# Evidence-Driven Succession

A NEW ERA IN LEADERSHIP: THE SUCCESSION-CENTRIC ERA



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#### **EXECUTIVE SUMMARY**

Welcome to the succession-centric era of leadership. Where leadership transitions take center stage as 3 powerful narratives converge:



#### **CULTURAL STORYTELLING**



#### **INDUSTRY TRANSFORMATION**



#### **SCIENTIFIC INSIGHT**

Entertainment juggernauts like *Succession* and *Shōgun* depict leadership transitions as deeply engaging human dramas, while \$56 trillion in mergers and acquisitions over the last 2 decades demonstrate the staggering real-world stakes.

The Center for Creative Leadership's comprehensive analysis of succession planning spans 161 Emmy and Golden Globe–nominated television shows, 190 case studies across 19 industries, and 1,000 peer-reviewed articles on succession planning. The evidence is unmistakable. As the number of

companies from the original *Fortune 500* list continues to shrink, organizations face record-high CEO turnover and hemorrhage \$1 trillion annually through poor transitions. Yet 70% still operate without formal succession plans, navigating tomorrow's challenges with yesterday's ad hoc tools.

Global forces drive this era. Leaders must navigate through societal polarization, adapt to shifting regulatory landscapes and demographics, and prepare for extreme weather events. They must harness artificial intelligence, leverage social media, and manage geopolitical tensions. Each new challenge reminds us that the old playbook for leadership transitions is closed.

We believe an important opportunity lies within these challenges. Organizations that understand the succession-centric era as a convergence of 3 narratives — cultural storytelling, industry transformation, and scientific insight — will write the next chapter of leadership. The future belongs to those who recognize that succession

planning is more than a process or a system. Succession planning is a mindset. One that understands and leverages the powers of culture, experience, and science to get it right, right now; keep getting it right; and reimagine what's right for the future. Those who don't get it right risk becoming cautionary tales.

In our research, we've connected the stories and data we've collected to megatrends and real-world outcomes. Our research is presented across 4 reports that provide the leadership pulse and lists of leaders to watch, along with playlists, frameworks, strategic recommendations, and scenarios designed to help leaders and their teams provide continuity for the entire business and develop the unique capabilities to anticipate what's coming next.

The succession-centric era is here. Leaders must transform succession planning from a reactive necessity into their greatest competitive advantage. The future of leadership begins now.

#### **LEADERSHIP PULSE**

The succession playbook gets a public rewrite, trillion-dollar pressures collide with scientific breakthroughs, and new stories about development and transition emerge.

#### THE \$56 TRILLION WAKEUP CALL IS HERE

Succession planning steps into the spotlight as mismanaged transitions pose an existential threat. Bain Capital reports 660,000 mergers and acquisitions worth \$56 trillion since 2004, while only 12% of the original Fortune 500 remain. Evidence-based succession strategies are essential to ensure organizational resilience and adaptability.

#### **→** STORYTELLING IS LEADERSHIP'S "SUPER SKILL"

LinkedIn CEO Ryan Roslansky tells *Harvard Business Review* storytelling is a super skill. Stakeholders demand emotional resonance, social relevance, and empirical evidence as organizations communicate decisions about leadership transitions.

**2** "LIVING INTELLIGENCE" RAISES THE STAKES

Future Today Strategy Group CEO Amy Webb points to advanced sensors, biotechnology, and AI as game-changers for leadership. These emerging technologies produce rich data streams that organizations must harness to refine and elevate succession planning.

LEADERS ASCEND, OPTIMISM FALLS, GENERATIONS SHIFT

Aon CEO Gregory C. Case underscores talent management as a "megatrend" just as a generational shift takes hold. Yet the *Edelman Trust Barometer* shows fewer than 1 in 5 people believe the next generation will be better off, signaling a profound skepticism toward current leadership's decision-making.

5 SOCIAL, RELATIONAL, AND CULTURAL FACTORS WRITE THE NEW SUCCESSION PLAYBOOK

The Center for Creative Leadership pinpoints 18 evidence-based factors that influence succession, grouped into 3 domains – relational, political, and cultural. Together, they offer a practical roadmap for organizations to shape their own succession stories.

# "We all want to get [succession planning] exactly right."

— Jamie Dimon, CEO JP Morgan

Getting succession planning exactly right is no longer aspirational. It's existential. As organizations navigate increasing complexity, leaders recognize succession planning as critical to leadership development and essential to organizational stability. Succession planning at the executive level has evolved from a relational and cultural process of apprenticeship to a more informal, ad hoc process and again to a more structured set of initiatives (Berke, 2005; Fayol, 1918; Kesner & Sebora, 1994; Umans et al., 2024).

#### **SUCCESSION PLANNING IS A(N)**

#### **ANTICIPATORY APPROACH**

that maps out future talent needs, ensuring employees at all levels have the necessary skills and experiences ready when they are most essential (Tosh, 2024);

#### **REGENERATIVE STRATEGY**

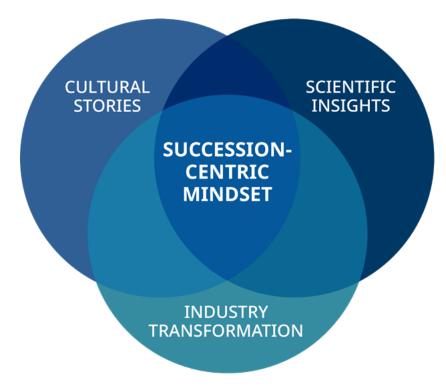
to prevent talent gaps in key leadership positions, build resilience in the talent pool, and align current resources with the organization's long-term vision (Tosh, 2024);

# COMMUNICATION OPPORTUNITY

that fosters transparency, engages employees in the organization's future, and reaches external stakeholders with consistent messaging and visible commitments to shared goals.

#### **CURRENT LANDSCAPE: SUCCESSION-CENTRIC MINDSET**

The demands of leadership have evolved for the succession-centric era. As we showed in our *Succession Stories* report, organizations are recognizing the importance of a new mindset: one that integrates story and science into succession planning. Taking on this mindset makes it easier to map general themes, identify best practices, and uncover trends that challenge and enrich current succession planning approaches. See Figure 1 below.



*Figure 1.* Narrative and empirical perspectives that inform the leadership mindset needed to navigate the succession-centric era.

Our Succession Stories report revealed that televised succession stories and industry cases offer 2 valid and important perspectives on the topic: an emotion-driven perspective and a credibility-based perspective, respectively. Research on succession planning offers a third, logic-based perspective that uses data and theoretical frameworks to guide effective practice. Succession planning research uses qualitative and quantitative data for statistical analyses, and it leverages the scientific method to address various actors (e.g., C-suite, upper management, human resource management, employees, family members, boards), processes (e.g., competitive, relay, forced, and natural turnover), and outcomes (e.g., return on assets, political fit, effectiveness) situated within many organizational contexts (Bottomley, 2018; Khurana & Nohria, 2000; Schepker et al., 2017).

#### **CURRENT LANDSCAPE: SUCCESSION-CENTRIC TRENDS**

The growth of academic research on succession planning mirrors the rise of media representations of the topic as shown in Figures 2 and 3, which illustrates exponential growth particularly in the past decade.

