

SUCCESSION PLANNING MANAGEMENT IN EGYPTIAN CONTEXT

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Abstract - This study is an exploratory study aims to investigate the extent to which the succession planning management practices are applied in Egyptian business environment. The paper surveyed literature review of the Succession planning management in academic literature. The study findings revealed that Egyptian business environment lacks to the application of succession planning practices but there are some implementation in the multinationals. The paper considered as a green light and opened a new future research direction to that topic

Key words - Succession Planning Management, Egypt, Business Environment.

INTRODUCTION

Organization's future plans may change by some reasons such as retirements, promotions within the organization, serious illness, death or any voluntary departure from the organization to follow a career elsewhere. To cover such changes, organizations must have a key employees' replacement plan. Succession planning is considered as a suitable effort in this regards. For decades, the concern of succession planning was about the exact people, not skills and talents, who are needed for the organization's future. During those times, the only purpose of succession planning was to tag and identify the needed successors to replace their ancestors for a specific job. The target of succession planning in this old view was top leaders and business owners in the large organization].

Traditionally, succession planning links with replacement planning. Replacement planning is a form of risk management which focus on the replacing the key executive, exactly before leaving the organizations. In today's dynamic world where competition is high, work is fluid, environment is unpredictable, organizations are flatter, and the organizational configuration frequently changes, the old view of succession planning by defining specific people for the specific job does not work. Nowadays, organizations need a group of high potential people at all levels of their organizations. Developing general competencies, creating flexibility and creating the leadership potential at all organizational levels is a wisely action in today's organizations.(William,2005)

II. DEFINITION AND EVOLUTION OF SUCCESSION PLANNING

Succession planning has been called workforce planning, strategic staffing (Paterson, 2001), human capital management (Rothwell, 2010a). Moreover, what one organization calls succession planning, another might call succession management or talent management (Berke, 2005).

Succession planning is a method used to forecast the supply of people for certain positions. It is developed to identify potential personnel changes, select backup candidates, promote individuals, and keep track of attribution (resignations, retirements) for each department in an organization (Mathis and Jackson, 1999).

Succession planning is planning the potential replacement of current leader positions. This may include identifying those who are fully qualified for the incumbent's position, those who are expected to be ready within a specified number of years, and/ or those who are expected to be ready once specific competencies are developed (without indicating a time period of readiness) (Sims and Gay, 2006).

Succession planning is an organizational management tool used to ensure continuous performance in the organization by identifying key internal people for work activities over time (Hickey, 2002).

Succession management includes succession planning, as well as all continuous actions and processes throughout the year regarding the development of successors. Succession management also involves looking ahead at the leadership competencies and positions that will be needed for the organization's future success, rather than only looking at replacement needs. (Sims and Gay, 2006). Succession planning should not stand alone. It should be paired with succession management. Therefore, succession planning and management (SP&M) is defined as the process that helps ensure the stability of the tenure of personnel. It is perhaps best understood as any effort designed to ensure the continued effective performance of an organization, division, department, or work group by making provision for the development, replacement, and strategic application of key people over time (Rothwell, 2005). It is worth mentioning that succession planning is not a new activity. It has been a subject of academic research since the 1960s (Sharma et al., 2003). Some say that professional research on succession planning and management

began in 1950s. The chief focus of that research was on CEO succession until 1980s (Subrahmnain and Anjani, 2011). Succession planning received greater attention from researchers during the 1980s (Kim, 2010).

Succession planning has evolved with the waves of change stemming from within both the workplace and HR management (Kim, 2010). The change in terminology, from replacement planning to SP&M and talent management, attests to and reflects this evolution (Kim, 2010). Succession planning is shifting from its traditional roots to include new considerations that will affect the future workplace (Rothwell, 2010b). The focus of succession planning has shifted from identifying successors for posts towards providing for the development of those successors by creating 'talent pools' (Armstrong, 2006b).

