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SUCCESSION IN SMALL FAMILY BUSINESSES IN THE TRANSPORT SECTOR

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Abstract: A group of small family businesses engaged in transportation in the central region of the state of Coahuila are currently facing the challenge of planning or carrying out the succession process. Specialized literature indicates that generational succession is one of the main challenges facing family businesses. Around 70% of family businesses in Mexico do not survive beyond the second generation. According to recent studies, this is due to the absence of a succession plan. Therefore, the objective is to identify the characteristics of the successor's profile, evaluate their level of preparation, and propose strategies for a successful succession. The methodology used is qualitative, through a semi-structured interview with ten owners of family-owned transportation companies. The main findings are: advance planning and the implementation of successor preparation programs are strategies that most of the interviewees have carried out and that have worked for them. Leadership skills and commitment to family values, as well as previous work experience and education, are elements that owners consider essential to ensuring a successful transition. These types of strategies implemented by owners serve to prepare the successor to assume business responsibilities and create an environment of trust and continuity. However, there are significant challenges, such as resistance to change and lack of financial resources, which hinder succession planning.

Keywords: Family business, Successor profile, Succession planning.

Introduction

Family businesses are an essential part of the global business fabric, repre-

senting approximately 70% worldwide (Gómez & Herrera, 2021). These companies not only contribute significantly to the generation of employment and wealth, but also have a profound impact on the communities in which they operate.

Family businesses are a fundamental pillar of the Mexican economy, especially in the central region of Coahuila, where their influence is evident not only in job creation but also in social cohesion and local development. These organizations face a number of challenges in ensuring their continuity, the most significant of which is succession. A change in leadership is not just a simple administrative change, as it involves a series of strategic, structural, and emotional decisions that have an impact on the future direction of the company.

This research is based on the case of a group of ten family businesses engaged in personnel transportation. These companies have operated successfully under the leadership of their founder. During this time, the companies have established themselves in the transportation service for students and workers, with routes within and outside the municipality. Despite being stable companies where some family members work in day-to-day operations, these organizations currently need to plan and implement a succession process that will ensure their permanence and consolidation. The main problem is that they do not have a succession plan to guide the generational change.

Specialized literature indicates that generational succession is one of the main challenges facing family businesses. Around 70% of family businesses in Mexico do not survive beyond the second generation.

According to recent studies, this is due to the absence of a succession plan. Some of the factors that hinder the process include the founder's resistance to relinquishing control, lack of professionalization, lack of preparation of the successor, and insufficient definition of roles and functions within the organizational structure. This generates internal conflicts that affect the performance and future prospects of the family business. The lack of strategic planning creates a risk, as the continuity of the company will depend on how it handles succession.

Given this scenario, it is necessary to thoroughly analyze how small family-owned transportation companies should design and implement a succession process to ensure internal stability and long-term sustainability. To understand this phenomenon, it is necessary to identify the personal characteristics, skills, and level of preparation of the successor, as well as the key elements that must be considered when transferring leadership.

However, with the passage of time and the need to ensure the continuity of the organization, concerns arise about how to carry out an effective succession process that ensures the sustainability of the business in the hands of the next generation. From this perspective, the objective of this research is to identify the characteristics of the ideal successor profile, assess their level of preparedness, and propose strategies for successful succession. The structure of the research includes a theoretical framework that contextualizes the relationship between family businesses and succession, a description of the methodology used, an analysis of the results obtained, and a discussion of the conclusions.

Theoretical framework

Family businesses

The origins of family businesses date back to ancient times, and they have been a form of economic organization that has endured throughout history. Family businesses have played a significant role in the economic and social development of communities in various cultures and civilizations, as they are one of the oldest forms of business organization (Naude, 2010).

Molina and Castañeda (2020) state that a family business is defined by the significant influence of the family on ownership, decision-making, strategy, and the intention of generational continuity. Likewise, Cáceres and Paredes (2019) highlight that these types of entities tend to prioritize the permanence of the family legacy, maintaining a structure in which family values are integrated into business management.

Family businesses are those in which control of the organization is in the hands of one or more families who, in addition to sharing ownership, also have a significant influence on the management and direction of the company (Zellweger, 2017). These companies are fundamental to the global economy; it is estimated that approximately 70% to 90% of companies worldwide are family businesses, generating between 50% and 80% of total employment in many countries (De Massis et al., 2018).

Family businesses represent a form of organization in which ownership and management are predominantly controlled by one family (Chua et al., 2019). These organizations are often characte-

ized by a strong organizational culture, shared values, and a long-term approach. However, they face very specific challenges related to the succession process, such as resistance to change, family conflicts, and a lack of processes for planning succession (Astrachan & Jaskiewicz, 2020). Successful management is essential to maintain competitiveness and ensure business continuity (García-Álvarez et al., 2021).