# TREND TV SHOWS ABOUT SUCCESSION PLANNING (1970-2024)

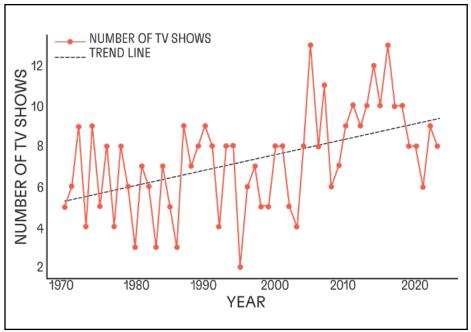


Figure 2. Trend of Emmy and Golden Globe Award–Nominated Television Shows about SP (1970–2024). Graph illustrates 161 distinct shows with a clear upward trend, especially pronounced in the last decade, indicating growing interest in and production of TV shows centered around succession planning and organizational power dynamics.

# TREND OF PEER-REVIEWED PUBLICATIONS ABOUT SUCCESSION PLANNING (1970-2024)

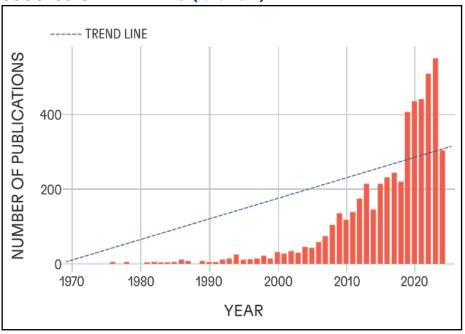


Figure 3. Trend of peer-reviewed publications about succession planning (1970–2024). Graph illustrates a clear upward trend, especially pronounced in the last decade, indicating growing interest in data-driven and theory-based insights and where succession planning is needed and how to achieve it.

#### **CURRENT LANDSCAPE: SUCCESSION-CENTRIC TRENDS**

Figure 4 (right) underscores the high stakes of succession planning. Only 52 of the original Fortune 500 companies from the inaugural 1955 list remain today (Xie, 2024). This sharp decline highlights a volatile market landscape where leadership transitions are inevitable and increasingly incentivized, shaping economic, social, and political dynamics across industries and culture (Gordon, 2025). The parallel rise in media and academic attention to succession planning, alongside shrinking corporate longevity and a declining median job tenure—now at 3.9 years, the lowest since 2002—signals a profound shift (U.S. Bureau of Labor Statistics, 2024). We have entered the Succession-Centric Era, where leadership development and transitions are no longer backroom conversations but front-page imperatives.

# **SURVIVIAL OF FORTUNE 500 COMPANIES** (1970-2024)

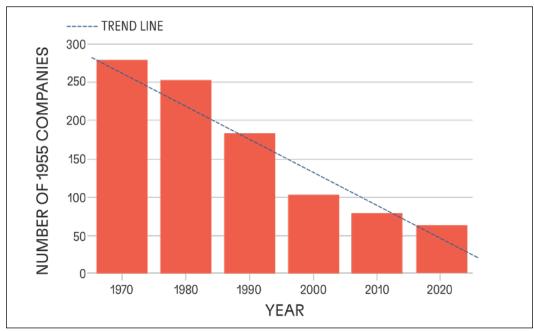


Figure 4. Survival of Fortune 500 Companies From 1970-2024. This figure illustrates the diminishing presence of companies from the original Fortune 500 list across 5 decades. The steady decline underscores the challenges of longevity in a dynamic business landscape, reinforcing the necessity of robust succession planning for sustained organizational success.

Growing popular and academic understanding of succession planning reveals 3 evidence-based actions leaders can take:



#### Identify key actors and measurable variables.

Key actors include investors, boards, management, and internal and external talent pools. Measurable variables include organizational capability, proportion of critical positions filled internally, time to fill, retention, flight risk, employee performance, legislative changes, wage gaps, fiduciary responsibilities, and emotional quotient. Once identified, carefully consider these elements throughout the implementation process.



#### Invest in the right tools.

Commit to equipping human resource partners with frameworks that are empirically validated, contextually relevant, technologically scalable, and supported by assessments (Dennison, 2024; Lewis, 2023; Ramlall, 2003; Ulrich, 1996).



#### Integrate the succession-centric mindset.

Ask big-picture questions like: Where am I and my organization going for inspiration? What sources influence thinking about who runs our company next and how? Does this organization view "boomerang leaders" favorably? How can our organization leverage what we learn about succession planning from all these sources (i.e., cultural storytelling, industry transformation, scientific insight) to make an impact?

#### **KEY RESEARCH INSIGHTS**

A brief look at how the story of succession planning has been told over time in academic literature is a valuable starting point. For over a century, succession planning has been discussed across a continuum of theoretical frameworks rooted in agency theory, social and political dynamics, group decision-making, information processing, communication, and, of course, leadership development.

# **Foundational** Principles

(1918)

Lesson: Succession is introduced as science. 14 management principles based on the idea that individuals must be prepared and skilled for future roles.

# Lessons of Experience

(1988)

Lesson: Actively develop future leaders with challenging assignments, mentorship, and rotational programs rather than simply identify prototypical successors.

### Responsibility Framework

(2005)

Lesson: Use a structured and actionable framework for articulating expectations, evaluating talent, and intergrating leadership development throughout the organization.

#### New Frontiers

(2024 - present)

Lesson: Emphasize talent management, workforce development, AI, emotional intelligence, foresight, and sustainability as critical components.

## Social Advantage

(1968)

Lesson: Interpersonal relationships support organizational stability during transitions. Set the stage for succession planning as logistical need and human-centered process.

## Insider-Outsider Debate

(1986 - 1994)

Lesson: Highlight the importance of structured succession strategies and the long-term organizational impact of internal v. external successors.

# Knowledge Transfer & Crisis Recovery

(2017 - present)

Lesson: Organizations explore how to move from succession planning as a reactive necessity to making it their greatest competitive advantage.

# Modern Research Stories

"Relational, political, and cultural factors are ink, pen, and paper in every organization's succession story."

- Daniel J. Smith, Ph.D.

#### SUCCESSION PLANNING & TALENT MANAGEMENT

Succession planning and talent management have been discussed and examined extensively in scientific literature (Pandita & Ray, 2018; D. J. Schepker et al., 2017). Together they represent a new frontier and a comprehensive organizational strategy to maximize effectiveness and stability. Therefore, it is important to define and describe both concepts.

#### **TALENT MANAGEMENT**

Focuses on all leader levels and encompasses human resource practices aimed at optimizing human capital (Ojaghi Shirmard et al., 2024).

Develops a strong talent pool from which future leaders can be identified via recruitment, selection, retention, and readiness.

Develops all employees with data and insights informing succession planning decisions (Rothwell, 2005; Pereira et al., 2023).

Establishes systems and processes that prioritize immediacy and stability in workforce development.

#### **SUCCESSION PLANNING**

Zeroes in on preparing specific individuals to take on key senior leadership roles in the future (Collings & Mellahi, 2009).

Addresses leadership mindsets and capabilities, particularly at senior levels, as a subset of talent management. (Cannon & McGee, 2011; Talpos et al., 2017).

Ensures the organization has the appropriate people with the appropriate skills in the appropriate positions at the appropriate times (Rothwell, 2005).

Establishes a mindset that responds to converging narratives and prioritizes medium- and long-term time horizons.