At one time succession planning was a term reserved for the last wills and testaments of family-owned companies. Later, the term expanded to include companies whose purpose it was to plan to replace CEOs. Today, succession planning is accepted as the best practice to replace leaders and critical employees at various levels in all types of organizations (Atwood, 2007). Modern organizations perceive the necessity for creating a pool of high-potential future candidates, on all levels of organization to fill any need that may arise at any time (Mandi, 2008, p. 20).

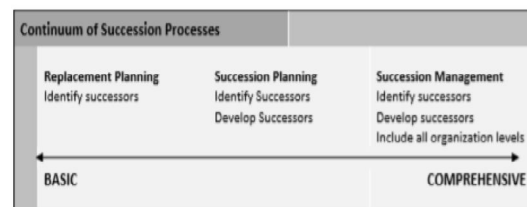
III., DISTINGUISHING SUCCESSION PLANNING & MANAGEMENT FROM REPLACEMENT PLANNING

Succession planning tends to be more long term in focus and more developmental in thrust than replacement planning (Rothwell and Kazanas, 2003). Succession planning and management should not be confused with replacement planning, though they are compatible and often overlap. Succession involves more than merely planning for replacements at the top. In its simplest form, replacement planning is a form of risk management and its chief aim is to limit the chance of catastrophe stemming from the immediate and unplanned loss of key job incumbents (Rothwell, 2005). Replacement planning would be defined as identifying up to three people to be the back-ups for the loss of key people or key positions (Howe, 2009). Replacement planning is considered to be the simplest form of succession planning, in which leadership roles with incumbents who are expected to retire or move on to other roles are viewed to determine who will be ready to take their place at that time. However, it is important to note that replacement to note that replacement planning may be a solid first step as an organization implements a talent management strategy for the first time. Overtime, replacement planning can evolve into a more robust succession management strategy (Sims and Gay, 2006).

Replacement planning is the process of identifying potential replacement candidates for current incumbent leaders. It is considered to be a basic level of succession planning and succession management—one that does not include identifying future leadership positions, future leadership pools, successor competency gaps and development needs (Sims and Gay, 2006). Replacement hiring is a reactive process to fill an immediate need, whereas succession planning is proactive and works to address the need before it exists (Atwood, 2007).

Different succession processes can be placed on a continuum ranging from relatively simplistic and bounded to relatively complex and comprehensive. Succession planning falls near the middle of this continuum of succession processes. It is more systematic and extensive than replacement planning because it is linked with intentional development initiatives targeted at successors; however, it is mainly for the top two or three management levels, like replacement planning. Succession management anchors the most comprehensive end of this continuum in that it identifies successors (replacement planning), develops them (succession planning) and is also directed at all managerial levels. The overarching goal of succession management is to have a pool or pipeline of prepared leaders—and not just a list of prospective candidates—across all organizational levels to fill vacancies in key positions when needed (Day, 2007).

Figure (3): Continuum of Succession Planning



Source: Day, David V. (2007). *Developing Leadership Talent: A guide to Succession Planning and Leadership Development*. USA: SHRM Foundation's Effective Practice Guidelines Series. P. 6.

Here is a summary of the differences between replacement planning and succession planning (Atwood, 2007):

1. Replacement planning is a narrow approach and is usually focused on trying to quickly avoid a crisis by filling a position in a short time. Succession planning takes the additional time needed to ensure that the decision aligns with the organization's strategic plan and goals.
2. Replacement planning is more restrictive, sometimes forcing to select the best person available at that moment. Succession planning is more flexible and allows focusing on selecting the best candidate for the position.
3. Replacement planning is a quick fix. Succession planning exhibits a long term commitment to the

- organization and to developing individuals in the organization.
4. Replacement planning is usually based on the current job description and has limited time for additional input. Succession planning allows you the time to further develop the job description to include new directions, expanded responsibilities, or other adjustments to the position.
 5. Replacement planning usually centers on identifying one or two potential successors to senior-level positions, whereas succession planning focuses on developing pools of talent for key positions at various levels of the organization.
 6. Replacement planning often uses only input from the incumbent and his or her immediate supervisor, whereas succession planning uses feedback from multiple perspective and resources.
 7. Replacement planning also may offer advancement as a reward or because of seniority with the company, whereas succession planning does not just consider whether a person has been in his or her position for a period of time long enough to merit an advancement, but rather looks at the persons abilities to ensure that he or she has the competencies needed to be successful in the new role.
 8. Because replacement planning usually needs to be done quickly, it often does not allow time to consider the relationship of the hiring activity with other human resource activities, such as recruitment, training, development, and diversity initiatives. Succession planning works to integrate itself with other human resources activities.

