the business unit, team, or job level were underexplored areas in talent management. For example, most empirical research on talent management comes from international organizations built on the talent management phenomenon. How talent management works with the study construct of leadership succession was, absent from the conceptual review of talent management. The summation of research on talent management provided the most persuasive evidence that talent management is new in the

21st century organization as a strategic approach to managing human capital. While the literature provided that talent management as a strategic approach for managing talent may lead to a competitive advantage, how talent management is implemented is important for a firm's sustained competitive advantage achievement.

Talent management implementation. Gallardo-Gallardo et al. (2015) assessed the approaches to talent management at various stages of an organization's evolution. The findings revealed that talent management is a phenomenon driven when the resource-based theoretical lens is dominant. Gallardo-Gallardo et al. provided three other theoretical lenses for studying talent management: international HRM, employee assessment, and institutionalism. The findings were summarized and concluded that a focus on the organization, specific to the employee or institution governing firm operation factors, leads to the success of talent management implementation. LeCounte et al. (2017) examined talent management policies and practices related to leadership pipeline identification finding that leadership succession might be an organizational strategy for managing leadership talent. The weakness is that the framework places too big of an emphasis on a board of directors. Such a body will not exist in other public and private organizations of smaller sizes.

Practical aspects of talent management implementation at the firm level were the subject of research by Gallardo-Gallardo and Thunnissen (2016). The qualitative case study used data from publicly funded Dutch universities. The findings suggested that successful talent management is differentiated between the individual or employee and the organization. The study suggested that if the employee does not believe he or she has sufficient knowledge, skills, and abilities, talent management is not practical. Talent management is effective through

developmental resources that lead to employee financial gains that fuel performance, which translates into a firm's competitive advantage. Gallardo-Gallardo and Thunnissen provided an overview of theoretical approaches in talent management backed by different viewpoints from other studies. No explanation was provided regarding why the longitudinal study was necessary. The findings may catalyze future research as the findings provided a review of foundational literature on talent management. The studies reviewed provided a human capital RBV theoretical context for examining the constructs of leadership succession planning in talent management. A comparison study is reviewed for contrast, as follows.

Mahfoozi, Salajegheh, Ghorbani, and Sheikhi (2018) suggested the conceptual view of talent mindset involving the attraction, identification, development, and relationship building for managing human capital as an implementation strategy for talent management. A conceptual definition of a talent management strategy indirectly places the practices of leadership succession planning within the talent mindset Mahfoozi et al. The research of Mahfoozi et al. connects with the current study's broader themes.

Other foundational research on talent management strategy examined organizational commitment as a dominant defining characteristic (Lawler & Hall, 1970; Lodahl & Kejnar, 1965). Talent management strategy involving the identification and development of people to fill gaps in leadership appears as a more substantial match to Mahfoozi et al.'s (2018) definition. Empirical research involving talent management implementation was found from an international contextual perspective.

Ewerlin and Süß (2016) used a quantitative study to determine the cause of German firms underutilizing talent management as a strategic choice. The findings revealed that firms

implemented talent management to stay compliant with organizational business goals but failed to develop a talent management strategy. Piansoongnern and Anurit (2010) explored talent management implementation among a population of firms in Thailand. The findings revealed that talent management, as a strategic focus, is a new phenomenon.

Succession planning was recognized and applied as the foundation for talent management. Other conclusions revealed a difference between managing talent from a developmental perspective for short-term needs and talent management as a long-term strategic choice for gaining a competitive advantage. Sharma and Bhatnagar (2009) examined the role of competency profiling in building an implementation strategy for talent management within an Indian pharmaceutical organization. Conclusions from the study involved the identification of common themes that may help organizations determine strategy regarding whether growing internal human capital talent or outsourcing the talent is best. While the study connected succession planning with managing talent, the study failed to show the working relationships between succession planning and strategic talent management.

Variances in the organization size, the role of HR, and perceptions regarding planning were indicators for the success of implementing a talent management strategy among Icelandic organizations, in a study by Guðmundsdóttir, Aðalsteinsson, and Helgudóttir (2017). Fundamental structural challenges, such as the workplace location and building conditions, were found to affect the development of a talent management by Tafti et al. (2017). A practical explanation for how to develop a talent strategy from a basic conceptual view was a recurring theme. Tafti et al. suggested that talent retention, development, and acquisition are parts of a successful talent management strategy. Leadership succession planning may be a part of talent

development provided other structural, behavioral, and managerial conditions are met. Organizational investment decisions in talent management were explored through empirical research.

Talent management investments. An organization's focus on profits as part of a talent management strategy over the needs of human capital might fail to achieve a competitive advantage (Collings, 2014). The author introduced the concept of looking at investment in talent through a broader lens. Collings (2014) posited that investment in talent should consider various investment phases rather than the short-term increase in performance. Chaturvedi (2016b) examined succession planning in the context of productive talent management investment for organizations. The author proposed that succession planning should link to communicating the rewards of increased responsibilities for developing a talent pool. What is most significant about Chaturvedi is that the study findings established an interrelationship between succession planning and talent management.

Investment in a talent management strategy for veteran hiring was examined by Ford (2017). The author proposed veteran hiring as a strategy for building a talent management strategy that uses untapped veteran skills in the civilian workplace. While the contributions of military veterans are admired, Ford did not provide anecdotal evidence of how best to manage the transition from military to civilian life and quantifiable return on investment evidence. The findings from Church and Silzer (2016) revealed a talent management framework that integrates various technological advances, such as social media analytics and digital profiling, as methods for recruiting and retaining talent.

Investment decisions for talent management lead to a rebranding of traditional HR practices for an Egyptian firm was found by Khalil, Elsaay, and Othman (2017). Santora et al. (2015) examined nonprofit organizations across six countries, including Australia, Brazil, Italy, Russia, and the United States, to determine the level of investment required for examining the role of succession planning and executive leadership selection. Santora et al. asked whether a formal or informal strategy of managing talent leads to success. The study examined human capital recruitment from internal and external pools to predict the best talent management strategy. Organizational investment scenarios that influence organizational effectiveness among nonprofit organizations provided an essential contribution.

Savanevičienė and Vilčiauskaitė (2017) explored investments in talent management strategy focused on employees in Lithuanian firms. The study aimed to determine whether the best investment strategy in talent management should include employees or limit the strategy to one segment, such as only leaders. While the findings concluded that the investment strategy should involve every employee, room exists for a variety of approaches based on the country, industry, and political climate. Information about the organizational climate for optimum succession planning and talent management strategy is the main contribution.

Synthesis of the Research Findings

The HCT was founded from economic theory with aims for the organization to earn a return on the investments made at the individual and organizational levels. Becker (1993) was credited with providing an empirical explanation of HCT as a lens for additional analysis. In addition to Becker, various researchers have identified human capital as a resource equal to other resources, such as physical, labor, and land capital (Bernstein & Beeferman, 2015; Brenner,

2016; Denison, 1962; Krueger, 1968; Schultz, 1961). HCT may link to a modern-day view involving the organization's measurements to determine resource value (Manuelli & Seshadri, 2014). The theory of human capital has practical implications for measuring the value of formal and informal training education. Future returns from the organization's investments may be calculated. Provided the returns or benefits outweigh the investment, success will occur (Denison, 1962; Mincer, 1962). The HCT is complicated when economic and human aspects converge.

Psacharopoulos and Woodhall (1985) used the HCT and found that investments in human capital through formal and informal education and training provide expanded individual productivity and improved knowledge, skills, and abilities that lead to a motivated workforce and high productivity levels. Various researchers expanded the findings to include the firm industry of operation and local communities as potential additional beneficiaries using the HCT premise (Becker et al., 1990). The investment cost is an essential element in measuring the value of resources for the idea of individual and organizational success.

The idea of recent capital cost as a predictor for future cost leads to additional influences on formal education, training, and on-the-job learning (Zula & Chermack, 2007). As the U.S. economy moved from a focus on manufacturing to a focus on service, human capital planning became important for organizations in achieving a competitive advantage. The theoretical phenomenon of HCT became practical in organizations through an emphasis on human capital development.

Wang et al. (2017) linked HRD to the HCT with four criteria for the creation of HRD in organizations: (a) HR practice identification, (b) practices must include potential future activities,

(c) HRD activity across the organization must be identified, and (d) the need for HRD activity to include the benefits for the broader community in which the organization or firm operates. Psacharopoulos (1985) examined identifying resource value for success at the individual, organizational, and broader community. HRD may provide a broader cover for the current study's inclusion of leadership succession planning and talent management strategy.

Santhoshkumar and Rajasekar (2012) examined the automobile industry in India to determine talent management factors for measuring human capital employment and investment decisions. The study provided HRD professionals with a process for measuring and managing talent. Challenges for HRD professionals connected to how talent is defined and identified were analyzed by Nilsson and Per-Erik (2012). The developments led to a research focus on human capital planning, which expanded the research from Zula and Chermack (2007). While the research timeline has no direct link, the RBV perspective provided a theoretical orientation for issues involving the HCT and the subordinate practices of HRD and human capital planning.

The conceptual frame of strategic HRM from Wright et al. (1994) suggested the resource- based view for strategizing the use of firm resources. Gaining a competitive advantage and creating a sustained competitive advantage through the strategic use of resources is the foundation for the RBV perspective (Barney, 1991). Because of Barney's (1991) finding, other studies have looked at the HR department within the organization as the responsible party carrying out the identification, planning, and managing of firm resources for firm success. Other studies by Wright and McMahan (1992) and Cappelli and Singh (1992) concluded that the resource-based perspective might provide a purpose for HR acquiring a strategic formation and implementation role.

Barney's (1991) four components of achieving a sustained competitive advantage provided a catalyst for other empirical research. H. Yang (2014) used human capital modeling as a means for emphasizing methods for firms to measure the appropriate human capital investment. The author provided that value in resources support an organizational implementation strategy that improves efficiency and effectiveness. Rare resources are not available to other competitors. A firm's competitors do not quickly implement imperfectly imitable resources. Resources not substitutable round out the list of resource characteristics that lead to a sustained competitive advantage. While Barney required four attributes within a resource for a firm to gain a sustained competitive advantage, the author was silent on how the strategic HRM practices address the natural evolution of resources.

Dynamic capabilities within firms address the need for firms to plan strategically for changes in resources. The changes may be the result of product evolution, worker skill level growth or decline, or the organization's expansion or retraction. The origins of dynamic capability came from organizational theory. The concept of dynamic capability connects the HRD, human capital planning, and strategic HRM by addressing the *what* in managing resources (Teece et al., 1997). The study constructs of talent management and leadership succession planning are strategic HRM activities that position the organization for change, as described in the dynamic capability phenomenon. Absent organizational preparation for acquiring, using, and monitoring valuable, rare, and imperfectly imitable resources, the firm will not achieve a sustained competitive advantage.

Critique of Previous Research Methods

An analysis of critical empirical findings regarding leadership succession planning and talent management begins the evaluation. The thesis and purpose of foundational conclusions are provided to measure value in the study. The HCT, from the RBV perspective, provided a theoretical lens for exploring the connections between the current study's constructs. The strengths and weaknesses of HCT, resource-based view, are provided as a contextual prospect for determining worth in answering the study question.

While the literature review provided a foundational history of empirical research involving leadership succession planning and talent management, the literature did not explicitly address the interrelationships between the study constructs. Leadership succession planning is a proactive planning exercise involving a systematic investment in human capital at the organizational level for building a pipeline of leaders prepared to fill leadership gaps (Garman & Glawe, 2004). Empirical research on talent management provided various strategies for implementing talent management (Lewis & Heckman, 2006). Developing a talent management practice is contingent on factors such as the organization's industry of operation, geographic location, and age, among others. Most important is that talent management is not a homogeneous activity within organizations.

The literature suggests that talent management strategy involves an organization's goal to hire, develop, manage, and retain talented employees who will support the creation of a sustained competitive advantage (Burkett, 2008). Leadership succession planning and talent management require organizational investment. The HCT, as a theoretical lens for exploring the interconnections between the study constructs, was selected because of possibilities for

measuring various human capital attributes for value creation in firms (Barney, 1991). HCT provided a broader contextual cover for exploring the study. A narrower perspective may be gained through the resource-based view. The strengths of HCT as a theoretical lens focuses on measuring investment cost for human capital, such as the competencies, skills, and abilities that may be sources of measurements within firms. HCT requires organizations to manage investment costs in human capital for gaining an advantage among competitors. Managing human capital investment costs may be necessary for organizational success. A notable HCT assessment is that measuring human capital investment costs may not be the determining factor for firm success. For example, a human capital resource in a firm may have value from the relationships formed from employment within the organization. Becker (1993) highlighted the complexity of human capital and suggested that human capital linked to connections internal and external to the organization makes human capital unmeasurable as a resource.

Barney (1991) linked human capital as a resource most associated with organizational managers responsible for work that may lead to competitive advantage. The importance of developing strategies that maximize human capital has become a growing phenomenon within the strategic management of human resources (Wright & McMahan, 1992). Barney's research was groundbreaking in revealing the role of people as a potential source for investment development for firm success. The impersonal nature of viewing human capital on the same level as physical resources such as equipment and buildings received early criticism (Becker, 1993). The idea of human capital transferability is not as simple as other firm resources such as equipment and materials.

Leadership succession planning and talent management are HR practices involving strategic HRM. The constructs are performed for sustaining the organization and preventing a gap in leadership. Research on HR practices involving a host of activities, including the study constructs, revealed a possible competitive advantage (Chapman, Sisk, Schatten, & Miles, 2018). Uncovering the reasons, characteristics, and practices regarding the role leadership succession planning has in organizational talent management could lead to strategies that may bring a sustained competitive advantage for the organization. In evaluating the human capital resource-based view as a theoretical lens, recognizing distinctions in human capital and HR practices specific to the ability to create a sustained competitive advantage was significant. The concepts of HRD and human capital planning are linked to the practical aspects of strategic HRM.

The study constructs fall within strategic HR practices. Barney (1991) expanded the definition to include HR managers and strengthened the strategic role of HR. HR practices were defined as a host of HR activities, including recruiting, selection, and retention (Wright et al., 1994). The question arose as to whether human capital or HR practices create sustained competitive advantage.

Schuler and MacMillan (1984) and Chapman et al. (2018) studied human capital and HR practices from the position of an ability to create a competitive advantage that may or may not be sustainable. Wright et al. (1994) clarified the distinctions by acknowledging the ability to create a competitive advantage. The findings focused on how HR practices create a sustained competitive advantage by developing the human capital pool.

Wright and McMahan (1992) suggested that strategic HRM becomes strategic when decisions over HR resources and practices influence strategic decisions substantial to the

organization's competitive advantage. Wright et al. (2001) provided a foundational overview of how resource-based view affects strategic HRM, highlighting how the RBV perspective is a bridge from the utilization of organizational human resources to include skills and abilities to strategies that promote an organization's competitive advantage. Barney (1991) developed a four criterion model for measuring resources based on attributes of being valuable, rare, inimitable, and organization centered. The model does not consider extenuating factors such as how a resource within Barney's criteria obtained status.

An assumption is made that the resources among the four principles exist. The review of literature on the RBV perspective did not yield empirical research on how the capabilities of human capital were obtained or created. An appraisal of the HCT resource-based view concludes that the current study's theoretical orientation was appropriate.

Summary

The literature review provided a synthesis of recent, foundational, and seminal empirical studies that informed the present study. Included were methods of searching for literature. The theoretical foundation included a review of the literature regarding the HCT from the RBV perspective, as well as a review of research on the study constructs of leadership succession planning and talent management. This section included a theoretical chronology of literature that informed the current study. The synthesis of the research reviewed provided a functional link between the study constructs and the resource-based view of HCT. Wright and McMahan (1992) suggested that talent management and leadership succession planning are appropriate activities within HRD linked to achieving a competitive advantage for the organization

While broadly addressed, a relationship between the present study constructs of talent management and succession planning exists (Cavanaugh, 2017; Chaturvedi, 2016b; Sanjeev & Singh, 2017). From an HRM theoretical perspective, Bae and Patterson (2014), Kalaiselvan and Naachimuthu (2016), and Wright and McMahan (1992) correlated talent management and succession planning with investments in an organization's human capital.

The constructive performance of succession planning and talent management strategy informs HR practitioners and organizational leadership. The use of succession planning and talent management may lead to firms gaining a sustained competitive advantage. The following chapter presents information on how the study sought to answer the research question about the role of leadership succession planning in talent management.

