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# Influence of Succession Planning on Knowledge Transfer

Robinson Ejakpomewhe  
*Walden University*

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# Walden University

College of Management and Technology

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Robinson Ejakpomewhe

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Walden University  
2017

Abstract

Influence of Succession Planning on Knowledge Transfer

by

Robinson Ejakpomewhe

MA, Delta State University Abraka, 2008

BSc, Imo State University, 2002

Dissertation Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Philosophy

Management

Walden University

November 2017

## Abstract

The problem was the lack of effective succession planning strategies to facilitate the transfer of technical expertise from retiring employees to younger employees. A rebound of oil exploration activities in Nigeria would adversely affect the drilling sector due to lack of preparation and succession planning to meet the demand for technical expertise. The purpose of this case study was to explore how a succession planning program contributes to knowledge transfer and development of expertise for business continuity and prevents loss of knowledge in the oil-drilling sector in Nigeria. Twenty-four participants from one oil-drilling contractor in Nigeria participated in the study. The conceptual framework was guided by knowledge creation theory, succession planning concepts, and transformational leadership theory. Data collection included semistructured face-to-face interviews supplemented with document review. Data analysis involved a traditional text method where data coder place each piece of data into various categories by hand. This study revealed 4 themes: individual development program, mentoring, on-the-job training, and 360-degree communication. Findings may affect oil-drilling practices by contributing to enhanced succession planning and knowledge transfer initiatives. The implication for positive social change may include the development of individuals for leadership roles and could add to the organization talent bench, and reduce knowledge gaps while ensuring business continuity.

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## Dedication

I dedicate this study to my children and my lovely wife, Mrs. Ejakpomewhe Victoria, who sacrificed her time for me; she took on the extra burden of overall care for the children to allow me time to attend to my Ph.D. program.

## Acknowledgments

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I would like to thank my colleagues in the office who continually provided the necessary motivation and encouragement to move on, particularly when I struggled to balance my work life and education. Finally, I would like to thank the operations director and the human resource manager of the drilling contractor for the privilege to use the company's facility.

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## Chapter 1: Introduction to the Study

The current drop in activities in the oil exploration sector akin to the notable downturn of the 1980s has necessitated the release of individuals with valuable skill sets in the short term who become scarce in the long term (Babey, Hagel, Montilla, Robins, & Harris, 2016). Babey et al. (2016) further pointed out that many in-service skilled workers from the 1980s era, who would be able to pass on their valuable skill sets are leaving the industry at an alarming rate. In a rebound of oil exploration activities, inadequate preparation and downplaying of succession planning would badly hit the industry and the future success of organizations. I conducted a qualitative case study to explore the potential influence of succession planning on knowledge transfer in the oil-drilling sector in Nigeria. Chapter 1 includes the background of the problem, problem statement, purpose of the study, research question, conceptual framework, nature of the study, definition of terms, assumptions, limitations, delimitations, significance of the study, and a summary.

The study was significant because the findings revealed the consequences that could arise if management fails to address the challenges created by the retiring and aging workforce leaving with their wealth of knowledge. I drew from past literature to elaborate strategies that support succession planning and knowledge transfer. The concluding part of this study provides suggestions on how to overcome the challenges associated with succession planning and knowledge transfer.

## **Background of the Study**

An increasing number of employees in the oil-drilling sector are becoming eligible for retirement in the drilling industry. In the oil-drilling industry, engineers, geologists, skilled laborers, and experienced executives are difficult roles to fill because the demand is high and there are fewer individuals with experience in these areas (Babey et al., 2016). Amato (2013) noted that slightly more than half of multinational firms do not have a signed, documented succession plan in place, and that a few companies recently started implementing a succession plan. Alvani, Souteh, Jandaghi, and Inaloo (2016) asserted that succession planning enables an organization to identify its knowledge gaps and to foster and train its employees so they are able to express their desires about career development in a safe, active, and comfortable environment. Effective succession planning helps to identify positions that are critical to organization success and enhances the strategic effort to prepare individuals to take up new roles. Supporting the influence of succession planning on knowledge transfer, Alvani et al. stated that the main aim of a comprehensive succession plan should be to transfer the knowledge possessed by key individuals before they leave the organization due to retirement or voluntary exit.

The challenges arising from retirements call for a concerted effort to understand how to increase knowledge sharing and knowledge transfer in the construction sector (Hau, Kim, Lee, & Kim, 2013). Leaders have recognized the management of knowledge in technological organizations as crucial for the enhancement of knowledge sharing and creating innovation (Nonaka, Kodama, Hirose, & Kohlbacher, 2014; Xu & Payne, 2014).

Pollack (2012) argued that leaders struggle with harnessing and transferring technical knowledge of aging and retiring employees to the less experienced generation, which could result in a technical skill gap. Forcada, Fuertes, Gangolells, Casals, and Macarulla (2013) added that in a highly technical industry like the drilling sector, lack of knowledge transfer may result in loss of knowledge, reduced productivity, and decreased client satisfaction. The effect of productivity loss induced by a lack of knowledge may lead to lost customers and reduced organizational success (Forcada et al., 2013). The viewpoints presented by various researchers justify the importance of my study to explore what succession planning strategies leaders need in oil-drilling companies to promote knowledge transfer.

There were no traceable research studies that addressed the influence of succession planning on technical skill transfer in the oil-drilling sector in Nigeria. A search of Walden University Library, ProQuest, and Google Scholar returned zero results related to my research topic. This study was critical to oil-drilling industry growth in Nigeria because the retirement of aging workers without an adequate plan to enhance succession planning and the transfer of knowledge to younger generations could create a significant knowledge gap.

### **Problem Statement**

The projected number of aging workers exiting industry between 2011 and 2029 will create a labor scarcity that will affect the oil and gas industry (Babey et al., 2016). In Nigeria, the business environment has become competitive, and organizations in the oil and gas industry have been confronted with the problem of replacing aging employees



who are due for retirement (Osuji, 2013). The general problem was the potential challenge that drilling companies would face primarily from two issues: deficient supply of people with the necessary skills and the aging demographics with the high rate of retirees (Alkhalaf, Zaballero, & Alzahmi, 2015). The challenges that follow the aging workforce's retirement result from the length of time required to train new and recently hired employees who may not be adequately skilled and experienced to fill the vacant positions. The specific problem was the lack of effective succession planning strategies to facilitate the transfer of technical expertise from retiring employees to younger employees. Adopting effective succession planning strategies that integrate knowledge sharing may help improve performance and maintain competitive advantage (Coulter & Faulkner, 2014; Hall-Ellis, 2015; Joe, Yoong, & Patel, 2013).

### **Purpose of the Study**

The purpose of this qualitative case study was to explore how a succession planning program contributes to knowledge transfer and development of expertise for business continuity and prevents loss of knowledge in the oil-drilling sector. This study included face-to-face semistructured interviews and review of company documents and physical artifacts within an oil-drilling company. The unit of analysis was drawn from one oil-drilling contractor in the oil and gas drilling business in Nigeria. The results of this study could assist leaders in the oil-drilling company to identify enduring succession planning strategies that would positively influence knowledge transfer. To efficiently manage the potential danger of aging or retiring workers exiting without sharing their knowledge, managers of organizations must adopt a strategic approach to understand how

to increase knowledge sharing (Hau et al., 2013). These strategies may include mechanisms that enable knowledge transfer among workers to safeguard valuable organizational knowledge. For example, identifying the criticality of the knowledge that is at risk when employees leave can help the organization to project retirement dates and guide management to develop detailed succession plans for those employees who are particularly valuable to the company (De Long & Davenport, 2003).

### **Research Questions**

Qualitative research questions provide a rich understanding of business problems (Yin, 2014). The following research question guided the study: What succession planning strategies do leaders use to facilitate the knowledge transfer of aging workforce? The following interview questions were used to collect data:

1. What is your perception of succession planning practice?
2. What is your perspective on succession planning practice as a means to promote knowledge transfer?
3. What benefit do you think succession planning brings to the company?
4. How have you managed the impact of an aging workforce leaving the company with their wealth of knowledge?
5. What strategies do you have in place to replace aging workers when they retire or exit the organization?
6. What method(s) do you use to transfer knowledge from retiring workers to younger employees?

7. What are the challenges you face in using these methods to promote the transfer of knowledge from retiring employees to younger personnel?
8. How have you managed such challenges or obstacles?
9. How do senior personnel share tacit knowledge in your company?
10. What is your personal experience in managing tacit knowledge with your team?
11. Tell me about other methods you have adopted to ensure effective knowledge transfer.

The interview questions arising from the research question provided vital information on how leaders have used succession planning to influence knowledge sharing in the oil-drilling sector in Nigeria.

### **Conceptual Framework**

I used three theories to construct the framework for the study. They include (a) succession planning theory, (b) knowledge creation theory (Nonaka & Takeuchi, 1995), and (c) transformational leadership theory (Burns, 1978). Each theory espouses assumptions that provide a solid basis for understanding leaders' perspectives on what succession planning strategies they use to influence knowledge transfer and address the potential barriers faced by organizations.

The field of succession planning and management lacks one unified theoretical and methodological approach (Giambatista, Rowe, & Riaz, 2005). According to Giambatista et al. (2005), there are differing viewpoints on the relationships of various succession factors. Different authors have advanced some theoretical concepts advocating

how succession planning and management efforts can be established, understood, and evaluated in organizations (Adams, Hester, Bradley, Meyers, & Keating, 2014). Rothwell (2011) argued that effective succession planning strategies enhance talent from within and ensure leadership continuity. Rothwell pointed out that it is crucial for organizations to establish formalized succession planning as part of organizational strategic and management tools. Rothwell suggested a

seven-point enhancement model which includes the following: (a) visible commitment that promotes succession planning management, (b) implementing assessment criteria of present work and human resource requirements, (c) using an appraising system to evaluate performance, (d) assessing future business changes and human resource requirements, (e) assessing future individual potential, (f) closing the development gap, and (g) evaluating the subsequent succession development program. (p. 79)

Buttressing the concepts of succession planning, Alvani et al. (2016) stated that a succession planning management system, which relies on organizational strength as a smart strategy for talent management, ensures inside organization talent retention. They further argued that such an approach supports the existence of the necessary skills for responding to quick business environmental changes and guarantees business continuity. Alvani et al. asserted that succession planning enables an organization to identify its knowledge gaps and to foster and train its employees so they are able to express their desires about career development in a safe, active and comfortable environment. Alvani

et al. noted that a good succession planning management system could benefit from the following elements:

- strategic statement,
- creating a knowledge database,
- ensuring a structured communication channel top to bottom,
- positive attitude in identifying a potential successor,
- supportive managers,
- reward system, and
- inclusive feedback system.

Furthermore, Alvani et al. (2016) stated that the main aim of a comprehensive succession plan should be to transfer the knowledge possessed by key organizational individuals before they leave the organization. Alvani et al. cited Hilton and Jackson, who reaffirmed that succession planning provides an organization with leaders who possess strategies of knowledge creation and transfer from retiring or aging workers.

Although knowledge management researchers have yet to agree on a framework that can be systematically suitable, Nonaka and Takeuchi's (1995) socialization, externalization, combination, and internalization (SECI) model was used to ground my research. The SECI model is concerned with knowledge creation and involves the fluid transfer of tacit and explicit knowledge among individual, group, and organization levels, resulting in knowledge creation. SECI represents the knowledge transfer activities of socialization (tacit to tacit knowledge transfer), externalization (tacit to explicit knowledge transfer), combination (explicit to explicit knowledge transfer), and

internalization (explicit to tacit knowledge transfer). The influence leaders have on trainees during knowledge exchange while grooming them for leadership is further addressed using transformational leadership theory.

The third theory used to guide the study was transformational leadership theory. Transformational leadership theory presupposes that followers commit wholly to the role of relationship within the expectations of their leaders, in this case, the leaders' role in the succession planning process (Burns, 1978). According to Burns (1978), transformational leadership demonstrates a relationship, mutual stimulation, and elevation that promote the growth of followers to become leaders and influence leaders to be moral agents. The study focused on the effect of transformational leadership on employees' technical enhancement through succession planning programs. Research has shown that visible leadership commitment plays a positive mediating role between transformational leadership and employee competence and job performance (Tsai, Wang, & Yuan, 2015). Qu, Janssen, and Shi (2015) argued that transformational leaders enable followers to focus on goal attainment, accepted ethical norms, and the promotion of personal sacrifice toward goal achievement.

In a related study, Tse, Huange, and Lam (2013) maintained that transformational leaders could promote enduring social exchange between the organization and the employees by breaking down the barriers between self-interest and organizational interest, and ultimately reducing turnover intention and behavior. Grover and Furnham (2016) argued that a transformational leader has a positive influence on trainees' engagement, job satisfaction, and personal commitment to an organizational goal. The

implication of the transformational theory is the impact leaders have on trainees during knowledge exchange while grooming them for leadership positions.

My study supplemented current knowledge by gathering data from management of drilling contractors regarding how management views succession planning through the lenses of mentoring and coaching as a viable means to transfer knowledge. I captured and described strategic initiatives used by organization leaders to promote knowledge transfer from the perspective of succession planning. I also offered suggestions based on the findings on how to make these strategies efficient and enduring in the oil-drilling sector in Nigeria.

### **Nature of the Study**

I conducted a qualitative case study to explore strategies needed to achieve effective succession planning and technical knowledge transfer from retiring employees within the oil-drilling industry in Nigeria. My research focused on how oil-drilling leaders use succession planning strategies to influence knowledge transfer within an aging workforce. In preparing for the study, I considered three research methods: qualitative, mixed methods, and quantitative. A quantitative study was inappropriate because this method is used to investigate relationships, cause-effect phenomena, and conditions (Bloomberg & Volpe, 2012).

A mixed-methods approach was not suitable because it requires quantitative and qualitative data to draw conclusions based on the combined strengths of both sets of data (Creswell, 2014). Mixed methods would have been appropriate if my study had required both qualitative and quantitative approaches to examine the relationship between

variables. I chose a qualitative approach to gain a deeper understanding of a workplace phenomenon by gathering data from the participants' point of view. A qualitative study afforded me the advantage of gathering leaders' perspectives and detailed responses to explain the influence of succession planning strategies on knowledge transfer.

In choosing a study design, I considered grounded theory, narrative, ethnography, phenomenology, and case study. Researchers choose grounded theory when the purpose is to develop a new theory about a phenomenon (Bloor & Burgess, 2012). According to Bloor and Burgess (2012), researchers use grounded theory to ground a social practice in a setting. Because my research focused on a single unit, grounded theory was not appropriate for the study.

The narrative design focuses on recounting stories to espouse personal experiences to elaborate understanding of life experiences. Narrative research requires the investigator to present an overview of a person or group through the eyes of the researcher (Jørgensen, Dahl, Pedersen, & Lomborg, 2013). I did not adopt a narrative design because interviews and artifacts guided my study.

Similarly, ethnography would not have provided the required data for my study because the ethnographer tries to understand the culture of people (Spradley, 2016). The ethnographer strives to identify a given social pattern of the population. Spradley (2016) further argued that ethnography includes techniques, ethnographic theories, and descriptions of human cultures from the perspective of those who have learned them. I did not use an ethnographic design because my study did not address the culture in the drilling sector.



I also considered a phenomenological design because it had the advantage of personal interaction with the participants to understand their experiences concerning succession planning at their respective companies. Van Manen (2016) argued that phenomenology involves questioning the meaning of life and the nature of responsibility for personal actions and decisions. Van Manen emphasized that phenomenology is the way to access the world as participants experience it prereflectively. Prereflective refers to the ordinary day-to-day experience. Because I was not seeking information on lived experiences, the phenomenological design was not appropriate. Consequently, I adopted a case study design because I investigated how succession planning strategies help to foster knowledge transfer. The single case study involves in-depth study of a single unit for understanding a larger class of similar units (Baskarada, 2014). The interviews were limited to a single unit and a review of documents and artifacts that embody succession planning strategies and knowledge transfer.

### **Definition of Terms**

This section includes terms I used that may not be familiar to individuals outside of human resources and the oil-drilling sector:

*Coaching*: Jakubik, Eliades, and Weese (2016) described a coach as a content expert capable of teaching skill development, and coaching as a task-oriented, short-term, performance-driven process. Muslim, Haron, Hashim, and Hassan (2015) explained coaching as “a short-term interventions aimed at developing specific technical skill or a more extensive process involving regular meeting between the coach and the trainee” (p.3).

*Human capital:* Goldin (2016) defined human capital as the skill the labor force possesses and is regarded as a source of asset. Human capital encompasses the notion that there are investments in people (e.g., education, training, health) and that these investment increases an individual's productivity.

*Job shadowing:* When an employee learns a particular task or profession under the supervision of an experienced or senior worker. The protégé gets the opportunity to take the seat while the more experienced person supervises the trainee (Lawal, Thompson & Thompson, 2016).

*Knowledge management systems:* Processes adopted to promote information creation, sharing, and preservation (von Krogh, Nonaka, & Rechsteiner, 2012). Meihami and Meihami (2014) defined knowledge management as a practice of discovering, capturing, and applying collective learning in an organization to help the organization gain competitive advantage.

*Knowledge transfer:* Trautman (2014) defined knowledge transfer as a planned movement of the right skills and information at the right time to keep a workforce productive, competitive, and able to execute business strategy.

*Mentoring:* A goal-oriented business relations strategy that establishes mutual benefits to the mentor, mentee, and organization. Tarus (2014) defined mentoring as a learning partnership between employees with the purpose of sharing technical and institutional knowledge; it provides an opportunity to gain insight into the particular occupation, profession, organization, and other business endeavors.