Importance of succession.

Succession is the main challenge facing family businesses. The transfer of leadership from one generation to another can cause internal problems, as the objectives or values of the new generations may differ from those of the founders. According to a study by PwC (2018), less than 30% of family businesses survive to the second generation, and only 12% reach the third. This demonstrates the importance of proper planning to ensure the continuity of these businesses.

Despite these challenges, family businesses often have distinctive competitive advantages, such as a strong organizational culture, long-term commitment, and greater flexibility in decision-making (Chrisman et al., 2018). These characteristics allow family businesses to adapt to market changes more efficiently than other forms of organization.

Succession is a critical process that can determine the survival of the family business (Le Breton-Miller & Miller, 2006). A lack of preparation on the part of the successor can create family conflicts that could lead to the dissolution of the business.

Successor profile

The profile of the ideal successor has been studied recently and is conceived as the set of competencies, attributes, values, and skills that the person who will take over the management of the family business in the future must possess (Sharma et al., 2021). Early identification and development of an appropriate profile facilitate a more effective transition and reduce the likelihood of conflicts or failures in succession (Vogel et al., 2020). In addition, the successor must combine technical skills, leadership, emotional competencies, and alignment with family values (Pérez et al., 2022). Evaluating the successor's profile at an early stage allows for the identification of competency gaps and the planning of training and professional development actions (Morash et al., 2021).

The successor's profile includes factors such as education, experience, and commitment to the company (Davis & Harveston, 1999). These attributes are essential to ensure that the successor can meet the challenges of the business.

Preparing the successor.

Succession planning in family businesses has been recognized as an indispensable strategic process to ensure a smooth and successful transition (Le Breton-Miller et al., 2020). The lack of formal planning can lead to internal conflicts, loss of institutional knowledge, and risks of business fragmentation (Hasnah et al., 2021). Modern approaches emphasize the importance of structured processes involving different actors, including family, executives, and external advisors, to define clear criteria, stages, and actions to be taken

(Dyer et al., 2022). Advance planning also helps reduce emotional stress and facilitates acceptance and support of the family legacy (García-Ramos et al., 2020).

Training and experience are essential to prepare the successor for their role (Cabrera-Suárez, 2005). This can include both formal education and practical experience within the company.

Transition strategies

Generational transition in family businesses is a complex process that requires comprehensive management, involving emotional, cultural, and strategic aspects. Recent literature highlights that the quality of the relationship between generations, upcoming expectations, and effective communication are central variables for the success of the process (Klein et al., 2021). In addition, strategies such as training the successor, providing emotional support, and gradual involvement are considered best practices for facilitating a smooth transition (Liu et al., 2020). The articulation of a formal transition plan with active family participation helps reduce resistance to change and strengthens the institutional legacy (Garcia et al., 2022).

Effective succession strategies include advance planning, training, and open communication (Sharma et al., 2003). These practices help minimize uncertainty and facilitate a smoother transition.

Methodology

This is a qualitative study in which semi-structured interviews were used as a means of collecting information from the

owners of small family businesses engaged in personnel transportation. This methodology allows for in-depth investigation of the perceptions and experiences of the founders of small family transportation businesses. These interviews were recorded with the permission of the interviewees, and the results were subsequently transcribed and analyzed. A thematic analysis approach was used to identify trends and patterns in the responses obtained. The analysis was carried out in six phases: (1) familiarization with the data through detailed reading of the transcripts; (2) generation of initial codes through open coding; (3) search for themes by grouping related codes; (4) reviewing and refining themes by comparing them with the original quotes; (5) defining and naming the themes; and (6) preparing the final report integrated with textual evidence. The coding was done manually.

This type of interview combines a predetermined structure with the flexibility necessary to explore the participants' perceptions and experiences in depth (Flick, 2012). The development of an interview guide is crucial to steer the conversation toward topics of interest, while ensuring the possibility of exploring emerging issues during the interaction. This guide should include open-ended questions that encourage detailed and thoughtful responses from interviewees (Díaz-Bravo et al., 2013).

This research studies the case of a group of companies dedicated to personnel transportation. For the case analysis, interviews were conducted with ten owners of family businesses to obtain information that would allow us to identify the characteristics of the successor's pro-

file, assess their level of preparation, and propose strategies for a successful generational transition.