CHAPTER 3. METHODOLOGY

The study explored the role of leadership succession planning in talent management strategy at the organizational level. Previous studies found an interrelationship between talent management and succession planning (Cavanaugh, 2017; Chaturvedi, 2016b; Sanjeev & Singh, 2017). A gap in the literature exists specific to the role of leadership succession planning in talent management (Erasmus et al., 2017; LeCounte et al., 2017). HCT connects talent management and succession planning with investments in an organization's human capital (Bae & Patterson, 2014; Kalaiselvan & Naachimuthu, 2016). The study's objective was to explore leadership succession planning and talent management. The findings may inform organizations on practices that may lead to a competitive advantage.

The chapter includes content relevant to the research methodology for the exploratory qualitative inquiry regarding the role leadership succession planning has in talent management. The exploratory qualitative inquiry method provided an empirical platform for exploring the opinions and experiences of HR professionals specific to their work on matters concerning leadership succession planning and talent management strategy. A discussion on the qualitative method appropriateness follows. Included is a discussion on the study purpose, including the research question and choice of research design. Covered are the data collection procedures and the selection of participants' procedures. Finally, this section synopsizes the instrument used to conduct the research and ethical considerations.

Purpose of the Study

The exploratory qualitative inquiry's purpose was to explore the role of leadership succession planning in talent management among senior HR professionals. The human capital theory was the lens used to explore the current study constructs. The HCT has a foundational link to the school of economics (Bae & Patterson, 2014). Human capital is an essential factor for an organization seeking a competitive advantage (Barney, 1991). The research may add to the knowledge regarding the field of business and specialization of HRM as succession planning is a recurring matter in companies. Rothwell (2011) described forms of succession planning regarding risk management and the need for organizations to prevent gaps in employment. Gaps in leadership have the potential to lead to a catastrophic loss for the organization (LeCounte et al., 2017). Exploring the role leadership succession planning has in talent management strategy may lead to the development of policies and practices that support an organization in gaining a competitive advantage.

Research Question

The research question developed from researching the topics of leadership succession and talent management. Pandiyan and Jayalashmi (2016) studied succession planning in the manufacturing and financial industries. Pandiyan and Jayalashmi provided a broad overview of succession planning activities specific to identifying talent. Lacking from Pandiyan and Jayalashmi was the specific role of leadership succession in a corporate effort to manage talent. Other studies from Hall-Ellis (2015) and Peters-Hawkins et al. (2018) examined the topic of leadership succession planning. Those studies focused more on the part of leadership succession planning in the context of HRD. Absent from these studies was information regarding leadership

succession in the broader context of talent management. The research question evolved from curiosity over what, if any, role leadership succession planning has in organizational talent management. The research question encompasses the study purpose, the phenomenon of leadership succession and talent management, and is aligned within the qualitative inquiry format. The research question is, what is the role of leadership succession planning in talent management strategy?

Research Design

Knowledge of any phenomenon held by an individual is a part of a reality that exists for the individual (Arora, 2017). An exploratory qualitative inquiry method explores the phenomenon and interprets the individual's knowledge and input to measure and understand the experience; these are the fundamental aspects of interpretive research. According to Merriam and Tisdell (2016), interpretive research is a common type of qualitative research connected to discovering an observable reality that varies based on the study. The description makes qualitative methodology ideal for the topic of exploring the role of leadership succession planning in talent management. The qualitative methodology selection aimed to answer the research question.

The research results may provide the underlying reasons, opinions, and motivations of leadership succession planning in talent management. Qualitative research increased in the 1900s as a rejection of positivism, an idea that an objective world can produce verifiable data (Nite & Singer, 2012). Qualitative research and the variety of approaches are as rigorous as quantitative research. Qualitative research houses a variety of research designs. The types of designs seek to

answer different kinds of research questions with unique analytical tools. The life experiences of others are the aim of qualitative research.

Exploratory qualitative inquiry is the qualitative method used to understand study participants' meaning of specific experience (Seidman, 2013). The research seeks to identify experiences that contribute to a determination on the role of leadership succession planning in talent management strategy. An exploratory qualitative inquiry approach is appropriate when participants' perceptions of events and actual external happenings may be subjective (Percy et al., 2015). Qualitative research was relevant for the study because the experiences are unique for each individual.

According to Percy et al. (2015), "Generic qualitative inquiry investigates people's reports of their subjective opinions, attitudes, beliefs, or reflections on their experiences, of things in the outer world" (p. 78). Semistructured interviews were conducted and included open-ended questions related to leadership succession planning and talent management. The research design aligned best with a qualitative study involving the discovery of unforeseen phenomena (Nite & Singer, 2012). The current study used the qualitative inquiry method to draw data from participants' experiences and beliefs.

The qualitative approach does not include statistics, numbers, and data; instead, it attempts to examine the meaning of a phenomenon from the perspective of humans. Qualitative research draws out the voice of study participants during interviews and allows the participants' accounts to be authentic and uninfluenced (Williams & Moser, 2019). The identification of biases and assumptions took place before the participant interviews. Williams and Moser (2019) suggested that researchers should assign a standard collection of meaning to the phenomenon

under examination. The current study employed Williams and Moser (2019) suggestion by providing descriptions for the constructs of leadership succession planning and talent management during the participants' interviews and soliciting additional meaningful data from the participants during each interview.

Consideration was given to using bracketing and epoché as a means for preventing interviewer bias. A reflective journal was created during the study development phase of research. The journal was designed as an e-journal. The format allowed fast entry additions from notes recorded on an iPhone for later transfer to electronic research files stored on a Macintosh computer (Fung, Abdullah, & Hashim, 2019). The participants' leadership succession planning and talent management experiences provided meaningful data. Fung et al. suggested recapping the experiences in writing might help create a mental wall for preventing the interviewer's interpretations from influencing the research process. The suggestion was accepted within the current study.

Target Population and Sample

The target population included individuals who may benefit professionally by knowing the role leadership succession planning may have in talent management. The target population included HR professionals, organizational leaders, and other professionals involved in organizational development. Profit and nonprofit organizations were represented in the population. In qualitative research, it may be difficult for a researcher to study the entire target population (Scheiber, 2014). Such an attempt is rare, and studying the whole population may extend the study beyond what is needed to answer the research question. The study identified a

target population and sample of individuals who reflected a narrow level of experience related to the study constructs of leadership succession planning and talent management.

Population

Leadership succession planning activities and the strategic management of talent are practices traditionally performed within the functional area of HR (Kalaiselvan & Naachimuthu, 2016). These functions fall within strategic HRM and gained credibility as a critical requirement for organizations seeking a competitive advantage (Wright & McMahan, 1992). Organizations have a variety of approaches for managing the activities of leadership succession planning and talent management strategy. Differences in the organization type, size, and location, among other variables, are determinants that may influence the implementation of leadership succession planning and talent management strategy (Wright et al., 1994). The current study may reveal other determinants for organizations seeking to develop and implement leadership succession planning and talent management. Wright et al. (1994) did not provide a definitive assessment of how leadership succession planning and talent management work together. The objective was to determine the role of leadership succession planning in talent management through gathering data from a population most likely to have experience with performing, advising, and implementing leadership succession planning and talent management at the organizational level.

The study population included people with a stake in knowing how leadership succession planning and talent management are related. The study population included HR professionals, organizational leaders, HR consultants, and organizational development professionals. Senior HR managers may hold positions within a firm as organizational leaders and organizational development advisors. According to Kalaiselvan and Naachimuthu (2016), “At this level, HR

becomes responsible for identifying core competencies necessary for their organization to attain leadership positions" (p. 5). Choosing a smaller population subset was necessary for identifying a sample to facilitate answering the research question.

Sample

Nite and Singer (2012) stated that a sample includes the people selected to participate in an empirical study. The sample consisted of senior HR managers, executives, and directors, or organizational development practitioners. Participants needed to have at least 10 years of experience advising, developing, or implementing leadership succession planning or talent management at the organizational level. The level of experience was suggested by Kalaiselvan and Naachimuthu (2016) as being appropriate for the strategic management of human capital, involving planning for leadership gaps and managing the talent of organizational human capital. Participants who misrepresented their experience, identified a conflict of interest, or did not respond to the e-mail with attached informed consent were excluded from the study. The current study aim was to use the exploratory qualitative inquiry and include 10 participants or a number that reached a saturation point where no new information could be learned, as Boddy (2016) suggested. Achieving balance among participant characteristics was a consideration during the participant selection process and for deciding the appropriate sample.

Determining the sample frame involved a process of narrowing the population through inclusion criteria for the smaller sample group (Given, 2008). The study used three sample frames. The first sample included two participants who met the study criteria and attended a leadership succession planning seminar. An HR training and development association focused on educating the HR workforce, talent management leaders and business leaders worldwide on

organizational development matters sponsored the seminars. Two participants met the study criteria and agreed to participate in the study.

The second sample included one participant recruited from Facebook professional networking groups tailored to the HRM and organizational development professions. The combined membership total for the Facebook groups was over 4,000. The number reflects member profiles for each group accessible on the recruitment date. The requirement for membership in the Facebook group included senior level HR management experience at the executive or director level. Snowball sampling, whereby selected participants recruit other participants, was employed (Khadangi, Bagheri, & Shahmohammadi, 2016). The one participant met the study criteria and agreed to participate in the study.

As recruiting a sufficient sample of qualified participants to reach the study's saturation point was not achieved among the previous two sample frames, the third sample included 10 participants who met the study criteria and were recruited from the company Respondent (2020). Respondent uses a database of potential participants, *respondents*, who serve as participants for various market and empirical research projects. Respondent verifies that participants' backgrounds match the study's criteria. Participant demographics are included in the fee-for-service online platform. While 10 participants met the study criteria, only six agreed to participate in the study.

Procedures

This section recaps the process of selecting participants, the approach to protect the participants, and the process used to facilitate an expert review. Included are the data collection

procedures and a detailed data analysis with subelements. The methods may lead to future studies using similar processes.

Participant Selection

Purposive nonprobability sampling relies on judgment in selecting a subjective sample capable of answering the research question (But & Ap, 2017). The reason for employing a purposive nonprobability sample was to include participants with adequate knowledge and experience on the topics of leadership succession planning and talent management in a practicing or advisory capacity. The study constructs are not as routine as other HR functions, such as recruitment, benefits, employment, and labor relations (Kalaiselvan & Naachimuthu, 2016). While succession planning as an HR function has a more extended history, leadership succession planning and talent management as strategic HRM functions grew in comparison to the period from 1980 to 1990 (Wright & McMahan, 1992). The purposive sampling method provided a concentrated effort to explore the opinions and experiences of HR and organizational development professionals and organizational leadership specific to leadership succession and how it fits within talent management.

Mishra and Mishra (2017) noted that qualitative purposive nonprobability sampling is an option when a smaller population and the researcher's experiences may be a source for participant selection. Participant recruitment began at three strategic HRM seminars. Attendance at the seminars required participants to be HR managers, directors, and leaders with a minimum of 10 years of organizational development and strategic planning experience. Attendees received a preliminary assessment as viable participants for the current study during networking times outside official class times. During the defined break times and lunch periods, networking with

professional colleagues to gauge experience related to the study constructs took place. Exchange of contact information occurred from those believed to have the requisite knowledge for the study. During the conferences, no discussion regarding the study or any formal interviews or recruitment occurred.

After the Institutional Review Board (IRB) approved the study, a recruitment e-mail was sent to the potential participants. The e-mail contained the informed consent document and requested participants acknowledge the study requirements. Simba, Niemann, Kotzé, and Agigi (2017) used e-mail as a method for obtaining informed consent from participants for convenience and efficiency purposes. The recruitment e-mail facilitated time management and electronic tracking.

Data collection and sampling procedures proposed to the IRB and researcher's committee hinged on recruitment taking place during the seminars. A lack of participants from the initial purposive sampling caused the employment of snowball sampling. Snowball sampling is a purposive sampling method used when samples are unique and hard to find (Khadangi et al., 2016). From the initial six e-mail to participants, a follow-up e-mail was sent requesting the contact information of those thought to have the requisite experience to participate in the study. While the snowball sampling method failed to yield a high number of recruits, two participants from a population of senior HR managers and leaders who attended the three strategic HRM seminars qualified.

The small number of participants prompted a request to the IRB for the inclusion of an additional sample source. Facebook is a social network that allows consumers to interact and connect with other people via a computer, with interaction driven by the sharing of information,

photos, and videos (Maslen & Lupton, 2018). After IRB approval, the recruitment message posted in the Facebook groups. Each group received the same recruitment message. The Facebook post requested that those interested in participating in a study involving leadership succession or talent management make contact via a reply post or a message to the provided university e-mail address. The potential participant self-identified their eligibility during their response to the recruitment solicitation. The Facebook post included the inclusion criteria for the study. Next, the potential participant received a formal e-mail containing informed consent.

Confirmation of eligibility to participate in the study involved the acknowledgment of study requirements identified in the informed consent. The participant's informed consent acknowledgment did not require a signature. A written acknowledgment occurred during the exchange of e-mails regarding interview scheduling. The acknowledgment was in the form of a digital signature. Participant eligibility was based on participants possessing at least 10 years of HR management experience specific to leading, developing, or consulting on leadership succession planning or talent management. Work experience in organizational development or strategic workforce planning or those who had served as an HR manager or director were additional acceptable experiences for participating in the study.

The official e-mail contained details on the study and informed consent. Only one participant met the study criteria. At this stage, only three viable candidates existed in the participant selection process. A final request to the IRB for the inclusion of an additional recruitment source from Respondent (2020) was necessary. The company operates an online database of potential participants for market and empirical studies. Respondent manages various participant recruitment phases and the participant selection process. For example, those wanting

to participate in a research project builds a profile and express interest by identifying their professional and educational backgrounds; they become respondents in the company's database. Respondent matches its members with research projects. Researchers create a study project on the respondent website and launch the program for recruiting participants. Certain demographic information is included, such as experience, age, professional experience, and formal education. After IRB approval, the study posted on the respondent website. Six additional participants were selected, bringing participant selection to nine.

Protection of Participants

Clear communication with the study participants is necessary for answering the research question. An extended responsibility exists to ensure the study participants were aware of study requirements to make an informed consent to participate. The obligation extends to protecting the participants from harm and maintaining research integrity. An e-mail attachment to the participants for acknowledgment contained the informed. Participants' read the informed consent and agreed via an email response before the study interviews. Bierer, Barnes, and Lynch (2017) noted that informed consent provides a written agreement that serves to protect the integrity of a study. The current study employed a written informed consent. Participants were located throughout the United States. A digital acknowledgment was employed for convenience and with IRB consent.

The informed consent acknowledgment was for participant protection. Participants had 1 week to reply to participate in the study. The IRB did not require participants to sign and return an informed consent. Each participant included a question for a verbal acknowledgment at the

recorded interview start. No pressure was made to participate. Participants had the right to withdraw from the study during the introductory interview period.

Hug, Hermerén, and Johansson (2012) set guidelines for recruiting participants in an empirical study to ensure participants are fully informed of their right to decline or withdraw from study participation activities. The right to withdraw from the study supported an ethical principle whereby participants' rights included an explanation regarding options for changing the participation decision even after informed consent was provided. Matters of confidentiality specific to the roles of all study stakeholders were addressed within the informed consent.

Each interview included recording on an iPhone recording device. The recorded interview was downloaded to a secure backup drive and placed in a locked file limited to the interviewer. A locked office included study files in a private office. The transcript did not include the name of each participant. Instead, each participant included the label *Participant* with a corresponding number that identified the position in succession among interviews conducted (for example, Participant 1, Participant 2). Reminders to the Participants include the point not to disclose the interview contents to anyone other than the IRB and in instances of unethical behaviors during the study (Alahmad, Al Jumah, & Dierickx, 2015). The interviewer and the participant working together were essential for answering the research question. The collaboration was necessary for ensuring the study integrity.

Expert Review

Yeong, Ismail, Ismail, and Hamzah (2018) discussed the role expert reviewers have in ensuring qualitative research extends beyond storytelling and that the actual research question is answered. The intent in conducting the study extended beyond simple storytelling. The interview

questions resulted from a vigorous iterative process whereby the initial draft developed into progressively improved versions. The recruitment of three subject matter experts to review, comment on, and suggest edits supported the creation of interview questions.

The expert panel included three individuals selected because of their previous affiliations with the researcher. Two were former colleagues, and one was an instructor at the doctoral level. Between the two former colleagues, one has over 10 years of experience in strategic talent management development at levels that include implementation advisory responsibilities for public and private organizations. The other has more than 10 decades of organizational development experience obtained through U.S. military service with the U.S. Marine Corps and other governmental organizations. The third panel member was an instructor with Capella University with experience in teaching a variety of courses at the doctoral level, including courses in the qualitative methodology. Panel members received a formal e-mail message outlining their role based on their unique competencies related to the design and experiences associated with the study constructs. The group of three were not aware of other panel participants.