*National Content Development Management Board (NCDMC):* A body in Nigeria that is statutorily empowered to enforce the engagement and training of Nigerians to occupy a technical and supervisory position in multinational companies. Part of the mandate extends to all services within the oil and gas sector in Nigeria.

*Organizational behavior:* The study of human behavior in the work environment, of the interface between human behavior and the organization, and of the organization itself (Griffin & Moorhead, 2014).

*Organizational memory:* A means for storing existing knowledge within the organization; a source of information needed by the organization staff (Esmaeli & Saeidabadi, 2016:20).

*Organizational performance:* Oyemomi, Liu, Neaga, and Alkhuraiji (2016) defined organizational performance as a measurement of productivity by considering the knowledge contributions of an organization's employees.

*Succession planning:* A process of identifying and developing internal people who have the potential to fill key business leadership positions in the company (Soans, 2015). Rothwell (2011) provided another definition of succession planning as the strategic effort by an organization to ensure leadership continuity in key positions. Akinyele, Ogbari, Akinyele, and Dibia (2015) also defined succession planning as a leadership pipeline that increases leadership effectiveness over time.

*Talent:* Foster (2015) defined talent as “knowledge, skills or ability that an individual or group perceives as a recognizable capability that has an intrinsic value” (p. 15).

*Talent management:* Activities and processes that enhance the identification of key areas in developing and training identified individuals to be skilled and competent to fill vacant positions to ensure the organization's sustainable competitive advantage (Golik & Blanco, 2014). Chitsaz-Isfahani and Boustani (2014) defined talent management as a systematic and dynamic process of discovering, developing, and sustaining skills.

*Transformational leadership:* Transformational leadership is a “process by which an organization's leaders and members have a mutual influence on one another” (Tsai, et al., 2015, p. 58).

*Trust:* Chitsaz-Isfahani and Boustani (2014) defined trust as an individual's belief or a common belief among a group of people that both parties will keep commitments, negotiate honestly, and will not take undue advantage.

*Workforce planning:* A continual process adopted by management to align organizational needs with those of its workforce to meet organizational goals and service requirements. Workforce planning derives from its contribution to organizational performance. Management used workforce planning to align the workforce with the business plan and address current and future workforce issues.

### **Assumptions, Delimitations, and Limitations**

#### **Assumptions**

Kirkwood and Price (2013), noted that researchers use assumptions to illuminate beliefs not yet verified as true. The first assumption was that participants would be able to relate their experiences regarding the researched phenomenon and provide realistic

perspectives. Second, I assumed that top management and human resources practitioners would provide accurate information regarding succession planning practices and strategies. The third assumption was that failure to implement succession planning would affect knowledge transfer from an aging workforce to younger employees.

### **Delimitations**

Qualitative research allows the researcher to report lived experiences from individuals or groups who have been part of the phenomenon. Adopting a purposeful sample size was a delimitation because the data reflected the experiences of the interviewed group, and generalization across drilling industries or geographic locations was not possible (Yin, 2014). The decision to limit the study to drilling contractors was an attempt to isolate results of succession planning and technical knowledge transfer experiences as observed in the oil-drilling sector from other areas of the economy.

### **Limitations**

The drawback of this study came from the small sample of 24 participants, (Yin, 2014). Merat and Bo (2013) stated that research focused on a small number of cases presents a limitation that does not allow the researchers to make a statistical generalization. Also, time constraints and operational restrictions presented a challenge to collect data from personnel who affected the outcome of the study. Another limitation came from management's unwillingness to divulge critical information concerning succession planning and knowledge transfer strategies. Such incomplete information weakened generalization of the findings across drilling companies in Nigeria.

The weakness of the research design (case study) is primarily from the scope and sample size, which was limited to one unit of a drilling entity. Similarly, with the study focused on a single small unit, individual perspectives shared cannot represent the entire oil-drilling sector. The study included suggestions that future researchers examine the cause and effect of succession planning on knowledge transfer, employee retention, behavior, and performance in the oil-drilling industry.

### **Significance of the Study**

My study had the potential to fill a gap in knowledge by improving understanding of the effect succession planning could have on transferring technical skills. This findings could be used in the development of Nigerian employees through succession planning to contribute to the social good of the communities in which the drilling contractors operate. The proposed strategies from my study could enhance management selection of best practices that would promote enduring knowledge transfer strategies in the oil-drilling sector.

### **Significance to Business Practice**

The contribution of my study to business practice is that it could help human resource management practitioners and business leaders refocus on where to place their efforts to improve succession planning (Hoffman & Womack, 2011). Hoffman and Womack (2011) noted that efficient management of some of the numerous competing priorities, including overengineered programs, processes, and practices, would enhance the effectiveness of succession planning efforts. The study may help streamline areas to improve knowledge transfer in tandem with succession planning. Pollack (2012) argued

that leaders struggle with harnessing and transferring technical knowledge of aging workers to the less-experienced employees, which could present a knowledge gap when experienced personnel exit the organization.

Organizations may benefit from a significant reduction in the associated cost of recruitment exercises that become necessary when the retirement or voluntary departure of an employee creates an unplanned vacuum and knowledge loss. Improving succession planning through mentoring and coaching has the advantage of enhancing career and individual readiness for the next job position, strengthening the talent pool, and giving the organization a competitive edge over its competitors. Similarly, Agwu and Luke (2015) noted that coaching and mentoring increase employees' motivation and commitment to the organization, promote better performance, and reduce turnover tendencies.

### **Significance to Theory**

The potential contribution of my study to the advancement of knowledge in the discipline is that the qualitative approach adopted would provide a solid basis for initial data collection that would inform further research on the relationship between succession planning and knowledge transfer. According to Mayan (2016), qualitative researchers work inductively from individual cases and a preexisting framework or a particular theory. Mayan further noted that qualitative researchers aim not to limit a phenomenon but strive to simplify the phenomenon so that a detailed description of the phenomenon, in all its contradictions, ambiguity, and depth, are presented. Such detailed description would lend further support to the theories adopted in my study.

### **Significance to Social Change**

The implications for social change may include the development of Nigerian employees through succession planning to contribute to the social good of the communities in which the drilling contractors operate. Retiring employees may leave the employment of these companies with explicit and tacit knowledge gained during their years of experience, thereby creating knowledge gaps and business disruption (Aboagye-Nimo, Raiden, King, & Tietze, 2015). According to Alvani et al. (2016), the main aim of a comprehensive succession plan is to transfer the knowledge possessed by key organizational individuals before they leave the organization. The opportunity for potential social change included the strategies that can enhance the effectiveness of succession planning activities and knowledge transfer within the organization. The findings and recommendations from my study may assist managers in designing effective strategies to retain and transfer knowledge from the aging workforce and promote succession planning models. The significance to the employees of the drilling companies is that improving succession planning through mentoring and coaching has the advantage of enhancing knowledge transfer and individual readiness for the next job position.

### **Summary and Transition**

There are several studies on succession planning, but the influence of succession planning on technical knowledge transfer has not been adequately researched in the oil and gas sector in Nigeria. Babey et al. (2016) noted that in-service skilled workers from the 1980s are leaving the industry at an alarming rate. A rebound in oil exploration activities could trigger talent scarcity due to downplaying of succession planning as a



panacea to the future success of the organization. Rothwell (2011) affirmed that most businesses had not given sufficient attention and commitment to developing technical skills by adopting a proper succession planning strategy. The lack of engagement by management could lead to significant knowledge loss and reduced productivity.

The purpose of this case study was to explore how a succession planning program contributes to knowledge transfer and development of expertise for business continuity and prevents loss of knowledge in the oil-drilling sector in Nigeria. Additionally, I attempted to broaden the knowledge base and understanding of succession planning and knowledge transfer strategies in the drilling area of oil and gas in Nigeria. Extant literature was used to ground the study and inform my suggestions in analyzing the findings. Part of this study included adopting sound succession planning practices that consist of mentoring and coaching to improve knowledge transfer and acquisition of technical skills.

Chapter 2 includes supporting evidence for the research problem and research question. I address ideas associated with succession planning and knowledge transfer. I also review suggestions and improvement areas captured in recent studies on succession planning and knowledge transfer. The chapter concludes with suggestions from the literature on how to improve succession planning practices and how to enhance knowledge transfer in the oil-drilling sector in Nigeria.

## Chapter 2: Literature Review

The challenges of the oil-drilling workforce reaching retirement age and exiting their positions are evident in the drilling industry in Nigeria. The oil and gas industry faces an impending and unprecedented labor gap that requires strategic efforts by management to address both short-term and long-term problems (Babey et al., 2016). Babey et al. (2016) further noted that the estimated number of aging employees exiting the industry between 2011 and 2029 would create a labor scarcity that would impact the oil and gas sector. The general problem was the potential challenge that drilling companies would face primarily from two issues: inadequate supply of people with the necessary skills and the aging demographics with the high rate of retirees (Alkhalaf et al., 2015). The specific problem was the lack of effective succession planning strategies that support the transfer of technical expertise from aging workers to younger employees.

The purpose of this case study was to explore how a succession-planning program contributes to knowledge transfer and developing expertise for business continuity and prevents loss of knowledge in the oil-drilling sector. Alvani et al. (2016) stated that the main aim of a comprehensive succession plan should be to transfer the knowledge possessed by key organizational individuals before they leave the organization. I gathered data from a single unit supported by additional information through document review and participant interviews. Data were analyzed using traditional text analysis. Traditional text analysis is a process where data coders place each piece of data into various categories by hand. A constant comparative method was used to create common themes in each category during the traditional coding process (Lincoln & Guba, 1985).

### Literature Search Strategy

The articles and literature that guided the study came from Walden's online library using ABI/Inform Complete, ProQuest, the Business Source Complete, EBSCO host databases, and ScienceDirect. I also used the Google Scholar search engine. The procedures, statements, and studies obtained from the drilling contractors as well as publications from the Society of Human Resources Management supplemented the search results. The search key terms used were *succession planning*, *knowledge transfer*, *knowledge management*, *coaching*, *mentoring*, and *succession planning in oil and gas*.

Articles, books, and dissertations covering succession planning, knowledge management, and knowledge transfer contributed to the body of knowledge for the study. Table 1 contains a list of peer-reviewed journals, dissertations, books, and non-peer-reviewed journals referenced in the literature reviewed. The total number of references for this study was 210, of which 179 had publication dates from 2013 to 2017 representing 85.1%.

Table 1

#### *Literature Review Source Content*

Reference type	Total	<5 years	> 5 years	% < 5 years old
Peer-reviewed journals	158	140	18	88.5%
Dissertations	1	1	0	100%
Books	16	10	6	63%
Non-peer-reviewed journals	35	28	7	80%
Total	210	179	31	85.1%

The review of the literature showed consistency and alignment of various authors on the practices of succession planning, but most of the studies focused on executive succession planning and not developing technical skills across employment levels. Also, a review of scholarly articles indicated a consensus among scholars regarding the influence of succession planning on knowledge transfer from retiring workers to young employees. Several authors corroborated the effect of aging workforce retirement on organizational knowledge retention (Barnett & Davis, 2010; Hau et al., 2013; Reeve, 2010).

Although management of the drilling sectors claimed to have given reasonable attention to developing technical talents, there is a lack of tangible evidence of formalized policy that supports the succession program. Burmeister and Deller (2016) affirmed that research in knowledge transfers in organizations is scarce, the nature and antecedents of knowledge retention processes are poorly understood, and the required conceptual framework is lacking. Buttressing Burmeister and Deller's statement, Rothwell (2011) argued that most organizations have not given adequate attention and commitment to developing technical skills by adopting succession planning from the outset. Even though knowledge transfer is an influential factor in the succession planning process, it is not clear how existing knowledge might be transferred or managed in the drilling industry. Additionally, Kim, William, Rothwell and Penaloza (2014) noted that one of the noticeable supply-demand deficits in the workplace is knowledge workers such as scientists, engineers, and information technology professionals. Kim et al. noted that the shortage of skilled workers will increase as the global workforce ages and fewer younger

workers are available to meet the demand. Kim et al. argued that the hallmark of a successful enterprise is the degree to which it generates, develops, maintains, grows, and protects its knowledge base and develops core skills and competencies. Madegwa and Muathe (2016) noted that talent development is an essential part of continuous care for employees. It provides people with the ability to be creative, to experience, to gain knowledge, and to have the will to work at a motivational level.

Similarly, Oyemomi et al. (2016) argued that it is unclear how knowledge sharing or transfer, business process, and organizational operations factors underpin the continuous improvement of business performance for sustainable competitive advantage. Most of the industry management takes the easy option of replacement instead of implementing a well-structured succession planning that would enhance the development of technical talent and close the knowledge gap (Rothwell, 2011). The potential gap in succession planning and knowledge transfer underscores the need to bridge the technical talent gap between expatriates and nationals and save the company the expensive cost of recruitment and training young employees.

### **Conceptual Framework**

To construct the framework for this study, I used three theories. Qualitative researchers strive to interpret or make sense of the meaning that people attach to their experiences underlying a particular phenomenon (Mayan, 2016). Mayan (2016) further noted that qualitative researchers work inductively from individual cases and a preexisting framework or theory. The current study drew from (a) succession planning theory, (b) knowledge creation theory (Nonaka & Takeuchi, 1995), and transformational

leadership theory (Burns, 1978). Each theory includes assumptions that provide a solid basis for understanding the influence succession planning can have on knowledge transfer and the potential barriers faced by organizations.

The field of succession planning and management lacks one unified theoretical and methodological approach (Giambatista et al., 2005). Giambatista et al. (2005) claimed there are differing viewpoints on the relationships between various succession factors. Different authors have advanced theoretical concepts advocating how succession planning and management efforts can be established, understood, and evaluated in the organizations. Rothwell (2011) argued that effective succession planning strategies enhance talent from within and ensure leadership continuity. Rothwell pointed out that it is crucial for organizations to establish formalized succession planning as part of organizational strategic and management tools. Rothwell suggested a

seven-point enhancement model which includes the following: (a) visible commitment that promotes succession planning management, (b) implementing assessment criteria of present work and human resource requirements, (c) using an appraising system to evaluate performance, (d) assessing future business changes and human resource requirements, (e) assessing future individual potential, (f) closing the development gap, and (g) evaluating the subsequent succession development program. (p. 79)

Alvani et al. (2016) examined succession planning based on the evolutionary approach toward growth process and classified succession theories under three pillars of replacement planning, succession planning, and succession planning management. For

my study, succession planning was the focus. According to Alvani et al., succession planning refers to a systematic process that emphasizes the requirements of managerial and key posts through a performance appraisal process, the percentage of quality to quantity of top- and middle-level managers. This stage of evolution of succession has received significant response to shortcomings observed in simple replacement charts, and with items such as “studying job requirements, dynamics of organizational changing needs, candidates information, information about performance, individual tasks and decisions of candidates training and education attracted attention” (Alvani et al., 2016, p. 202).

Buttressing the concepts of succession planning, Alvani et al. (2016) stated that succession planning management system, which relies on organizational strength as a smart strategy for talent management, ensures inside organization talent retention. They further argued that such an approach supports the existence of the necessary and required skills for responding to quick business environmental changes and guarantees business continuity. Alvani et al. asserted that succession planning enables an organization to identify its knowledge gaps and to foster and train its employees so they are able to express their desires about career development in a safe, active and comfortable environment. Alvani et al. noted that a good succession planning management system could benefit from the following elements:

- strategic statement,
- creating a knowledge database,
- ensuring a structured communication channel top to bottom,

- positive attitude in identifying a potential successor,
- supportive managers,
- reward system, and
- inclusive feedback system.

Furthermore, Alvani et al. (2016) stated that the main aim of a comprehensive succession plan is to transfer the knowledge possessed by key organizational individuals before they leave the organization. Alvani et al. reiterated that succession planning provides an organization with leaders who possess strategies of knowledge creation transferred from retiring workers to younger employees. Ratten and Ferreira (2016) added that knowledge creation is important in corporate entrepreneurship as it can include the creative recombination of information. They asserted that organizations use knowledge creation to discover ways of developing new knowledge to benefit future knowledge management strategies. Akinyele et al. (2015) affirmed that through a succession planning process, superior employees stay longer because they appreciate the self-development and investment in them.

Researchers have argued that intergenerational knowledge transfer is critical to organization survival to prevent corporate amnesia (Harvey, 2012). Existing literature has acknowledged that knowledge retention is dependent on the successful transfer of knowledge between individuals: that is, the knowledge senders and the knowledge recipients (Ropes, 2013). Knowledge retention researchers have argued that certain factors, for example, job satisfaction and the social relationship could motivate knowledge-sharing behavior change as employees age in service (Ropes, 2014).



Dutter and Banerjee (2016) examined Nonaka knowledge model and affirmed that knowledge consists of tacit along with explicit elements. Dutter and Banerjee reaffirmed that there are similarities between Nonaka's and Boisot's knowledge management models. First, Boisot's codified and uncoded knowledge has some degrees of similarity with Nonaka's category of tacit as well as explicit knowledge. Second, both the models presume that there is spread or diffusion of knowledge across the organizations as indicated via horizontal dimension of the model. Ultimately, in correspondence with Boisot's model, Nonaka's tacit in addition to explicit knowledge are two separate categories of knowledge. Within the two aspects, tacit knowledge is defined as non-verbalized, intuitive and unspoken, and explicit knowledge articulated through writing, drawings, computer programming along with others. Nonaka's model believes explicit knowledge is capable of being transferred into tacit knowledge in others by socialization as well as tacit knowledge can be articulated into explicit knowledge by formalizing a body of knowledge or from side to side externalization process. Similarly, Nonaka's model believes that explicit knowledge can be transferred hooked on tacit knowledge within others by translating theory into practice also known as a process of internalization, and explicit knowledge converted to precise knowledge in others by combining various existing approaches—known as combination process.