The complementary natures of talent management and succession planning offer 4 significant organizational benefits:



They ensure comprehensive workforce development while targeting critical leadership preparation, creating a broader talent pool that still addresses specific leadership needs.



They **balance employee engagement and retention** across all levels with focused risk mitigation for key positions.



They allow for efficient resource allocation, aligning short-term operational needs with long-term strategic goals.



They **foster an adaptable**, **high-performing workforce** with strong leadership continuity, cultivating a culture of continuous learning and growth throughout the organization.

These organizational benefits are only part of the story. Research also indicates that a comprehensive approach to succession planning must employ various models and metrics to measure the value of the human resource activities that contribute to succession planning efforts. These evaluation frameworks typically combine quantitative metrics, qualitative assessments, and balanced scorecard approaches. Organizations commonly track quantitative metrics like bench strength indicators, retention rates, development progress of succession candidates, and time and cost savings related to filling key positions (Tootian, 2019). These numerical measures are complemented by qualitative assessments, such as leadership feedback on succession candidates, employee engagement metrics, and evaluations of overall organizational capability (Kim, 2010). Many organizations also adopt a

balanced scorecard methodology, examining succession planning impact across financial performance, customer satisfaction, internal processes, and learning and growth dimensions (Amirkhani et al., 2016). This multifaceted approach affords a comprehensive view of succession planning effectiveness, allowing planners to align evaluation methods with specific organizational goals and broader business strategies. Research indicates that, by integrating these various assessment tools, organizations can better understand how succession planning efforts impact long-term performance and leadership continuity.

More recent studies show that the integration of digital tools and scientific developments, especially those relating to big data, artificial intelligence, bioengineering, and machine learning, have become crucial in identifying and developing leadership talent (Shamim et al., 2019; Webb & Jordan, 2024). It is argued

that digital succession planning tools facilitate better data management, more accurate assessments, and enhanced transparency in the succession process (Jackson & Dunn-Jensen, 2021). Additionally, today's research emphasizes the importance of inclusion in succession planning. Despite competing claims about the nature and effectiveness of meritocracy in selection processes, research indicates that more inclusive leadership pipelines enhance decisionmaking, foster innovation, and reflect the demographics of a global customer base (Mallick, 2024; Dunne-Moses et al., 2023). Research suggests more effective succession planning models should include strategies for: (1) identifying and developing inclusive talent pipelines within the organization and, (2) mitigating shifting biases based on the success of similarly situated predecessors (Preston & Carton, 2024; Thakur, 2022; Ugoani, 2020).

Emergent research also shows emotional intelligence and sustainability as critical components of leadership and, consequently, integral to succession planning (de Oliveira et al., 2023; Saha et al., 2023). Studies show that leaders with high emotional intelligence are more effective in boundary spanning, managing teams, navigating organizational change, and maintaining relationships across social groups (Zhylin et al., 2024). As a result, modern succession planning frameworks are incorporating emotional intelligence assessments and practices including the development of self-awareness, self-management, and relationship management as part of the evaluation and development process for future

leaders (Zhylin et al., 2024). Emotional intelligence is proven to positively impact leaders' abilities to navigate the complexities of autonomous learning, implement new technologies, manage change, operate globally, and balance innovation with ethical considerations and empathy (Rajib & Jahan, 2024; Rakhimov & Mukhamediev, 2022).

In addition to emotional intelligence, researchers argue that a future-focused approach to succession planning should emphasize sustainability. Sustainabilityoriented succession planning focuses on long-term strategic efforts that link governance with economic, environmental, and societal goals (Bottomley, 2018; Häußler & Ulrich, 2024). This approach ensures core

values and governing principles are upheld and passed down to emerging leaders, promoting continuity and responsible business practices. The literature also draws parallels between ecological and organizational succession. These scientific insights illustrate how succession planning is a multifaceted process of cultivating talent, aligning strategic objectives, and ensuring the long-term health and adaptability of the organization and the geographic environments in which it operates. In this way the literature likens succession planning for organizations to ecological succession for the environment, where each stage of development lays the groundwork for the ongoing process of renewal and evolution (Chang & Turner, 2019).

#### WHY RESEARCH STORIES MATTER TO YOUR ORGANIZATION

Our comprehensive review of the literature reveals 18 factors affecting the succession planning process for organizations across industries, which align with signals tracked in industry case studies and central themes identified in cultural stories presented in our *Succession Stories* report. These factors are grouped into 3 domains: relational, political, and cultural.

# RELATIONAL POLITICAL CULTURAL

Relational factors represent human connections such as mentorship, socioemotional wealth, and leader prototyping. Imagine a family-owned business where the retiring CEO serves as a steward, passing down not just authority but also relationships and wisdom. This is what keeps the mission alive, and we see examples of how this can go wrong on television shows like *Succession* or *Empire*.

Political factors represent the backbone of strategy and structure — decisions like internal versus external successors, governance, and co-location that are procedural and transformative. Picture a company navigating its first external C-suite hire, balancing fresh perspectives with organizational alignment and legacy. It's a high-stakes game that reshapes the entire field. It's also the story of *Ted Lasso*.

Cultural factors represent the mindset. Think about sustainability, "glocalization," and digital integration shaping a Fortune 500 company's leadership pipeline. These cultural factors are critical to leadership that meets global challenges while respecting local needs. It's *Star Trek: Discovery*.

#### WHY RESEARCH STORIES MATTER TO YOUR ORGANIZATION

Relational, political, and cultural factors are ink, pen, and paper in every organization's succession story. They help leaders find what works, where the gaps are, and how they can level up.

FACTOR	DOMAIN	DEFINITION
Emotional Intelligence	Relational	Incorporates assessments and practices to develop emotional self-awareness, self-management, and relationship management in succession candidates.
Leader Prototyping	Relational	Refers to the mental models people form about ideal leader traits and behaviors, guiding the evaluation of candidates against an internalized "prototype."
Socio-Emotional Wealth	Relational	The perceived value of non-economic elements in family firms, such as family values, legacy, longevity, altruism, intergenerational vision, pride, and emotional bonds.
Intergenerational Stewardship	Relational	Develops leaders who prioritize long-term choices that ensure the organization's sustainability and legacy, emphasizing responsibility for its lasting health and impact.
Development Relationships	Relational	The current leader's readiness, both mentally and financially, to transition, along with opportunities for potential leaders' growth through coaching, mentorship, sponsorship, crossfunctional experiences, skill gap identification, action learning, and performance assessments.
High Potentials & Star Performers	Relational	Addresses potential turnover risks for high-performing employees. Establishes goals, performance reviews, and feedback sessions to provide a holistic view of each candidate's potential.
Governance	Political	Addresses diverse governance structures shaped by regional and industry factors.
Firm Valuation & Market Dynamics	Political	The complex valuation of family businesses influenced by the loss of socioemotional wealth, especially when internal family successors are unavailable or when external buyers are involved.