Another notable concept discussed in the literature is talent management. Sometimes, this concept is confused with succession planning or succession management (Berke, 2005; Krauss, 2007). It seems that the notion of talent management overlaps between succession planning and succession management. Often, the term 'talent management' is used to denote strategies for "recruiting, on-boarding, and developing" talents who are viewed as strategically important for the future of an organization (Rothwell, 2005). Also, Berke (2005) posits that when "recruitment, selection, and retention strategies" are added to succession management, the resulting process can look like talent management. Lewis and Heckman (2006) assert that talent management "focuses on sourcing, developing, and rewarding an employee talent" (Hughes & Rog, 2008). According to a survey by Deloitte (2005), human resource officials of numerous companies consider the ability to attract and retain new talent as critical challenges of today's organizations (Hughes & Rog, 2008). Especially in this age of talent

competition that is known as a "war for talent", talent management is becoming an increasingly important human resource management philosophy and practice (Hughes & Rog, 2008). However, it is necessary to clarify that the notion of talent is intertwined with the concept of high potential employees. Hughes and Rog (2008) uphold that high potentials are those considered to possess exceptional talent; in other words, they are individuals with ability to make a difference in organizational performance.

Whether talent management focuses more on internal grooming, external recruiting, or both, is a matter of debate. For instance, a description of talent management by certain authors (e.g., Hughes & Rog, 2008; Rothwell, 2005) indicates that the strategy also focuses on attracting competent people from outside and retaining them. However, there are authors who perceive talent management as more of an inward looking strategy. Gay and Sims (2006), for example, describe talent management as an effort for identifying, developing, and moving employees and leaders upward to increase retention of the key talent. Likewise, Krauss (2007) indicates that, unlike succession planning that combines both the harnessing of the internal talent and sourcing it externally, talent management is mainly concerned with maintaining the internal competencies.

Despite these debatable differences, it is obvious that talent management is an important component of succession planning or vice versa; and sometimes, the two concepts are used interchangeably (Kraus, 2007), although they may technically differ. However, it is contended here that when the two concepts are merged, a more comprehensive concept comes into view, which is what Rothwell (2005) calls succession planning and management.

Importance of Succession Planning

Effectively managing succession planning yields many benefits, including the following (Rothwell et al., 2003):

1. Enables the organization to assess its talent needs by establishing competency models or job descriptions.
2. Provides avenues for present and future succession planning and discussions about how to develop talent.
3. Defines career pathways through an organization.
4. Provides for a higher return on investment form employees.
5. Leads to the appropriate promotion and pre-selection of people to meet organizational goals.
6. It fosters cross-functional development and facilitates the integration of HR planning components, processes and procedures. Not only this, it supports connecting formats, guidelines, analyses, judgments and discussions at their front.

7. It establishes a logical basis for making choices among qualified candidates. Who should be selected, why they should be selected and what skills and competencies they own and what needs to be developed in them are critical factors while identifying the employees for succession planning.
8. The process establishes a specific connection between the business objectives and HR strategic planning. Along with this, it also increases internal promotion opportunities
9. It gives managers a clearer picture of people who might later qualify for key positions, and to ensure that high potential individuals received development plans to help them build their skills (Cheese et al., 2008).

There are more examples of the values and benefits for developing a succession plan (Sims and Gay, 2006):

1. Decrease the cost of external hires for leadership positions in the organization by increasing internal hires (through lateral and promotional career moves).
2. A shorter "learning curve" time period for new leaders who have been developed and prepared for management positions.
3. Retention of high potentials and successors.
4. The organization is prepared to deal with sudden, catastrophic losses of key people (Rothwell, 2010a).