The third theory used to ground the current study was the transformational theory. Burns' (1978) transformational leadership theory espoused the influence leaders can have on succession planning and knowledge sharing. Transformational leadership theory presupposes that followers commit wholly to the role of relationship within the

expectations of their leaders: in this case, the leaders' role in knowledge sharing and the succession planning process (Burns, 1978). My research drew from the influence of transformational leadership on employees' knowledge sharing behavior when they are engaged in a succession-planning program. Tsai et al. (2015) affirmed that transformational leadership has a positive effect on the ability of the members to align with an organizational goal (cited in Burns).

Tse, Huange, and Lam (2013) further argued that transformational leaders could promote enduring social exchange between the organization and the employees by breaking down self-interest barriers to embracing organizational interest; and ultimately reduce turnover intention and behavior. The implication of the transformational theory is the influence leaders have on trainees during knowledge exchange while grooming them for leadership positions (Badara, Johari, & Yean, 2014, 2015).

Research has shown that visible leadership commitments play a positive mediating role between transformational leadership with employee competence and job performance (Tsai, et al. 2015). Supporting the above argument, Qu, Janssen, and Shi (2016) added that transformational leaders create enablement for followers to focus on goal attainment, sound ethical norms, and personal sacrifice towards goal achievement. Qu et al. asserted that achieving individual goals through transformational leaders could leverage knowledge transfer under an efficient succession planning process.

Reunanen and Kaitonen (2017) gave support to the essence of transformation leadership to inspire followers to produce far beyond expectations and become change agents by themselves. Reunanen and Kaitonen (2017) noted that transformational

leadership focuses on improvement in various ways regarding organizations, leaders, followers and adaptive problem-solving. Reunanen and Kaitonen (2017) delineated the transformational leadership approach into four 'I's (idealized influence, idealized inspirations, intellectual stimulation, and individualized consideration) which relate to leaders' actions to influence followers to perform beyond expectations. Idealized influence and inspirations support envisioning a desirable future, setting high standards, and enhancing determination and confidence as an example with which followers can identify. Intellectual stimulation refers to style and tools to help followers to increase their innovativeness and creativeness. Individualized consideration contributes to identifying personal developmental needs of followers, provide appropriate supports, and coaches actions from leaders.

Noruzzy, Dalfard, Azhdari, Nazari-Shirkouhi, and Rezazadeh (2013) echoed Reunanen and Kaitonen (2017) argument and added that transformational leadership inspires an atmosphere of trust resulting in the employee performing beyond expectations. Noruzzy et al. further noted that transformational leadership could play a fundamental role in enabling individuals and organizations to create, exploit, renew, and apply knowledge to develop the necessary competencies required for improvement of organizational learning. Noruzzy et al. noted in their research findings the importance of transformational leadership in improving, and promoting organizational performance through organizational learning, knowledge management, and organizational innovation. Noruzzy et al. affirmed that transformational leadership is critical in forming organizations' potential to generate innovation by nurturing the environment and

decision-making that foster a strong generation and implementation of knowledge.

Finally, Noruzy et al. observed that transformational leadership positively and indirectly influences organizational innovation through organizational learning and knowledge management.

Other theories that have been used to support the influences of knowledge transfer include lifespan development theories (Baltes, 1987), socioemotional selectivity theory (Carstensen, 1991) and the theory of psychosocial development. These principles provide useful lenses to explain evidential changes in individual motivation over one's lifespan. The employee's age in service derives from the lifespan development theory, socioemotional selectivity theory, and the theory of psychosocial development.

Baltes (1987) argued that personal growth is a lifelong process in which there are simultaneous growth and decline during the lifespan. Socioemotional selectivity theory propounded by Carstensen (1991) examined age-induced changes and proposed that subjective perceptions of remaining employment time have an influence on the choice of personal goals. Carstensen, Isaacowitz, and Charles (1999) argued that individuals who perceive their work duration as limited tend to prioritize social values and emotional goals and focus on immediate benefits. Conversely, similar perception by older and retiring workers could result in increased motivation to share knowledge (Deller, Liedtke, & Maxin, 2009) and engage in mentoring behaviors to build emotionally satisfying relationships (Beehr & Bennett, 2015).

## **Literature Review**

The supporting literature that guided this study came from the academic research center and Walden University online library. I supplemented the literature review with documents, procedures, and practices from a drilling company in Nigeria. Additionally, I used other scholarly web pages using search key terms like *succession planning*, *knowledge history or evolution*, *knowledge management*, *knowledge transfer*, *mentoring*, and *coaching* to source relevant articles. The review of the literature revealed consistency and alignment of various authors on the influence of succession planning on technical knowledge transfer when a formal program is in place and implemented.

The literature review covered six areas related to effective succession planning and knowledge transfer. They include (a) evolution of succession planning, (b) general overview of succession planning, (c) history of knowledge and knowledge types, (d) promoting knowledge transfer through mentoring and coaching, (e) generational influence on succession planning, and (f) strategies for effective succession planning. The literature review also had existing literature to elaborate the overarching problem associated with potential challenges that drilling companies could face when the current aging workforce starts to leave the organization due to retirement or medical grounds.

### **Evolution of Succession Planning**

The development of succession planning as presented by early contributors sheds light on varied opinions on the succession planning process. Succession planning started back in ancient times. About 2000 years ago, the Roman armies relied on succession planning to replace officers killed or severely wounded in combat (Druckman, Singer, &

Van Chistoryott, 1997). In the early 20th century, French industrialist and famed writer Fayol stated that certain aspects of management activities are common to all organizations. In 1916, Fayol published his 14 management principles in which he claimed that management has a responsibility to ensure continued stability of tenured personnel. Fayol also argued that management has the responsibility to ensure that job security is assured; otherwise, key positions would be filled by inexperienced young group. Fayol further argued that organizational strength lies within its people, and when people became more skilled and prepared the organization benefits. It is pertinent to point out that many early researchers on succession planning concerned themselves primarily with senior management and chief executive officer succession (Rothwell, 2011). Most of such studies were limited to a particular sector and were in general case studies. The earlier literature written by Whyte in 1949, Dale in 1957, and Gouldner in 1950 are a few examples that readily resonate with the present (Druckman et al., 1997).

Grusky (1963), credited with moving the field of succession planning forward, proposed a rationale for the importance of succession planning; first, that succession process could cause instability and second, that succession planning is inevitable for the organization. Grusky claimed that the succession process through inside talent could lead to increased business performance. The traditional theories of succession planning and performance emerged at this time. These principles termed common sense, vicious circle, and ritual scapegoating originated from an exchange between Grusky (1963) and Gamson and Scotch (1964) in their explanation of managerial baseball succession.

The common sense theory assumed that a wisely chosen successor; the replacement of a known failure, combined with honeymoon effects and the fresh outlook of a newcomer, would lead to improved business performance (Grusky, 1963). Vicious circle theory presupposes that decline precedes succession, which leads to instability, lower morale, hastening decline and more succession. Gamson and Scotch (1963) in a counter reaction to Grusky's argument suggested that while poor performance triggers succession planning, there is no guarantee of post-succession performance improvements. Gamson and Scotch described the succession process as ritual *scapegoating*, motivated partly by the need to placate frustrated shareholders and publicly demonstrate an awareness of the need for a change.

The 1970 era included theory formulation and empirical investigation into the succession planning process with valuable contributions from Liebreson and O'Connor (1972). The focus during this period was to examine the magnitude of the relationship between succession planning and performance. The question asked at this time was, does leadership matter? Further studies on leadership styles by Helmich and Brown (1972) found that the selection of most successors was on the ground of *fit*, the leadership requirement based on the prevailing situation. Similarly, Hall (1976) examined the relationships within *fit* and suggested that a linkage exists between chief executive officers' (CEO) educational background, career paths, and the type of organizations they lead. Hall's argument presupposed that succession was most effective when the needs of the organization matched the background of the CEO. The early period concentrated mainly on the succession of CEOs with no emphasis on lower level succession strategies.

## **General Overview of Succession Planning**

There are different definitions of succession planning. Trepanier and Crenshaw (2013) described succession plan as an essential business strategy that promotes effective leadership transition and continuity while maintaining productivity. Trepanier and Crenshaw emphasized the imperativeness of the executives to respond to the business benefits of an effective succession planning program: identify common barriers and solutions, and implement best practices for a successful strategic succession planning program. For this current study, I defined succession planning as a precise and formal effort by an organization to ensure business and leadership continuity in the core positions. Such efforts include retention and development of intellectual and capital knowledge for the future aimed at encouraging individuals to improve performance (Rothwell, 2011). The practice of succession planning traditionally is a confidential process, which makes it lopsided in most organizations. A traditional approach often results in managers favoring a select group or individuals known personally or only close associates (Rothwell, 2011).

The traditional approach negates merit and equity because of favoritism, and the godfather influence. The attendant perception by people not selected under the traditional method results in resentment and lack of interest and commitment to work with little or no attention paid to knowledge transfer. To avoid internal conflict, Rothwell (2011) suggested that organizations must adopt a strategic approach and begin to prepare leaders for business continuity. Simoneaux and Stroud (2014) examined succession plan from the perspective of organizations strategizing to avoid the consequences of an unavailable



replacement for a key leader. Simoneaux and Stroud recommended that leaders must take onboard succession plan as a key strategic initiative. Similarly, Sabir and Kalyar (2013) asserted that taking policy initiatives that would promote organizational learning through enhanced business practices such as succession planning and knowledge transfer could result in bridging the knowledge gap, increased competitive advantage, higher employee retention, and job satisfaction.

Similarly, Rothwell (2011) noted that the shortage of technically experienced drilling workers and the exit of aging workforce members could present a significant challenge to top management if there is no immediate action to prepare the next generation of leaders. Although several studies have explored the problems of succession planning and talent management in the management arena, management seems to have failed to focus on building an enduring talent pool in the drilling sector at the junior level. The challenges of terrorism, executive hostage taking, and natural disasters, coupled with the lack of preparedness by organizational leaders, are worrisome and call for a strategic approach to enhance implementation of succession planning (Rothwell, 2011).

Furthermore, Pandey and Sharma (2014) identified the loss of experienced talents and the changing trends in the market as two harsh realities faced by organizations who are struggling to maintain their workforce and maintain a competitive advantage. Pandey and Sharma suggested adopting a strategic succession planning process that would promote preparing individuals to take up a leadership role. The study conducted by Pandey and Sharma also identified lack of awareness in companies of the long-term impact of ignoring succession planning and absence of a rigid structure or model existing

for succession planning. They further suggested the integration of individual development plan in the succession planning strategies to develop the employees' knowledge base. Supporting Pandey and Sharma argument, Kippist (2013) observed that adequate management development and succession planning of managers with PhDs might provide a cadre of leaders who have the motivation, skills, and knowledge required to meet the challenges in providing an efficient and responsive health care service. Kippist recommended that Health service administrators must plan for succession at all levels of management, including the managers with PhD role.

Kronz (2014) provided information on the Development Dimension International Global Leadership Forecast 2014-2015 research that covered over 2,000 organizations in 48 countries that have buttressed succession plans. The research findings indicated that less than one-third of human resource professionals are satisfied with the quality of leadership development they have in place. Kronz further argued that although organizations spend a substantial amount of over \$50 billion, fewer than half of the leaders are satisfied with the level of quality among the leaders they have. Kronz presupposed that creating and developing leaders from within could help the organization to develop a talent pipeline. Kronz suggested that potential leaders must be flexible to changing business strategies, particularly in multi-market organizations. Kronz noted that succession planning must focus on the roles that are critical to the present and future success of the firm to avoid leadership crises and promote retention of organization top performing employees.

Hoffman and Womack (2012) found that the lack of a robust corporation-wide succession planning program could create a significant challenge for companies in the oil and gas industry. Hoffman and Womack further stated that a recent survey conducted by Price Water Corporation found that even though companies may think they have a valid succession planning program in place, typically the focus is solely on a handful of high-potential executives who are considered next in line for a higher position. The study by Hoffman and Womack revealed that most companies are not looking at lower job groups and suggested the inclusion of lower cadre staff to improve the technical talent at this level and be able to face technological challenges.

Corner (2014) provided different dimensions of the problems encountered by management and pinned the problems down to the fear of economic downturn that has resulted in cutting down on talent development initiatives, including training, and coaching programs. Corner made the point that the challenges faced by owners of organizations relate to technological changes that are moving at a faster pace than most businesses can cope. Although Corner's argument may be correct, no consideration was given the benefits that effective succession planning brings to an organization regarding strengthening its talent pool and preventing the potential consequences of aging workforce members' departing with the wealth of knowledge they have accumulated over the years.

Stadler (2011) examined the backdrop of the recent economic downturn and the need for management to develop and retain top talent for critical job roles. Stadler proposed the adoption of talent management as an essential activity that aligns with an

organization's business strategy with the goal to attract, develop, and retain a pool of talented employees. This current research, with the primary focus on identifying the influence of succession planning on knowledge transfer, strove to fill the gaps left by Stadler's study and provide a specific strategic plan that would promote succession planning through knowledge transfer in the oil-drilling industry.

Seniwoliba (2015) argued that in today's dynamic world where competition is high, work is fluid, the environment is unpredictable, organizations are flatter, and the organizational configuration repeatedly changes, the old view of succession planning by defining specific individuals for specific tasks does not work. Modern organizations perceive the necessity for creating a pool of high-potential future candidates at all levels, to fill any needs, at any time. Seniwoliba (2015) also noted that organizations that do not provide '*home grown*' talent, and possibly lose valuable knowledge and expertise along the way, may have to seek replacements from outside. But runs the risk of recruiting the wrong person. Seniwoliba (2015) noted that such occurrence could be a disaster, particularly when the senior leaders make an unfavorable choice. Management's failure to make the right choice could lead to severe disruption in an organization and, depending on the importance of the employee concerned, the result could be a terminal decline in business performance (Seniwoliba (2015)).

Gandhi and Kumar (2013) argued that ensuring the progression of talent is a critical strategic process that minimizes gaps in leadership. Gandhi and Kumar added that succession-planning procedures could also help organizations to identify the best people and to help them to develop the skills necessary for possible future roles. Researchers

view this strategic effort, which enhances the development of talented individuals to take over for current leadership, as the crux of succession planning (Gandhi & Kumar 2013). Cook (2015) noted that despite organizational leaders realizing the importance of talent management to company strategy, there still exists a gap in knowledge regarding its application in practice.

Similarly, Church (2014) examined several authors' viewpoints of the state of succession planning and talent management practices in present day organizations in line with an integrated model for enhancing the performance and effectiveness of agencies. Church identified some factors that have worked against the effectiveness of succession planning in businesses. These factors include lack of focus on the future capabilities needed, inconsistencies in the implementation of process design, limited system integration of talents and succession planning efforts with other key human resource processes, and lack of accountability and follow-up to ensure the effectiveness of the process. Supporting the above argument, Gonzalez (2013) reaffirmed that a successful succession planning must have the leadership on board with the training program. Gonzalez (2013) added that the training program must go beyond individuals and involve entire cohorts and the goal of the training must be the development of as much talent as possible to enhance succession planning.

Babey et al. (2016) argued that the oil and gas industry faces an impending and unprecedented labor gap that requires strategic efforts by management to address both short-term and long-term problems. Babey et al. further stated that the estimated volume of aging group exiting the industry between 2011 and 2029 would create a labor scarcity

that will affect the oil and gas sector. Some of the contributing factors to labor shortages arose from the volatility of industry since the early 1980s, which has significantly diminished the talent pool, and succession planning did not receive any priority (Babey et al. 2016).

Barzinpour, Jafari, and Biuki (2015) argued that given the instability of work environment, various displacements of employees as well as aging of leaders and managers, organizations are faced with the phenomenon of their valuable employees' exit soon or late. Barzinpour et al. also noted that those organizations that have trained suitable successor for their critical posts and have transferred their staff and managers' experience to the next generations by implementing succession plans will prevent the damages due to managers and employees' displacement as much as possible. Generational differences within the workforce compound the problem but also offer unique opportunities for the future (Barzinpour et al. 2015). Managing multigenerational teams requires consistent reviews of existing workplace condition and making necessary adjustments that would engage, encourage, and motivate the teams (Cole, Oliver, & Blaviesciunaite, 2014; Coulson-Thomas, 2013).

### **Generation Influence and Challenges**

The work of Mannheim initially influenced the fundamental construct of generation in the field of sociology (Ng, Lyons, & Schweitzer, 2012, p. xvii). Mannheim in 1923 presented a report on the problems of generational influences. In the same report, Mannheim noted that people born within the same historical period and the same sociocultural context share common events and experiences. Mannheim referred to such

shared values as an “inborn way of experiencing life and the world” (Ng et al., 2012).

Generation unit relates to a group of people born around the same time and who share common life experiences during the formative, early development period which leads to similar values, attitude, and views within each generational group (Ng et al., 2012).

Literature has identified different generations. According to Twenge et al. (2010), there are four main generations. The Silent Generation (1925–1945, a 20-year period), baby boomers (1946–1964, an 18-year period), Generation X (1965–1981, a 16-year period), and Generation Y, also known as Millennials, iGen (1982–1999, a 17-year period). Although the generations classification was based on a U.S. sample and does not reflect the actual situation globally, most researchers have adopted the categorization above (Bang, 2014; Festing & Schafer, 2013; Harvey, 2014). Researchers have identified that aging population has continued to affects changes in the labor market (Ciutiene & Railaite, 2014). Furthermore, Ciutiene and Railaite (2014) noted that the changes in workforce lead to organizational challenges that human resource management has to be prepared to face and must find and implement appropriate human resource measures to manage aging workforce, and ensure smooth performance. Additionally, management must be ready to maintain the effectiveness of age-diverse workforce with different mindsets and work values (Thrasher, Zabel, Wynne, & Baltes, 2016).