#### WHY RESEARCH STORIES MATTER TO YOUR ORGANIZATION

FACTOR	DOMAIN	DEFINITION
Internal v. External Successors	Political	Considers industry fit, degree of change needed, number of candidates for evaluation, technical fit, and informal networks.
Political Processes	Political	Dynamics and strategies involved in succession, such as competitive vs. relay processes, how the previous leader left, and resistance to change.
Clearly Articulated Success Factors	Political	Aligns succession planning with business strategy, defining specific leadership criteria and competencies that support organizational goals and address business challenges.
Co-Location	Political	Allows some top leaders to live away from headquarters while commuting as needed, potentially causing disparities in in-office expectations across leadership levels and impacting succession planning and company cohesion.
Glocalization	Cultural	Adapts global business strategies to align with variations in local cultures, laws, and industry practices.
Digital Integration	Cultural	Utilizes digital tools and platforms to improve data management, assessment accuracy, and transparency in succession planning.
Originality	Cultural	Builds on past knowledge to create intellectual and knowledge capital for future organizational advantage.
Communication	Cultural	Prioritizes effective engagement with stakeholders, including potential successors, current leaders, and employees, to avoid reactive succession processes.
Sustainability	Cultural	Prepares future leaders to manage nature-related risks, promote sustainable practices, and balance economic goals with social responsibility, including shareholder education.
Social Transference	Cultural	How the qualities and characteristics of outgoing leaders and subsequent perceptions of their performance impact successor selection, positively and negatively.

# Data-Driven Insights

"Data doesn't simply describe the world. Data defines the stories waiting to be written."

- Marcia A. Dawkins, Ph.D.

#### **DATA-DRIVEN INSIGHTS**

Figure 5 (on the following page) provides a map (or bibliometric snapshot) of succession planning research, highlighting the top 1,000 documents in the succession planning literature and revealing 9 distinct clusters.

At a high level, the map splits into 2 main groupings: clusters in the top half (teal, green, black, and gray) focus directly on succession planning, while clusters in the bottom half (dark blue, yellow, turquoise, red, and purple) center on broader talent management topics. This division reflects the modern research story discussed in the preceding pages that distinguishes succession planning from talent management.

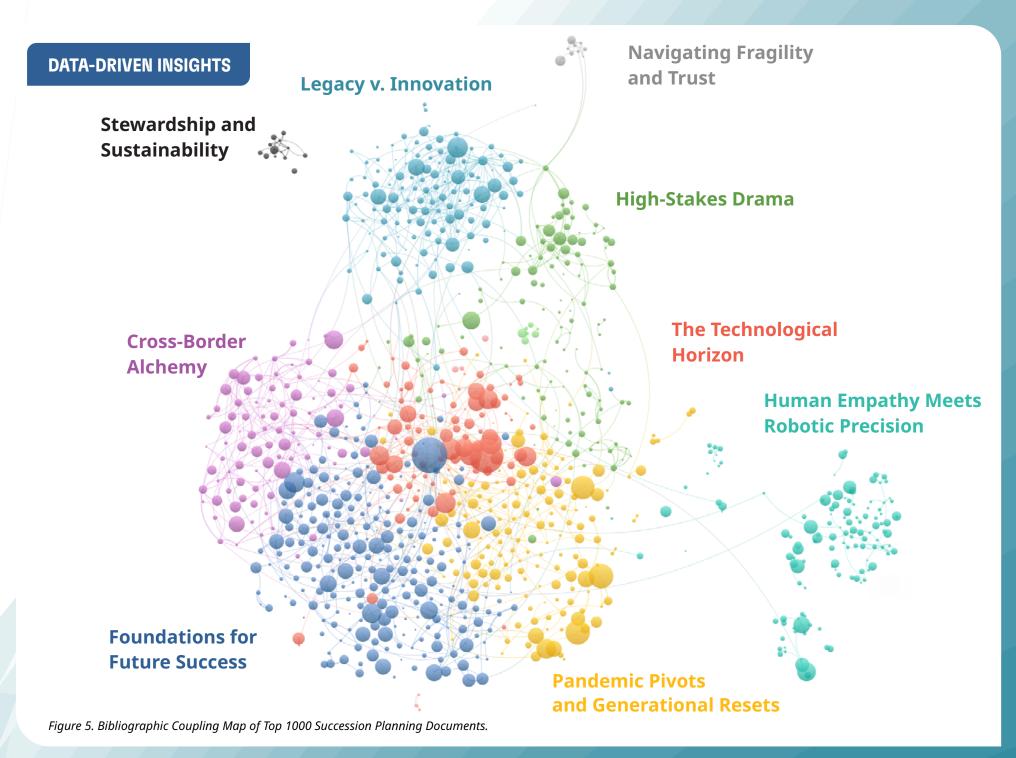
Explore the map for about 2 minutes on your own as if you are holding a magnifying glass over it. The size of each node reflects its influence, and the lines connecting nodes are the invisible threads of ideas and strategies that hold it all together. This map is your navigation tool for tackling the complexity of ideas and challenges affecting leadership transitions.

As you look at this map, think about where your organization's story fits. Ask yourself: What challenges resonate with your teams' experiences? Which clusters reflect the struggles and opportunities your organization faces? And how can you use these insights to craft a future of succession planning

that is culturally relevant, evidencebased, and actionable? We encourage you to refer back to the map while reading our in-depth analysis.

The research story we uncovered is about the importance of connecting data, context, and application.

Whether identifying research gaps, designing leadership pipelines, or addressing emerging challenges, our analysis provides a roadmap for writing the next chapter in your organization's succession planning journey. We invite you to engage with the data alongside the broader story of leadership transitions explored in the pages that follow.



#### **DATA-DRIVEN INSIGHTS**

Our bibliometric deep dive maps the invisible architecture of how organizations, industries, and even nations regenerate their core leadership DNA. From family farms to Fortune 500 boardrooms, from political regimes to agricultural stewardships, succession planning is a story evolving in real time.

#### Family Firm Succession Planning: Legacy v. Innovation (Teal Cluster)

Succession planning is uniquely complex for businesses in which 50% or more of equity is owned by a single family (Baltazar et al., 2023). Family businesses must navigate intricate exchange processes, from family dynamics and legacy, to managing shareholder expectations and the business's continued success (LeCounte, 2020; Daspit et al., 2016; Miller et al., 2003). Transitions can be fraught, as next generations may or may not want to take over responsibility (Venter et al., 2005) or as the socio-emotional wealth that family owners experience conflicts with what's financially best for the company (Umans et al., 2024; Gilding et al., 2015). These tensions mirror real-world challenges seen in high-profile cases and narratives, such as the legal battles surrounding the Murdoch family trust and HBO's Succession. Differences in generational approaches to technology and sustainability further impact innovation and longevity (Baltazar et al., 2023; Liu et al., 2023). For example, the Faaborg family farm's pivot from hog farming to sustainable mushroom cultivation underscores how agility in leadership transitions can align legacy preservation with emerging market demands.

The following insights help explain why succession planning in family firms is more than a system or process — it is a mindset and a story about how personal and organizational values can shape and complicate leadership transitions. A happy ending demands navigating complexity with emotional intelligence, socio-emotional wealth, foresight, and a vision that incorporates legacy and innovation.

- Successful succession requires emotional intelligence.
- Legacy preservation demands radical adaptability.
- **Innovation** emerges from intergenerational communication.