Developmental Strategies of Succession Planning

Leadership training and development programs are important to succession planning and can be conducted in a variety of ways, including coaching, job rotation, mentoring, action learning, job enrichment, and acceleration pools. The internal development approaches to successors can be explained as follows:

1. **Coaching:** This approach is particularly useful for developing improved job performance and involves day-to-day discussions between the manager and the individual. Moreover, coaching can be applied for many purposes to correct deficiencies in performance or to build skills. It is important to succession planning and management because it can be an important tool in grooming prospective successors for the future (Dessler, 2008).
2. **Job Rotation:** Job rotation is a management training technique that is used as a learning mechanism. This approach means moving management trainees from department to department to broaden their understanding of all parts of the business and to test their abilities through identifying their strong and weak points.

3. **Mentoring:** A mentor is simply a teacher, and mentoring is thus the process of teaching others. It involves moving to other jobs within the organization. Mentors can help build bench strength and talent in organizations by providing support to others to build their competencies in line with organization needs. Therefore, mentoring can help build bench strengths. Moreover, mentoring plays a role in succession planning and management; in closing developmental gaps between the competencies that individuals possess now and what they need to qualify for advancement (Rothwell, 2010a).
4. **Action Learning:** Action learning is practical way to build competencies as individuals learn while doing. It literally means "learning through action". Action learning focuses on solving problems, creating visions, seeking goals, or leveraging strengths. Participants in action learning are assembled to work on a practical realworld problem. They are chosen based on individual abilities that will contribute to the developmental need to be met. Furthermore, learning through action serves to help employees develop critical competencies. Action learning has also been used to select, assess, and develop stars and high-potential employees to new levels of knowledge, skills, experience, and competencies (Singer and Griffith, 2010).
5. **Job Enrichment:** This involves expanding present responsibilities to include a wider variety of assignments and duties. It is effective for improving both skill and knowledge area, but should be limited to those who already are effective in their present positions, since it requires expanding work performance rather than simply adding more of the same work (Buckner and Slavenski, 2000).
6. **Acceleration Pools:** An acceleration pool is a group of people who are being quickly and systematically prepared for possible promotion. A simple way to understand it is as a __talent pool on steroids, "a group of people who are being developed faster than is typical to meet some need of the organization (Rothwell, 2010a).
7. **Off-the-Job Activities:** Learning that takes place in a non-job related environment is considered an off-the-job learning activity. Examples of off -the -job activities where learning may take place include participation in professional and /or community organizations or involvement in activities of personal growth and interest.
8. **Formal Training:** Classroom training, lectures, computer-based learning and el-earning are all examples of formal training. Formal training is typically used to introduce a new concept or theory or to explain the importance of a particular topic. This type of training is most

effective when coupled with experience sharing and role-playing.

Succession Planning in Academic Context:

A number of researchers examined the effectiveness of succession planning (Cross, 2009; Robinson, 2009). Others studied the integration of succession planning and career development (Beever, 2008; Robinson, 2009). Additionally, the study of Krauss (2008) adds to the body of literature that succession planning provides organizations with a means to address turnover.

Mandi's (2008) study recommended exploring organizational culture as an important factor to be considered in the success of succession planning. Romejko (2008), in his study, suggested further investigating the alignment of succession planning with goals and strategies of overall organization. A new topic that Kasper (2008) produced in his study is the importance of communication in succession planning. Another study proved that costs and benefits of succession planning are affected by a firm's level of operational complexity and its human capital requirements. It is worth mentioning that while reviewing all the literature it is evident that succession planning was applied in almost all types of institutions such as: healthcare organizations, financial institutions, fire departments, human service organizations, courts, schools, colleges, universities, private family business, IT companies and governmental organizations. This shows that there is no question as to if implementing a succession plan is important or not. There are some studies gave a focus for succession planning management in Family owned business and SME's and its impact on performance as Mokhber et al (2017) indicated that preparation level of heirs and the relationship between family and business members – have a positive impact on the performance of family business in Malaysia, while Subramanian & Ajani (2011) indicated that succession planning management impacts the organizational performance with young group's more than older groups. While Wright (2010) argued that there is a need for succession planning and management in Human Service organizations. Lusseir & Sonfield (2012) revealed – that there are statistically significant differences in family business succession planning between Croatia, Egypt, France, Kosovo, Kuwait, and the USA. However, there were no statistically significant differences between India and the other six countries. Regarding succession planning in education the literature revealed by (Mateso, Mack, Gallo, 2010), Mercer (2009) & Stutsman (2007) that succession planning management practices are informally implemented and only applied for managerial leaders positions. While there are other studies investigated the implementation of succession planning practices in