The panel members' role in ensuring the development of an interview protocol capable of answering the research question was explained. An e-mail script to solicit the expert reviewers was developed. The e-mail contained a request for an acknowledgment reply to the sender. The e-mail detailed the expert reviewer's role along with confidentiality and ethical considerations about the study. The panel members brought individual strengths to the interview protocol. Expert panel members were never considered as potential participants because they served as expert reviewers.

After the expert panel reviewed the interview protocol, useful suggestions were provided. One expert panel member suggested a closer alignment among the question's syntax and the qualitative study design. Questions were rephrased appropriately. Another panel member discussed the benefits of using a quantitative study design. While the panel member stopped short of suggesting a change, the feedback was useful in eliminating proposed questions from the interview protocol. The third expert panel member provided comments and questions that led to the development of an additional question in the interview protocol. The contributions from the expert review panel resulted in substantive edits to the interview protocol included in the dissertation review plan and approved by the IRB.

Mock Interviews

Two mock interviews occurred before the study participant interviews. The exercise allowed time for practice in an attempt to test the 60-minute interview time requirement. The mock interviews provided an opportunity to examine the flow of questions and predict the use of follow-up questions. Goodell, Stage, and Cooke (2016) suggested the use of mock interviews for orienting an interviewer to the questions as a way to manage time, practice recording notes, and testing voice and tone during the official interviews. A lesson learned from the mock interviews is not to speak in a hurried tone. Corrections occurred before the participant interviews.

Mock interviews included colleagues who met the inclusion criteria but were excluded because of their professional connections to the interviewer. The interviewer asked that the interview remain confidential. The interviewer emphasized that participation was voluntary, and the selection did not include any unethical reciprocal payment in any form. The second mock interview included a recording for correcting the interviewer's voice inflection.

Data Collection

The formal interview arrangements included an e-mail between the interviewer and the participant. The informed consent was included in the e-mail. The participants' reply acknowledged that informed consent was read and understood. Participant interviews began within 2 weeks from the informed consent reply. Data collection began with phone interviews with the participants. The semistructured phone interview lasted 6 months. Farooq and de Villiers (2017) argued that phone interviews in a qualitative study have a balanced distribution affect among the interviewer and participants. Farooq and de Villiers suggested that phone interviews allow participants to speak without any hesitation or prompts from the interviewer's physical presence. Phone interviews prevent the potential influence the interviewer's physical presence and facial expressions could have on an interviewee's response. Farooq and de Villiers further suggested the semistructured phone interview might be beneficial for minimizing the influence of nonverbal facial expressions during qualitative interviews. The semistructured interview for the study was used for providing the most efficient data collection method. The participants were located within the United States.

The data collection process has a theoretical foundation linked to gathering and measuring information that might be tried and evaluated (Soltanifar & Ansari, 2016). Data collected from the participants corresponded to the qualitative inquiry needs. Preparing the questions ahead of time through an iterative process supported the exploration of leadership succession planning in talent management. An interview guide was prepared and used for each participant interview. A semistructured interview method was used utilizing open-ended

questioning. The technique allowed for the revelation of new and unforeseen data on the study constructs (Mohajan, 2018).

The participant interviews took place at a convenient, mutually agreed upon time. Each interview included a recording on a dedicated iPhone and was subsequently downloaded. The phone interviews with participants took place in secure locations; no in person interviews were conducted. Participants selected a private area free from interruptions. Interviews did not take place in public spaces. The recorded interview files included the transfer to a private electronic folder secured through a virtual private network (VPN). Each participant interview included the label *Participant* with a corresponding letter to signify the interview order.

Initially, an attempt to transcribe each interview took place. As a safeguard, and for accuracy and efficiency reasons, IRB provided approval to use the company Scribie to transcribe the participant interviews. Yang et al. (2018) focused on professional transcription business services during a qualitative study to ensure interviews captured discussions between the interviewer and interviewee. During the request for using the transcription service, a confidentiality agreement from Scribie was provided to the IRB. Once the transcribed file was received, data verification within the Microsoft Word file occurred. Participants reviewed their file for verification that the data content met the participant's intent. Participants agreed not to share the data file or any content with anyone.

Study interview materials, including notes, interview guides, recorded files, participant feedback, and e-mails regarding the translated interview, were locked in a secure location, where they will remain for 7 years. The recorded data were used only for answering the research question. Data storage occurred in a secure environment not accessible by anyone other than the

study interviewer. The data will be held for 7 years from study completion. At the end of 7 years, data will be destroyed.

Walden (2018) stressed the importance of trust during qualitative research interviews. The guiding interview questions were designed to establish trust. A strategy for building trust into the guiding interview questions included the addition of a preliminary question whereby the participant was asked preliminary questions before the interview started. The IRB approved, and the question was included in the interview protocol. The preliminary question was asked during introductions at the start of the participant interviews. Specifically, the interviewer sought the participants' experiences with the study constructs. Provided at the interview start were definitions of *leadership succession planning* and *talent management* from the literature.

The participants were provided an opportunity to expand the defined study constructs during the interview. The preliminary communications facilitated trust. Interactions with potential participants for the study were completed via e-mail. The email choice supported record keeping. The guiding interview questions were semistructured, which permitted open-ended explanations from the participants on experiences related to the study constructs. No use of other instruments occurred beyond the guiding interview questions.

Data Analysis

The data analysis procedure for the study involved examining, purging, and metamorphosing data collected from the study participants to obtain information that may inform the role of leadership succession planning in talent management. Data were collected from the semistructured interviews. The study used data analysis procedures that aligned with the qualitative exploratory inquiry method. Data collected were transformed using what Bennett

and McWhorter (2016) described as theoretical thematic analysis. The analysis involved developing categories and constructs from the literature on the study constructs of leadership succession planning and talent management. An inductive approach to analyzing the data was employed. The process involved analyzing the data from the contextual participant perspective rather than a predetermined view on the study constructs (Percy et al., 2015). The analysis began with the specific data collected from each participant and moved to general themes combined from the study participants.

Data preparation. Data from the semistructured interviews were audio recorded and transcribed. Meaningful phrases, sentences, and paragraphs were identified by hand. Unrelated data, such as small talk, were eliminated. Initially, data were coded by hand without the use of any data analysis software. The steps were taken for comparison with data analysis software.

Data review and coding. Recurring codes were clustered for interpretation with an acknowledgment that a possible change of emphasis during analysis may become necessary. Clusters of data were named per the language of HCT, leadership succession planning, and talent management. A description of themes was written supported by direct quotes from participant transcripts to show the patterns of emergence. Paragraphs were composed, integrating the common themes. The process was repeated with the transcript for each study participant.

Analysis of the data. The final thematic analysis process involved the creation of a Microsoft Excel spreadsheet, including integrated themes from the participant interviews. These steps support an analysis process associated with what Kahlke (2014) described as epistemologically social constructivist and theoretically interpretive. Legitimate and adequate data that were meaningful for answering the study question were gathered. Processing of word

count, constant comparison analysis, and key in context data analysis approaches were used for analyzing themes.

The word count analysis approach involved examining the meaning, characteristics, and descriptions of data collected for further analysis. The key in context analysis was employed by identifying a dominant word in clusters of data. An examination of surrounding words for better clarification of universal terms was the next step. For example, the word *talent* was prominent among the data. Other terms, such as *strategy*, *recruitment*, and *retention*, brought clarity to the meaning of *talent*. Onwuegbuzie, Leech, and Collins (2012) suggested that constant comparison analysis might involve taking clusters of data and reducing them to codes that may develop into themes for additional analysis.

The findings from the described analysis approaches were synthesized using thematic synthesis. The meaning was applied to groups of data spanning the collected information for each participant interview. Determining meaningful conclusions was objective (Bradley, McGowan, & Michelson, 2018). While the inferences drawn from the data were the interviewer's interpretation of data collected, a more scientific method was needed for verifying the descriptions placed on the data. Qualitative content analysis was used for finalizing sketches and interpreting data.

The informant's role in providing ideas and opinions regarding leadership succession planning and talent management was a critical first step. At the start of data collection, the data analysis software program NVivo was evaluated as a possible option for analyzing the data. The study interviewer had concerns regarding ease of use and cost. The decision to employ a trial version of NVivo was made as an option for comparing the thematic analysis of data completed

by the interviewer outside the software analysis program. Transcribed data from the Excel spreadsheet were uploaded into NVivo for additional analysis utilizing the queries of themes and categories options.

The mode classification of processes within NVivo was used for organizing topics and groups of talent management and succession planning components. While the data analysis software provided a faster organization of data, a learning curve existed. NVivo was used to confirm preliminary manual analysis procedures. The software mainly confirmed patterns previously identified.

Bracketing

Becoming a scholar practitioner was unlike any other formal educational experience. The recruitment of participants for the study, and the eventual process of collecting the data from them proved to be challenging. Notable during these periods was the absence of daily face-to-face communications with someone to consider ideas, discuss strategy, and vent frustrations about the study. Reflections on thoughts, beliefs, and reactions to the study processes were recorded after receiving approval to conduct the study.

During the final dissertation seminar, a Capella University professor recommended maintaining a journal. Creating a journal to record reflective learning was a benefit. Strict confidentiality requirements made it impossible to discuss the study outside the appropriate Capella University staff. Initially, the study journal was not structured. The journal reflected a list of action items, potential study participant information, names of authors conducting research that may inform the study, and other scattered random thoughts. Reflections regarding the dissertation research plan completion, thoughts on the study mentor, and the interview

question protocol development were recorded with no clear idea for how those entries may influence the study.

After the first participant interview, it became apparent that a more structured journal was necessary for organizing the data collected from multiple participants. Separate journal entries for each participant were created for identifying patterns and connecting themes within the data. Annink (2017) noted that in the qualitative method, researchers might use a journal to work through issues that may arise during the data collection period. One glaring issue that was resolved through journaling involved the study participants' experiences. The study allowed individuals with various forms of expertise to qualify as informants. The journal was structured to record the participants' experiences.

After the participant interviews were completed, themes developed, allowing for an initial motivating perspective on how the participants' experiences may add meaning and purpose that bring credibility to the study. Goodell et al. (2016) described this type of contextual analysis of data. No overreaching assessment was made from these initial journal entries; instead, the benefits of memoing and journaling became more evident. Weiner-Levy and Popper- Giveon (2013) suggested that omission on the journaling or memoing process by researchers creates the possibility that research findings may be incomplete. How to organize thoughts and perceptions and choose meaningful data may be answered through the journaling process.

Identifying the potential effect that stress could have on the interview was instructive in developing approaches to limit anxiety. The practices of using an expert panel and mock interviews were examples of how identifying awareness of internal reflections may lead to

strategies that overcome deficiencies. While the journal was personal, the journal helped in developing an analytical distance from the data collected during the participant interviews.

The journal entries became larger in scope during the data collection phase. The first section recorded basic thoughts, comments, and questions specific to the informant. The heading included the title *Participant*, along with a corresponding letter that matched the interview order. Reflective thoughts on the initial section helped create a format for organizing data that were later transferred to an Excel spreadsheet. The spreadsheet was used for identifying labels referred to as codes by Goodell et al. (2016). The participant's interview date, contact information, and employment status were entered in the journal. Before each participant interview, thoughts from the interviewer were recorded. The journal recordings varied for each participant interview.

Journaling allowed a starting point for beginning the participant interviews. Alahmad et al. (2015) described qualitative content analysis from the contextual perspective of data description and interpretation, suggesting the qualitative method as a process of taking textual data and creating a system of codes that translates to topics and shapes for definition. Content analysis for the study turned data into meaningful and contextual themes for answering the research question.

Instruments

The researcher was the primary instrument for the study. Olivier (2017) outlined the role of an instrument in a qualitative study. The author used a mixed method process to highlight the differences among instruments appropriate for quantitative and qualitative empirical research. Recorded semistructured interviews were used to collect data. Semistructured interviews were used to build credibility, dependability, and transferability of thoughts, perceptions, and

competencies and to prevent biases or quick data assessments. Secondary instruments, such as focus groups and document analysis, were not used. The qualitative method was employed in the study. As such, the interview guide was developed with the sole responsibility of exploring relationships between the study constructs. Informants were selected based on tenure and experiences related to the phenomenon of leadership succession planning and talent management.

The Role of the Researcher

The researcher has a 30-year career focused on strategic HR advisory and planning competencies. Professional experience includes the development and implementation of policies focused on talent management and succession planning at levels for governmental organizations. During the data collection period, an effort was made to suspend knowledge and experiences related to the study constructs to promote objectivity. Any form of prejudged bias would influence the data collected and harm the study's credibility (Annink, 2017). Objectivity regarding the study constructs extended to the organizational settings where the experience was gained related to leadership succession planning and talent management strategy.

The process of bracketing was employed. Bracketing involved identifying knowledge and experiences related to the study constructs to suspend personal knowledge and prevent it from influencing the entire process of data collection and analysis (Tufford & Newman, 2012). Two practical actions that supported the idea of bracketing were taken. First, the study interview guide was answered by the interviewer in a written form. The results were reviewed and put away to mentally rid the information from the interviewer's mind during the participant interviews.

Second, a journal was used as a reflexive tool (Fung et al., 2019). The bracketing procedures helped the interviewer subdue biases. The procedures supported a bias free posture during the participant telephone interviews. Refai, Klapper, and Thompson (2015) discussed the importance of bracketing for bias prevention during qualitative research. The author outlined the necessary equal balance between the prevention of bias and the need for the interviewer to have a closeness to the qualitative research subjects.

Guiding Interview Questions

Lakiza and Deschamps (2019) suggested that qualitative research can be repetitious and that study interviews may fill gaps between theory and organizational practices. An interview protocol was developed through an iterative process of review and edit. The guiding interview questions were designed to answer the research question. Various considerations regarding the appropriate instrument were deliberated. The final participant interview protocol was suitable for a qualitative research design.

Other data collection instruments, such as document review and participant observations, were considered but ruled out. The guiding interview questions were designed to be simple, open-ended, and structured in a way that one question does not take significantly more time to answer than others. Establishing trust at the interview start was an aim. The guiding interview questions facilitated a conversation and created a free flow of ideas on the study topic from the participants. Table 1 contains the interview questions, including the specific questions as aligned with HCT constructs.

Table 1

Interview Questions

Study question	Human capital theory construct
Based on the definitions of talent management and leadership succession planning described in the introduction, please expand the definitions by adding your thoughts and understandings to the concepts.	Leadership succession planning & talent management
So that I may gain a sense of your organizational role, describe your HR work experience where the responsibilities involved leadership succession planning and talent management.	Leadership succession planning & talent management
What previous experience led to your managerial or executive level experience in leadership succession planning and talent management at the strategic level?	Leadership succession planning & talent management
What, if any, are the process differences among leadership succession planning and talent management strategy? a. How did you come to this conclusion? b. Describe your answer within the context of a different organizational setting than that of your experience. c. How did you come to this conclusion?	Leadership succession planning & talent management
Describe the priority for leadership succession planning among succession planning at other levels of the organization in talent management strategy. a. How do you make such a determination? b. Please describe a situation where talent management strategy has a higher or lower priority over leadership succession planning. c. How do you make such a determination?	Leadership succession planning & talent management
What are the organizational resources needed for leadership succession planning? a. What influence do those organizational resources have on talent management strategy?	Leadership succession planning

Other Instruments Used to Collect Data

Participants were allowed to provide a résumé or brief biography after their informed consent acknowledgment. The submission of a résumé or short biography was optional. Only one potential participant submitted a résumé; the person did not meet the study criteria and was not selected to participate in the study.

Ethical Considerations

The most important considerations involved the protection of participants for the study. The participants' dignity, privacy, and anonymity were constant areas of reflection during the study. These pillars guided the study processes involving participant solicitation, data collection, and data analysis. Latham (2014) suggested three basic ethical principles in research design: "Respect for persons, beneficence, and justice" (p. 15). Each participant acknowledged informed consent before the interview. Study aspects, including the research methods, benefits, and risk, were communicated through written form during the participant solicitation phase.

The limited potential for the study to harm the participants was relegated to a scenario involving the potential for a computer hack. The situation was mitigated with a subscription to a VPN. The participants' anonymity was maintained. Because the participants included HRM practitioners, the study benefits indirectly supported the participants' HR professions. Collected data were coded. Participants' names and places of work were not revealed. The participants' identities were concealed during interview transcription. The procedures described ensured no possible risk of harm.