#### Succession Planning for CEOs: High-Stakes Drama (Green Cluster)

Due to CEOs' unparalleled influence over the strategic direction of a company, the topic of their succession has rightfully inspired its own body of research. Research historically centered on the event of CEO succession itself, with far less study of the processes that precede and follow CEO succession (Berns & Klarner, 2017). In their widely used integrative framework, Berns & Klarner explain various predictors of succession planning that deserve more attention and provide a deeper understanding of the factors influencing leadership transitions. These include environmental and industry predictors; and industry, organizational predictors such as form, size, structure, board composition, and incumbent qualities; the actual succession event; and outcomes of CEO succession like investor impact (Bills et al., 2017) and firm performance, as well as numerous factors such as emerging economies, (Chung & Luo, 2013), organizational cultures, board compositions, and characteristics of both the incumbent and prospective successor.

Signals from real-world cases echo and challenge these insights, as CEO succession is often communicated through surface-level details, such as new CEO name, brief background information, and salary to establish credibility. Beneath these headlines lies a deeper story about systems and cultures that shape succession planning. Consider Whitney Wolfe Herd's return to Bumble, Elon Musk's transformative acquisition of Twitter (now X), and Bob Iger's return to Disney. These are leadership changes and strategic performances with global audiences. Organizations that approach succession planning as a system/process- and narrative-oriented mindset, rather than an isolated positional vacancy driven by a "romance of leadership," position themselves for competitive advantage in communicating change.

- Leadership transitions ripple throughout entire corporate ecosystems.
- Succession is a narrative, not just a replacement strategy.
- **Organizational** identity is an ongoing negotiation.

#### Talent Management: Foundations for Future Success (Dark Blue Cluster)

This dark blue cluster is a starting point for seasoned practitioners or newcomers, as it houses 236 influential landmark articles and high-level reviews and serves as the largest and most central grouping on the bibliometric map. The most prominent article within this cluster is Collings & Mellahi's (2009) review paper on strategic talent management. Their model offers an enduring framework of strategic talent management that depicts how individuals are chosen for pivotal positions from internal and external labor markets, ultimately driving organizational outcomes and firm performance. Tarique and Schuler's review of global talent management builds on Collings's and Mellahi's model by acknowledging the unique influences of external drivers of global talent management strategies (e.g., globalization, demand-supply gap) and internal drivers of global talent management strategies (e.g., regiocentrism, international strategic alliances). Foundational reviews also explore theoretical and definitional frameworks, such as the meaning of "talent" in the workplace (Gallardo-Gallardo et al., 2013), the top theories in talent management research (Al Ariss et al., 2014), and the empirical research within the field (Gallardo-Gallardo & Thunnissen, 2016). These studies establish a robust intellectual foundation for developing industry- and context-specific succession planning approaches.

Newer studies in the dark blue cluster address evolving challenges and contexts in talent management, including crisis management, workforce development, digital transformation, and globalization. For example, Kaliannan and colleagues' (2023) review paper highlights the lack of research on inclusive talent development amid growing industry demands. Other papers focus on the role of context in talent management (Gallardo-Gallardo et al., 2020), such as COVID-19 (Collings et al., 2021) and Industry 4.0 (Whysall et al., 2019). Regional perspectives on the Middle East (Budhwar et al., 2019) and South Africa (Aghimien et al., 2021) provide nuanced views of talent management's global applications.

By synthesizing the following insights, leaders can create more dynamic, responsive, and strategically aligned talent management and succession planning frameworks that anticipate organizational needs and maximize global talent pools.

- **Boundaries** are fiction. The best leaders are now borderless network architects.
- Your org chart is a living algorithm, not a static hierarchy.
- **Inclusive talent** pools are the competitive edge.

#### Talent Retention for Hospitality and Tourism Industries: Pandemic **Pivots and Generational Resets (Yellow Cluster)**

Branching off from the foundational dark blue cluster of general talent management, the yellow cluster focuses on talent attraction and retention of hospitality and tourism workers in the context of industry-specific challenges. This sub-stream of research highlights how industry-specific challenges and systemic shocks, such as the COVID-19 pandemic, reshaped workforce dynamics (Baum et al., 2020; Giousmpasoglou et al., 2021). As one of the fastest-growing areas in research, this cluster explores strategies for addressing disruptions while retaining top talent, particularly among younger generations (Goh & Okumus, 2020; Naim & Lenka, 2018).

By addressing the following insights, organizations in these sectors can develop emerging leaders while addressing intergenerational friction points, maintain organizational stability in dynamic environments, and keep their competitive edge.

- **Emerging leaders want** transformative experiences, not jobs.
- **COVID-19** rewrote the entire talent contract in hospitality and tourism.
- Work location is becoming more valuable than compensation.

#### Workforce Planning for Healthcare and Human-Robot Collaboration: **Human Empathy Meets Robotic Precision (Turquoise Cluster)**

The turquoise cluster highlights 2 prominent areas of talent management research: workforce planning in healthcare and human-robot collaboration. While these research streams developed separately, their co-presence in current literature suggests intriguing possibilities and invites exploration of how robotics might help address persistent healthcare workforce challenges.

In healthcare, burnout and retention dominate the research landscape. Studies spanning different regions and countries (Maier et al., 2016), such as the UK (Anderson et al., 2021; Brennan et al., 2023; Culpan et al., 2019), United States (Sellers et al., 2019), and Australia (Keane et al., 2011; McGrail & Humphreys, 2015; Sullivan et al., 2011) reveal a global crisis. Nursing faces particular strain, with researchers documenting burnout, negative psychological outcomes, and turnover (Dall'Ora et al., 2020). The field grapples with specific pressure points from nursing workload management (Griffiths et al., 2020) to physician retirement planning (Silver et al., 2016).

Human-robot hybridizations and collaborations in production form their own separate grouping of dark blue clusters on the map, indicating significant interest in how humans and robots interact in the workplace. Alongside documented healthcare workforce challenges, the potential for robotic automation to alleviate healthcare staffing pressures remains an area for further investigation. Future research could explore how automation might help address the welldocumented psychological strain on healthcare workers while potentially increasing human safety and creating opportunities for workforce development and retention.

Using the following insights, leaders can design workforce architectures that strategically integrate technological resilience with human potential, transforming healthcare succession from burnout management to professional sustainability.

- The next breakthrough in healthcare is understanding how human resilience can be amplified technologically.
- Care economy workers are frontline soldiers in a war against systemic exhaustion.
- **Automation** may be a lifeline preventing physical and industrial collapse in healthcare.

#### AI, Digitalization, and Sustainability in HRM: The Technological Horizon (Red Cluster)

The red cluster focuses on the impact of several major and recent technological advancements on talent management. This impact reflects the major digital transformation occurring in various types of work and across industries. One key innovation driving change is big data management, which has made its way into organizational strategic decision-making practices (Shamim et al., 2019). Big data management has led to the creation of new terms and practices, such as HR analytics (Bahuguna et al., 2023; Margherita, 2022; Marler & Boudreau, 2017), and HRM 4.0 (Da Silva et al., 2022), which stems from the broader emergence of Industry 4.0 (Mukhuty et al., 2022) and emphasizes the impact of digitization and automation across industries. With these innovations in hand, organizations can optimize talent management strategies by leveraging predictive insights and improving decisionmaking.