Public and other service organization as: (Farashah, et al, 2011; Wright, 2010; Robinoson, 2009; Cross, 2009; Comini & fischer, 2009; Romejko, 2008; Mandi, 2008; Shipman, 2007). It is noteworthy from the previous studies that there is a paucity of studies that dealt with the subject of administrative succession planning practices in Egypt, but they were confined to the political side. Therefore, this study aims to study the extent, to which administrative succession planning practices are implemented. Also the study aims to provide the business leaders and HR practitioners with the clear picture to succession management in Egypt.

III. RESEARCH METHODOLOGY AND DESIGN:

To realize the objectives of the present study, the following methodological techniques have been adopted.

3.1 Research Approach:

According to the purpose, this study is in the category of applied research and according to data collection procedure is in the category of exploratory research.

3.2 Research Questions:

-To what extent the Succession planning Concept is applied in business organizations in Egypt?

3.5 Questionnaire

The study instrument is a questionnaire consists of 5 questions about the succession planning concept and implementation based on (William, 2005) study

3.6 Population and sample:

The study population consists of the organizations in business environment in Egypt, for the difficulty of measuring the population as whole we selected sample 688 human resources managers & specialists from organizations working in different industries and services. This study has one level of analysis: Succession planning management, so the study has one unit of analysis which is: SPM & the observation unit are human resources managers and specialists of the organizations.

The sample was as follows:

Family owned business (128) organization, individual business (112), holding company (176), multinational organizations (48), Public sector (16), and educational institutions (13).

IV. FINDINGS

As mentioned in the figure (1-1) the most selected succession planning standards are as follows: regarding holding company types: job experience (64%) followed by educational qualifications (48%) & gender (32%).



Figure (1-1) Sucession Planning Standards According Organization Type

While in Family owned business depends most on educational qualifications (64%) then followed by job experience (32%) and personal relationships and behaviors (16%). While in individual business depends equally on job experience (32%), leadership (32%), behavior (32%) and educational qualifications (16%). The most common standard to Multinational

organizations is the nationality of employee (32%), then followed by personal relationships (16%). Regarding public sector organizations is only depends on educational qualifications (16%). For educational organizations depends on: job experience & gender (48%), followed by leadership and behavior (32%).

Table (1-1) The term of the last Director or Chief Executive Officer of the Organization		
orgtype	Percent	
family	6-4	40.0
	7-10	20.0
	more than 16	40.0
	Total	100.0
individual	6-4	100.0
holding company	1-3	16.7
	6-4	50.0
	7-10	33.3
	Total	100.0
multinational	7-10	100.0
public	6-4	100.0
education	1-3	85.7
	7-10	14.3
	Total	100.0

As mentioned in table (1-1) the duration of last director or chief executive officer of the organization in family owned businesses ranged from 6-4 (40%) and more than 16 years (40%). While in individual business is only from 6-4 years, which is agreed with

holding company (50%). In multinationals the management duration from 7 years to 10 years, contrasted with public education range which is from 4-6 years. And finally in educational institutions from 1-3 years (85.7%).