The sample was selected through purposive sampling, which included owners of family-owned transportation companies of different sizes and lengths of time in the market. Ten entrepreneurs were interviewed. The sample was purposive and limited ($n = 10$) and geographically specific, which is consistent with the qualitative design focused on the depth and contextual richness of the experiences. Due to its size and selection, statistical generalization to larger populations is not intended; instead, the results offer theoretical and analytical transferability.

Table 1 presents the inclusion and exclusion criteria established for the selection of study participants.

A semi-structured interview guide was developed with open-ended questions addressing the following topics:

- a) The successor's experience in the company.
- b) Characteristics valued in the successor.
- c) Succession strategies implemented.
- d) Challenges faced during the succession process.

The semi-structured interview is developed based on the trigger question for each topic.

a) What is your experience in the family business and how has it influenced your preparation for succession?

b) What characteristics do you consider essential in a successor?

c) Have you implemented a formal succession plan? If so, how have you carried it out?

d) What are the main challenges you have encountered in this succession process?

Analysis of results

The most relevant results of the semi-structured interviews conducted with 10 owners of small personnel transportation companies are presented in Table 2 of findings, which revealed several key aspects related to the succession process, the characteristics of the successor, and the strategies employed.

Figure 1 of the main results of the interviews shows the graph with the percentages for each of the main findings for each aspect.

Successor's experience

- Previous work experience: 75% of those interviewed said they considered it essential for the successor to have previous work experience in the company. One owner commented: "It is essential that the successor knows every corner of the business. My son has worked here since he was 16, and that gives him a huge advantage."
- Education: 58% of the owners interviewed mentioned that academic training is also important, especially in areas related to management and logistics. One business owner said: "Although experience is key, I also believe

Inclusion Criteria	Exclusion Criteria
Owners or founders of family businesses engaged in personnel transportation.	Non-family businesses or businesses without family members involved in management.
Companies actively operating at the time of the investigation.	Businesses engaged in activities other than transportation.
Businesses that have been in operation for at least five years.	Inactive companies or companies in the process of closing.
Participants involved in decision-making within the company.	Owners who do not participate in operational or strategic management.
Entrepreneurs who have initiated or considered a generational succession process.	Participants who do not give consent for the interview or recording.

Table 1: *Inclusion and exclusion criteria.*

Source: Own elaboration

Aspect	Main finding	Percentage	Representative quote
Successor's experience	Previous work experience in the company considered essential.	75	"It is essential that the successor knows every corner of the business."
Successor's experience	Importance of academic training related to management and logistics.	58	"A good education in administration can make all the difference."
Valued characteristics	Leadership and interpersonal skills as a crucial requirement.	100	"A good successor must be able to lead and motivate the team."
Valued characteristics	Commitment to the family business and its values.	83	"It is important that the successor shares our vision."
Succession strategies	Advance succession planning	67	"We started talking about succession long before I thought about retiring."
Succession strategies	Implementation of mentoring and training for the successor	75	"I have been training my son in every aspect of the business."
Challenges in succession	Resistance to change by employees and family members	50	"Some employees were unsure whether my son could run the business."
Challenges in succession	Lack of financial resources to formalize the process	42	"We would like to have a more structured plan, but the costs are a barrier."

Table 2: Findings.

Source: Prepared internally based on the results of interviews with owners of transportation companies.