Other challenges include adjusting human resource practices, such as training to address the aging workforce’s needs (Kooij 2015) as part of inclusive practices for all age groups (Boehm, Kunze, & Bruch, 2014). Also, Pundt, Wohrmann, Deller, and Shultz, (2015) presented the challenges of managing extended working life careers as well as

managing the retention of critical knowledge from skilled and retiring workers (Ropes, 2014). To forestall the potential loss of competitive advantage arising from changing demographics, Ropes recommended that business leaders should develop strategies that support intergenerational workforce learning and development.

United Nations (2013) report indicated population aging is taking place in nearly all the countries of the world. Aging has profound consequences on a broad range of economic, political and social processes. Aging results from decreasing mortality, and, most importantly, declining fertility. This aging process leads to a relative reduction in the proportion of children and an increase in the share of people in the main working ages and of older individuals in the population. The world's crude death rate, the ratio of annual total deaths to the entire population, is increasing because the population is aging shifts the age distribution towards the older ages, which are subject to higher risk of mortality.

In a related study, Barnett and Davis (2010) addressed the changing demographic environment caused by Generations X and Y's replacement of the aging workforce. They argued that changes in the demographic environment has remained a significant challenge for most organizations. Barnett and Davis proposed industry best practices that would enhance the replacement of positions in the retiring workforce and examine how their intellectual characteristics and skills could be retained and transferred to the next generation. The best practices discussed by Barnett and Davis include: (a) process overall, (b) talent identification and review, (c) feedback and development, and (d) measurement. Barnett and Davis argued that the success of these strategies is the



responsibility of the line managers who are accountable for ensuring proper coordination in a structured manner.

Furthermore, Harvey (2012) noted that intergenerational knowledge transfer is critical to organizational survival and prevents corporate amnesia. Harvey further noted that the challenges most corporate bodies face is the lack of strategic approaches on how organizations would motivate such knowledge transfer between the two generations. Literature has identified that younger generation employees demonstrate reduced work commitment (Park & Gursoy, 2012). Park and Gursoy (2012) also argued that younger employees place more value on work-life balance and personal life; hence, they would not allocate personal resources and time to work tasks. Park and Gursoy suggested the inclusion of younger generation work preferences and work values into human resources policies and practices to keep the younger generation in focus.

On the other hand, aging workers would always remain loyal to organizations when offered flexible choices as they approach retirement (Gursoy, Chi, & Karadag, 2013). For leaders to manage aging workforce knowledge and enhance knowledge transfer effectively, agencies must specify explicit and tacit knowledge of each near-retiring worker by communicating unwritten practices and procedures, developing internal strategies to identify knowledge gaps, and learning how to bridge the gaps in knowledge (Meriac, Woehr, & Banister, 2010). Argote (2013) noted that critical knowledge is one of the most important success factors for organizations to achieve competitive advantage in present day knowledge-driven economies. Patriotta, Castellano, and Wright (2013) reaffirmed that the transfer of locally created knowledge and best

practice to the rest of the organization heightens the organization's ability to exploit its knowledge base and improve performance.

### **History of Knowledge Management (Transfer)**

The concept of evolution of knowledge stemmed from the perception that knowledge can be converted through group interaction to achieve a knowledge management process (Williams, 2006). Grant (2015) reaffirmed that the most significant knowledge management paper published in the 1990s was Ikijiro Nonaka's *The Knowledge-Creation Company* (Nonaka 1991). At this time Nonaka coined the corporate term tacit and explicit dimension of personal knowledge as originally proposed by Polanyi (1958) and propounded a spiral model for knowledge creation and knowledge transfer. The knowledge model was later formalized by Nonaka (1994) and Nonaka and Takeuchi (1995) as the "SECI model" (p. 124).

Bolisani and Handzic (2014) stated that knowledge management has more or less 20 years of history and argued that it is hard if not impossible to describe the origin of knowledge management in specific terms. However, many cited authors have written on knowledge management. Some of them are Davenport and Prusak, Nonaka and Takeuchi, Bontis, Grant, Wiig, and Spender (Bolisani & Handzic, 2014). Research conducted by Wiig (1997) expanded the history of knowledge using Treacy and Wiersema's model to illustrate how the world has increased reliance on knowledge by observing the shift in economic focus over time. Wiig argued that the present emphasis on knowledge management has resulted primarily from the economics, industrial, and cultural

developments that have taken place. Wiig further examined the history of knowledge management under the following descriptive stages based on economic evolution:

1. **Agrarian Economies:** Knowledge at this time was not apparently recognized. The primary focus was on providing physical labor for animal husbandry, tilling the soil, planting, and harvesting. Success was measured by the farming skills of the individuals during the Agrarian era.
2. **Natural Resource Economies:** During this era exploitation of natural resources – mineral, agricultural commodities—created competitive advantage. The primary focus was to the physical activities required to facilitate the conversion of these resources to salable goods made available to the market. This era engaged some group of expert artisans to provide specialized services, and recognition of knowledge became evident.
3. **Industrial Revolution:** The 18<sup>th</sup> and 19<sup>th</sup> centuries witnessed an improved mechanized and organizational approach to enhance the efficiency of production processes. Organizations and countries achieved competitive advantage through human efforts and application of technology to provide goods and services at an acceptable quality and affordable cost. Knowledge was evident at this stage but only among the guilds and other specialists.
4. **Product Revolution:** The first half of the 20<sup>th</sup> century heralded a new dimension that focused on market variability and product sophistication. During this period market advantages were based on producing products that would meet the needs of a particular market niche both functionally and

economically. The advancement resulted in significant changes in roles of professional and artisans to a level of expertise and a higher level of skills.

Although knowledge began to evolve at this stage, the recognition of broad individual skills had not changed and was not explicit.

5. Information Revolution: During the second half of the 20<sup>th</sup> century, information technology became available and enhanced adequate control of manufacturing, logistics, and marketing strategies. The advent of informatics promoted information gathering and exchanges of information internally and between enterprises and their suppliers and customers. The information revolution period also saw the changes of physical or manual work to the automated system.
6. Knowledge Revolution: According to Wiig, the last decade has witnessed a significant shift towards how well knowledge and intellectual assets are managed to make enterprises' customers satisfied. Organizations need to obtain, renew, and make efficient use of available knowledge in all areas of work. Wiig further argued that the versatility and intelligent behavior of knowledgeable people become the main force and driver that would promote customer satisfaction and the associated market sophistication demands.

The development stages mentioned above, influenced by changing market and business focus created the need for knowledge management and knowledge transfer in both academic and industrial sectors. According to Spender (1993), academic knowledge is the knowledge defined within positivistic science. Spender further affirmed that

knowledge viewed through the lens of positivistic science is a model of reality *out there*, hypotheses tested and validated against that reality. Spender (2015) noted that knowledge is multifaceted, many sourced and *several-languaged* and not yet a coherent academic field with established body of ideas, methods, and target phenomenon. Spender noted that many authors start first by defining knowledge with a general approach of differentiation of explicit and tacit knowledge. Spender further added that knowledge creation requires linear movement from a state of ignorance or knowledge absence to a state of knowledge presence and then make it visible.

William (2006) articulated the evolution of knowledge to show the relationship between explicit and tacit knowledge. Olivia (2014) noted that Knowledge is evident when thought and experience interface on the path of the unknown which leads to the light. Olivia reechoed Polanyi differentiation of knowledge as explicit knowledge and tacit knowledge. Explicit knowledge is the knowledge that can be encoded and stored in different media. Tacit knowledge is the knowledge that comes from the experience, internalized by understanding and practice. The following subsection would be used to examine the various types of knowledge as presented by researchers.

### **Types of Knowledge**

Regarding the kind of knowledge that older and retiring workers possess, researchers have identified two types, explicit and tacit knowledge dimensions. In the light of the knowledge types, scholars have emphasized the importance of the tacit knowledge that older, and retiring workers possess because of the relevance to the organizations (Joe et al., 2013). Boyd, Royer, Pei, and Zhang (2015) argued that explicit

knowledge such as general knowledge is easily transferable to others in the form of memo or procedures. Conversely, technical expertise demands individuals with a similar background to communicate and share. Implicit or tacit knowledge is harder to share, but also offers a greater potential regarding the creation of isolating mechanisms. The following paragraphs would expatiate more on explicit and tacit knowledge processes.

**Explicit knowledge.** A codified knowledge shared through diagramming, writing and speaking (Nonaka & Takechi, 1995). Nonaka's model presented the transfer of explicit knowledge based on the tacit knowledge of individuals by translating theory into practice (internalization). Combination process (i.e. integration or a combination of various methods) transforms explicit knowledge into a simplified form. Procedures, written standard practices, simultaneous operations guidelines, original equipment manual (OEM), and e-learning are examples of explicit knowledge. Most oil-drilling contractors have adopted modular training as a means of communicating knowledge. The design of modular training books allows the trainees to read different technical books related to oil-well drilling, complete and answer questions from task workbooks, and get the books signed off by their supervisors when complete. The modular system has remained the preferred methods used by oil-drilling companies to transfer explicit knowledge; however, written knowledge in the form of procedures and manuals cannot be valid without a hands-on (tacit) practical experience.

**Tacit knowledge.** Dutter and Banerjee (2016) examined Nonaka's knowledge management model (1995) and defined tacit knowledge as non-verbalized, intuitive and unspoken. This model presupposed that tacit knowledge could be transferred into tacit

knowledge in others by individual or group socialization. In the same vein, tacit knowledge can be transferred into explicit knowledge in the form of procedure, cookbook or through formalizing a body of knowledge from side to side externalization process (Dutter & Banerjee, 2016). Boyd et al. (2015) added that Implicit or tacit knowledge is difficult to transfer, but also offers a greater potential regarding the creation of isolating mechanisms. Boyd et al. argued that tacit knowledge falls into experiential knowledge, which is “intuitive knowledge, based upon training and practical experience. Ahammad, Tarba, Liu, and Glaister (2014) examined knowledge transfer from the context of a cross-border acquisition. They argued that social interactions between acquiring and target firms may establish a venue for channeling tacit knowledge collaboratively, such as group tasks or projects so that tacit knowledge transfer can have a positive effect on acquisition performance. Ahmmand et al. further stated that tacit knowledge resides in personal experience, and it is procedural rather than declarative in structure. Although tacit knowledge is difficult to formulate and codify, several studies found that it significantly affects organizational performance (Ahammad et al.). Sung and Gibson (2015) survey on technical knowledge transfer shows four key factors in knowledge and technology transfer which include: communication, distance, equivocality, and motivation. Communication refers to the degree to which a medium supports the efficient and accurate transmission of task-related information and media while distance involves both physical and cultural proximity. Equivocality relates to the level of concreteness of knowledge and technology transferred, while motivation includes incentives for and the recognition of the importance of knowledge and technology transfer activities.

Manhart and Thalmann (2015) asserted that Tacit knowledge is highly personal and rooted in actions and comprised of mental models, beliefs, and individual perspectives which make it difficult for people to articulate. The contrasts with explicit knowledge, such as a document for example, which by being formalized and systematically presented can easily be communicated and shared within communities or workplaces (Olander, Hurmelinna-Laukkanen & Heilmann, 2011). Buttressing the importance of communication, Eckblad and Golovko (2016) argued that tacit knowledge is overly dependent on localized face-to-face contacts in inter-organizational collaborations during knowledge transfer. Eckblad and Golovko further emphasize the value of face-to-face communication between individuals, which facilitates the transmission of knowledge across agents, firms, and even industries, over and above the high endowment of workers' knowledge.

Two models of knowledge management offered by Boisot (1987) and Nonaka and Takeuchi (1995) were adopted to explain the various types of knowledge transfer strategies. Boisot's (1987) model sees information as codified or uncoded as well as diffused or undiffused within the organization. In this context, the term *codified knowledge* refers to knowledge that can be made available for processing and transmission (e.g., financial data, exploration data consistent with oil well drilling). Boisot model presupposes that codified undiffused knowledge is a propriety knowledge which is transmitted to limited groups within the organization on the right-to-know basis. The other aspect of Boisot model, *uncodified knowledge*, is considered as not easily transmissible such as the experience of individuals specific to their trade, personal skills,



views, perception or ideas. The Boisot model also considers public knowledge as shared intelligence knowledge as codified and diffused (e.g., libraries, books, journals, newspaper, social media, etc.) Boisot further argued that mutual knowledge transfer is easy, and uncoded knowledge is processed quickly through socialization and internationalization.

The second model propounded by Nonaka and Takeuchi (1995) assumes that knowledge consists of two elements, tacit and explicit knowledge. Within these components, tacit knowledge falls under non-verbalized, intuitive and unspoken knowledge, while explicit knowledge is the knowledge easily communicated in writing, drawings, computer programs, and procedural formats, and so on. Nonaka and Takeuchi's model implies that tacit knowledge is transferable to others, and also into written forms by formalizing a body of knowledge. In other words, tacit knowledge can be used explicitly to support and improve existing procedures to guide technical services delivery.

Nonaka's model presented the fact that explicit knowledge can be transferred based on tacit knowledge within others by translating theory into practice (internalization), and the transformation of theoretical knowledge into simplified knowledge in others through a combination process (i.e. integration or a combination of various principles). Manhart and Thalmann (2015) asserted that tacit knowledge is highly personal and rooted in actions and comprised of mental models, beliefs, and individual perspectives, which make it difficult for people to articulate.

Furthermore, Yong, Byoungsoo, Heeseok, and Young-Gul (2013) noted that due to the importance of knowledge in today's competitive world, an understanding of how to enhance employee knowledge sharing has become critical. Yong et al. defined the concept of information "stickiness" as "the incremental expenditure required to transfer a given unit of information to a specified locus in a form usable by a given information seeker" p.358. They noted that tacit knowledge, by nature, is stickier than explicit knowledge (Von Hippel, 1994). Accordingly, it is natural for employees to adjust their willingness to share knowledge according to the stickiness of the knowledge as shared, requesting adequate extrinsic or intrinsic benefits in exchange (Von Hippel, 1994). Butressing the challenges, Theocharis and Tsihrintzis (2016) stated that sharing of knowledge across groups presents challenges to the extent that it can be easily or hard to codified. Theocharis and Tsihrintzis noted that unidentifiable experience of personnel is difficult to share, but the knowledge that is identifiable and tangible and explicit can be encoded and transmitted. Such coding allows knowledge to be better understood, maintained, and improved and become part of organizational memory. Theocharis and Tsihrintzis further argued that the codification of explicit knowledge is achievable through cognitive mapping, decision trees, taxonomies, and knowledge analysis of tasks that are driven by previous work or projects. Furthermore, Strasser and Westner (2015) discussed knowledge transfer in an offshoring context and noted that many challenges and difficulties abound. Strasser and Westner linked the problem of knowledge transfer to the stickiness of knowledge and the lack of communication skills with the teams. Cao and Peng (2013) examined the challenges of knowledge transfer and categorized it into

three areas: (a) knowledge stickiness, (b) knowledge ambiguity and, (c) knowledge tacitness. Some scholars believe that knowledge transfer environment is also an important form of knowledge stickiness. It is, therefore, imperative to factor both characteristics of knowledge and the environmental factors in knowledge transfer in the formation of knowledge stickiness. The other barrier to knowledge transfer is a level of knowledge tacitness created by the complexity of the knowledge. The difficulty in communicating the knowledge creates a higher degree of tacitness. Cao and Peng emphasized the importance of effective communication and feedback to assure efficient knowledge transfer at all levels to reduce knowledge tacitness.

Paulin and Suneson (2015) explained why knowledge and skills might be difficult to transfer to persons, entities, and organizations. Paulin and Suneson identified three factors which include: (a) lack of absorptive capacity (in which lack of knowledge is a part), (b) causal ambiguity – uncertainty regarding how aspects of the knowledge interact and respond to factors in the environment as well as uncertainty if necessary elements are present in a given situation, and (c) an arduous relationship between the source and the recipient. Knowledge transfer occurs by ensuring frictionless communication and intimacy between sender and receiver. Zykov (2015) also noted that factors as cultural diversity, organization maturity level and mentality of the knowledge holders might present a barrier to knowledge transfer. Similarly, Liu, Gao, Lu and Wei (2015) noted that extant literature had identified knowledge transfer research has recognized that successful knowledge transfer involves multiple stages and is much more than a one-way, linear diffusion of knowledge within or between organizations. Liu et al. stated that there

are various difficulties and challenges involved in any knowledge transfer process, including the willingness to transfer and the attractiveness of the source, the lack of absorptive capacity and learning intent by the recipient, the quality of the relationship and causal ambiguity. Evans (2013) affirmed that knowledge transfer activities influence individual's willingness to transfer knowledge.

### **Promoting Knowledge Transfer**

Edwards (2016) argued that most researchers use knowledge sharing and knowledge transfer interchangeably and reaffirmed that knowledge sharing is a fundamental part of any knowledge management initiative. Loebbecke, van Fenema, and Powell (2016) defined knowledge as the exchange of necessary know-how or information across company lines. Knowledge transfer occurs when people, as members of the same department or cross department exchange tacit and explicit knowledge. For example, in the drilling sector, the subsea engineers transfer both tacit and explicit knowledge with drilling crews for efficient execution of their tasks. Such transfer of knowledge is critical in highly technical industries like the drilling sector because the lack of knowledge transfer could result in an enormous consequence ranging from reduced productivity to decreased client satisfaction (Forcada et al., 2013). Accordingly, Witherspoon, Bergner, Cockrell, and Stone (2013) asserted that knowledge sharing is a building block for the success of the organization and must be adopted by leaders as a survival strategy. Edwards (2016) argued that the complexity of knowledge transfer require that leaders consider the specifics circumstances in which sharing takes place. Edwards affirmed that such approach would help organizations realize its goal and improve performance.