Respect for Persons

The research was conducted under the guidelines published in *The Belmont Report* (U.S. Department of Health and Human Services, 1979). The participants for the study were considered experts in the constructs of leadership succession planning or talent management, or both. A participant's organization type might have been a data analysis point; the specific company name was not a point of data analysis. The interviewer looked upon the participants in an autonomous manner. The data collected were not exposed to any outside source.

Beneficence

The participants' welfare was a constant area of concern. The study phases involving participant solicitation, data collection, member checking, and data analysis were conducted in a manner that protected the participants from harm. Confidentiality was maintained throughout all study phases. Beneficence has two components: "(a) do no harm, and (b) maximize the possible benefits and minimize the risks" (Latham, 2014, p. 15). The participants may benefit from the study findings as the study may add information to the general HRM function. The benefit was shared among the informants and interviewer. No processes in the study were immoral.

Justice

Justice in research involves developing fair criteria for participant selection. Participant race, sex, sexual orientation, among other generic demographics, were not criteria for participating in the study. Participants with less than 10 years of strategic planning experience or a lack of organizational development experience related to leadership succession planning or talent management were excluded from the study.

The strategic role HR managers hold in organizations was not an exclusion criterion for participants at the level of the HR manager and director. According to Kalaiselvan and Naachimuthu (2016), HR managers and directors have an inherent responsibility for identifying and advising organizational leaders on the competencies necessary for gaining a competitive advantage. Participant selection for the study was not based on participants' privileged status or status within a vulnerable population. Instead, the criteria for participant selection were designed to garner informants from a population with competencies best positioned for answering the research question.

Summary

This chapter included the outline of the method details used for the study. The collection of data, specific to the procedures within the qualitative inquiry methodology, may aid future researchers using similar processes within the same method. Chapter 3 provided instructive detail regarding rigor and plausible methods. The study's goal was to explore the role of leadership succession planning in talent management. The rationale for the qualitative inquiry research design includes an explanation of what Seidman (2013) described as a design for seeking the experiences of humans for answering a phenomenon among constructs. While Seidman's interpretation is simplistic, the qualitative inquiry design was appropriate for answering the research question. Explanation included criteria for the target population were explained.

The sample identification was drawn from the contextual perspective of identifying a sample frame. The data collection procedures began with the participant interviews. A discussion regarding the participants' protection was included. Procedures involving the interview guide development were delineated. Listed are the methods used for data collection and analysis in a systematic review. The role of the researcher as an instrument in the study was explained. Included is a data collection and analysis methods summary. Chapter 4 presents the study results. Information about the study and the sample description is included. The research methodology applied to the data analysis and a detailed data presentation with analysis is included, along with a summary.

CHAPTER 4. RESULTS

Chapter 4 introduces the data collected through qualitative inquiry. This chapter presents the following: sample description, research methodology applied to the data analysis, and data and results analysis. The study objective was to examine the experiences of senior HR managers and executives to explore the functional aspects of leadership succession planning within an organization's talent management strategy. The research results are reported in this chapter. The discovery of themes from the constant comparison data using thematic analysis is defined in this chapter.

Introduction: The Study and the Researcher

As a former U.S. Air Force member and current civil servant with work experience spanning over 30 years devoted entirely to the HR profession, the experience is a match to the present study topic. Professional experience includes work in every functional area of HR, including earning an undergraduate degree in business administration and a graduate degree in HR. Areas involving strategic workforce planning, organizational design, and advising executives on the full complement of HR functions are pinnacles of professional experience. The subject of leadership, specifically leadership ascension, is an area of interest. Through advising executives on issues related to planning, recruitment, and development of potential organizational leaders, there were experiences gained where the processes did not result in recruiting a leader who matched the organization.

Leadership issues such as lack of vision, fear of competition from followers, and being more concerned over one's title were examples of a failure to plan for leadership succession. They led to a desire to find a role for leadership succession planning that connects with the

organization's vision, mission, and goals (Schaeffer & Akhavan, 2017). The researcher's professional development includes various certifications in strategic workforce planning, leadership succession and development, and talent management analytics.

The experiences from serving as a local officer and national member of a leading HR association to include attendance at various HR seminars devoted to the topics of leadership succession planning and talent management strategy informed the present study. These networking opportunities allowed an exchange of ideas and perspectives on leadership succession. The broader concept of how organizations manage employees under their talent management strategy has become a running narrative and topic of conversation among peers. How leadership, development, and recruitment fit within an organizational talent management strategy remains a driving focus for exploring the present study topic in an empirical setting.

The professional experiences, education, and motivation to complete research created the possibility of inadvertently inviting bias into the collection of data and the analysis process. Journaling was used to record detailed records of thoughts and opinions on the study constructs. Separating learned views and opinions supported an objective stance while completing the study phase. Notes were taken after each participant interview included notes taken, and an independent transcription service transcribed the interviews. The transcribed interviews were shared with respective participants to confirm the data provided. Data were reviewed and categorized so as not to create bias through omission. Open-ended questions were used to allow for a free flow of ideas by the participants. Open-ended questions brought a level of closeness that facilitated trust among the study participants and the topic of research.

The study included the use of qualitative data analysis software NVivo Pro 12 Mac to analyze the data in comparison to the handwritten analysis. The findings revealed descriptions of emanating and extended themes, interpretations, and organizational designs delineated using the exact expressions and terminology from the transcribed participants' interviews. Other than the recorded participant interviews, the study participants did not provide any documents for analysis. No solicitations of materials such as policies, procedures, or work methods related to the study constructs of leadership succession planning or talent management were asked from participants for determining the study findings.

Qualitative methods and procedures were employed in the present study. The participant interviews derived from an interview guide. Question formulation came from correlations between the constructs of leadership succession planning and talent management. The question's wording aimed to determine if and how the constructs related.

Description of the Sample

The sample included senior HR managers, executives, and directors. The participant selection criteria required participants to have at least 10 years of experience advising, developing, or implementing leadership succession planning and talent management at an organizational level. An organization dedicated to educating HR professionals and executives on matters involving talent management strategy was the beginning target for recruiting participants. Later, the recruitment sources expanded.

Participant selection began with solicitations from external HR professional development organizations. The initial recruitment generated interest: over 20 volunteers responded to the study recruitment solicitation. From the initial response, only one participant met the study

criteria with 10 or more years of experience in either an HR managerial or executive role or 10 or more years of consulting service experience on the subject of organizational development.

Two additional participants included a selection from HCI, known among HR professionals for being an HR networking and human capital development organization. The participant selection brought the total qualified participants to three. The total participants at this stage of recruitment were the result of an unexpected and extended participant solicitation process. The research plan required the addition of and approval for the inclusion of other recruitment sources. While the research plan needed modification to include more participant recruitment sources, the sample criteria did not change. A further research plan modification with the inclusion of a fee-for-service online respondent database yielded 16 additional interested potential participants. Only six participants from the source met the study inclusion criteria. The six participants combined with the initial three participants, resulting in nine qualified participants. Participants completed a 60-minute semistructured interview.

Responses from the recruitment e-mail message posting determined participant eligibility. The recruitment criteria were identified in the recruitment source solicitation messaging. Participants acknowledged the informed consent included in the original recruitment e-mail. While two potential participants provided an unsolicited résumé in their replies, acknowledging their review and informed consent acceptance, a résumé or biography was neither required nor used as a source for analysis. Later, determinations indicated that the two potential participants who provided résumés did not qualify for the study.

Participants received a follow-up e-mail with an attached informed consent was sent to the participants who met the study criteria. The participants' e-mail responses confirmed that

each had read the informed consent form and was ready to participate in the study. Letters were assigned to each participant to maintain anonymity and confidentiality. Each participant interview included a mutually agreed upon date and time.

Rescheduling of two participant interviews took place for personal reasons. Before the meeting, one participant sent an e-mail, asking if they would need to have the questions in advance to prepare responses. The interviewer replied that answers to questions would be collected during the scheduled interview. The participants' interviews did not go beyond the allotted 60-minute interview time.

The study included nine participants; the sex breakdown included 66.6% female participants and 33.3% male participants. Ethnicity was represented as 77.78% White, 0.09% Asian/Pacific Islander, and 0.09% Black. Regarding educational background, 0.09% had a doctorate, 55.56% had master's degrees, and 33.33% had bachelor's degrees. Participants between the ages of 30 and 39 represented 44.44%, and participants between the ages of 40 and 49 represented 55.56%. The participants' professional titles varied, and their years of experience met or exceeded the minimum 10-year requirement. The participants' organizations represented profit and nonprofit organizational types. Table 2 provides the participants' demographics.

Table 2

Participant Demographics

Age range	Sex	Ethnicity	Education level	State of residence
30–39	Female	White	Master's	VA
30–39	Female	Black	Master's	TN
30–39	Female	White	Bachelor's	MI

30–39	Male	White	Master's	WA
40–49	Male	White	Doctorate	IL
40–49	Female	White	Bachelor's	AL
40–49	Male	Asian/Pacific Islander	Master's	NC
40–49	Female	White	Master's	CA
40–49	Female	White	Bachelor's	CO

Note. The order in which participants are listed is not necessarily the order in which they were coded (i.e., the first participant listed is not necessarily Participant A).

The participants provided data related to their experiences with the study constructs. Organizations with more than 100,000 employees representing major well-known business firms with international subsidiaries represented by 18% of participants. Medium sized companies with less than 20,000 employees included representation by 45% of participants. Nonprofit organizations with 20,000 or fewer employees were represented by 18% of participants. The remaining 19% of participants were from organizations with 50,000 to 60,000 employees. Forty-four percent of participants were executives, and 56% were managers. Among the participants, the average years of HR experience were 21. Table 3 provides the participants' professional background experience and organizational size.

Table 3

Participant Background Experience

Organization size	Title	Position level	Years in HR profession
2,000	HR director	Managerial	23
3,000	Talent manager administrator	Executive	21
5,000	Senior HR consultant	Executive	25

8,000	Senior HR business manager	Managerial	18
12,000	Talent management director	Executive	21
50,000	Director of business development	Executive	22
60,000	Director of HR/recruitment	Managerial	20
100,000+	Operations manager	Executive	28
100,000+	Recruiter/HR	Managerial	24

Note. The order in which participants are listed is not necessarily the order in which they were coded (i.e., the first participant listed is not necessarily Participant A).

Research Methodology Applied to the Data Analysis

The study implemented an exploratory design. A purposive nonprobability sampling method was employed for data collection. The data analysis completed in NVivo Pro 12 Mac was used to compare the software results with the thematic analysis initially completed by hand. No significant difference exists between the handwritten analysis and the analysis completed with NVivo Pro 12 Mac. The analysis of data produced codes that led to themes that further revealed patterns to answer the research question.

The open-ended conversation is a process in exploratory research (Arora, 2017). The aim is to gather the input of participants to investigate a problem that has no clear definition. The perspective of humans and their real-life experiences with a problem may lead to answering a study question and lead to further inquiry. The exploratory research design included selections from possibilities for discovering varying levels of examples regarding the role leadership succession planning has in talent management at the entire organizational level. While researchers have explored leadership succession planning in a variety of contexts (Erasmus et al., 2017; LeCounte et al., 2017), none addressed leadership succession planning specifically within

the contextual basis of how it may or may not fit within talent management strategy. The exploratory research design was not centered on providing a final and decisive answer to the study question. A range of possibilities and options exist as an answer to the study question on the role of leadership succession planning in talent management. Finding a conclusive answer is beyond the study scope of the current study.

Analyzing the data collected as methodically as possible was critical for determining the relationships between the study constructs. A systematic process involving a careful, deliberate, and slow process of analyzing the data took place. Process changes affecting the additions to recruitment sources of participants and interview question changes were necessary. An advantage of using an exploratory research design is in the facilitation of potential shifts and changes that may not call for a change in research design.

The exploratory research design has disadvantages in the collection of data and data analysis. Preventing and managing bias was paramount. Professional experiences, opinions, and beliefs beyond the participants were isolated with the use of a journal during the study. The process supported suspense in judgment and an awareness of preventing bias in the study. Other bias preventive steps involved writing the exact statements from participants as spoken.

Participants needed to have at least 10 years of HR management experience specific to leading, developing, or consulting on leadership succession planning and talent management. While the creation of criteria was to explore and answer the research question, the study requirements experienced modifications in the initial study design phase. In an attempt to narrow the population and collect a sample size capable of answering the study question, three other qualifying experience indicators were added to the requirement of 10 years of HR management

experience: (a) work experience in organizational development, (b) work experience in strategic workforce planning, or (c) served or serving as an HR manager/director.

A significant contribution to future research is the systematic outline of each phase and the corresponding steps in the study. Scholars may view the facts as a disadvantage in the choice of selecting the exploratory research design (Arora, 2017). As is the case in the exploratory research design, the findings from the study may not be considered useful in making practical decisions.

This section includes the actionable steps outline. The steps followed the generic qualitative research model specific to conducting in-depth interviews. A one-on-one interview with a single participant was chosen to collect descriptive data about the participant's experiences and professional opinions regarding the study constructs. The specific research method involved interviewing nine study participants.

Each interview was recorded using a digital recorder. Upon completion of each interview, handwritten notes were taken. The notes were written in an electronic document and filed for future analysis. The recorded interview was transcribed using a third-party transcription service, as approved by the university's IRB. Participants reviewed their respective transcripts. Seven of nine participants declined the offer to review their transcripts. Between the other two participants, no changes to the transcripts were suggested.

The start of analysis involved reading the notes taken after the interview, along with the interview transcript. Additional measures included highlighting and filtering the data codes and subsequent themes. The step leads to patterns that would support answering the study question. Qualitative data analysis computer software confirmed themes and patterns discovered through

the manual and clerical tasks of managing the collected data. The data analysis phase did not use every capability of NVivo Pro 12 Mac during the data analysis phase. A detailed list of steps taken during the data analysis phase follows.

A random order was selected to read each participant interview. This step created an independent perspective. Highlights of sentences, phrases, and words connected to the study constructs moved forward for analysis. All the initial highlighted data included scrutiny and judgment regarding the data's applicability to the study constructs. Highlighted data from each participant interview were eliminated because the identified data were not relevant to the study purpose. Stored rejected interview text was named accordingly in a Microsoft Word file. The remaining data were labeled and categorized.

Data included coded names not connected to any individual participant. Coded data were connected to patterns pertinent to the study question. The patterns were labeled under theme headings in a separate Microsoft Excel spreadsheet. Direct quotes from each participant connected with themes from the coded data file were updated. Similar patterns among the themes were identified, resulting in the development of broader themes. The themes were clustered and saved in a separate Microsoft Word file.

An analysis was completed by connecting identified participant statements into data points that were coded for additional analysis. An explanation for the coded data was recorded in the study journal. The file was separated from other analysis files in the previous steps. Each participant's interview was reviewed once more and compared to the latest entry in the study journal. An additional separate Microsoft Word file was completed and labeled according to the participant code; in other words, a different file was created for each participant. Direct quotes

from each participant were identified. Separate records were completed and marked according to the participant and their corresponding letter.

Additional manual analysis from previously described actions was completed to review for the emergence of new patterns and themes. Results were categorized and saved in an additional Microsoft Word file. Each participant interview was saved in NVivo Pro 12 Mac. Nodes were created and compared to the themes identified during the manual analysis. NVivo Pro 12 Mac confirmed most findings from the manual analysis. A new pattern emerged that, upon analysis, resulted in an additional theme connected to the study question. A final assessment of newly found patterns in NVivo Pro 12 Mac was compared to a final assessment from the manual analysis. Themes emerged for a final relevancy review to the research question.

The analysis followed what Kahlke (2014) described as "epistemologically social constructivist and theoretically interpretive" (p. 41). The process involved the collection of legitimate and adequate data that were meaningful to the study constructs. The generic qualitative method of data analysis is relevant because the study aims were to learn the participants' ideas and opinions on issues in the strategic management of human resources specific to the role leadership succession planning has in talent management.

Presentation of Data and Results of the Analysis

Themes emerged from the data. The most significant data points indicated that leadership succession planning is occurring within the participants' organizational talent management activities. The data points were categorized under four topical themes: implementation differences, oversight of leadership succession planning and talent management, organizational culture, and employee engagement differences. Data were analyzed from nine participant

interviews, which were the only data source. This section provides a summary of each participant interview, along with participant interview comments connected to the emerging themes. Figure 4 displays the four themes discovered through the analysis of data that influence the role of leadership succession planning in talent management specific to the implementation.

The nine participants interviewed confirmed that they believe leadership succession planning is subordinate to a broader organizational goal of managing talent. Participants differed on how leadership succession planning is being implemented in their respective organizations. Most participants' organizations are fully embracing a role for leadership succession in their talent management strategy, while others are in the planning phase.