Now there is increased research inquiry into the impact of artificial intelligence tools on the workplace, including talent management practices (Kaushal et al., 2023; Pereira et al., 2023). Drawing on insights from the Living Intelligence framework (Webb & Jordan, 2024), this cluster also highlights how the convergence of AI, advanced sensors, and biotechnology is poised to transform HR practices further. Webb describes this convergence as "living intelligence" systems that can sense, learn, adapt, and evolve. These systems are not only disrupting industries but creating new opportunities for integrating sustainability into human resource management (HRM). For example, advanced sensors embedded in workplace environments and wearables can provide real-time feedback on employee wellbeing, helping organizations address challenges like burnout and productivity. Living intelligence is based on large action models (systems designed to predict and take action) that are expected to streamline complex HR operations, from workforce planning to personalized career development paths.

By embracing the following insights, organizations can enhance agility, address complex workforce challenges, and build more sustainable talent pipelines.

- Wearables and workplace tech can alert you to burnout before it breaks your team.
- **Effective** leadership teams treat succession as a never-ending scientific story.
- Data-driven tools can keep development relationships relevant.

#### Multi-National/Multi-Cultural Talent Management and HRM: Cross-Border Alchemy (Purple Cluster)

The purple cluster examines talent management through a global lens, exploring how international and multicultural variables shape human resource management (HRM) practices. Located on the left side of the map, adjacent to the dark blue cluster that includes general talent management literature, this cluster reflects the growing importance of managing a diverse, global workforce in today's interconnected world.

Keywords frequently appearing within article titles in this cluster reveal a clear theme related to global talent management. Examples include "global," "multi-national enterprises," "international HRM," "cross-border acquisitions," "cultural intelligence," "expatriate," "international assignments," "global context," "multiculturalism," "global mobility," "global employees," "global staffing," "international theory," "refugees," and "international talent." The research emphasizes critical challenges organizations face in global talent management, including managing cross-border acquisitions, facilitating international assignments, and fostering intercultural communication competency. As the world becomes more globalized, greater study of how organizations can effectively manage talent that comprises employees from across the globe and diverse cultures is needed. Such studies will help organizations build systems that can accommodate pluralism and leverage it as a competitive advantage.

- Tomorrow's workforce is a planetary network, not a corporate org chart.
- Organizational resilience is built by those who've already reimagined survival in other contexts.
- Your next breakthrough leader might be speaking a language you don't yet understand.

#### Succession Planning in Politics: Navigating Fragility and Trust (Gray Cluster)

Succession planning in politics is a smaller but vital body of research, focused on transitions within governmental and political systems. This gray cluster at the top of the map explores how succession unfolds in unique contexts, including authoritarian regimes (Li, 2012; Zeng, 2014), dictatorships (Frantz & Stein, 2017), modern autocracies (Helms, 2020; Meng, 2021), and in extreme political contexts or situations, such as civil war (Kokkonen & Sundell, 2020) or assassinations (Igbal & Zorn, 2008). Much of the research in this area focuses on political succession in the Asia Pacific region and reveals both fragility in governance structures and the critical importance of communicating to reduce uncertainty (Blanchard, 2015; Li, 2012; Xiao, 2016; Zeng, 2014).

Politics/government is one of 4 industries we identified in the Succession Stories report as having the most urgent need for robust succession planning, alongside news/ entertainment media, technology, and financial services. In politics, the stakes are particularly high, as leadership transitions intersect with public trust, stability, and geopolitical crises. Whether managing succession in authoritarian regimes or during extreme political events, the insights from this cluster underscore the need for proactive, transparent, and adaptive approaches to leadership transitions.

- Succession planning is where institutional memory meets disruption.
- Succession tests a system's capacity to transfer power and preserve collective cultural cohesion.
- Communicating change is among the most critical factors in effective succession planning.

#### Succession Planning in Agriculture: Stewardship and Sustainability (Black Cluster)

Succession planning in agriculture represents another distinct area of research, concentrating on unique challenges. This black cluster is further subdivided into 2 key subcomponents for farming businesses and ecological succession.

The first subcomponent of the research addresses who will take over a family farm (Chiswell & Lobley, 2018; Foguesatto et al., 2020; Nuthall & Old, 2017; Pessotto et al., 2019; Rech et al., 2021). These studies highlight the deeply personal and often complex nature of farm succession, mirroring challenges faced by family firms in other industries (see teal cluster). The second subcomponent concerns ecological succession planning, such as forest succession (Oikonomakis & Ganatsas, 2012) and soil, plant, and land restoration and renewal (Coopmans et al., 2021; Jakovac et al., 2021; Jungueira et al., 2010; Qu et al., 2020; Zhang, 2005). Recent research is expanding this focus to consider the broader impact of various farming and other land uses on the environment (Barnes et al., 2022). These 2 facets of agricultural succession planning intersect in meaningful ways, offering potential insights into how leadership transitions and environmental stewardship can be complementary.

Further, they help explain how leadership transitions in agriculture can serve as a model for balancing economic, social, environmental, generational, and even technological priorities in other industries. The Faaborg farm's success highlighted in our Succession Stories report exemplifies how thoughtful leadership transitions can bridge generational priorities, market demands, and sustainable practices and provide a model for resilience across industries.

- Farms are living ecosystems of intergenerational negotiation.
- Succession is no longer about who owns the land, but about who can most sustainably steward it.
- **Agricultural transitions** are the Rosetta Stone of leadership, decoding how people, economics, and ecology can co-evolve.

The data reveals where succession planning is headed—and what's missing. But evidence alone doesn't drive change. Leaders like you do. Ask these provocative questions to spark conversations that challenge assumptions, reimagine legacy, and unlock opportunity in your organization's next chapter.

#### IS YOUR STRATEGY TRANSFORMING CONSTRAINT INTO OPPORTUNITY?



- Reframe gaps in leadership, talent, and budget as design challenges, not dead ends.
- Identify hidden strengths in overlooked roles, rising talent, or untapped networks.

#### ARE YOU PRESERVING OR REIMAGINING LEGACY?



- Define which parts of your leadership culture are worth keeping and which need a reset.
- Challenge the assumption that "what worked before" will work again.

#### CAN YOUR NEXT CHAPTER BE MORE COMPELLING THAN YOUR LAST?



- Invite emerging voices to co-author the future instead of just inheriting the past.
- Make succession a reinvention opportunity rather than a simple replacement plan.

#### 1. LEVERAGE DEVELOPMENT RELATIONSHIPS



Embed succession planning for specific roles within broader talent management initiatives. Focus on developing leaders holistically, ensuring adaptability and preparedness for future experiences through continuous training and cross-functional development. Use evidence-backed practices such as our Lessons of Experience framework (70% experiential learning, 20% social learning, 10% formal learning) to align succession with broader organizational goals.

#### 2. MEASURE WHAT MATTERS



Evaluate, in detail, all talent management efforts, programs, and initiatives against an updated comprehensive 10-year succession plan. Use tools like leadership culture audits, 360-degree feedback, and developmental readiness assessments to measure cultural alignment, leadership effectiveness, emotional intelligence, and the long-term resilience of your organization. Pair quantitative metrics with qualitative insights from interviews, case studies, and observational data to capture a fuller picture of outcomes and success factors (Baltazar et al., 2023).

#### 3. INVEST IN EMERGING TECHNOLOGIES



Develop dynamic, real-time insight platforms that integrate with existing systems and future innovations. Create tools to help automate leadership forecasting, create data-informed talent pools, and identify successors with precision (Shamim et al., 2019). Use neural network interpretability and computational modeling to map potential leadership scenarios, mitigate biases, and optimize talent acquisition.