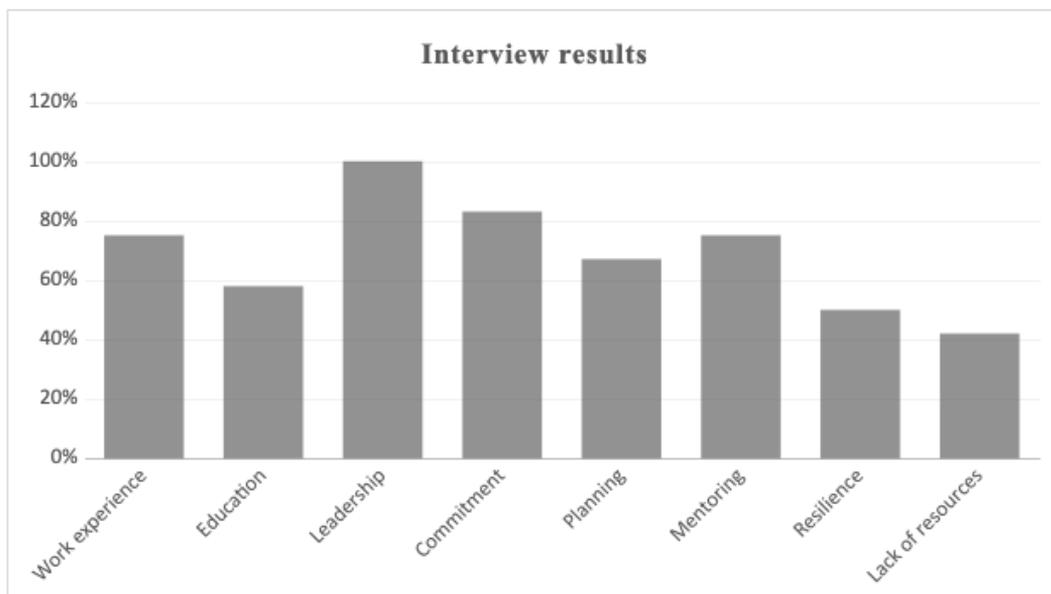


Figure 1: *Main results of the interviews*

Source: Prepared by the author based on the results of the semi-structured interviews.

that a good education in business administration can make a difference.”

In this regard, the results agree with what is mentioned in the literature, that training and experience are essential to prepare the successor for their role.

Characteristics valued in the successor.

- Leadership and interpersonal skills: 100% of the owners interviewed agreed that leadership skills and the ability to communicate effectively with employees are crucial. One interviewee said: “A good successor must be able to lead and motivate the team. Without that, the business will not work.”

- Commitment to the family business: 83% of the owners interviewed valued the successor’s commitment to the values and mission of the family business. One owner commented: “It is important that the successor shares our vision and is willing to work hard to maintain the company’s reputation.”

The results are consistent with what is mentioned in the literature, as leadership and commitment on the part of the successor are essential.

Succession strategies

- Advance planning: 67% of those interviewed said they had begun planning for succession several years in advance. One owner said: “We started talking about succession long before I thought

about retiring. That has given us time to prepare.”

- **Mentoring and training:** 75% of the owners interviewed mentioned that they implemented mentoring programs to prepare the successor. One entrepreneur shared: “I have been training my son in every aspect of the business. I want to make sure he is fully prepared to take over.”

According to the literature, succession planning in family businesses has been recognized as an indispensable strategic process to ensure a smooth and successful transition, so the results of the research are consistent with what is stated in the literature.

Challenges in the Succession Process

- **Resistance to change:** Fifty percent of the owners interviewed mentioned that they faced resistance from both employees and family members during the succession process. One owner said: “Some employees were not sure if my son could run the business. That created tensions that we had to handle carefully.”
- **Lack of resources:** Forty-two percent of the owners interviewed indicated that the lack of financial resources to implement a formal succession plan was a significant challenge. One entrepreneur commented: “We would like to have a more structured plan, but the associated costs are a barrier.”

According to some authors, the articulation of a formal transition plan with active family participation helps reduce resistance to change and strengthens the institutional legacy. Strategies such as successor training, emotional support, and gradual involvement are considered best practices for facilitating a smooth transition. In this regard, the results do not entirely coincide with what the authors mention, as there are problems with resistance to change.

Conclusions and Proposals

The results of interviews with 10 owners of family businesses engaged in personnel transportation offer valuable insight into the critical aspects that influence the succession process in family businesses and the characteristics valued in successors.

Leadership skills and commitment to family values are important, as are previous work experience and appropriate education, which owners consider essential to ensuring a successful transition. This means that the success of succession depends not only on technical training but also on alignment with the company’s mission.

Advance planning and the implementation of successor preparation programs are strategies that most of the interviewees have carried out and found to be effective. These types of strategies, put into practice by owners, serve to prepare the successor to assume the responsibilities of the business and create a healthy environment of trust and continuity. However, there are significant challenges, such as resistance to change and lack of financial resources, which hinder succession planning.

Proposed strategies for successful succession:

- Create a formal succession plan: plan succession ahead of time, considering all aspects of the process that will allow the successor to adapt appropriately.
- Develop programs to prepare the successor: Implement a training and supervision program so that the successor acquires practical experience and skills.
- Open communication with the team: Foster constant dialogue between family members, employees, and the successor with the aim of reducing resistance to change and encouraging acceptance.
- Examine sources of financing: Seek financial support from government and private institutions that offer specific advice or subsidies for succession planning in family businesses.
- Encourage family participation in the succession process: Include the family in the preparation of the successor to strengthen their commitment to the continuity of the business.

Combining some of these strategies can help minimize conflict and ensure the continuity of the family legacy in small family businesses dedicated to personnel transportation, thus ensuring their long-term sustainability. For future research, we plan to conduct this interview with a larger number of family businesses or in other locations to explore the extent and

variation of the issues identified in order to broaden the scope of the research.

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