Alegre, Sengupta, and Laliedra (2013) examined how knowledge management affects innovation performance in biotechnology firms and conceptualized knowledge management as a business function comprising organizational practices and dynamic capabilities that can create sustainable competitive advantage. Alegre et al. noted that the distinction between practice and dynamic capabilities facilitates the analysis of knowledge management and explains how new sets of knowledge management practices and dynamic capabilities are created on a continuous basis so that the firm can adapt to changing environments. Alegre et al affirmed that Knowledge management consists of identifying and leveraging the collective expertise in an organization to contribute to its performance. Iyamah and Ohioorenaya (2015) examined the impact of knowledge sharing on organizational performance in the oil and gas sector in Nigeria and concluded that knowledge sharing has an influence on performance. Iyamah and Ohioorenaya argued that people might not be willing to share knowledge because they may have the misconception that they will lose such knowledge and that there is no leadership commitment to sharing knowledge. People fear the lack of satisfaction from sharing their tacit knowledge because they feel that there is no sufficient reward for sharing knowledge (Iyamah & Ohioorenaya, 2015). The consequence is reduced performance when there is a lack of knowledge transfer. Thus, the performance of organizations depends on the extent to which managers can mobilize all the knowledge resources at their disposal and turn them into value-creating activities.

Urbancova, Vnouchkova, and Laboutkova (2016) noted that the principal source of success in knowledge management is no longer information as such, but the right

knowledge, which resides with a bearer—an employee who must continuously develop the knowledge in a currently highly competitive environment. Urbancova et al. (2016) reaffirmed the necessity for each organization to concern itself with efficient knowledge transfer, to support the personal development of their employees and in doing so to increase the organization's knowledge base. Urbancova et al. noted that the first step in supporting the knowledge economy is a focus on efficient knowledge transfer and how the knowledge transfer system is set up inside the organization.

Buttressing knowledge management, Nonaka and Takeuchi (1995) suggested four aspects of knowledge creation and transfer which include the following:

1. socialization: Involves sharing experiences that would treat tacit knowledge in the form of the mental model and technical skills. Tacit knowledge can be attained without the use of language but through observation, imitation, and practice.
2. externalization: Involves expression of tacit knowledge through explicit concepts such as metaphors, analogies, hypotheses, and models.
3. combination: Involves systematizing concepts into a knowledge system by combining different bodies of explicit knowledge. Codified knowledge, unlike tacit knowledge, is transferable through media such as documents, meetings, e-mails and phone conversations and,
4. internalization: A process that involves converting explicit knowledge to tacit knowledge and promoting learning by doing. Such an approach is evident

when referencing the operating equipment manual (OEM) during troubleshooting hardware faults for repair.

The preceding four models supported the assumption that knowledge transfer depends on the transmission of mutual understanding from the knower to the user of the knowledge. Nonaka and Takeuchi (1995) argued that a successful knowledge management program must translate practical experiences (tacit knowledge) into written procedures (explicit knowledge) for effective communication and maintain organizational memory. The individuals and groups sharing knowledge must internalize and make personally meaningful procedural or codified knowledge once retrieved from the knowledge management system.

Kim, Williams, Rothwell, and Penaloza (2014) stated that technical expertise such as engineering is often the key competitive advantage in the global knowledge economy. Despite this advantage, there are some problems associated with transferring knowledge. Kim et al. (2014) examined the challenges faced in attracting, retaining, and transferring knowledge of engineers or technical professionals whose knowledge is essential to knowledge transfer or innovation economy. In the same vein Daghfous, Belkhodja, and Angell (2013) suggested that organizations should retain and diffuse architectural knowledge, improve strategic coordination among units, develop existing capabilities through different networking strategies and promote networks, and transform these capabilities into effective organizational routines to mitigate knowledge loss and increase knowledge retention.

Kim et al. (2014) recommended a strategic model for technological talent management that reflects a long-term and integrated perspective comprising nine steps that represent all the complicated components of managing technical talent (cited in Rothwell)

- clarify the goals, roles, and accountabilities of the technological and professional talent management program
- identify work process key to the organization's success
- identify present work duties and professional competencies
- pinpoint who possess specialized knowledge
- pinpoint the risk of loss of key people
- align strategic plans with future talent need
- implement talent management by recruiting, developing and retaining individuals with specialized knowledge
- implement knowledge transfer strategies and,
- evaluate the continuing results of the technical professional talent management program.

Similarly, Pawlowski and Bick (2015) identified some key factors that influence knowledge management and recommended effective coordination to promote an enduring knowledge management.

- Human-oriented factors (culture, people, and leadership): Knowledge sharing depends on culture (both organizational and ethnic such as regional/national



culture). Thus, everyday knowledge management activities like knowledge sharing are affected.

- **Organization (processes and structures):** Knowledge management must consider both organizational and ethnic culture to ensure efficient knowledge transfer.
- **Technology (infrastructure and applications):** Technology infrastructures also differ in the various countries. The acceptance of technological applications is also dependent on preferences (e.g., how technologies are accepted, which social networks is acceptable in a country)
- **Management (strategy, goals, and measurement):** Management practices and strategies must align with ethnic and organizational culture.

### **Knowledge Transfer Criteria**

A modest body of scholarship exists on knowledge transfer. However, emerging research has revealed that knowledge transfer is critical to corporate managers to reduce productivity loss and weakened competitive advantage (Kim, Lee, Paek, & Lee, 2013). Undermining knowledge transfer from experienced employees has a far-reaching effect on decreased productivity and output, as well as loss of competitive advantage (Joe et al., 2013; Kim et al., 2013). Organizations managers must adopt a strategic approach to understanding how to increase knowledge-sharing to prevent the potential danger of retiring employees exiting without sharing their knowledge (Hau et al., 2013). Knowledge sharing supports skill development that would help improve the quality of work (Hudcova, 2014). Asrar-ul-Haq and Anwar (2016) acknowledged that knowledge

that is not well managed and shared corrodes quickly. They emphasized the importance of sharing mainly, tacit knowledge that resides in the minds of people accumulated over time. Among other processes of knowledge management, knowledge sharing stands out as the most vital aspect of organizational performance and competitive advantage. Tong, Tak, and Wong (2015) argued that knowledge sharing is an essential element of self-learning and helps the development of professional skills. From the operation standpoint, skilled people are still the primary drivers of knowledge sharing practice in organizations. Organizational management must understand how to facilitate and improve the process of knowledge transfer to equip all workers with the right knowledge to enhance their skills (Hudcova, 2014). To achieve efficient knowledge transfer, Hudcova (2014) recommended six criteria; they are building trust, interaction, and storytelling, the involvement of more senses (audio-visual), spontaneity and balanced dialogue. The six criteria include the following:

- Building trust: Trust is a fundamental element in building a business relationship. Once there is trust, sharing contact, experiences become easier and cheaper to attain. Ensuring customized message for the various audiences in business relations helps to promote confidence. Chitsaz-Isfahani and Boustani (2014) cited Cumming and Bromiley's model and argued that trust reduces transactions cost, influences the interactions among individuals and reduces the insecurity of cooperation behavior. Sankowska (2013) added that knowledge transfer and creation requires the organizational trust to promote innovation. Furthermore, Evans (2013) reaffirmed the effect of confidence on

knowledge transfer and asserted that establishing trust is a crucial element in motivating an individual to share knowledge over other factors like vision and the length of the relationship. Reinforcing Evans position, Goh and Nee (2015) noted that trust reduces the instances of pseudo-knowledge sharing in which employees may provide false knowledge where confidence is lacking in the organization. Commenting further on the importance of trust, Rutten, Blaas-Franken, and Martin (2016) argued that knowledge sharing intentions increases when there is trust between co-workers and emphasized the need for an organization to promote intra-organization trust.

- Immediate feedback (interaction): Providing quick and honest reactions to the communicated message enhances the flexibility of the parties in communication. Turiago, Theone, and Arjoon (2016) noted that when a knowledge worker is self-managed and receives ongoing feedback, confirms the fact that they accept instruction and guidance, that is, *coachability*. Truthfulness is the intellectual virtue that ensures self-knowledge and discernment, but previous feedback activity also supports it carried out by superiors and partners to achieve an efficient process (cited in Drucker). Truthfulness also requires a precise dose of the moral character trait of courage, “persevering or pursuing what is good in spite of obstacles” to achieve consistent and constant corrective processes.
- Involvement of more senses (especially hearing and vision): Adopting audio-visual methods enriches messages and makes them more informative. It is a

known fact that when people visualize and listen to instructions, they are more apt to act correctly.

- Spontaneity in communication usually promotes subliminal and uncontrolled messages, which enrich the communication with more content.
- Balanced dialogue: Communication should be two-way and interactive, ensuring that the parties in communication listen to each other, and more importantly, show respect.
- Humor, stories, and bringing personal context to bear make a message more involving and send positive “*vibes*.”

Researchers have argued that retiring workers show passion for sharing knowledge with subordinates and trainees because they have accumulated relevant organizational experience over several years (Voelpel, Sauer, & Biemann, 2012). The research conducted by Dunham and Burt (2011) indicated that employees are more likely to approach older employees with requests for knowledge sharing, regardless of their tenure. Harvey (2012) asserted that mentoring sessions and storytelling group meetings generated mutual exchanges rather than unidirectional transfers.

Research has shown that mentoring and coaching are emerging as a critical activity that promotes knowledge transfer. Despite leader’s knowledge of the benefits of mentoring and coaching, a study by Accenture in 2005 found that over 40% of organizations have no formal processes for transferring the knowledge of retiring employees. Learning organizations have adopted different strategies to attain successful

mentoring and coaching. The different criteria discussed next sheds more light on principles that enhance knowledge transfer.

### **Mentoring and Coaching as a Means to Effective Succession Planning**

This subsection reviews some strategies that could improve effective succession planning and knowledge transfer through mentoring and coaching in the drilling sector. Okechukwu and Raymond (2015) examined coaching and mentoring as a learning relationship that improves job skills and develops employees' potential for better performance. Coaching and mentoring enhance the personal skills of employees through an active learning process that is beyond the traditional training methods (Okechukwu & Raymond, 2015). They further added that organizations must continue to support and promote employees continuous learning process through coaching to enhance competitiveness. Ibidunni, Osibanjo, Adeniji, Salau, and Falola (2016) suggests that employees with mentors experience a variety of positive organizational outcomes which includes increased job performance, greater job satisfaction, and organizational commitment, personal learning, and reduced turnover intentions. They also asserted that harmonizing leadership development with succession planning (through mentorship) increases the ideal development and placement of leadership talent. Additionally, successful mentoring relationships help in the transfer of psycho-social benefits, such as acceptance, encouragement, and coaching, as well as career facilitation (Ibidunni et al.). Extant literature supports the view that mentoring and coaching represent two distinct concepts; however, researchers have stated that there is a thin line between coaching and mentoring (Rothwell, Jackson, Ressler & Jones, 2015). Arora and Rangnekar (2014)

maintained that coaching relates primarily to performance improvement for learning specific skills aimed at the accomplishment of intermediate or sub-goals in line with the suggestion of the coach. My study drew from the two paradigms—mentoring and coaching—to support the value of succession planning in knowledge transfer.

Mentoring is a goal-oriented business relations strategy that establishes mutual benefits to the mentor, the mentee, and the organization. Tarus (2014) cited Kram's definition of mentoring as a learning partnership between employees with the purpose of sharing technical and institutional knowledge, which provides an opportunity to gain insight into an occupation, profession, the organization, and other endeavors. Similarly, Jakubik, Eliades, and Weese (2016) defined a mentor as a close, trusted, experienced counselor or guide who engages in a long-term, relationship-oriented, development-driven, mentoring relationship. Brondyk and Searby (2013) argued that mentoring is the exchange of knowledge, skills, and social interaction over time during knowledge transfer. The primary objective of mentoring is to develop identified individuals, train them, provide feedback, and share experiences through coaching to create a self-reliant workforce to fill leadership gap. Kim et al. (2015) conceptualized mentoring as enhancing career development, stimulating psychosocial support and role modeling. Lawal, Thompson, and Thompson (2016) emphasized the need for mentorship as a means for career development. Lawal et al. identified in their research that classroom; on-the-job training (OJT) and online training were the most critical component of leadership development. Lawal et al advocated the use of shadow manager attached to a substantive

manager to step in when operation so demands or necessitated by sudden departure or promotion.

Arora and Rangnekar (2014) highlighted two types of mentoring—psychological and career mentoring. Psychosocial mentoring includes those functions that enhance the personal competence of the protégé through unconditional acceptance and providing timely feedback to the protégé. Arora and Rangnekar noted that psychological mentoring support provided by a mentor carries more of the affective component. Career-oriented mentoring covers functions such as sponsorship, challenging assignments, protection, exposure, and visibility. Arora and Rangnekar argued that mentoring focus mainly on the identification and nurturing of the individual based on the mentor–protégé long-term relationship where the mentor’s role is critical for providing useful insights for enhancing the protégé’s self-awareness. Arora and Rangnekar further remarked that workplace mentoring facilitates employee counseling to strengthen employees for overcoming challenges related to professional and personal development. Similarly, Spring (2014) noted that mentoring could take place in a variety of ways, through formal programs, such as traditional mentoring which seasoned professional mentors a nascent professional in a one-on-one interaction, or through structured group and peer mentoring. Additionally, a combination of formal and informal mentoring may also take place depending on the objectives and local practices for a given organization. Informal mentoring can also occur, where a person seeks out mentors from a variety of sources, including colleagues, administrators, or peers within or outside their organization. Janssen, Vuuren, and Jong (2016) observed that both formal and informal mentoring

relates to behavioral, attitudinal and career benefits for protégés and mentors. Janssen et al. study proposed a developmental network approach to further the advantage of mentoring by understanding the interplay between mentoring dyads and the context.

According to Rothwell et al. (2015), mentorship helps in the transfer of technical knowledge, improved interpersonal relationships from soon-to-be retired groups to the younger mentees to prepare them to assume a higher organizational role. Wheeler and Cooper (2016) see mentoring as a strategy to support retention, succession planning, job satisfaction and career enhancement. Wheeler and Cooper further noted that an efficient mentoring strategy promotes cordial personal engagement in work conversations and relationships directed at enhancing career satisfaction, professional development, and improved practice. Wheeler and Cooper added that mentoring benefits both the mentors and the mentees by improving confidence and trust in one's role, increased productivity, the transfer of new knowledge and skills. Such relationship promotes inter-professional collaboration. A successful mentoring relationship relies on mutual trust, shared values, interests, and commitment to a personal and organizational goal. Crumpton (2014) examined the effect of mentoring as a tool for measuring employee performance and argued that mentoring enhances acceptance of added responsibilities and prepares future leaders to fill vacant positions. Crumpton further examined the benefits from mentoring program and identified the following key points:

1. Improved technical skill for the mentor who through the process increases his or her technical ability.



2. Improved technical skills of the mentee who become more efficient in the execution of his new job and ultimately becomes ready for the next job position.
3. Acquiring new technological experience by the mentee has a positive effect on retention and turnover intention.
4. Effective succession planning activities help to develop and sustain institutional knowledge; thus, the leadership pipeline is maintained and assured.

Ross (2013) stated that effectiveness of a good mentoring program relies heavily on organizational purpose and must be streamlined to meet the goal. Ross highlighted the benefits of mentoring for both the mentee and the mentor which according to the researcher produces a sound organizational relationship. Such mutual ties, Ross argued, are critical in achieving organizational success. Additionally, Tarus (2014) saw the benefits of mentorship as a deliberate, systematic transfer of knowledge with a focus on providing a job specific knowledge towards meeting organizational present and future strategic goals. Good mentoring has the advantage of improving morale, reducing turnover, developing people faster, and helping to create solutions to business problems. Tarus further argued that the attainment of a high-performance workplace is through mentorship programs for employees. Tarus pointed out that mentoring help protégés to advance in their careers through supportive learning and hands-on practice to improve skills and ability. Tarus also noted that research has shown that mentoring helps accelerate the development of talent, improves retention intention, and creates a high-

performance culture. Hence mentoring is enhanced by establishing sustainable succession planning.

In a similar argument, Olusiji (2013) suggested that adequate attention to mentoring of young employees and taking the initiative to commence mentoring programs early enough would help in reducing the dearth of competent employees. Olusiji cited Clutterbuck's (2000/2001) study, conducted in the United States, which pointed out that employees' intention to change jobs is 35%. Olusiji argued that organizations that engage in mentoring programs experience as little as a 16% turnover rate. In a related argument, Jakubik et al. (2016) noted that mentoring is a solution for retention and succession planning in nursing; however, there is a lack of information about "how to" mentor based on evidence. Jakubik et al. identified the following as benefits of engaging in the mentoring process: (a) belonging, (b) career optimism, (c) competence, (d) professional growth, (e) security, and (f) leadership readiness.

Kim, Im, and Hwang (2015) viewed mentoring as an effective human resource management strategy for addressing issues of role stress, job satisfaction, and turnover intentions among employees. Mentoring, according to Kim et al. (2015), entails the process in which a more experienced employee helps a less experienced employee in adapting to an organization's culture, in performing a task better or developing a better career trajectory. Kim et al. examined the hospitality sector to explain the role of mentoring on stress, job attitude, and turnover intention.