#### 4. PLAN GLOCALLY AND ACT PREDICTIVELY



Combine global ambition with local sensitivity. Integrate emotional intelligence, living intelligence, and intercultural communication training into leadership development so leaders can adapt strategies to fit pluralistic contexts and advance global operational priorities.

#### 5. INCENTIVIZE SUSTAINABILITY



Equip future leaders to manage environmental challenges while fostering long-term organizational health. Incorporate nature-positive strategies to align with multigenerational priorities (Nisar et al., 2020). Understand how ecological succession models signal how sustainability can enhance organizational resilience (Stahl et al., 2020).

#### 6. EVALUATE RELATIONAL, POLITICAL, AND CULTURAL FACTORS



Understand succession planning as a way to shape future outcomes. Use our relational-political-cultural framework to see realities that might otherwise be overlooked. For instance, use social transference to understand how the social cognition of a predecessor correlates with evaluations of their performance and impacts future hiring decisions.

#### 7. CUSTOMIZE FOR INDUSTRY NEEDS



A CFO transition in a media organization is different from a CFO transition in a healthcare organization. Mine the research to tailor evidence-backed strategies to the unique demands of your industry. Align succession strategies with sector-specific challenges so organizations can support legacy and future innovations and facilitate quicker responses to rapidly shifting leadership demands, competitor product offerings, and internal goals.

#### THOUGHT LEADERS TO FOLLOW

#### ... IN BUSINESS & ORGANIZATIONAL LEADERSHIP

#### Dr. Nicholas Nassim Taleb,

New York University, for introducing 3 influential concepts of "Black Swan Events," "Antifragility," and "Skin in the Game" to the study of economic uncertainty and organizational change.

#### Dr. Luis R. Gomez-Mejia,

University of Notre Dame, for groundbreaking work in socioemotional wealth and family business dynamics.

**Dr. Livia Alfonsi**, Harvard Business School, for future-focused research on emerging leaders and labor market dynamics, specifically youth employment and female labor market participation barriers.

**Dr. McKenzie C. Preston,** New York University, for co-leading a study on the impact of perceptions of social characteristics on succession efforts.

Professor Amy Webb, CEO and Founder of Future Today Strategy Group and New York University professor, for expertise in strategic foresight and for developing and applying a quantitative futurist methodology to organizational change.

**Dr. David G. Collings,** Trinity College Dublin, for studies specializing in human resource management, sustainable work, future of work, talent management, and global mobility. **Dr. Kristin V. D. Berns,** University of Munich, for work on CEO succession, financial reporting, and corporate governance.

**Dr. Tony Dundon,** University of Limerick, Ireland, for work on international and comparative systems of employee voice, representation, and human resource management.

**Dr. Leif Melin,** Jönköping International Business School, for work in family business dynamics, strategic leadership, organizational change and renewal, and entrepreneurship in family firms.

#### THOUGHT LEADERS TO FOLLOW

#### ... IN MEDIA & COMMUNICATION

Dr. Stacy L. Smith, University of Southern California Annenberg School of Communication & Journalism, for groundbreaking work on representation in the entertainment industry and for founding the Annenberg Inclusion Initiative.

Professor Evan Shapiro, New York University, for becoming the "official, unofficial cartographer of the Media Universe." Media Universe Maps are widely used by industry leaders, analysts, and educators as a comprehensive representation of the media landscape.

Dr. Isaac S. Coffie, Accra Technical University in Ghana, for work on the role of marketing communication and ethics in effective succession planning practices in familyowned businesses.

Dr. Roiyah Saltus, University of South Wales, for coleading the George Ewart Evans Centre for Storytelling, expertise in UN Sustainable Development Goals, and ongoing work on health and wellbeing for global leaders.

#### ... IN TECHNOLOGY

Dr. Joy Buolamwini, Algorithmic Justice League founder, for groundbreaking studies on algorithmic harm in artificial intelligence that raise public awareness, influence public policy, shape leadership pipelines, and evaluate industry products.

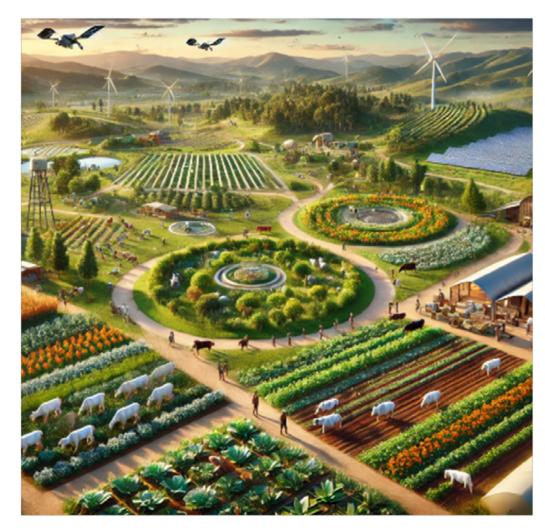
Dr. Fei-Fei Li, World Labs founder and Stanford University professor, for pioneering work in spatial intelligence and for establishing ImageNet, a large-scale dataset that revolutionized the world of computer vision and has key implications for leader selection and prototyping.

Dr. Fernanda Viégas, Co-founder of Google's People + AI Research initiative and Harvard University professor, for work in data visualization, computational design, and co-leading the Insight and Interaction Lab where she oversees projects that weave societal expectations and values into the design and evaluation of AI systems.

**Dr. Ruha Benjamin**, Princeton University, for founding the Ida B. Wells Just Data Lab and for work on the intersections of imagination with science, medicine, technology, and organizational justice.

#### IT'S 2035. WHAT IF SUCCESSION PLANNING WAS POWERED BY EVIDENCE?

This short scenario set in 2035 is designed on the recommendations shared in this report and outcomes we believe are achievable. It is neither a prediction nor a conclusion. Rather, it is designed to stimulate thought, facilitate discussion, and drive innovation.



Agro Supply Ltd in 2035: Where Innovative Succession meets Agriculture--A thriving, futuristic farm blends sustainable agriculture, clean energy, and advanced technology in harmony with nature. Created by CCL and Chat GPT-4o.

# IT'S 2035. WHAT IF SUCCESSION PLANNING WAS POWERED BY EVIDENCE?

It's Q3 and the leadership team at Agro Supply Ltd. reviews their latest talent analytics report in preparation for a key succession planning milestone. As Africa's leading agribusiness innovator, the company transformed succession planning into a science, leveraging data, predictive modeling, neural network interpretability, and artificial intelligence to ensure the seamless transition of leaders critical to its mission of regenerative agriculture and sustainability.

The meeting is focused on identifying the successor for the outgoing CFO, who has overseen Agro Supply Ltd.'s exponential growth over the past decade. The company's evidence-driven succession process begins with Akello, its AI-powered leadership talent platform, which integrates performance data, sustainability impact scores, social cognition, and cultural alignment metrics for all potential candidates. Through this system, Agro Supply Ltd. pinpointed 3 potential internal successors and one external candidate, each rigorously evaluated using simulations, people-centered stakeholder feedback, and predictive leadership assessments.

The CFO role is pivotal because it ensures financial stability. The CFO also advances Agro Supply Ltd.'s biopositive strategy and is expanding its "Seeds for Tomorrow" initiative, which has already restored 50,000 hectares of degraded land and increased community wealth by 20%. The evidence suggests that the most promising candidate, Zuri, is a rising financial leader from Kenya with proven expertise in aligning corporate sustainability with long-term profitability. Her track record includes implementing AI-driven financial forecasting models, which increased resource efficiency by 15% in her previous role.