Participant Analysis

This section contains excerpts from the participant interviews. The summaries are provided to appraise the participants' experiences, opinions, and beliefs regarding the role of leadership succession planning in talent management. Synopses from each participant are provided to show how emerging themes were composed. The summary for each participant represents data provided before the study themes were refined.



Figure 4. Influences on the role of leadership succession planning in talent management.

Participant A. Participant A is a White female with a Bachelor of Science degree in HR. She has worked as a senior HR consultant for 25 years. Her study interview lasted 58 minutes. Participant A owns an HR consulting firm and has a 25-year career that spans work in profit and nonprofit organizations. She has worked for an organization with over 5,000 employees. Her assessment of talent management was defined as an *offshoot* from organizational development. In her consultant role, Participant A has advised on the implementation of every stage of leadership succession planning as part of talent management. Implementing a successful succession planning component of talent management requires concentration on organizational

development. Participant A described the implementation of leadership succession planning for her organization:

> In my mind, they [leadership succession planning under talent management] both would be things like creating pools of talent for specific roles. That's one thing that is one activity. Another one is running experiential learning programs. Another one would be having a standard procedure for how to manage internal applicants to jobs because that is a career development issue. Mentoring would be another.

Participant A emphasized that the size of an organization influences implementing leadership succession planning under an organizational talent management program. Participant A pointed to size in describing her midsize organization and the need to "align business goals with human resources." For example, Participant A described a partnership she has involving the administration of leadership succession planning and talent management. The data led to the conclusion that HR was not the sole owner of leadership succession planning and talent management. Participant A's business partner has no formal HR related expertise and assists her in consulting with organizations on strategic HR management services. Participant A commented on the nature of oversight involving the study constructs. "Experience is required for understanding employee performance connected to business strategy..... However, I occasionally employ an outside person for talent management administration on succession planning activities." During the interview with Participant A, a follow-on question arose regarding whether the administration of leadership succession planning requires HR experience. The participant response was inconclusive. Participant A responded by saying, "Talent management and succession planning cannot be done in a vacuum; a strategy is required involving our business partner." For example, Participant A emphasized the importance of organizational culture in developing activities in talent management:

> I believe that understanding your culture chain is critical. Talent management strategy dovetails into decisions on what proportion of talent to buy, borrow, for talent. This situation determines the level of investment. Mapping this all out support talent management strategy may lead to a trickle-down effect.

Participant A explained that her internal organizational title of director of total rewards and talent management is an indication of the seriousness her organization places on ensuring employees are recognized and compensated often and regularly. "Our total rewards program encompasses all compensation and benefits, including performance and recognition, work life balance, because rewarding and recognizing talent has a correlation with success of our broader talent management strategy." For Participant A, organizational culture, employee engagement, shared oversight of leadership succession in particular, and talent management, in general, were factors discovered in the role that leadership succession planning has in talent management.

Participant B. Participant B is an African American female with a Master of Science degree in HR. The audio recorded interview with Participant B concluded at 52 minutes. She works as a talent management director and has 21 years of experience. "I don't do the work alone" (referring to the study constructs). Other nonformally trained HR employees are assisting in the work of strategic HR management. Participant B described her organization's talent review process and leadership development activities as programs that involve a combination of HR staff and business line managers. Participant B mentioned the availability of business line partners heavily influences her organization's "timeliness in performing these activities."

Participant B's organization is a large retailer with international clients. Implementation of leadership succession planning and talent management was evident in her organization. Talent management strategy not only includes planning for leadership succession, but it encompasses

other processes related to compensation strategies to manage attrition. Participant B described a talent management implementation activity:

> Total rewards are included in talent management strategy for my company; it [total rewards] encompasses all compensation and benefits, including performance and recognition, work life balance, and retirement, because growing your talent, rewarding your talent, recognizing talent has a direct correlation to the way you are going to keep them.

While Participant B is a talent management director, she emphasized her certification as a total rewards expert. She described the certification as a significant contributor to her job success. Participant B's experiences outside the formal HR training raised questions regarding how much of an influence formal HR experience has on implementing the role of leadership succession planning in talent management.

Participant B provided an overview of their leadership development activities. "We have a homegrown plan of internal development where experimental training on the job and stretch assignments are sought voluntarily." Participant B's organization involved employees in its employee branding strategy by soliciting employees to comment on and suggest changes in business objectives, vision, and mission. The activity described by Participant B involved the engagement of employees from the organization. The organizational culture emerged from the data connected to the "homegrown plan of internal development" training. Organization size related to Participant B's corporate culture emerged from the data whereby Participant B described her total rewards program as a benefit that a larger organization can pull off. Participant B's talent management role included a process that involves employees and supervisors providing feedback to one another. Participant B commented, "Our talent review process involves our supervisors." The participant noted that talent management was a "sort of

shared" responsibility between HR and "everyone who cares [about] managing talent" for business success.

Participant C. Participant C is a White female with a Master of Science degree in HR. Participant C is an HR director with a 23-year career in HR. The audio recorded interview with Participant C concluded at 48 minutes. She consults on a talent management strategy. She works for an organization with approximately 2,000 employees. Her organization is the smallest among the participants. She views planning for leadership succession as a natural part of a talent management strategy. Business alignment with talent management is an organizational strategy that Participant C is consulting on with her corporate governance. She anticipates a formal implementation in the future. Participant C predicted that the speed of execution would depend on business growth. According to Participant C,

> Our goal in planning for an expanded talent management strategy is looking at. What are we aiming for? What are our risks, people, and finances? There is the saying that 'Not everyone is a leader.' Everybody can manage; not everybody can lead.

Participant C offered DISC (Dominance, Influence, Steadiness, Conscientiousness) behavioral assessments as a talent management activity "useful for smaller organizations where feedback is critical." Participant C stated, "Oversight of leadership succession and talent management strategy development is a shared activity." Participant C's organization has an independent group of senior managers who form a *people review* panel. HR chairs the committee, and the group is responsible for developing policies, and activities focused on succession planning for key leadership positions under their general talent management function. Participant C commented, "The panel works well on the matter involving the expenditure of funds for employee development, but it is hard to reach consensus on longer term strategic issues."

Participant C discussed in detail her people review process involving her organization's general manager and HR:

> As a part of their talent management strategy, employees review their performance with a peer for determining areas needed for future development and training. Our process is outside the employee and supervisor performance review process. The process is similar to the 360 degree assessment process.

Employee engagement became of interest to Participant C, who described the need for full participation in discussing her organization's people review process: "We cannot have success if we do not have an engaged workforce."

Participant D. Participant D is a White male with a Bachelor of Science degree in HR. The audio recorded interview with Participant D lasted 51 minutes. As a talent management administrator, Participant D has full oversight over the functions of leadership succession and talent management strategy development. Similar to Participant C, Participant D is a member of an external HR group called the *succession strategy forum*. The team is comprised of HR, C-suite representatives, and business line representatives. Participant D indicated his experience working for the Gallup Poll organization better equipped him for communicating with C-Suite executives. Participant D applauds the group effort on the strategic aspects of administering leadership succession and talent management activities. Even so, the timeliness in making decisions was characterized as "slow." Participant D commented,

> You got to get your leaders to buy into any kind of succession plan and talent strategy before they will see it, so they are . . . or visualize it for their employees, you know what I'm saying?

Participant D represented the second smallest organization. The participant works as a talent management administrator. He has 18 years of experience in nearly every role in HR; 15 years are directly related to developing and consulting on issues related to talent management. In

contrast with Participant C, in Participant D's organization, successful implementation of leadership succession planning under the umbrella of talent management strategy exists. The organizational size was not a factor. In describing how the implementation is occurring, Participant D provided an overview of his organization's strategy:

> So, we had to look at the [leadership] role specifically and say, Okay, why don't we more clearly define what manager means, what supervisor means, what does a team lead mean? What kind of duties do they have? So, we had to redefine all of the duties and tasks for every role in that department, and, in doing so, had a realignment.

Participant D described his "succession strategy forum, which comprises HR, C-suite rep, and business line rep." Participant D commented on culture in explaining how he must be sensitive to the culture when administering leadership succession planning: "The entire organization is fearful of being replaced because of high employee turnover for various reasons, including retirements, technology improvements, and downsizing of resources." Oversight of leadership succession planning and talent management was a shared activity. Unlike the other participants, HR in Participant D's organization takes the lead on administering leadership succession planning, with formal HR training being mandatory to perform the role of talent management administrator. Participant D said, "I have taken extensive courses and training in talent management, but I would not have had a foot in the door without my formal HR education."

Participant E. Participant E is a White male with a doctorate in business. Participant E works as an operations manager. The Participant E interview ended at 54 minutes. HR experience was gained on the job. Possessing work experience in HR for over 15 years, he believes his most robust strategic HR experience was earned in organizational development activities with prominent experience advising in the planning for leadership gaps and advising

on talent management development matters. Participant E is the *primary* on issues about leadership succession planning and talent management. Participant E credited his partnership with an outside organization to help develop leadership competencies as part of their leadership succession planning activities.

Participant E works for an organization of 100,000 employees. The organization performs planning activities for leadership succession and has an organizational commitment to managing talent at every level within the organization. Participant E commented on his organization's approach to implementing leadership succession planning in talent management:

> Talent management is a part of organizational development, so strategic planning is part of the talent management, which includes recruitment, sustaining human capital, and planning for succession. It is a blend of the science of human resources planning. We cannot discount organization development.

Participant E followed up by stating, "Size is an impact; size and culture are impacts; I also think maybe geography could be an impact for us."

Participant E referred to his organization's "national size and operations in all 50 states" while explaining their use of "Harris Polling" as part of their talent management strategy connected to how they conduct succession planning for their leaders. As part of leadership succession planning efforts, Participant E contracts out firms for polling on talent management strategy and competency development. Participant E commented, "We are learning organization, and our culture has a protectionary climate that must be considered in managing talent."

Participant E described his matrix organization:

> We have cross functional teams that target specific professional associations, they send job announcements, interview candidates, and then when new employees come on board, we develop their skills to match them to the best position in the company; our engagement starts early.

Participant F. Participant F is a White female with a Bachelor of Science degree in HR. Participant F works as a senior business partner for a large international furniture retailer with over 8,000 employees worldwide. The audio recorded interview was finished at 49 minutes. Participant F's formal HR experience spans 17 years. Oversight of leadership succession planning and talent management is shared with other business partners from other business lines. Participant F described her matrix organization:

> So, the best way to describe it is they [business partner] are a liaison between the service office and our stores, but they are only a partner, so they recommend, they might say, this is what I am thinking. But ultimately, the four of us are responsible for decisions and the succession at the . . . we call it a management review.

Each independent matrix team has various strategies for leadership succession and talent management, according to Participant F. Participant F is from a matrix organization. Matrix organizations are organizations in which employees report to more than one leader in a dotted line reporting chain. Frequently, matrix organizations have cross functional teams (Martela, 2019). The team approach to managing talent is the case for Participant F's organization. Participant F described a team approach to implementing leadership succession planning: "The cross functional team concepts necessitate multiple teams that manage succession planning and managing talent. The groups are independent." Participant F's organization is a group of leaders who conduct management review. Participant F described the management review: "So, what we choose to do is that we use different increments, 6 months, 1 year, and 3 to 5 years, to review all plans. We are looking at succession planning benching from all teams." The comments suggest that the size, type, and international business heavily influence the implementation of leadership succession planning in talent management strategy.

Participant F works with a business partner in talent management activities. Participant F discussed the requirement for HR business partners in explaining her organization's "large international clients and employee pool" while describing the matrix organization business line. Participant F described her organizational culture as possessing an international business focus as a cause for not developing a top-down mindset. Participant F further described the culture of her organization as one that views leadership succession planning and talent management through the lens of a "quantitative process rather than a people qualitative matter."

Participant F justified her organization's use of a third-party recruiting service: "We wanted to ensure objectivity in recruiting. Engagement must begin at the moment of recruitment for us." Employee engagement as a theme in the study was not limited to talent management recruitment activities. The summaries from Participant F led to the conclusion that her matrix organization provides a unique influence on the implementation of leadership succession planning in talent management. While the study construct's oversight is shared, formal HR training influences the lead role Participant F has in advising and administering activities within the study constructs.

Participant G. Participant G is an Asian / Pacific Islander male with a Master of Science degree in HR. He has 24 years of experience working as an HR recruiter for an organization of approximately 100,000 employees. The interview with Participant G lasted 46 minutes. According to Participant G, implementation of leadership succession planning under talent management strategy is "necessitated by the organizational size second to earning profits." Participant G stated, "We view our need to conduct leadership succession planning and talent management strategy development through the lens of protecting valuable assets." Participant

G's recent HR management experience has focused on connecting employee recruitment to profit earning for his business organization. The growth of Participant G's organization has led to a "concentrative effort to link planning for succession and talent management to growth centered on increasing profits."

Participant G discussed his organization's different moving pieces and various partnerships achieved from its organizational size and national footprint: "I would prefer not to name our company as I'm sure you would know the name..... Suffice to say, we may be small in employee totals, but our product is regulated and trademarked."

Participant G stated his leadership succession strategy is "one piece for managing our human capital talent." Participant G's work as a senior HR recruiter has mandated partnerships with communities from academia and government, with limited international business, for recruiting a highly skilled workforce. Primary oversight of leadership succession planning and talent management is shared with executive leadership. "Leadership succession planning and talent management fall to HR and leadership." These two groups are employed as executive leadership allows. The organization has a focused priority on earning profits. Participant G was not silent on his opinions on the partnership:

> A bit more of a mass problem when you look at where a team is at in terms of individual contributors, people, managers, and so on. I think it could be a bit more almost mechanical in its nature when you are structuring an organization for growth. It is less personalized to anyone, in particular, let us say, leader or executive.

Participant G said, "We work with different partners," referring to his oversight of talent management policy development, which encompasses succession planning at every level. Participant G indicated that direct control over leadership succession planning and talent management responsibilities has characteristics whereby people are performing limited

shared oversight of leadership succession planning and talent management without any formal HR training.

> I put it this way: Everyone believes that they can perform HR work. Some people think that by counting your employee totals and assign[ing] a label to them, you have accomplished leadership succession and talent management. You are an HR person; you know I'm right. [pause] [laughter]

Participant H. Participant H is a White female with a Master of Science degree in HR. The interview with Participant H ended at 43 minutes. Participant H works as the director of business development and has oversight of leadership succession planning and talent management. According to Participant H, key talent management activities such as the *stay interview* and *exit interview* are conducted in partnership with HR. Participant H defined the stay interview:

> Our stay interview is completed by HR and the supervisor to solicit feedback on where the employee is at, and where they can improve, and how they may become more efficient and productive. This is an example of many partnerships our organization employs to manage our talented employees.

Participant H cited scheduling conflicts and a lack of professional experience as concerns in the timeliness and quality of activities related to leadership succession planning and talent management. When asked to explain her comment on a lack of professional experience, Participant H said, "Well, partnerships are good, but people need to have some formal HR baseline experience related at a minimum with leadership succession strategy."

Participant H works for an organization with 100,000 employees. Participant H said, "Our leadership succession planning activities are linked to talent management strategy." Participant H discussed her employee totals in the context of a talent management strategy:

> We regularly focus on the professional development of our employees through talent management strategy development. I do think that I can more see the benefit of focusing

> on talent management with a succession planning influence because of the size of our employee population.

Participant H expressed pride while expanding on her organization's stay interview [and] exit interview.

> These two tools have changed our culture for the better. There is no penalty in employees not only discussing why they feel compelled to leave but with our stay interview, we get to learn about what is working and what is not working, with the added bonus of being able to correct the latter and prevent our talent from walking out the door.

Similar to the other participant interviews, the implementation of leadership succession planning in talent management was occurring in Participant H's organization. Employee engagement, organizational culture, and oversight regarding the study constructs were running patterns.

Participant I. Participant I is a White female with a Bachelor of Science degree in business administration. The interview with Participant I finished at 47 minutes. Notable is that the 47 minutes represented a combined two interview sessions. The recorded participant phone interview call dropped at the 31-minute point as the participant accidentally ended the call on her cell phone. The participant called back immediately, and the interview continued for another 16 minutes.

Participant I discussed the decline in organization size in the context of how its f*uture leaders* program is an example of how planning for leadership succession connects with its broader strategy for managing talent. Participant I maintains the oversight of leadership succession planning, and talent management strategy development is in HR. Participant I's organization was decentralized because of a reorganization, which resulted in a loss of thousands of employees. Participant I commented,

> Some of our business locations lack HR staff. Employees are performing activities related to leadership succession planning and talent management outside of HR. This makes me worry that the quality of leadership succession and talent management activities may lack substance without HR input.