Table (1-2) Succession Planning Existence			
Orgtype			Percent
family	Valid	written plan and implemented	20.0

		there is no plan	80.0
		Total	100.0
individual	Valid	written plan and implemented	50.0
		in process for 3 years	50.0
		Total	100.0
holding company	Valid	written plan and implemented	33.3
		written but not implemented	16.7
		in process for 4 years	16.7
		there is no plan	33.3
		Total	100.0
multinational	Valid	written plan and implemented	100.0
public	Valid	written but not implemented	100.0
education	Valid	written plan and implemented	14.3
		written but not implemented	57.1
		there is no plan	28.6
		Total	100.0

In investigating the existence of succession plan in organizations the results were as follow: for owned family business there is no plan (80%), individual business there is a written plan and implemented (50%), in process for 3 years (50%). Regarding holding company there is a written plan and implemented (33.3%), there is no plan (33%).

While in multinational the plan written and implemented (100%), which is opposite to the public sector as the plan is written but not implemented (100%). Regarding educational institutions the results varied as: the plan written and not implemented (57.1%), or there is no plan (28.6%).

Table (1-3) Does the organization implement job development and training programs for staff that are likely to hold leadership positions in the future?

orgtype	Percent
family	Valid
	yes
	no
	Total
individual	Valid
	yes
	no
	Total
holding company	Valid
	yes
	no
	Total
multinational	Valid
	yes
public	Valid
	yes
education	Valid
	yes
	Missing
	System
	Total

Regarding job development & training programs implementation for staff that are likely to hold leadership positions in the future, the results showing that those practices are applied in family owned

business (80%), individual business & holding company (50%) while in the multinational and public (100%) and in educational institutions (85.7%)

Table (1-4) Does the organization have a formal job development plan?			
orgtype			Percent
family	Valid	yes	40.0
		no	60.0
		Total	100.0
individual	Valid	yes	50.0
		no	50.0
		Total	100.0
holding company	Valid	yes	16.7
		no	83.7
		Total	100.0
multinational	Valid	yes	100.0
public	Valid	no	100.0
education	Valid	yes	42.9
		no	57.1

Regarding having a formal job development plan as mentioned in the above table (1-4) ,the results showing that those practices are not applied in family owned business(60%), individual business & holding company (83.7%)and in educational institutions (57%) ,while applied in the multinational (100%) and not applied in public sector (100%)

CONCLUSIONS

From the result analysis in the previous section, the results revealed that:

The Egyptian business environment lacks to the full application of succession planning practices as the study revealed that the duration for executives and directors to hold managerial positions is varied according the organization type:

The family owned businesses have the longest time period of holding managerial and executive positions and lacks to the application of succession planning management practices, also this type of organizations in promotion process depending on educational qualification, job experience and personal relationships. The job development planning and training programs implemented in informal way not targeted to leadership development.

Most of the organizations in individual business have a written plan and implemented or process to develop a plan, also in their selection standards they depend on the job experience, educational qualifications and leadership and they informal training plan.

Regarding the holding company the average have a written and implemented plan also this type of organizations in promotion process depending on educational qualification, job experience and gender.

The job development planning and training programs implemented in formal way. The multinational organizations have the shortest time period of holding managerial and executive positions and fully apply succession planning management practices just for the managerial positions and only for the employees having the nationality of the home country not the host country or foreign employees, The job development planning and training programs and evaluation implemented in formal way not targeted to leadership development.

The Public Sector have the short time period of holding managerial and executive positions and lacks to the application of succession planning management practices, also this type of organizations in promotion process depending on educational qualification. The job development planning and training programs implemented in formal way in general not for developing future leaders purpose.

Educational institutions have the short time period of holding managerial and executive positions and lacks to the application of succession planning management practices, also this type of organizations in promotion process depending on educational qualification, job experience. The job development planning and training programs implemented in formal way not targeted to leadership development

To sum up some of Egyptian business environment succession planning is focusing on increasing salary and job grades not promoting to managerial position or leadership development.

So the organization should refine their resources to link the succession planning with the capabilities and competencies of their employees to meet their strategic vision and goals.

The recent paper faced many limitations as it is an attempt to articulate the frame work of succession planning application in Egypt, as there is scarcity in research for that topic in Egypt.

Reference were limited and the sample size was small it is recommended for the future studies to make a comparative study between industries and countries. Also,investigating the economic and social factors influencing the application of succession planning

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