To ensure a smooth transition, Agro Supply Ltd. uses an evidence-based developmental relationships framework that includes a 6-month shadowing process with the outgoing CFO. At the same time, the outgoing CFO leverages their accumulated knowledge and experience by participating in a "Wisdom Transfer Initiative" aimed at transitioning to an advisory role and refreshing organizational vision. This dual approach has been shown to reduce leadership transition risks by 30%, according to internal audits and industry benchmarks. Additionally, Zuri will complete the company's rotational leadership program, focusing on cross-functional collaboration, operational excellence, and community-driven impact.

Agro Supply Ltd.'s evidence-driven succession planning ensures leadership continuity while driving innovation, accountability, and measurable results. With a robust pipeline of future leaders in place, the company is poised to meet the growing global demand for sustainable food systems while empowering local communities across Sub-Saharan Africa.

By 2035, Agro Supply Ltd. has proven succession planning is more than a process. Succession planning is a mindset that catalyzes enduring impact and long-term success.

### **NOTES ON METHOD**

We used data-driven and theory-based research methods to offer insight and evidence to leaders on research narratives about succession planning.

Our methodology for this report centers on revealing the narratives within succession planning scholarship. Using bibliometric techniques, we transformed 5,063 peer-reviewed articles published between 1970 and 2024 into a detailed, data-driven landscape of 1,000 articles

(Bogilović & Černe, 2018). This approach amplifies patterns and narratives that are often overlooked, connecting the dots between existing research and emerging trends (Boyack & Klavans, 2010; Zhao & Strotmann, 2008).

Bibliometric methods allow researchers to systematically analyze vast collections of academic literature, uncovering citation patterns that illuminate the current state of a field. We employed bibliographic coupling (a technique that identifies shared references between pairs of articles) to capture citation patterns among articles and generate a visual map of the current structure of the field (Jarneving, 2005, 2007; Zupic & Čater, 2015; Kessler, 1963). This process helps visualize the research story of succession planning, identifying key topics, trends, and opportunities for future exploration (Boyack & Klavans, 2010).

# SAMPLE AND PROCEDURE

Our data-driven approach ensures rigor, replicability, and comprehensive coverage of the field. Below we outline the steps we took to map the structure of succession planning research.

To begin, our process of obtaining the article sample included 3 main steps: comprehensive Web of Science search for research related to succession planning, bibliographic coupling map generation, and cluster analysis.

# SEARCH TERMS AND RESULTS

We utilized the search terms in the table below to identify all published articles related to the topic. To gather comprehensive coverage of the topic, we included numerous phrases that were either synonymous or conceptually adjacent to succession planning.

### **WEB OF SCIENCE SEARCH TERMS**

"succession planning" OR "leadership succession" OR "succession management" OR "leadership pipeline" OR "leadership transition" OR "talent management" OR "organizational continuity" OR "successor identification" OR "workforce planning" OR "organizational succession" OR "succession process" OR "succession systems"

**BIBLIOGRAPHIC COUPLING MAP GENERATION** 

To transform the dataset into a visual research narrative, we used VOSviewer, a recognized bibliometric software. Several methodological decisions ensured the resulting map was accurate, clear, and actionable (van Eck & Waltman, 2022).

- Fractional counting method: This method is the most accurate way to calculate coupling link strength (Perianes-Rodriguez et al., 2016).
- Citation threshold: We set a minimum citation threshold of 5, using guidelines suggested by van Eck and Waltman (2022), to avoid excluding newer relevant articles without adequate time to acquire more citations. This threshold narrowed the dataset from 5,063 to 2,448. To create a comprehensive but interpretable visualization, we selected the 1,000 articles with the highest coupling strength. Visualizing fewer articles than the entire sample helps facilitate comprehensibility of the resulting map and of content analysis (Vogel et al., 2021).
- Node size: Each document's weight/strength for the map was determined by its "normalized citations," which is a metric of citation count that adjusts for the number of years since the article was published. This normalization process removes any bias toward articles that have more raw citations simply because they are older. Link connections (i.e., curved lines) occur between pairs of articles with at least 1 shared reference on their reference lists.

**CLUSTER ANALYSIS** 

To uncover the subplots of the research story, we analyzed the bibliographic coupling map for clusters of thematically related articles. VOSviewer assigns each article (when possible) to a cluster of similar articles. Articles that exhibit similar patterns across all their reference lists tend to be clustered together. When a group of documents has similar reference lists, it is because those documents are likely on similar or related topics of study. VOSviewer clusters articles together visually by placing them spatially near each other and by assigning them the same color node. Investigating clusters helps to identify substreams of research within a given field. Each cluster tells a unique chapter in the succession planning narrative, capturing research substreams like family business dynamics, CEO succession, political succession, and global talent management.

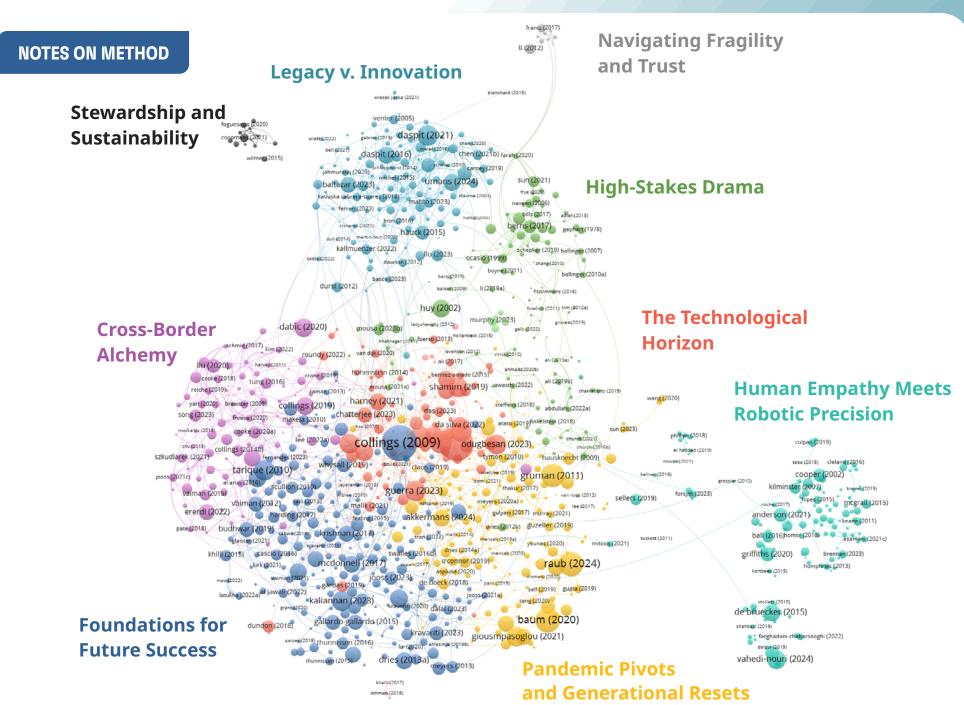


Figure 6. Bibliographic Coupling Map of Top 1000 Succession Planning Documents.

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