Participant I works as a director of HR and recruitment for a for-profit educational organization. She has worked as a director for an organization of up to 60,000 employees. Participant I discussed the political, regulatory pressure on her organization for internal reform:

> Increased regulations on for-profit educational institutions have caused our organization size to decline, necessitating a focused effort on leadership succession planning and talent management. Leadership succession planning and talent management strategy development are in the planning stages with the implementation of activities we hope later in the year.

Participant I continued, "Our future leader program will launch our succession planning efforts for our leaders." Participant I discussed her organization's future leaders initiative as part of their leadership succession planning activities connected to their talent management strategy. Their previous leadership succession planning efforts did not have a self-nominating component and were deemed not credible by employees. Participant I provided a contextual view on the importance of her organization's Future Leaders Program; employee engagement and organizational culture were connecting patterns:

> Our formal Future Leaders Program is self-nominating, and your peers may nominate you; this gives our employees some ownership over our leadership succession planning efforts. The nature of us being in for-profit academia has been a source of worry for us HR types more than our actual employees, but I believe things will get better; there is a light at the end of the tunnel.

Analysis by Theme

This section contains the analysis from the participant interviews. Upon completion of interviews, patterns emerged within the data that connected the participants' comments to four areas of influence on the role leadership succession planning has in talent management strategy.

A miscellaneous theme was found and is discussed at the end of this section. The theme summaries and corresponding data from the participant interviews follow.

Theme 1: Implementation differences for leadership succession planning in talent management. Implementation of leadership succession planning in talent management involved a process whereby plans and strategies become organizational actions in the organization's fulfillment of strategic goals. The participant data revealed methods, ideas, and opinions on how leadership succession is occurring as a subordinate process to the participants' talent management strategy. Participant A commented, "We view talent management and succession planning at all levels as a complementary process, and the human capital knowledge of our talent supports our strategic workforce planning." Participant A viewed workforce planning at all levels as the catalyst for planning for leadership succession. Participant B described leadership succession planning from the perspective of other processes:

> So, I'm basically starting from the ground up and establishing related programs like performance management, compensation as part of our talent management strategy, and leadership development is a priority. My next priority will definitely focus on succession planning at other levels.

Participant C discussed her people's review process from the context of knowledge sharing for the identification and development of future leaders. She described an internal evaluation of potential leaders. Participant C commented, "You can have a really great succession plan, but if you are not on the same page as your employees, it really will not get you anywhere." Participant C's philosophy and implementation practices do not differ from Participant D. Participant D described his organization's talent management strategy involving a *life cycle* whereby worker knowledge is harnessed and enhanced from the

employee hiring to retirement. The life cycle was inclusive of leadership succession planning efforts, according to Participant D:

> So, I do everything from leadership succession planning to working with our recruiter to hire the best, to screen the best, and then I take them from orientation all the way through their career here. And then on the other side of that, I'm doing consulting with our executives on succession planning at all levels, and although we don't call it succession planning here, we call it growth planning, it's tied very much to our talent management strategy.

Participant E implemented leadership succession planning as part of a complete talent management strategy focused on career development. Participant E emphasized the belief that proper career development connects with organization development:

> A lot of what I do in organizational development is helping with recruitment and succession planning and performance planning and career development. So, some of those things we directly help with the planning for talent acquisition at the CEO level.

Implementation of leadership succession planning in talent management strategy for Participant F has aligned her organization's active engagement in identifying potential gaps in leadership: "We strategically implement leadership succession planning for our high level management group to prevent fatal gaps in our business model." Participant G's organization is in the early stages of implementing leadership succession planning as a talent management strategy. A steady focus on profits has dominated executives' time, according to Participant G: "Most of the time, leadership planning is more of an afterthought, unfortunately. The focus frequently comes to be in the here and now versus what happens tomorrow or a year, 5 years, 10 years down the road." As a result, Participant G is implementing *forecast planning* that includes the identification of potential leadership successions at the managerial levels for various periods from one to five-year increments and 10-year increments.

Participant H analyzes data from her organization's stay interview and exit interview to identify potential leaders and, once identified, the creation of a development plan. The resulting development plan is attached to a plan for leadership succession. Participant H stated,

> Our leadership succession strategy is more about an ongoing talent management strategy that is building those knowledge bases that are part of the critical roles that's [sic] building those characteristics that are part of a successful profile and figuring out how to round out the people that we have.

Participant I justified the use of a third-party company to come into her organization for implementing leadership succession planning as part of the talent management strategy:

> We hired a third party to come in and actually look at everything, the whole structure of the company, not just succession planning to accurately develop a leadership succession plan to really get a full big picture of how the company operates on a day-to-day basis at various levels.

While the implementation of leadership succession planning in talent management is occurring in all participants' organizations, differences existed in how the implementation is occurring. Differences in the speed of implementation and formality were the main patterns revealed during the study analysis.

Theme 2: Oversight of leadership succession planning and talent management. The data revealed a shared role between HR and the business line for most participant organizations. The revelations led to questions regarding who should have oversight responsibility for the current study constructs. Business line employees collaborated with HR staff on oversight of strategic aspects of leadership succession planning and talent management. For example, Participant A described a partnership she has involving the administration of leadership succession planning and talent management. Participant A's business partner has no formal HR related expertise and assists in her consultation with organizations on strategic HR management

services. Participant B described her talent review process, and her organization's leadership development activities have programs that involve a combination of HR staff and business line managers. Participant B mentioned the availability of business line partners heavily influences her organization's timeliness in performing these activities.

Participant C commented that oversight of leadership succession and talent management strategy development is a shared activity. Participant C's organization has an independent group of senior managers who formed a *people review* panel. HR chairs the committee, and the group is responsible for developing policies, and activities focused on succession planning for key leadership positions under their general talent management function. Participant C commented, "The panel works well on the matter involving the expenditure of funds for employee development, but it's hard to reach consensus on longer term strategic issues."

While Participant D has oversight responsibilities for leadership succession planning and talent management, his organization has hired a talent management consultant who advises on processes and plans regarding the broader talent management strategy from the development and implementation perspectives. Participant F has a similar approach to Participant D involving oversight of leadership succession planning for their talent management strategy: "We hired an organizational development consultant for helping with recruitment, and performance management, and career development. I work on the leadership succession piece."

Participant E described the study constructs oversight being split along geographical lines:

> We have a strategic management team in Philadelphia who sends us any viable leadership candidates, and then what we do is identify the viable candidate, interview them, and then onboard them, develop the skills and help them to kind of match the

> position that's best in the company. This works for strategic succession planning at the leader level as well.

Participant G has a shared role with his executive leadership team. While he has primary oversight responsibilities regarding leadership succession planning and talent management, a shared oversight role took place specific to the activities involving leadership development and recruitment under his organization's leadership succession planning efforts:

> I advise on talent acquisition, talent—and everything that falls under that umbrella. Things like talent assessment, talent pipelining, and future growth of the company; I partner closely with leadership to better understand where their organization is headed, how to get there, and what a strategy looks like to get in that position.

In conclusion, for Theme 2, the extracts of data from the study participants were provided to show how oversight emerged as a theme. Participant H and Participant I did not describe a shared oversight role. The data revealed similar processes among the participants. The overwhelming theme that emerged is that oversight of leadership succession planning and talent management was not a sole activity for HR.

Theme 3: Organizational culture. Organizational culture includes the values and goals that support the unique rules of behavior and organizational norms. Corporate culture affects the way employees interact and communicate. Organizational cultural influence emerged as a factor in showing how leadership succession planning and talent management work together in the participants' organizations. For example, Participant A, who worked in various organizational settings, emphasized the importance of corporate culture in developing activities in talent management:

> I believe that understanding your culture chain is critical. Talent management strategy dovetails into decisions on what proportion of talent to buy, borrow, for talent. This situation determines the level of investment. Mapping this all-out support talent management strategy may lead to a trickle-down effect.

Participant C expanded her comments with specific examples:

> Is our culture all about examining the company's aim? What is your risk for people and for the financial aspects of the company? There's the saying that not everyone is a leader. What I am saying is that everybody can manage; not everybody can lead.

Participant D commented on culture in describing how he must be sensitive to the culture when administering leadership succession planning: "The entire organization is fearful of being replaced." Participant I commented, "We are an educational organization, and our culture has a protectionary climate that must be considered in managing talent."

Participant F described her organizational culture from the perspective of her organization, implementing a matrix organization with cross functional collaborative teams without a centralized leader. Participant G described the culture of his organization as one that views leadership succession planning and talent management through the lens of a "quantitative process rather than a people qualitative matter." In conclusion, the extracts of data from the participant interviews revealed a pattern that shows the shared assumptions, values, and beliefs that influence those responsible for administering leadership succession planning and talent management.

Participant A discussed organizational culture from the perspective of how her consulting firm must understand the company's culture when she provides consulting services:

> So currently, I own my own consulting firm. There is two of us consulting under that brand, so we do sometimes implement succession planning in midsize to smaller companies from scratch very often, and help to manage and train their HRDPs [human resource development personnel] to be able to take it over eventually. No matter our expertise, we must match it to the company's culture.

Participant A expressed reservations over any leadership succession planning efforts that do not consider the organizational culture and the influences that corporate culture has in the execution of succession planning and the development of talent management strategy:

> Usually, the conversations with C-Suite about their direct reports, that is usually managed by myself with the HR director present, but the person facilitating is me. Every situation is different; some organizational cultures require a single conversation among me and the CEO; other org cultures, it's a group meeting.

Participant B described her organization's culture, specific to how the HR function is perceived: "The culture here thinks of the HR function as a strategic entity that helps support the business and to help to support the business achieve its objectives." Participant H used organizational culture to describe how her organization plans for employee investments in developmental activities:

> Our organization has a culture that view succession planning as a talent management strategy so that there isn't a separate path that is activated for leadership succession planning. It starts with understanding the employees that we have, understanding their roles, their strengths, their weaknesses, what their growth edges are, and then thinking about, of course, with just succession planning, what are the needs of the organization as a whole.

Theme 4: Employee engagement. During the study analysis, patterns revealed employee engagement as a factor in determining the implementation of leadership succession planning in talent management. Two participants considered the successful recruitment of leaders as part of succession planning, an element connected with employee engagement. Participant E described his matrix organization:

> We have cross functional teams that target individual professional associations; they send job announcements, interview candidates, and then when new employees come on board, we develop their skills to match them to the best position in the company; our engagement starts early.

Participant F justified her use of a third-party recruiting service: “We wanted to ensure objectivity in recruiting..... It’s imperative that engagement begins at the moment of recruitment for us.” Employee engagement as a theme in the study was not limited to talent management recruitment activities.

Employee recognition activities were described in varying forms among most study participants. Participant A noted her title of director of total rewards and talent management is an indication of a seriousness her organization places on ensuring employees are engaged, recognized, and compensated often: “Our total rewards program encompasses all compensation and benefits, including performance and recognition, work life balance.” The areas identified may be viewed as a part of Participant A’s broader talent management strategy.

Participant I discussed her organization’s Future Leaders initiative as part of her leadership succession planning activities connected to their talent management strategy. Participant I’s previous leadership succession planning efforts did not have a self-nominating component and were deemed not credible by employees. Participant I explained, “Our formal future leaders' program is self-nominating, and your peers may nominate you; this gives our employees some ownership over our leadership succession planning efforts.” Additional data from the participant interviews emphasized other employee engagement efforts attributable to leadership development as a component of planning for leadership succession and management talent. Participant B provided an overview of her leadership development activities: “We have a homegrown plan of internal development where experimental training on the job and stretch assignments are sought voluntarily.” Participant B’s organization involves employees in its

employee branding strategy by soliciting employees to comment on and suggest changes in business objectives, vision, and mission.

Participant C described her organization's people review initiative. As a part of their talent management strategy, employees review their performance with a peer for determining areas in which the employees need future development and training: "Our process is outside the employee and supervisor performance review process." The process is similar to the 360 degree assessment process.

In conclusion, for Theme 4, the study participant examples illustrated critical patterns in the data. The data strings from participant responses in the areas of recruitment, compensation, and organizational response to employees' ideas pointed to employee engagement as an influence on leadership succession planning implementation in talent management.

Miscellaneous theme. During the data analysis, a topic not directly related to the research question arose from the data regarding how the participants obtained their current roles. The theme involved the role of formal education in HR for obtaining oversight of leadership succession planning and talent management. Because the issue offered relevant information on how leadership succession planning under talent management strategy is administered, the data are discussed as follows.

The data collected revealed that most participants obtained their experience through various paths, not necessarily connected with their formal educational pursuits. Five out of nine study participants have Master of Science degrees, three hold Bachelor of Science degrees, and one participant has a PhD. The data did not provide a predictive indicator of how the participants with professional experiences beyond HR successfully manage leadership succession planning in

talent management. Instead, participants described their perceived success in administering leadership succession planning in talent management to experiences beyond their formal HR education.

Participant A suggested her background in organizational development allows her to consult on leadership succession planning and talent management for her consulting firm:

> In a previous role, I was the top OD [organizational development] person, which included all of the programmatic work in OD, so that included all of the talent development, like programs in succession planning, career development, talent review, leadership development programs, particularly the experiential ones where you accelerate the learning for potential leaders so that they are ready actually to take on the next role. I owe [those] experiences to my ability to own my consulting firm.

Participant B credited her work in the pharmaceutical industry for allowing her to perform her current oversight role of leadership succession planning and talent management strategy: "My previous roles, particularly when I was working in the pharmaceutical industry as an analyst and workforce planning analyst, helps [*sic*] me now." Participant C suggested her consultant work as a self-employed analyst, provided her the emotional distance to perform her current job: "I was once on-site with a client for almost 10 months helping them through some change management; they were downsizing and had to reevaluate their organizational structure." Six participants did not credit formal educational attainment as necessary for their current oversight of leadership succession planning and talent management.

Summary

Chapter 4 began with an introduction. The sample description highlighted the participant selection criteria, recruitment, and selection process. The participant demographics, including professional background experience, were contrasted for analysis. The research method applied to the data analysis revealed the study themes. The procedures for selecting the study's sample

size were presented for comparisons to the chosen study design. A detailed description of how the data were analyzed was provided. The presentation of data and results analysis was included. Four themes and a miscellaneous theme emerged from the data.

The chapter included the presentation of data within the four emerging themes that influenced the role of leadership succession planning in talent management among the study participants. The participant data analysis revealed implementation differences. Exceptions in the oversight of leadership succession planning and talent management processes exits. The analysis revealed the difference between the process owners' professional experiences with leadership succession planning and talent management. Organizational culture emerged from the data as influencing the role of leadership succession planning in talent management. The data analysis revealed different levels of employee engagement, and employment engagement emerged as an influence on the role leadership succession planning has in talent management strategy.

Chapter 5 presents a discussion of results, a summary with additional analysis and conclusions, and a comparison of findings with the conceptual framework and previous literature, including interpretations. The study limitations, design, and delimitations are presented. Study implications, including the theoretical and practical implications, are provided. Recommendations for further research concludes the chapter.

CHAPTER 5. DISCUSSION, IMPLICATIONS, RECOMMENDATIONS

This chapter begins with the research problem overview. The research topic was the role of leadership succession planning in talent management. The study's purpose and research method are examined for their appropriateness for use in exploring the research problem.

Limitations within the study are analyzed. Contrary to the initial expectations developed from the literature, the data collection process revealed evidence that leadership succession planning possesses a role in talent management. Additionally, outlined are the interrelationships among the study constructs.

Summary of the Results

Essential elements of leadership succession planning may involve a process for identifying and developing potential leaders for filling gaps in leadership. An introductory view of talent management includes identifying human capital for recruitment, retention, development, and reward for improving the organization. The research literature on leadership succession planning indicated an interrelationship among talent management and succession planning (Cavanaugh, 2017; Chaturvedi, 2016a; Sanjeev & Singh, 2017). Comparison of findings with those of other studies Erasmus et al., (2017) and LeCounte et al. (2017) suggested the role of leadership succession planning in talent management is vague within the empirical research.

The research question explored through a generic qualitative methodologyhow senior HR managers view the role of leadership succession planning with their organizational talent management strategy. Participants included selection based on their experience in strategic workforce planning, organizational development, or as an HR director (Kalaiselvan & Naachimuthu, 2016). Semistructured interviews using open-ended questions were used to assign meaning to the perceptions, attitudes, and experiences of nine study participants selected to explore the role of leadership succession planning in talent management strategy. The findings revealed clarifying details about the research problem and offered four themes.