Another study conducted by Kim et al. (2014) echoed the assertion made by Haggard et al. (2011) that because the career success of a protégé is a positive evidence

of mentoring functions, the protégé makes more efforts to work hard toward upward promotion. Kim et al. further argued that the process lead to a strong commitment to the employer and employees' commitment often results in employment retention, and continued service with reduced turnover intentions. Conversely, Xu and Payne (2014) proved in their study a negative relationship, indicating that mentoring stimulates employment continuity in an organization. Contrary to Xu and Payne's argument, Karatepe (2013) argued that the mentoring functions of supervisor support and co-worker support indirectly affect turnover intention through job embeddedness. Ramalho (2014) added that mentoring is an effective, low-cost means of making the most of a company's in-house experience and developing the potential of the workforce.

Furthermore, Agwu and Luke (2015) argued that implementation of a mentoring process in the Nigerian Liquefied Natural Gas Company would reduce employee turnover and improve performance. Agwu and Luke based their argument on Khakwani, Aslam, Azhar, and Mateen's (2012) research and affirmed that coaching and mentoring improves employees' performance model. According to Agwu and Luke, the model presupposed that coaching/mentoring impacts new knowledge and skills on employees with a positive influence on behavioral change. They also argued that coaching and mentoring increase employees' motivation and commitment to the organization, promote better performance, and reduce turnover tendencies. Sharma and Sahoo (2013) added that the employees go beyond the call of duty and work for the profitability, survival, revival and growth of the organization through motivation, involved in decision making, felt

appreciated and cared for which in turn helps in creating value for the customers and the investors.

Wheeler and Cooper (2016) argued that mentoring is a strategy to support retention, succession planning, job satisfaction and career enhancement. Wheeler and Cooper further noted that an efficient mentoring strategy promotes cordial personal engagement in work conversations and relationships directed at enhancing career satisfaction, professional development, and improved practice. They added that mentoring benefits both the mentors and the mentees by improving confidence and trust in one's role, increased productivity, the transfer of new knowledge and skills. Such relationship promotes inter-professional collaboration. Coaching and mentoring improve employees' performance by influencing new knowledge and skills on employees (Khakwani et al., 2012). Similarly, Bello and Mansor (2013) asserted that mentoring as a tool for knowledge transfer influences trainees and their skills development. Bello and Mansor further stated that mentoring in knowledge transfer has a moderate to strong correlation with skills development, and it improves cataloguers' proficiency and overall development. Researchers argued that mentoring influences change in behavior and increases employee motivation and commitment, thereby reducing turnover and improving performance (Khakwani et al., 2012). Ramalho (2014) noted that mentoring is an effective, low-cost means of making the most of the organization's in-house experience and developing the potential of the workforce. Brewer (2016) observed that groups benefit by delivering interactive feedback during the mentoring process. Brewer affirmed that feedback is a core part of all employees development as well as mentoring.

Rohatinsky and Ferguson (2014) recommended that all employees, from senior leadership to front-line employees, needed to be committed to mentoring for mentorship to be successful within healthcare organizations and for the creation of mentoring cultures.

Sun, Pan, and Chow (2014) examined the mediating effect of psychological empowerment and organization-based esteem on the relationship between supervisory mentoring and employee performance and the moderating effect of supervisor political skill. Sun et al. noted that direct and indirect effects of supervisory mentoring are stronger when the mentors demonstrate a higher level of political skill during mentorship. Sun et al. also pointed out that mentor-mentee relationship enhances performance.

Rothwell et al. (2015) reported that mentoring is a frequently misunderstood concept and often mistaken for coaching. Whereas mentoring involves similar approach on a one-on-one conversation between the mentor and the mentee, coaching involves more practical demonstrations to impact practical knowledge. Rothwell et al. further differentiated between a coach and a mentor and stated that the primary focus of a mentor is the growth of the mentee while the coach focuses on performance on the job. Mentoring and coaching remain the best approach to achieve skills transfer (Fletcher, 2016).

Coaching is a means of teaching and directing another person to reach a higher level of contemporary knowledge through encouragement and advice (Olusiji, 2013). In knowledge organizations, coaching remains a vehicle to transfer technical expertise, particularly in a highly technical organization like a drilling company. Ahmadi, Ahmadi,

and Abbaspalangi (2012) stated that knowledge coaching supports non-structural experiences and combinations shared with employees as feedback. Ahmadi et al. further argued that in coaching interaction, the coach is the owner of experiences and the relationship between experiences and events taking place within the organization.

Muslim, Haron, Hashim, and Hassan (2015) argued that majority of leaders' community agree that leadership development comes through a system approach whereby individuals become exposed to developmental opportunities through experience, mentorship, and formal training. Muslim et al. argued that effective leadership development initiatives ensure succession-planning effectiveness. Muslim et al. further claimed that coaching and mentoring or developmental relationships as a formalized form of feedback and often lead to succession planning goals. Coaching can be short-term intervention intended to develop specific leadership skills or a more extensive process involving a series of meetings over time. Coaching can take place in two different forms. A coach may choose to work one-to-one with an individual manager or conduct workshops and seminars with larger groups of managers. The latter approach is a one-to-many coaching process, also defined as team coaching. Lawal et al. (2016) identified in their research that classroom; on-the-job training (OJT) and online training were the most critical component of leadership development.

The drilling companies use OJT adopting coaching techniques to improve employee skills and practical knowledge; this is what coaching stands to achieve. Coaching supports the transfer of theoretical training into practice or practical hands-on experience. According to Rothwell et al., coaching is an effective way of making

organization and people more efficient. Using coaching strategies demonstrate the commitment of management to their employees. Coaching could help to reduce the cost of hiring/recruiting and retraining. Coaching could enhance an opportunity for employees to see where they are today and where their potential future position would be as they grow within the organization.

According to Van Genderen (2014), the mainstay of coaching is to improve professional performance through the human being. The advantages of coaching are the positive influence on behavioral modification, enhancing cognitive ability and self-directed learning (Van Genderen). Supporting Van Genderen's position on coaching, Grover and Furnham (2016) added that coaching is used in an organization to improve employee, group, and team performance. Grover and Furnham further argued that coaching help to make learning easier and less time consuming, enhances succession and career planning aimed at improving leadership and personal skills, and builds interpersonal relationships.

To further buttress coaching strategies four simple paradigms are used in this current study. They are: Explain, Demonstrate, Imitate and Practice (EDIP);

- Explain involves communicating explicit knowledge in simple terms that the trainee can effectively put into practice (tacit). The experienced employee or supervisor provides explanation and guides the trainee through procedural steps to enhance understanding of the task.

- **Demonstrate:** The most skilled person gives a practical demonstration of the work steps based on the explanation, breaking down the job into a simple and understandable process to ease understanding.
- **Imitate:** The protégé is allowed to imitate following the job steps as demonstrated. The supervisor helps to correct the mistakes as the protégé progresses and the protégé is allowed ample opportunity to repeat the steps until perfection. Davies (2015) added that tacit knowledge can still be communicated and shared. The mechanism of transmission is not telling and understanding, but rather a performance and imitation (learning by example).
- **Practice:** The protégé is authorized to practice the task with close supervision until a reasonable level of skill is attained and can be allowed to assume new responsibilities with minimal supervision. According to Argote (2013), a long stream of research in psychology has documented that individual performance improves as the trainee practices and acquire more experience with a task.

In summary, coaching strategies require the coach to exhibit transparency and fairness to achieve the desired goal. The coach gives ample time to explain the task, the task steps, and the operation of the equipment to produce the desired results. The next step is to demonstrate the preceding steps to the trainee or protégé repeatedly and then give the protégé an opportunity to imitate the task steps and operation of the equipment or tools. The trainee is then allowed to practice these steps in a more structured approach to attain proficiency. Integrating practice in coaching technique has the advantage for the



protégé to learn the rudiments of the task steps, thereby perfecting individual skills and technical knowledge and ultimately improving service delivery and performance.

### **Benefits of Effective Implementation of Succession Planning Strategies**

The effectiveness of a good succession planning depends on the effective implementation of the succession planning process. The rewards of formal succession planning go beyond market forces. It helps to minimize disruption to the organization and maintain performance. According to Talpos, Pop, Vaduva, and Kovacs (2017), the key to overcoming succession planning challenges is an ongoing succession and knowledge-based talent management. Talpos et al. argued that a systematic effort to retain and develop the company's intellectual capital for the future is necessary to maintain competition. From the literature review, it would be instructive to argue that effective succession planning speaks the words that organization leaders have an interest in their employees' development. It also demonstrates a commitment to creating pathways for them; that they can succeed at higher levels in the organization.

Another benefit of effective implementation of succession planning is knowledge retention. Aladwan, Bhanugopan, and Fish (2013) identified work opportunities, personal needs, and personal responsibilities as three key reasons why employee quite an organization. Therefore, retention as a critical element of a successful succession planning relies hugely on the organizational effort to retain skilled individuals while maintaining a competitive advantage. Ahmadi et al. (2012) stated that succession planning at lower levels facilitate the connection with the employees and provide a proper definition of competence and availability of structural employees encouraging the

employees to follow career path given the available opportunities. Failure to address succession plan would lead to more limited structures and opportunities for succession development. Bansal (2014) argued that the primary purpose of retention is to prevent the loss of competent employees and knowledge loss from the organization, which could set back productivity and service delivery. Loss of knowledge can be avoided by retaining key employees and developing a system that supports organizational memories.

### **Organizational Memories**

Esmaeli and Saedabadi (2016) defined an organization memory as a system used to store the existing knowledge in the organization, which provides and reminds the staff of useful information when needed and enhances re-use of internally created knowledge. Another definition offered by Ibrahim-Aminu and Mahmood (2016) of organizational memory is a collection of the firm's knowledge, which consists of declarative knowledge, based on accurate information and procedural skills, and expertise which enhances declarative knowledge. Declarative knowledge and procedural knowledge represent explicit and tacit knowledge, respectively. Ibrahim-Aminu & Mahmood, (2016) cited Walsh and Ungson and defined organizational memories as a means of acquiring, retaining, and recalling past things associated with individuals). Researchers have argued that when knowledge resides with individual employees other than structures and routine, there is a high tendency of losing such knowledge due to employee turnover (Nieves, Quintana, & Osorio 2014). Organizations must integrate individual knowledge into an organizational knowledge base to prevent loss of skills and expertise. Esmaeli and Saedabadi (2016) argued that organizational memory is not limited to collecting and

preserving knowledge, but to promote the transfer of knowledge. Jain and Moreno (2015) reaffirmed it is important to identify and harness the collective knowledge of the organization gained through experience and competencies. They argued that knowledge management must be supported by the right kind of strategy, structure, system, culture and people management policies and practices to codify tacit knowledge and utilize tacit and explicit knowledge to enhance organizational effectiveness.

Oyemomi et al. (2016) affirmed that business processes should support organizational memory that would generate new knowledge through knowledge production operation and categorization. They would then flow into business activities, further providing solutions for business process problems. Oyemomi et al. further added that a critical phase of business education process must emphasize retrieving and sustaining business information. Oyemomi et al. stated that leaders must establish business process mechanism that would influence performance by retaining relevant knowledge and experience. Oyemomi et al. also affirmed that business process builds organizational memory for performance. Oyemomi et al. argued that aspects of business process and knowledge sharing implementation succeed when there is top-management participation providing the necessary resources and leadership. Such processes as succession plan and knowledge transfer strategies form the basis for my study.

### **Summary and Conclusions**

From the literature review, it would be instructive to argue that effectiveness of succession planning and its impact on knowledge transfer comes from management commitment to promoting knowledge transfer from more experienced groups to less

experienced ones. Improving knowledge transfer through succession planning practices (mentoring and coaching) has the advantage of impacting new insights and skills (Agwu & Luke, 2015) and improving professional performance (Van Genderen, 2014). The literature review further pointed out that effectiveness of a good mentoring program depends primarily on the organizational purpose and must be in tune with the succession planning process design (Ross, 2013). My current study suggested adoption of succession planning as a business process to develop an organizational memory that would generate new knowledge through knowledge production– operation–categorization, then flows into corporate activities, further providing solutions for business process problems (Calareso, 2013; Oyemomi et al., 2016).

I have suggested approaches that would promote knowledge transfer through succession planning to enhance business continuity and competitive advantage. The information received during the interview and experiences of selected employees from the drilling company informed the approaches adopted.

### Chapter 3: Research Method

The purpose of this case study was to explore how a succession planning program contributes to knowledge transfer and developing expertise for business continuity and prevents loss of knowledge in the oil-drilling sector. I aimed at gaining an in-depth understanding of the effect of succession planning on the skills of the employees being prepared to take over higher positions (Ahmad, Mohamed, & Manaf, 2017). Chapter 3 includes a description of the purpose of the study, research design, and rationale as well as the method and the justification for adopting the approach. The method for this study includes a description of the population of study, the research design and rationale, and ethical approaches to ensure confidentiality and protection of respondents from undue consequences. Also covered in Chapter 3 are discussions on data collection techniques, data collection organization methods, and the data analysis plan. Lastly, this chapter addresses approaches adopted to ensure trustworthiness.

#### **Research Design and Rationale**

The research question was as follows: How does succession planning influence the transfer of technical knowledge in the drilling sector in Nigeria? I considered three research methods to guide the conduct of the study: qualitative, mixed methods, and quantitative. The quantitative approach was inappropriate because it is used to investigate relationships, cause-effect phenomenon, and conditions (Bloomberg & Volpe, 2012). Klenke (2016) noted that although quantitative methods are ideal for testing hypotheses, especially with a large sample, and permit the development of a sophisticated causal model allowing for replication across settings, they are poorly suited to help researchers

understand the meaning leaders and followers ascribe to a phenomenon. Klenke noted that qualitative analyses is well suited for leadership research because of the multidisciplinary nature of the field, which has to be more open about logical assumptions.

Similarly, a mixed-methods approach was not needed to answer the research question. Mixed-methods studies combine qualitative and quantitative data using a specific type of mixed-methods design (Creswell, 2014). A mixed-methods approach would have been appropriate only if my study required both qualitative and quantitative data to elucidate the relationship between variables.

I selected a qualitative approach because the study focus was the perception of leaders and the experiences of participants. According to Mayan (2016), a qualitative study is primarily naturalistic, interpretive, and inductive. Mayan further argued that by studying naturally occurring phenomena, qualitative researchers strive to interpret or make sense of the meaning that people attach to their experiences underlying a particular phenomenon. A qualitative approach has the advantage of providing a deeper understanding of a workplace or social environment through the description of the phenomenon from the participants' point of view. Before adopting a case study design, I considered grounded theory, narrative, ethnographic, and phenomenological designs.

Grounded theory was not appropriate because I was not focusing on developing a new theory. Researchers adopt grounded theory when they strive to develop a new theory about a phenomenon (Bloor & Volpe, 2012). According to Bloor and Volpe (2012), researchers use grounded theory to ground a social practice in a setting. Because

my research addressed the phenomenon experienced by drilling workers, grounded theory was not appropriate for the study. The second design I considered was narrative. The narrative approach focuses on recounting stories to describe personal experiences to enhance an elaborate understanding of life experiences. The investigator presents an overview of a person or group through the eyes of the researcher (Jørgensen, Dahl, Pedersen & Lomborg, 2013).

The third qualitative design I considered was ethnography. In ethnography, the researcher seeks to understand the culture of people (Spradley, 2016). Spradley (2016) further argued that ethnography consists of a body of knowledge that includes techniques, ethnographic theories, and hundreds of cultural descriptions of human cultures from the perspective of those who have learned them. Because ethnography does not address the perceptions and lived experiences of individuals or society, the ethnographic design was inappropriate. Additionally, ethnography was inappropriate because of my focus on the individual's conceptual world (Grossoehme, 2014).

A phenomenological design was not suitable because my study did not focus on lived experiences of individuals or a group. According to Gee, Loewenthal, and Cayne (2015), to gain a description of the experience as lived, a phenomenologist strives to reveal the essential meaning of the phenomenon under study instead of creating abstract theories about the phenomenon through methods of quantification or cause-effect analysis. Furthermore, the phenomenological design was inappropriate because of potential confusion that may have arisen when processing a large number of interview

transcripts (Tomkins & Eatough, 2013). Additionally, phenomenology is time-consuming because of a lengthy interview process, which can be complex (Yin, 2014).

I chose a case study design because my study focused on a single oil-drilling unit. According to Cronin (2014), a case study design has strong philosophical underpinnings that provide a robust framework for exploratory research in a real-life setting. Cronin further added that the case study design is a rigorous and systematic method used in many research settings. A case study allowed me to source multiple pieces of evidence from documents, physical artifacts, archival records, audiovisual materials, interviews, and direct observations to triangulate findings and validate conclusions (Yin, 2014). The case study involves in-depth study of a single unit for understanding a larger class of a similar group (Baskarada, 2014). The interviews were limited to a single unit and a review of documents and artifacts that addressed succession planning strategies and knowledge transfer.

The selection method used was purposeful sampling. The sample size from the single unit was 24 participants. Boddy and Boddy (2016) argued that sample sizes involving one single case could be highly informative and meaningful as demonstrated in examples from management and medical research. Boddy and Boddy affirmed that data saturation can be useful as a guide in designing qualitative studies. Purposive sampling has the advantage of flexibility in instances where new information or situations would necessitate a change in sample size. Similarly, Robinson (2014) argued that researchers use a purposeful sampling technique to select informants based on their knowledge and experience with the focus of empirical inquiry. This study could have been conducted



using a quantitative method, but the size of the sample would not have provided sufficient data that would have allowed generalization of the findings.