The study revealed interrelationships between leadership succession planning and talent management. All participants provided data to the effect that leadership succession planning activities are occurring within their talent management strategy. The direct role of leadership succession planning within the participants' talent management strategy varied based on four themes: implementation differences for leadership succession planning in talent management, oversight of leadership succession planning and talent management, organizational culture, and employee engagement. This section concludes with a remark on an additional finding not directly related to answering the research question but relevant to the study.

Theme 1: Implementation Differences

Implementation concerning the study constructs of leadership succession planning in talent management may be viewed as a process whereby plans and strategies become organizational actions in an organization's strategic goals fulfillment (Berner, Vazquez, & McDougall, 2019). A review of recent empirical studies on how organizations are implementing leadership succession planning within talent management revealed a gap in the literature. Empirical evidence connects individual, organizational influences on the successful implementation of leadership succession planning and talent management. Al-Azzam and Al-Qura'an (2019) suggested that talent management implementation has a foundational base involving the enhancement of worker development. Al-Azzam and Al-Qura'an found that strategies for implementing talent management rely upon organizations managing the knowledge of their human capital.

The data from the study participants tangentially connect with Al-Azzam and Al-Qura'an

(2019) from the viewpoint of how knowledge management influences the implementation of talent management. Participants provided examples of leadership succession planning activities occurring within their talent management strategy. Six participants described formal implementation strategies; the remaining three participants described informal implementation strategies. Participant A described a structured implementation activity involving her organization's investment decisions for leadership succession planning in talent management:

> We ask questions on where our investment dollars should be spent. We ask, should we build, borrow, buy, bounce, balance, or bind our talent? This includes our leadership development dollars for succession planning. We use the 6B model of talent management.

Participant C described a formal implementation of leadership succession planning in talent management strategy using the DISC assessment as a mandate for potential leaders wanting to ascend to a leadership role. Participant E uses Harris Polling specific to the company's corporate reputation management function to guide his organization on strategic planning, including leadership succession planning and talent management strategy development. While explaining the use of Harris Polling, Participant C said, "So, I think that once you have a strong leadership succession plan in place, it will show the rest of your talent that the organization is very concerned about retaining, keeping, evaluating, recognizing staff." While three from the nine participants described formal implementation choices for leadership succession planning under talent management strategy, the remaining six participants described less formal implementation activities; the distinguishing factor for determining whether an action was formal or informal hinged on the participant stating so.

Participant B described a talent review process whereby HR leads a discussion with business line managers to develop leadership succession planning within a talent management

strategy tailored to each business line in a decentralized process. Participant D described a similar succession strategy forum: “Our team is comprised of HR, C-Suite reps, business line reps, and we work as a team on leadership succession planning under our talent management strategy development.” Participant F has a similar informal process labeled *management review board*. Participant I described a stay interview as an informal process of planning for leadership succession under her organization’s talent management strategy.

Theme 2: Oversight of Leadership Succession Planning and Talent Management

Filippus and Schultz (2019) examined talent management and found that oversight happens at three levels in the organization: HR, operations, and strategic. The current study participants provided data that may be categorized in the areas described by Filippus and Schultz. Schaeffer and Akhavan (2017) examined succession planning from the perspective of leadership succession for family owned businesses. Schaeffer and Akhavan found that planning for leadership succession must include stakeholders beyond HR who represent unique firm features. Filippus and Schultz (2019) further stated that a team approach would provide oversight over the process of leadership selection for specific and consulting purposes citation. Participants from the current study provided data reflective of a shared team approach to managing leadership succession planning under a talent management strategy.

Laturkar and Mupade (2019) suggested that oversight of leadership succession planning and talent management is the responsibility of HR. While all participants confirmed they have a significant responsibility in overseeing the activities involving leadership succession planning and talent management, six participants reported a shared responsibility with various stakeholders of their organizations. The data confirmed Schaeffer and Akhavan’s (2017)

suggestion that a team approach is best for managing strategic HRM activities such as leadership succession planning and talent management strategy development.

Theme 3: Organizational Culture

Camelia, Ioana-Valentina-Alexandra, and Larisa-Andreea (2019) found that organizational culture includes the organization's collective norms, values, and beliefs. Corporate culture influences how employees communicate. Data from the participants' interviews revealed that organizational culture has an influence specific to how leadership succession planning is implemented in a talent management strategy. Participant A emphasized the collective organization norms in describing activities for deciding investment choices under her leadership succession planning and talent management strategy. The investment choices included investments in on-the-job training and cross business line shadowing for leadership development. Participant D mentioned organizational culture in explaining the sensitive nature of planning for leadership succession. Participant G described his organizational culture involving a quantitative perspective when making investment decisions for leadership development under his organization's leadership succession planning and talent management strategy.

Theme 4: Employee Engagement

Employee engagement is increasingly gaining importance for organizations across industries because of profitability increase demands (Nugroho, 2017). Employee engagement may suffer when employees are not noticed and acknowledged for their contributions (Nugroho, 2017). Organizations that respond to their employees' ideas value their employees and are upholding the principles needed for successful employee engagement (Nugroho, 2017). Engaged

employees help shape the organization, mainly when a fair and democratic process is implemented from quality ideas.

Nugroho (2017) found that employee engagement has evolved into a dominant factor for organizations aiming to gain a competitive advantage. Elements of employee engagement appeared in the current study's data. Participants connected their recruitment efforts to employee engagement as part of a talent management strategy. Participant E provided an example involving a cross functional team developed to recruit leaders as part of their leadership succession planning efforts. Participant C explained that her people review program involves employees at every level providing performance feedback as part of their talent management activities. Participant I described her Future Leaders Program and the self-nominating employee engagement aspect: "We rely on the engagement of our employees in managing this aspect of our whole leadership succession planning efforts."

Additional Findings and Interpretations

Another theme uncovered during the study not directly related to the research question was leadership succession, warranting further discussion. The participants gained oversight of leadership succession planning and talent management strategy through various paths not necessarily connected to their formal educational accomplishments. Five participants acquired Master of Science degrees, three obtained Bachelor of Science degrees, and one participant had a PhD. Patterns emerged that revealed that their professional experiences were not necessarily through their formal education but organizational mandates.

Two thirds of the participants described their perceived success in administering leadership succession planning in talent management to experiences beyond their formal HR

education. The data align with Wright and McMahan's (1992) forecast that work experience beyond formal HR education would become valuable in the administration of policies and practices involving the strategic management of human capital. The data in the current study show patterns that may suggest that formal education among the study participants may be secondary to other influences, such as on-the-job training and HR industry certifications. The findings lead to questions regarding what amount of formal education is necessary for those with oversight responsibilities over leadership succession planning and talent management. What nonformal certification or experience is needed for managing leadership succession planning and talent management at the organizational level?

Discussion of the Results

The most prominent finding to emerge from the analysis is that the data revealed not only that leadership succession planning has a role in talent management, active leadership succession planning activities happen in the participants' organizations. The research question asked, what is the role of leadership succession planning in a talent management strategy? Based on the data analysis from the nine study participants, the role of leadership succession planning in talent management varies based on four influences or themes. The four themes are; how leadership succession planning is implemented in talent management strategy, who has oversight of leadership succession planning and talent management, organizational culture, and employee engagement in activities involving leadership succession planning within talent management strategy.

The literature involving the role of leadership succession planning in an organizational talent management strategy was questioned by Erasmus et al. (2017) and LeCounte et al. (2017).

Findings from the current study add empirical data specific to the role of leadership succession planning in talent management. The current study findings are not conclusive; additional empirical research and analysis may add to the body of knowledge regarding the broader constructs of leadership succession planning and talent management.

Three from the nine participants represented organizations in the initial phases of implementing leadership succession planning as part of their talent management strategy. Six of the nine participants included shared oversight of leadership succession planning and talent management. The shared oversight finding revealed a theme connected to an oversight authority and its influence on the role of leadership succession planning and talent management.

Shahi, Farrokhsheresht, Taghipourian, and Aghajani (2020) rated organizational culture in the top 10 factors that affect the successful implementation of a talent management strategy. Organizational culture may include the organization's philosophy, values, attitudes, customs, and beliefs that shape the way business is conducted (Bhalla, Qazi, & Maram, 2019). The organizational culture may include written and unwritten assumptions that guide business situations and the way employees interact with each other and their stakeholders (Bhalla et al., 2019). On the question of why Participant E contracts out the services of leadership succession planning and talent management despite being competent to perform the tasks himself, Participant E's response was, "This is a professional way to do things. We believe we are on the right side of what we should be doing as an organization." Participant E's response points to organizational culture as a factor in determining the role of leadership succession planning activities within talent management. The data collected from other participants illustrated examples of leadership succession planning efforts under a broader talent management tent.

Participant B's organization implemented a total rewards program under its strategic talent management efforts. Benefits, including performance and recognition, work life balance, and retirement, are rolled into incentives, financial and nonfinancial, designed to grow, motivate, recognize, and reward talented employees. Participant C has a formal leadership development competition, wherein the winner receives formal leadership training and mentoring opportunities. Participant I's organization has a similar leadership succession activity under its strategic management of talent. Participant I's Future Leaders succession program involves a self-nominating process in which the nominee's peers make the selection based on a written biography that describes why the nominee wants to assume broader leadership responsibilities.

The study participants' examples of leadership succession planning and talent management activities connect on a broader theme: The leadership succession planning and talent management activities described by the participants would not be successful without a concerted effort to encourage employee engagement. Talent management may include a variety of organizational activities involving recruiting, retaining, developing, rewarding, and motivating employees (Kalaiselvan & Naachimuthu, 2016). These investments are not limited to the organization. Employees invest their time, skills, ideas, knowledge, and creativity into the organization through their engagement.

A relevant finding was that employee engagement is a factor in exploring the role of leadership succession planning in talent management. Employee retention is a motivator for engaging employees at the organizational level. Employee growth is a motivator for the engagement of employees at the organizational level. Whatever the motivation is, and for whom,

employee engagement is a factor in exploring the role of leadership succession planning under a broader strategy for managing talent.

Nugroho (2017) determined the importance of employee engagement in talent management and leadership performance. In Nugroho's study, employee engagement was ranked highest among other factors that influence the success of an organizational talent management strategy. Comparison data from the participant interviews in the areas of obtaining top management support, increasing the visibility of talent management activities, and standardizing talent review and feedback corroborate the critical role employee engagement has for determining a successful talent management implementation strategy.

Conclusions Based on the Results

The analysis of data from the nine study participants revealed a role for leadership succession planning in talent management. An indication from the analysis is that the activities within leadership succession planning from a talent management perspective vary among organization sizes and types. The findings compared with the conceptual framework and previous literature follow, along with finding interpretation.

Comparison of the Findings with the Conceptual Framework and Previous Literature

This study results confirmed the evolutionary role HR has specific to the strategic management of people in organizations. Wright and McMahan (1992) discussed foundational HRM theory development of practices that transport the HR function from a micro practitioner to a more significant prominent strategic partner role. The current study participants managed strategic aspects of their organizations related to leadership succession planning and talent management. Among the nine participants, two were HR directors with oversight responsibilities

for the full spectrum of HR functions involving benefits, recruitment, employee and labor management, and training and development, among others. The findings confirmed the transformative role that exists in the workforce of 2020, predicted by Wright and McMahan (1992). The remaining seven participants managed the strategic workforce planning activities of their organizations with sole focus and oversight of leadership succession planning and talent management strategy development.

Further support for Bae and Patterson (2014) included in the current study that confirmed leadership succession and talent management activities are investments in human capital. Participant F summarized the idea of human capital investment when describing her organization's outlook on leadership succession planning in talent management:

> Talent management may be viewed through the lens of an equation, as very much a number or a quantitative type of calculation. You're looking at things like revenue and growth and where the company is headed, and then you're working backwards [sic] from there to plan with your existing team and what needs to take place.

The investment in leadership succession planning and talent management, as described by Participant F, resembles the HCT perspective, as defined by Kalaiselvan and Naachimuthu (2016). The HCT was the theoretical lens used to examine the role of leadership succession planning in talent management. The HCT links with organizations gaining a competitive advantage and increasing employee wages.

The current study revealed data linked to the development of policies and practices that promote organizational success and create sustained competitive advantage. The 6B model of talent management described by Participant A, the total rewards program from Participant B's organization, and the Future Leaders Program from Participant I led to increased wages from the

participants' organizations. An argument may be made that the wage increase broadly supports the participants' organizations' success.

The current study could not demonstrate Barney's (1991) suggestion that investment in human capital may lead to broader benefits for the society in which the human capital lives. While Participants E, F, and I discussed their leadership succession planning activities and the benefits to their employees, no participants described benefits transportable to other organizations or the communities. The benefits described were unique to Participants E's, F's, and I's organizations only.

HR development as an activity subordinate to leadership succession planning within the talent management strategy was evident in the current study. Wang et al. (2017) suggested that HR practices aimed at developing human capital might include the planning for leadership gaps as a part of a talent management strategy for ensuring a competitive advantage. The data analysis revealed matches to HRD activity observed in earlier studies. Participant B's talent review program and Participant C's DISC assessment program are similar leadership development HRD examples illustrated by Jacobs (2014) and Swanson and Holton (2009), who viewed HRD from the practical focus of improving human capital at the organizational, individual, and team performance levels.

The current study revealed evidence that supports the findings from Giambatista et al. (2005). Three participants provided multiple examples that matched Giambatista et al.'s description regarding the evolution of leadership succession planning history. Organizational factors such as the inevitability of human capital turnover, size, and focus on the leadership–

organization fit created the need for a narrower succession strategy for organizations concerned about the effect of leadership changes.

The study results were consistent with Lewis and Heckman's (2006) assessment regarding the evolution of talent management. The data revealed a consensus among the study participants specific to a process for identifying talent as apart from the participants' talent management strategy. While not widespread, one indication of what Mahfoozi et al. (2018) described as a talent management mindset was evident. Mahfoozi et al. suggested that attraction, identification, development, and relationship building are necessary for creating a talent management mindset. Participant A described her mindset and the effect on implementing leadership succession in talent management:

> Our succession planning efforts and talent management program is linked through our outlook and mindset. We create pools of talent for specific roles, running experimental learning programs, establishing procedures for managing internal job applicants, connecting to career development; mentoring is included.

The current study attempted to answer the call for more empirical research related to leadership succession planning and talent management, as described by Erasmus et al. (2017) and LeCounte et al. (2017). Data specific to how leadership succession planning is linked with talent management through implementation procedures were illustrated through the data analysis. The data may provide HR practitioners and the strategic HRM community with a case history that may be replicated and expanded. The current study provided data specific to the influence that organizational culture and employee engagement have in the strategic activities involving leadership succession planning and talent management program development.

This section includes illustrations on how the current study aligns with previous literature and the human capital (RBV) theoretical framework. The current study finding interpretations

begins with a comparison and contrast from the current research with the most recent literature published regarding the study constructs.

The current study findings specific to leadership succession planning, acquiring a leadership development component, confirms the findings of Sanjeev and Singh (2017). Sanjeev and Singh found a positive relationship between talent management and leadership development connected to organizational retention and reward strategy. In the current study, Participant B discussed a talent management activity involving her organization's total reward program. According to Participant B, "The program aim is to keep the best employees as part of our strategy to manage our talent." Erasmus et al. (2017) researched talent management policies and strategies at the organizational level and found a lack of consistency in talent management implementation among senior levels. The current study produced data confirming implementation differences among the participants. Differences in the organization size and type, along with the process owner's professional experience over leadership succession planning and talent management, may explain the differences.

A review of literature from the previous 12 months did not yield empirical findings directly related to the role of leadership succession planning in talent management. Recent empirical findings involving the study constructs of leadership succession planning and talent management revealed tangential correlations. Shahi et al. (2020) noted a conceptual model of behavioral factors affecting talent management, involving employee recruitment and development aims for expanding the organization match participant data from the current study. Data from Participants B, C, and D related to their talent management strategy of recruiting and developing their leaders for succession planning purposes relates to Shahi et al. Specifically, data

from the current study revealed patterns in the administration of managing talent where the development of potential leaders for succession purposes was occurring. Recruitment was another data point shared among the participants. The recruitment perspective was paramount in developing a talent management strategy.

The current study revealed that organizational culture related to the organization's embrace of leadership succession planning and talent management influences implementation. Shahi et al. (2020) found that culture, specific to the organization atmosphere, has behavioral factors that affect talent management. The current study results indicated that oversight responsibilities involving the administration of leadership succession planning and talent management are not necessarily the sole responsibility of HR. Partnerships continued to occur. Participant B has a talent review board that includes business line executives who make leadership succession decisions related to recruitment and development of talent. Participant C has a people review group that make talent development recommendations. These findings correlated with Lamoreaux, Litov, and Mauler (2019), who investigated the use of a lead independent director as a means for offering an objective perspective on the decision that affects the entire organization. The findings from the current study involving oversight partnerships do not support Lamoreaux et al., who described boards of directors and investor holdings.