### **Role of the Researcher**

The qualitative researcher plays the role of an instrument through which data are gathered and interpreted. The researcher should play a neutral role to avoid bias in data collection and to ensure a reasonable interpretation of the results (Khan, 2014). My role as a researcher conducting a single case study included (a) designing the study, (b) collecting evidence that related to the research problem, and (c) analyzing and reporting the findings (Yin, 2014). Furthermore, my role as a researcher took the form of an insider-outsider because I was a consultant to the single unit under study. Although I had worked with some of the individuals who formed part of the study sample, there were no direct professional relationships, and none of the participants came under my immediate supervision; therefore, there was no bias in my data collection and analysis. My role included reporting the findings accurately and without bias, maintaining the confidentiality of the participants, and ensuring that my research met strict ethical guidelines. Banks and Martey (2016) noted that the appearance of the researcher and his or her behavior could influence the participant's thoughts, feelings, and actions during the interview or one-on-one data collection. As the researcher, I maintained neutrality and ensured that my conduct did not change or affect respondents' feelings and thoughts.

Furthermore, I explored all possible means and maintained ethical standards to avoid bias. According to Malone, Nicholl, and Tracey (2014), bias in research is difficult to recognize and often difficult to manage. Malone et al. pointed out that selection bias

occurs when research subjects are not representative of the sampled population. Because my sample size was small and limited to a single unit, I made an effort to avoid selection bias by verifying responses on perspectives shared by the respondents.

### **Methodology**

Methodology refers to the methods that researchers employ to answer the research questions. Research demands that the researcher choose among three methods of inquiry to identify the most suitable method to address the research problem and the purpose of the study. The three choices available to researchers in social sciences are quantitative, qualitative, and mixed methods.

In social sciences study, qualitative research becomes useful when there is a need to explore a problem or issue and when a study entails a group or population. According to Dongre and Sankaran (2016), qualitative research methods include focus group discussions, in-depth interviews, and review of documents to identify themes and gain a better understanding of the experiences shared. Furthermore, qualitative research allows for more diverse data collection than quantitative methods that include limited and closed questions (Farrelly, 2012). Adopting a qualitative case study allows for rich, thick data collection through shared perspectives from business leaders. A case study design includes interviews with open-ended questions, member checking, and additional sources to triangulate the findings from the interview data (Yin, 2014). Qualitative researchers strive to understand and interpret personal perspectives, behaviors, people or group interactions, and the social context ascribed to a phenomenon of interest. Phenomena could include attitudes, beliefs, and perspectives of parents, workers, and managers as

well as the interpersonal relationships between employees and their supervisors in the work environment (Booth et al., 2016).

Interviewing is a crucial part of the qualitative method. It has become one of the most widespread knowledge-producing techniques used across the human and social sciences and specifically in critical psychology (Brinkmann, 2014). Interview helps to understand the meaning that individuals ascribe to a social phenomenon and how they perceive it. Fremeth, Holburn, and Richter (2016) asserted that the qualitative method allows in-depth exploration of a relationship in a manner that quantitative techniques cannot achieve. They further argued that qualitative methods are not easily adapted to an estimation of the direction or magnitude of a phenomenon's effect as found in a quantitative approach.

In the qualitative method, the direct interactions afford the researcher the opportunity to examine subjective responses of participants; however, the interpretation and understanding of the feedbacks are not generalizable. The qualitative approach allows small sample sizes, and nonprobability sampling methods are acceptable. Adopting a qualitative approach is not an easy way out of statistical approach but would enable the researcher to spend valuable time with the participants in the field to get firsthand knowledge of their perspectives and experiences. Qualitative design entails rigorous data collection that requires diligence in collating, sorting out emerging themes, and summarizing the data correctly. The qualitative approach does not use statistical tests, but the content analysis is acceptable.

In differentiating qualitative method from the quantitative approach, quantitative methods involve statistical testing for the causal effect of two variables; hence numeric based and statistical tests are used for analysis. Tran (2016) cited Creswell's submission that quantitative research is a deductive and theory-driven approach that focuses on the strict measurement and control of variables within large samples and utilizing analysis to identify statistical link among the data. According to Dongre and Sankaran (2016), quantitative research methods characteristics includes surveys, structured interviews and observations, and review of records or documents for numeric information. Quantitative analysis is chosen when a researcher wants to identify the frequency of behaviors related to a phenomenon, assessing dependent and independent variables, and testing hypotheses. It also involves deductive processes adopted to test defined concepts, constructs, and hypotheses associated with a theory. Dongre and Sankaran further stated that quantitative research is more futuristic and evolving; planning follows data collection, analysis, results, and reporting. In quantitative studies, the validation of the interpreted results enhances their generalizability and objectivity, which calls for a large sample size and adoption of probability sampling technique.

The third method adopted by researchers in social sciences research is the mixed-method. Mixed methods incorporate both qualitative and quantitative questions and paradigms to allow several approaches to the study. For example, the researcher starts the study of qualitative data collection techniques through semistructured interviews, focus groups, observations, and ethnography. To generalize findings, the researcher adopts randomized controlled trials, cohort studies, cross-sectional studies, and case series. The

insight gained from mixed methods fosters a more holistic and in-depth understanding of the phenomenon under study (Booth et al. 2016). Hussein (2015) noted that mixed method uses triangulation to enhance the possibility of neutralizing the flaws of one method and strengthening the benefits of the other for the better research results. Despite the advantages of the mixed method, I choose case study because of the flexibility in instances where new information or situation would necessitate a change in sample size until achieving data saturation.

### **Participant Selection Logic**

The selection of the participants for the current qualitative single-site case study came from one oil-drilling contractor in Nigeria. The selected unit of study is one of the leading Jack up oil-drilling contractors engaged in drilling activities in the Nigeria petroleum and mining blocks, and was the primary source of data. Cleary, Horsfall, and Hayter (2014) noted that selecting participants based on the researcher's central questions, framework and purposefulness are critical to explore the complex meaning and obtain data saturation. Wright, O'Brien, Nimmon, Law and Mylopoulos (2016) argued that it is crucial that researchers examine their philosophical assumptions and those underpinning their research questions before selecting data collection methods.

Quantitative study favors using large, randomly generated samples, especially if the intent of the research is to generalize to other populations. Instead, qualitative research often focuses on participants who are likely to provide rich information about the study questions, known as purposive sampling. To address the fundamental research questions, I used purposeful sampling and interview techniques which has the advantage of

flexibility in instances where new information or situation would necessitate a change in sample size until achieving data saturation. O'Reilly and Parker (2013) stated that data saturation occurred when the data collected from new participants becomes repetitive.

Similarly, Palinkas et al. (2015) argued that purposeful sampling is commonly used in qualitative research for the identification and selection of information-rich cases related to the phenomenon of interest validate my choice for a purposeful sampling technique. Additionally, the use of purposive sampling technique would ensure that selected participants have the knowledge and experience to provide rich data (Yin, 2014). In consideration of this planned approach, the population size comprised of personnel who have served for 5 years and more. Each participant in the study included persons who work in the onshore office and offshore installations (drilling platforms). I conducted the in-person interview to the participants following formal approval from the operations director and the personnel manager. The interviewee were selected based on the selection criteria which covered 3 levels of management, mid-level management and senior staff, and employees who have served 5 years and above. Selection of eligible organization members who have served 5 years or more enhanced the richness of data. Personal contact and e-mail was used to distribute the questionnaires.

I provided the informed consent form to each participant before the interview session, followed by e-mail communication. The informed consent form had a relevant subsection that included my name and contact information, my objective for the study, and the purpose of the research. I briefed the participants of the potential risks of

participation, information on how the respondents may opt out if it becomes necessary to discontinue, and protections of data confidentiality.

### **Instrumentation**

The purpose of this case study was to explore how a succession planning program contributes to knowledge transfer and developing expertise for business continuity and prevent loss of knowledge in the oil-drilling sector. I used an interviews template and interview protocol and audiotape as the data collection instrument. Rosetto (2014) noted that interviewers engage in active, supportive listening that involves paraphrasing and probing to develop rapport and encourage in-depth discussion. Rosetto (2014) emphasized that researchers must carefully maintain boundaries to protect the researcher–participant relationship and ethical obligations to do no harm. Roulston (2014) argued that the successes and failures in generating rich and detailed reports from interviewees are commonly understood as prompted by the interviewer’s actions. Efficient management of interactional problems made the interview a success. The interview instrument consisted of open-ended questions used to elicit the perspectives of the participants on succession planning strategies and its influence on knowledge transfer. To address the research question, I used purposeful sampling and interview techniques. Palinkas et al. (2015) noted that purposive sampling allows the researcher to choose the sample unit based on features or characteristics that enhance exploration and understanding of the central themes and questions, which the researchers wish to study. The guiding framework of the study research question was a descriptive and interpretive format which is consistent with qualitative research methodology (Bloomberg & Volpe,

2012). In consideration of this planned approach, the sample size comprised of management and mid-level employees, with a sample size of twenty-four personnel from the single unit.

### **Pilot Study**

The rationale for the pilot study was to determine the clarity of the instruments and to eliminate potential ambiguities from the crafted questionnaires. Seven participants in the single-unit of study were engaged to determine the simplicity of the instructions and the interview questions. The pilot study participants were disengaged after adopting the feedback I received from the participants. The seven participants did not form part of the 24 purposive sampled participants for the final study. According to Janghorban, Latifnejad Roudsari, and Taghipour (2014), a pilot study is small-scale of a complete survey or a pretest for a research instrument such as a questionnaire or interview guide. The feedback received from the participants guided me in rephrasing or administering the questions as crafted. The purpose of the pilot study was to determine the level of understanding of the questions by the participants and to remove any ambiguity. The feedback from the pilot study provided additional information that enhanced the quality of the interview questions and the need for additional resources. Responses from the pilot study provided an additional source for confirmability (see Appendix B for the interview questionnaire). I have included the final result of the pilot study along with IRB number in the final dissertation.



### **Procedures for Recruitment, Participation, and Data Collection**

Data collection protocol consisted of a semistructured questionnaire using e-mail and telephone interviews to obtain the necessary data for the study. Additionally, I used company document to support interview data (Yin, 2014). Company documents included employee handbook, human resource policy covering training, knowledge management, and succession planning and employee development programs. The data collection process lasted for 5 weeks. I recorded data through audio recording, and jotting down responses on a dedicated diary I provided for the study. Data saturation was attained when no new information was received from the participants.

According to Carter, Bryant-Lukosius, DiCenso, Blythe and Neville (2014), triangulation is the use of multiple data sources in qualitative research to promote understanding of the phenomenon being studied. Carter et al.; (2014) cited Denzin and Patton who identified four stages of triangulations (a) method triangulation, (b) investigator triangulation, (c) theory triangulation, and (d) data source triangulations. My study derived from data source triangulation using in-depth interviews supplemented with archival records and employee handbook to develop a comprehensive understanding of the concept of succession planning and the influences on knowledge transfer thereby ensuring triangulation of data sources. Triangulation helped to strengthen the credibility of the data sets. Triangulation was achieved by adopting multiple data collection methods such as document and interviews to draw on varied viewpoints to glean the study theme.

I administered informed consent as this was an important aspect in conducting ethical research (Yin, 2014). Before applying the instrument, I presented to each

participant the informed consent form for acceptance and signature. To provide transparency, the informed consent form included detailed information about myself, my contact details, the participant selection criteria, and the purpose of the research. The consent form also included any potential risks resulting from participation, clarified the voluntary nature of involvement, and lastly I provided information on how participants may exit if it becomes expedient to withdraw.

### **Data Analysis Plan**

The data analysis plan included the use of qualitative single-case study to explore how leaders in the oil-drilling company use succession planning to influence technical knowledge transfer from aging workers to younger employees. In this current qualitative case study, the following interview questions were used to collect data:

1. What is your perception of succession planning practice?
2. What is your perspective on succession planning practice as a means to promote knowledge transfer?
3. What benefit do you think succession planning brings to the company?
4. How have you managed the impact of an aging workforce leaving the company with their wealth of knowledge?
5. What strategies do you have in place to replace aging workers when they retire or exit the organization?
6. What method(s) do you use to transfer knowledge from retiring workers to younger employees?

7. What are the challenges you face in using these methods to promote the transfer of knowledge from retiring employees to younger personnel?
8. How have you managed such challenges or obstacles?
9. How do senior personnel share tacit knowledge in your company?
10. What is your personal experience in managing tacit knowledge with your team?
11. Tell me about other methods you have adopted to ensure effective knowledge transfer.

Face-to-face interviews, and telephone interviews was used to collect data. Mealer and Jones (2014) argued that qualitative telephone interviews can limit emotional distress because of the comfort experienced through virtual communication. The interview session lasted five weeks. The approach of face-to-face interviews supported by telephone interviews allowed me to reach out to the target participants. Once I completed the interviews, I continued with the next stage of data analysis.

Data analysis was a four-stage process starting with the retrieval of transcribed data from the audio recorder I used, supported by the secondary data collected through review of company documents (Bloomberg & Volpe, 2012). I used traditional text analysis instead of a computerized method to analyze the data. Traditional text analysis is a process where data coders place each piece of data into various categories by hand. I used a constant comparative method to create the common themes in each category during the open coding process (Lincoln & Guba, 1985). According to Bright and O'Conner (2007), researchers use traditional text analysis to interpret meaning from data

as opposed to electronic methods, which may indicate unclear antecedents. Bright and O'Connor further noted that computerized text analysis has the disadvantage of creating incorrect coding based on sentence structure. I used the open coding process to allow me to note new words and short phrases in a diary once I gathered the raw data. The next step was to identify and label the themes, linking ideas and identifying thematic clusters and finally producing a summary table of ideas (Lyons & Coyle, 2016). Additionally, I separated long responses into meaning units to bracket the responses received into separate code unit to align with the study objectives (Bloomberg & Volpe, 2012).

Furthermore, I used a member checking technique to enhance the credibility of my study. According to Thomas and Magilvy (2011), member checking increases the credibility of findings by allowing participants and other people who may have particular interests in the evaluation to make their input after going through the results of the research, interpretations, and conclusions. Member checking allowed participants to comment on whether the categories and outcomes described in the results relate to their personal experiences. Member or stakeholder checks was carried out on the first documents (e.g., interview transcriptions and summaries) and the data interpretations and findings. I conducted checks by interested parties progressively during the research project both formally and informally. The following is a simple list that outlines strategies adopted for member or stakeholder check during my study:

1. I summarized data at the completion of interview and participants were given the opportunity to correct errors or misrepresented facts or challenge interpretations.

2. During subsequent interviews, participants were asked to verify interpretations and data gathered in earlier interviews.
3. Informal conversations took place with participants from the company under my study.
4. Copies of a preliminary version, or specific sections, of the detailed report, was provided to participants and written, or oral commentary on the report sought.
5. Before the submission of the final report, I performed the last member check by providing a complete draft copy for review by the participants. Member checking enhanced the confirmability and credibility of the facts gathered from the interviews.

### **Issues of Trustworthiness**

#### **Credibility**

Credibility is the believability of the research process and findings. According to Noble and Smith (2015), credibility requires that researchers develop an intimate familiarity with the context in which human experiences rest. The data collected were tested against existing policy to ensure consistency. Houghton, Casey, Shaw, and Murphy (2013) affirmed that credibility refers to the value and believability of the research findings. To achieve credibility, I ensured strict adherence to qualitative methods and instruments. Combining appropriate tools and approaches used in case study research enhanced the trustworthiness of my study (Frels & Onwuegbuzie, 2013). According to Creswell (2013), qualitative researchers should adopt accepted strategies to document the

accuracy of their findings. I conducted member checking and debrief to achieve credibility. Member checking provided an opportunity for the participants to give feedback regarding the interview and the inferences drawn from the comments.

Agreement with the interview transcript through member checking and a confirmation of the absence of bias in my reporting was sufficient to render my study credible. Lastly, I ensured clear statements of any bias that may arise in the course of the study which could add to the credibility of my research.

### **Transferability**

Hammarberg, Kirkman, and De Lacey (2016) described transferability of the research findings as the criterion for evaluating external validity. I used multiple sources of evidence including participant interviews, documentation, and physical artifact collection to meet the intent of transferability. I specified what context and community the findings will be applicable and be able to justify that results arising from the research are generalizable to the community or industry (Noble & Smith, 2015). Researchers use rigor to establish consistent methods to replicate a study, thereby creating transferability, credibility, dependability, and confirmability of research (Thomas & Magilvy, 2011).

Adopting such rigor as recommended by Thomas and Magilvy enhanced the transferability of my study. A study meets the criterion of transferability when its findings can fit into contexts outside the study situation and when other researchers view the findings as meaningful and applicable in their personal experiences (Hammarberg et al., 2016). Findings from my research were presented logically in a way that other oil-drilling contractors struggling with succession planning can key into the recommended

strategies. Finally, transferability occurs when a study offers detailed descriptions of the population of study, sources of evidence collected, demographics, and boundaries of the study (Yin, 2014).

### **Dependability**

Dependability occurs when a researcher establishes consistency across different projects. Dependability is evident when another researcher can relate with the audit trail of the original researcher (Thomas & Magilvy, 2011). My research ensured an audit trail by: (a) presenting the purpose of the study, (b) describing the selection process for the participants, (c) describing the data collection process, (d) demonstrating how the data were interpreted and analyzed, (e) discussing the research findings, and (f) communicating techniques to determine credibility of data (Thomas & Magilvy, 2011). I checked the interview transcripts to eliminate any ambiguity or mistakes, ensured that the coding aligns with the actual meaning by always comparing data with the codes. I also crosscheck codes by engaging a colleague who helped me to double check the code frequency to ensure agreeability. I used rich, thick description to elucidate the findings. In-depth description helps the reader to have a better understanding of the setting and convey shared perspectives.