A variety of leadership succession planning activities within talent management is in the current study. These implementation variances may be explained by the differences in size, organizational culture, and organizations. The organization's ability to obtain employee engagement is another factor. These results are congruent with those obtained from Al-Azzam and Al-Qura'an (2019), who investigated the elements of talent management strategy related to

customer satisfaction. Inferences to the organizational culture and employee engagement were made about employee perception of talent development strategy. Notable in Al-Azzam and Al-Qura'an's study are the links made among talent development strategy, succession planning strategy, and talent attraction strategy. Those broader concepts align with the data collected from the current study participants.

The current study included the resource-based view of HCT to explore the role of leadership succession planning in talent management. Empirical research from Bae and Patterson (2014) and Kalaiselvan and Naachimuthu (2016) associated talent management and succession planning with investments in human capital. The current study results corroborate that research. Three participants spoke about internal organizational processes, viewing leadership succession planning and talent management as investments in the development of human capital. The remaining six participants tangentially spoke about the current study constructs as investments when describing their leaders' developmental activities.

Interpretation of the Findings

This section provides explanations for the current study findings. A contrast and comparison of findings with previous literature will determine the study findings' outcomes. The findings are analyzed from a contextual perspective of literature published on leadership succession planning and talent management. This section includes discussion regarding the current study outcomes, specific to the implications for the broader literature and community, are discussed. An explanation of how the outcomes were determined is included. The evaluation includes the findings' positions in the theoretical framework selected for the study are evaluated.

The research question asked, what is the role of leadership succession planning in talent management. The study results indicated that leadership succession planning has a role within the nine study participants' organizational talent management programs. Another important finding was that the role of leadership succession planning in talent management is one subordinate to talent management. For example, the participants had various levels of leadership development within succession planning for future leaders. These activities are a part of a broader talent management strategy among the study participants.

The results of this study indicated the role of leadership succession planning in talent management has four influences: implementation differences for leadership succession planning in talent management, oversight of leadership succession planning and talent management, organizational culture, and employee engagement. The findings, representing the four influences, were unexpected and suggest the list is not inclusive of every aspect of determining the role of leadership succession planning in talent management.

The study was not designed to reach a conclusive finding on the role of leadership succession planning in talent management. Upon data collection completion, nine participants believed that leadership succession planning, as a construct, is subordinate to talent management. One participant, Participant A, believed that organizational development, as a construct, is broader than talent management. As she explained her theory, she repeated that leadership succession planning is subordinate to talent management.

The data revealed a consensus among the participants regarding a role for leadership succession planning in talent management strategy. The data collected made possible the ability to analyze the data and draw conclusions. The level of HR experience, coupled with the years of

experience, resulted in a group of participants who brought a level of real-world experience that would not be matched by those with a lesser level of HR experience.

The data analysis revealed the participants' oversight authority for carrying out leadership succession planning and talent management activities varied. Other non HR employees teamed with the formally trained HR process owner to manage the implementation of leadership succession planning under a talent management program. The shared oversight authority extended to include strategy and policy development. The study results indicated that organizational culture and employee engagement influence the success of implementing leadership succession within talent management. The analysis of data revealed the organizational culture, and the organization's ability to embrace leadership succession planning and talent management and engage the workforce may create long-term growth for the organization.

Limitations

The study had constraints that influenced its outcome. Farooq and de Villiers (2017) defined constraints as a limitation in study design. Farooq and de Villiers suggested that limitations in empirical research are the result of a methodic bias beyond the control of a researcher. Farooq and de Villier's description of limitations was not entirely evident in the current study. Farooq and de Villiers suggested the identification of limitations in the empirical study might serve to predict gaps in a study that may uncover factors that answer the research problem.

While Farooq and de Villiers' (2017) interpretations of identifying limitations in an empirical study were noteworthy, Basias and Pollalis's (2018) explanation on limitations aligns with the current study. Basias and Pollalis suggested that limitations should be identified for

analyzing the debilities in research. An evaluation from the current study design, problems, and limitations are in this section. The design limitations serve as a reflection on improvement that may enhance the study finding's quality. Included are design limitations, delimitations, and problems related to participant recruitment. Limitations reveal data collection process related matters that occurred.

Design Limitations

The current study used a qualitative inquiry method. The qualitative inquiry method was selected for soliciting the study participants' real-life experiences, opinions, and beliefs. Other aspects of data would likely have produced additional findings. Recent research conducted by Munthe-Kaas, Glenton, Booth, Noyes, and Lewin (2019) revealed that qualitative researchers often fail to identify and use the myriad analysis tools available. In the current study, participants were not asked to provide any policies or written records regarding the activities they described. The study design did not include written documents. During the participant interviews, three participants offered to submit written policies as they touted their respective organizational processes related to the study constructs. Written materials such as resumes, policies, and procedures are not included in the current study. The addition of written policies and procedures would have become another data source for analysis that may have enhanced the findings. During the participant recruitment process, challenges included the ability to locate qualified participants. A benefit from the current study came from identifying additional participant recruitment sources. Identifying the participant recruitment sources during the design prevented the multiple occurrences of seeking approval from the IRB.

Delimitations

Cunningham and Carmichael (2018) chronicled their doctoral research journeys and proposed that the dissertation writing process provides a prerogative to exclude various designs, methods, and other research elements. Cunningham and Carmichael suggested excluded elements be categorized under recommendations for future research. The current study aimed to answer the research question involving the role of leadership succession planning in talent management. An underlying delimitation within the study is that the findings cannot be generalized to the broader population of HR managers with oversight authority involving the study constructs.

Delimitations may include research questions, variables, or populations beyond the study aim (Rodríguez & Martín, 2018). The current study had delimitations. A discovery was made during the participant interviews: The chosen population did not include partnerships outside the identified sample. The data revealed examples in which leadership succession planning and talent management strategy development were administered in a partnership arrangement. Four participants had a shared role involving the oversight of leadership succession planning in talent management. Two participants collaborated with business line managers on policy and strategy development involving the study constructs. The other three participants were part of an internal working group where they served as chairs over a committee that made the financial and operational decisions regarding the study constructs. The study population did not include non HR participants who may be performing leadership succession planning and talent management work.

Another delimitation involved organization type. During data collection, it became apparent that larger organizations implemented leadership succession planning within talent management in a more systematic manner compared to smaller organizations. Narrowing the population to include organization types may have revealed additional findings regarding the role of leadership succession planning in talent management.

Implications of the Study

The study's implications for the resource-based view of HCT and the broader HR community are discussed. This section provides an evaluation of how the study findings add knowledge to the study constructs. This section addresses the theoretical and practical implications. Included are specific findings that may benefit those with oversight of leadership succession planning and talent management.

Theoretical Implications

The growing and changing dynamics of work brought on by new technologies and an ever changing demographic among employees have heightened the need for an organizational focus on the leadership selection process and for managing talent across the organization levels (LeCounte et al., 2017). The theoretical lens used to explore the role of leadership succession planning in talent management was the resource-based view of HCT. The resource-based view of HCT associates talent management and succession planning with investments in an organization's human capital (Bae & Patterson, 2014; Kalaiselvan & Naachimuthu, 2016). A contextual perspective regarding the resource-based view of HCT is found in organizations that invest in strategic HRD through planning activities related to leadership succession and overarching talent management strategy.

The current study's theoretical implications for the resource-based view of HCT are found in the study findings involving the identification of processes in which the implementation of leadership succession planning under a talent management strategy was occurring. Participant F discussed her HR business partner relationship. Financial investment decisions related to leadership development, recruitment, rewards, and retention strategies are shared in Participant F's organization. Participant F commented on how the implementation and ongoing administration regarding the study constructs is a "quantitative monetary investment in employees with hope for the employee and company to benefit." Similar data were collected from Participants A, G, and I.

The findings from the current study support the hypothesis from Wang et al. (2017) that leadership succession planning and talent management are linked through human capital development. Beal (2016) noted the study constructs might link through HRD. The current study findings provided data that confirm assertions made in previous studies from Wang et al. and Beal. Before the current study, no empirical research within the resource-based view of HCT specific to the role of leadership succession in talent management existed. Collings (2014) and Desai et al. (2016) examined leadership succession planning from the resource-based view of HCT. The resource-based view perspective from the HCT theoretical lens was used by Bae and Patterson (2014) to examine talent management issues. Foundational literature was nonexistent specific to the role leadership succession planning has in talent management from the theoretical perspective. The current study provides data that may be expanded in future research on the study constructs and other variables from the resource-based view of HCT.

Practical Implications

Data collected from the study participants illustrate how leadership succession planning is being implemented under a broader organizational talent management strategy. The current study aimed to assist HR professionals and organizational leaders with the responsibility of developing policies and implementing practices that support organizational effectiveness using leadership succession planning and talent management strategy.

The study findings regarding the shared oversight role of leadership succession planning and talent management may provide a model for the HR practitioner seeking concurrence for funding activities related to the study constructs. The findings regarding the influence of organizational culture and employee engagement may support the HR practitioner in designing and implementing leadership succession planning in talent management. The study findings may support the creation of tools for creating leadership development activities under leadership succession planning as part of a talent management strategy. An example comes from Participant I's interview: She described her organization's Future Leaders Program under her organization's leadership succession planning efforts.

Other findings specific to the implementation variances and their causes may support the HR practitioner in identifying factors that influence the implementation of leadership succession planning under talent management. Factors involving oversight responsibilities, process owner professional experience, organizational size, and organizational culture were found in the study to influence the role leadership succession planning has in talent management. These findings may support the HR practitioner in design and implementing related policies and practices regarding the study constructs.

The study findings on the influence of organizational size, organizational culture, and employee engagement regarding the study constructs and their implementation at the organizational level provide a path for the HR practitioner seeking to become a strategic advisor on the study constructs. Organizational culture may determine how succession planning and talent are managed. Gallardo-Gallardo et al. (2015) recommended that practitioners educate themselves with the psychometric qualities of different talent management tools and metrics. Gallardo-Gallardo et al. suggested that leadership succession planning and talent management are activities within the HR function where HR has responsibility for overseeing a firm's strategic management of talent.

A growing and recurring need for organizations to anticipate the need for human capital to meet organizational challenges was found by Bolander et al. (2017). Planning for leadership gaps and managing human capital talent are factors in an organization obtaining a competitive advantage. The findings from the current study provided data for the HR practitioner, business line executive, and future researcher that uncover factors that may influence the implementation of leadership succession planning as part of a talent management strategy. The HR practitioner has data specific to the influence that organizational culture and employee engagement have on the development of policies and procedures that may assist in the study constructs' implementation. Organizational employees outside the traditional HR channel, including the CEO, business line manager, and those without formal HR training, have data that provide them examples on how partnerships with HR may provide approaches for managing talent. Future researchers have data specific to the role of leadership succession planning in talent management that may be expanded.

Recommendations for Further Research

This section includes recommendations to build upon the current study findings. The recommendations show how reproducing the current study from a different context may add to knowledge regarding the role of leadership succession planning in talent management. Recommendations are made from the analysis of data. Recommendations derived from the research design are included. Recommendations are provided from the study delimitations. Recommendations not supported by the data but relevant to the research problem are examined for their influence on future research.

Recommendations Developed Directly From the Data

Data from the current study provided insight regarding the role of leadership succession planning in talent management among the nine study participants. A consensus on the research question regarding the role leadership succession has in talent management was unexpected, given the diverse organizational sizes represented in the study. The results of this study do not explain the variances along the lines of corporate type. The participants represented companies that have profit-making goals. Implementation of leadership succession in talent management varied among the study participants. Issues emerged from the findings explicitly related to organization size. Participants from larger organizations had more experienced professionals conducting oversight activities regarding the study constructs. Leading the current study using populations from the organizational perspective may add depth to the present study findings. Human capital development was a running topic the participants noted as necessary for leadership succession planning. Developing future leaders was referenced by Participants A, C,

and E directly, while the remaining six participants described various leadership development activities indirectly.

Future research should measure the effectiveness of human capital development as part of leadership succession planning under a broader organizational talent management strategy. The finding of Edeh and Dialoke (2017) supports the recommendation regarding the effectiveness of talent management from a corporate perspective. The current study did not use the quantitative method used by Edeh and Dialoke. The more significant contextual role measuring the effectiveness of leadership succession planning and talent management may reveal more data that substantiate the role leadership succession planning has in talent management.

Recommendations Derived From the Research Design or Other Limitations of the Study

The study employed an exploratory qualitative inquiry design. The design fits the current study because it included an in-depth interview to obtain the lived experiences, opinions, and beliefs to explore the role of leadership succession planning in talent management. A quantitative design may explain variances in the implementation of leadership succession planning in talent management. For example, a minimum of 10 years of HR managerial experience was required. Among the nine participants, the average years of experience were over 20 years. Using a quantitative research design to discover how years of experience connect to the implementation variances found in the current study may add depth to the findings.

Recent literature explored various organizational topics from the perspectives of leadership, succession planning, and talent management. Filippus and Schultz (2019) used a qualitative study to explore the practical application of talent management across various

industries. Oppong and Oduro-Asabere (2018) used a qualitative method to develop criteria for selecting leaders for succession planning under an organization's talent management function. Savanevičienė and Vilčiauskaitė (2017) investigated the talent management strategy connected with inclusive and exclusive internal practices. While the three studies tangentially connect with the current study constructs, the more considerable similarities come from the studies' recommendations for more research using the quantitative method.

Recommendations Based on Delimitations

The present study revealed that non HR employees are collaborating with HR in the administration of leadership succession planning and talent management. The data collected represented an unexpected finding as non HR staff performing oversight activities within the current study constructs were omitted from the study criteria. Future research using a population inclusive of non HR in a solo or partnership role is recommended. Conducting the present study using a defined organizational type, such as nonprofit or government, within the study population may add to the knowledge obtained from the current study.

Recommendations Not Supported by the Data but Relevant to the Research Problem

A recommendation for more research using specific variables is recommended. For example, empirical research on the role of leadership succession planning in talent management for particular industries such as healthcare or the automotive industry may provide a tailored approach to managing unique and situational organizational challenges. A quantitative design may give depth to the findings. Quantitative models allow for a larger population, which promotes accuracy and strengthens the prevention of bias. A participant from the current study represented a large U.S. based organization with international subsidiaries. During the data

collection process, the participant referred to the role she has in the oversight of leadership succession planning in talent management in the United States and a subsidiary in another country. Exploring the role of leadership succession planning in talent management for multinational corporations and international corporations is recommended. The findings may reveal transformative data for managing talent across geographical boundaries.

Conclusion

The study revealed a role for leadership succession planning in talent management among the nine study participants. The specific role involves a variety of leadership succession planning activities within the participants' broader organizational talent management strategy. Four themes emerged from the data. The emerging themes are the result of analyzing data points collected after the participant interviews. The themes that emerged helped support the finding specific to the differences among the participants regarding the implementation of leadership succession planning in talent management. Data from the analysis explain four determinants for uncovering the role of leadership succession planning in talent management.

The study adds to the resource-based view of HCT with the inclusion of data that show specific investments in human capital specific to leadership development. Those investments benefit the employee and the organization (Wright et al., 1994). Data collected from the participants' revealed investments connected to rewards and retention. The findings add to the theoretical knowledge of talent management.

The data analysis revealed specific practices among the study participants that illustrate how leadership succession planning and talent management are being implemented. The data may aid HR practitioners in their oversight role regarding the study constructs. Another finding

revealed that the sole responsibility for the study constructs does not rest with HR. Partnerships among HR and other business lines existed among the participants in carrying out duties related to the study constructs. While the study required 10 years of HR experience, and the participants met the criteria, participants acknowledged their auxiliary experiences as factors for their success in carrying out the study constructs' oversight role.

A recommendation for future research on the role that non HR members have on the study constructs is made. Another suggestion includes research on the process owner professional experience to determine what expertise is needed to oversee activities regarding leadership succession planning, talent management, and their correlations. The recommendations may be best discovered using a quantitative design. An issue that arose during the study involved the role leadership succession planning has in talent management for a multinational corporation. Future research is recommended for examining the constructs of leadership succession planning and talent among a population that includes multinational and international corporations.

This section concludes the current study. Issues regarding leadership succession planning and talent management are of supreme interest. The study findings are a catalyst for future research. Future research will expand knowledge covering the topics involving the planning for leadership, to include factors affecting leadership gaps, accession, and succession. Future empirical research will expand the knowledge of talent management strategy among a variety of organizational settings.

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