Maxwell (2013) noted that long-term participant observation provides complete data about particular situations or phenomena more than any other method, adding that long-term involvement and intensive interviews enable the researcher to collect robust data. Maxwell further opined that such data provides detailed and varied insight that could reveal the real picture of what is going on or the actual position of the

phenomenon. My research may be dependable because of the rich description of interconnected details relating to the identified themes.

### **Confirmability**

Confirmability relies on ensuring that the result of the study aligns with similar research that adopted a single-case study. Confirmability represents what objectivity is to quantitative analysis (Sinkovics, Penz, & Ghauri, 2008). Sinkovics, et al further argued that researchers must demonstrate that their data and the interpretations drawn from the data adequately align with circumstances and conditions outside from the researcher's imagination and are coherent and logically assembled. Researchers establish confirmability by using member checking and peer review to assure that reports correctly reflect the feedback received. This current study ensured confirmability by sending the transcribed data to participants who agreed to the accuracy of the transcription

### **Ethical Procedures**

Ethical issues are known to occur at all stages of research from methods, goals, selection of research questions, and critical assessment of conceptual framework (Maxwell 2013). Additionally, Maxwell (2013) noted that ethical issues in qualitative research are looming as an important part of all studies. In keeping with ethical procedures, first, I received approval from the Institutional Review Board (IRB) before commencing data collection. I ensured compliance with the acceptable code of conduct, social acceptability, and legal requirements. I also received local permission from the management of the participants. I made sure that the participating members received the consent form that detailed the purpose of the study, clarification on the choice of



participation and that their involvement would not place them at undue risk. Another important aspect I avoided, was any form of influence during the interview. Such interference may come from my knowledge of the phenomenon and the social setting. To prevent any influence, I avoided asking leading questions or preempt participants' answers to the questions.

During data analysis, I ensured fair reporting of multiple perspectives as identified during the interview. I also avoided selective reporting and presented my findings as received. Reports maintained confidentiality and no names assigned. Lastly, I ensured transparent reporting, and no publication made unless I have express permission.

### **Summary**

The primary purpose of Chapter 3 was to describe the qualitative case study approach to this research which contains information on the study design and rationale, the researcher's role, and the assurance of trustworthiness of the methods. Chapter 4 of this study covers pilot study results, research settings (organizational influence), and issues regarding demographics, data analysis, evidence of trustworthiness, and finally the study results. Fair reporting of the perspectives shared during the interviews was assured during data analysis.

## Chapter 4: Results

The purpose of this case study was to explore how a succession planning program contributes to knowledge transfer and developing expertise for business continuity and prevents knowledge loss in the oil-drilling sector. This study included face-to-face semistructured interviews and review of company documents and physical artifacts within an oil-drilling company. The central question was as follows: What succession planning strategies do leaders use to facilitate the transfer of knowledge from the aging workforce? In Chapter 4, I describe the pilot study detailing the impact on the study, the research setting, participant demographics, data collection methods, data analysis procedures, evidence of trustworthiness, study results, and a summary.

### **Pilot Study**

I conducted a pilot study with seven participants from the single unit of study to determine the suitability of the interview questions. The purpose of the pilot study was to determine the level of understanding of the questions by the participants and to identify potential ambiguity. Additionally, the pilot study helped to confirm the suitability of my audio recording instrument. The pilot study enhanced the credibility of the interview questions. The advantage of the pilot study was that it gave me an insight on where the main research project could fail and where the research protocol could impede the process.

The feedback received from the pilot study participants identified a need to define succession planning and tacit knowledge during the interview. The changes helped to

avoid unclear questions and clarified the meaning of succession planning and tacit knowledge. However, the logic and intention remained consistent and unchanged.

Following the inclusion of the definitions of the key words *succession planning* and *tacit knowledge*, the pilot study participants agreed that the interview questions were clearer. Confirmability was enhanced by the pilot study. At this stage, I disengaged the seven participants from the study. Appendix C contains the interview questionnaire.

### **Research Setting**

The research partner was an international drilling contractor operating in Nigeria that provides offshore drilling services to oil majors. The partner operates jack-up rigs capable of drilling oil wells in Nigeria in challenging oil marginal fields. The company has a population of over 250 employees with the potential to increase its fleet and staff strength.

The research setting was a relaxed atmosphere, and no undue influence that would affect or undermine the genuine intention of the participants. I was able to interview the members in a quiet setting using the senior staff lounge or the interviewee's office without interference. Participation was voluntary, and there were no budgetary issues or financial inducements to participants and no cost implications to the company. Although there were some interruptions due to phone calls, there was no influence on interview outcomes.

### **Demographics**

The sample for this case study consisted of 24 oil-drilling company employees across three employee levels. The role of participants ranged from core drilling

professionals to those in maintenance, marine, and administrative units. The 24 participants were required to meet an experience level of 5 or more years of service. Following the approval from Walden's institutional review board (IRB 04-10-17-0346575), I invited participants to take part in my qualitative study. I collected and analyzed the data and reached data saturation when no additional information was received. Interviews were 15-30 minutes to allow the gathering of adequate information. Participants were cooperative and offered relevant information based on their individual experiences. Recorded interviews were played back for confirmability of information given.

Table 2 illustrates the participants' profiles including pseudonyms, job level, educational qualifications, and years of service. In accordance with the objective of the single case study, I used a sample size of 24 to establish data saturation and adequately answer the research question. The research protocol (see Appendix B) provided guidance during the interview process.

Table 2

*Participant Profiles*

Pseudonym	Job level	Degree	Years in service
P1	Management	Masters	17
P2	Management	BEng	24
P3	Management	Masters	27
P4	Manager	BSc	24
P5	Senior supervisor	BSc	18
P6	Management	BA	15
P7	Management	BSc	12
P8	Management	BSc	18
P9	Senior supervisor	HND	13
P10	Senior supervisor	BSc	14
P11	Senior supervisor	BEng	12
P12	Supervisor	BSc	15
P13	Senior supervisor	BA	27
P14	Senior supervisor	BSc	19
P15	Senior supervisor	BSc	11
P16	Management	BEng	30
P17	Senior supervisor	BEng	17
P18	Manager	BEng	14
P19	Senior supervisor	BA	27
P20	Supervisor	BEng	7
P21	Senior supervisor	HND	17
P22	Senior supervisor	BEng	8
P23	Senior supervisor	BSc	30
P24	Senior supervisor	Diploma	27

### **Data Collection**

The data were collected from the single unit of study. During data collection, I distributed the IRB-approved dissertation questionnaire through e-mail to the single unit oil-drilling company that participated in the study. Prior approval was received from the participating company's management to distribute the interview questionnaire. Twenty-four participants from the single unit were contacted and issued the consent form before the interview session. Eleven interview questions covered succession planning and knowledge transfer. Seven participants recruited for the pilot test who reviewed the questionnaires provided responses that confirmed the suitability of the questionnaires and interview protocol.

I started the interview with a brief introduction and an overview of the qualitative study. Next, I thanked the participant for accepting and making time to participate in the study. I then reviewed the informed consent form with each participant whose copy was signed. I clarified the goal of the study and made it clear that personal information would not be published. I also gave each participant an opportunity to ask any questions related to the consent form, to which answers were provided. Finally, I informed participants that the transcribed data would be sent to them through e-mail to confirm the correctness of the responses, and I would ask participants to verify the accuracy of the recorded information. Once the participants confirmed their readiness to continue with the study, I proceeded with the interviews. At the end of each interview, I thanked the participants for taking time out of their busy schedule to attend the interview session. The interview

period lasted about five weeks due to location and operational constraints. Each interview session lasted between 15 and 30 minutes.

Each interview was guided by the interview protocol and interview questions (Appendix A and Appendix B). The protocol contained a structured approach that guided the interview. The interview questionnaire contained semistructured open-ended questions designed to promote flexibility during the interview. I used my iPhone audio recording software to record the interviews. The digital recording helped me to play back the interviews multiple times to confirm the accuracy of the transcribed data. I assigned a pseudonym to each participant at the start of the interview, and I made it clear that this approach was to maintain confidentiality.

### **Data Analysis**

Data analysis is a vital aspect of the research process that requires diligence and clarity in reporting. The purpose of the study influenced the data analysis technique I adopted. Because my study was a qualitative study using an interview protocol, I asked member participants to confirm the understanding and clarity of the interview questions.

I conducted a qualitative study to explore how a succession planning program contributes to knowledge transfer and development of expertise for business continuity and prevents loss of knowledge in the oil-drilling sector. In this qualitative study, 24 participants answered 11 semistructured interview questions (see Appendix B).

I gathered data using semistructured open-ended questions during face-to-face interviews, and I reviewed company documents to triangulate the data. Once the audio-recorded interviews were complete, I transcribed them by listening to the interviews

several times to confirm that the transcriptions were accurate. Traditional text analysis was used instead of a computerized method to analyze the data. According to Bright and O'Conner (2007), researchers use traditional text analysis to interpret meaning from data as opposed to electronic methods, which may indicate positive and negative qualifying statements that could create a wrong interpretation.

To ensure the accuracy of the data and findings, I relied on reflexivity during the research process, particularly during the interview and data analysis phases. I reflected on participant actions during the various stages, reviewed transcripts, and played back the audio recordings multiple times to verify that the coding correctly reflected the interview data provided. I used traditional text analysis to count recurring themes to confirm reliability.

Traditional text analysis method was used to analyze the data. This method involves the placement of piece of data into various categories by hand and manually counting the emerging themes. I then used a constant comparative method to create the common themes in each category during the open coding process (Lincoln & Guba, 1985). The next step was to identify and label the themes, linking ideas and identifying thematic clusters and finally producing a summary table of ideas (Lyons & Coyle, 2016). I repeated this process multiple times to ensure I had not missed any vital theme and no more themes emerged in the data analysis process (Yin, 2014). Additionally, I separated long responses into meaning units to bracket the responses received into separate code units to align with the study objectives (Bloomberg & Volpe, 2012).



Finally, I started interpreting the meaning of the data based on the emergent themes and patterns (Yin, 2014). The research question was used for better understanding of the themes and pattern supported by the research findings. This data analysis approach is appropriate for qualitative research studies (Lyons & Coyle, 2016). The data analysis process was useful in uncovering the themes that answered the semistructured research questions. Furthermore, the data analysis process provided a framework to understand how succession planning strategies influence knowledge transfer in the oil-drilling sector. The emergent themes were mentoring, individual development plan, on-the-job training, and 360-degree communication.

Transformational leadership has a strong effect on mentoring and coaching because of the influence leaders have on trainees during knowledge exchange while grooming them for leadership positions, which is key to the success of knowledge exchange (Badara et al., 2014, 2015). The participants affirmed mentorship as a knowledge transfer technique, individual development plan, on-the-job training, 360-degree communication, personal commitment, and resilience are all important in grooming new employees.

Consistent with Nonaka and Takeuchi's (1995) model, individual development plan and on-the-job training were identified as methods used to transfer tacit knowledge. Those who created the model claimed that explicit knowledge could be transferred hooked on tacit knowledge within others by translating theory into practice (Nonaka & Takeuchi, 1995). The concept is also known as a process of internalization and explicit knowledge converted to precise knowledge in others by combining various existing

approaches; in other words, a combination process. The succession planning concept, knowledge transfer theory, and transformational leadership theory provided a foundation for the study design to explore how a succession-planning program contributes to knowledge transfer and development of expertise for business continuity and to prevent loss of knowledge in the oil-drilling sector.

### **Evidence of Trustworthiness**

#### **Credibility**

According to Houghton, Casey, Shaw, and Murphy (2013), credibility refers to the value and believability of the research findings. To achieve credibility, I ensured strict adherence to qualitative methods and instruments designed for this study. Combining appropriate tools (the interview protocol, member-checking) and approaches used in case study research enhanced the trustworthiness of my study (Frels & Onwuegbuzie, 2013). I conducted member checking and played back the audio recorded interview to participants. Their agreement and confirmation of the correctness of the transcripts helped me to achieve credibility.

Member checking and playback of the audio provided an opportunity for the participants to give feedback regarding the interview and the inferences drawn from the comments. Agreement with the interview transcript through member checking and a confirmation of the absence of bias in my reporting were sufficient to render my study credible. Finally, I confirmed the data culled from the company documents through feedback from the participants' company management to achieve credibility. Prion and Adamson (2014) explained that rigor enhances trustworthiness on credibility,

transferability, dependability, and confirmability of research. I collected, audited, coded, categorized, corroborated, and confirmed data to ensure the study's credibility as well as transferability, dependability, and confirmability through participant interview responses, member checking, feedback by the dissertation committee, and literature review and analysis.

### **Transferability**

According to Hammarberg, Kirkman, and Lacey (2016), the transferability of the research findings is the criterion for evaluating external validity. I used multiple sources of evidence including participant interviews, member checking, documentation, and physical artifact collection to meet the intent of transferability. Similarly, Dongre and Sankaran (2016) affirmed that qualitative research methods characteristics include focused group discussions, in-depth interviews to gain rich data, and review of documents to identify themes and gain a better understanding of the experiences shared. Furthermore, to ensure transferability, I engaged 24 in-service drilling workers across three levels of employment with substantial knowledge in succession planning practices and knowledge transfer.

The rich information provided by the participants during the interviews helped me to ensure transferability. The interview protocol (Appendix A) that guided the interview process was used to administer the interview questions to each participant to saturate the data. I provided a detailed description of the interviews, which was confirmed through member checking. According to Yin (2014), transferability occurs when a study offers detailed descriptions of the population of study, sources of evidence collected,

demographics, and boundaries of the study. At this stage, transferability was met, even though transferability is dependent on the reader to make an informed decision based on personal disposition (Marshall & Rossman, 2015).

### **Dependability**

Onwuegbuzie and Byers (2014) stated that dependability exists when another researcher can follow the steps of the original researcher. Similarly, Thomas and Magilvy (2011) affirmed that dependability is evident when another researcher can relate with the audit trail of the original researcher. To establish dependability in my study, I provided detailed steps taken throughout the qualitative study regarding the interview protocol; participants' responses to the interview questions, which were recorded; and the interview transcripts. Most of the participants reviewed the transcript a day after the interview, while the others were delivered through e-mails after which correctness of the transcript was confirmed. Creswell (2013) recommended that qualitative researchers should adopt accepted strategies to document the accuracy of their findings. I used member checking to confirm the synthesis represented the answers provided and to gather additional information that the participants might have found expedient. This process was continued until there were no new data to collect from the participants.

### **Confirmability**

Confirmability represents what objectivity is to quantitative analysis (Sinkovics, Penz, & Ghauri, 2008). Researchers establish confirmability by using member checking and peer review to assure that reports correctly reflect the feedback received. I conducted an internal audit of the coding process and themes for consistency. I shared my research

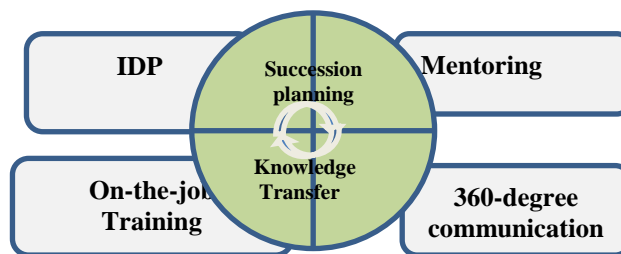
findings with another Walden Ph.D. graduate to confirm alignment with the process used during the study. Finally, I presented detailed research findings to increase the confirmability of the research results.

### **Study Results**

The results of the current study could help clarify understanding of how succession planning strategies influence knowledge transfer. My study addressed the research question and the various succession planning strategies used by leaders in the oil-drilling company to influence knowledge transfer. I organized the data collected into themes. The themes deduced from the transcribed data, additional information from documentation, and artifacts are as follows; (a) Individual development plan, (b) mentoring, (c) on-the-job training, and (d) 360-degree communication.

The purpose of this case study was to explore how a succession planning program contributes to knowledge transfer and developing expertise for business continuity and to prevent loss of knowledge in the oil-drilling sector. The participants and supporting documents provided rich data on the succession planning strategies used to transfer knowledge from aging workforce to the younger employees. Identifying the strategies used by senior personnel to transfer knowledge formed the major aspect of the study. The following subsections describe the participant's sample, the four themes that emerged, and how the data collected supported the central research question, aligned with existing research, and validated the choices of the three theories that formed the conceptual framework for this study.

This study included face-to-face, semistructured interviews, and review of company documents and physical artifacts within an oil-drilling company. The 11 semistructured interview questions presented to the participants of a single case study unit in oil-drilling sector aimed at determining the succession planning strategies used to influence knowledge transfer. The participants interviewed were oil-drilling workers with over 400 combined years of drilling and administrative experience. The 24 participants selected shared their perspectives about succession planning strategies used to transfer knowledge in the industry. The study results identified a preference for knowledge transfer with mentoring, individual development plan, on-the job training, and 360-degree communication. Figure 1 illustrates the influence of succession planning in knowledge transfer and the methods from the emergent themes used to promote knowledge transfer.



*Figure 1.* Graphic representation of the emergent themes

### **Theme 1: Individual Development Plan (IDP)**

The first theme elucidates the participants' perceptions of the individual development plan as “the banner under which potential successors are developed systematically to move up the ladder.” From the interviews, I discovered that 75% (18/24) of the participants affirmed individual development plans as a critical aspect of

the succession planning process used to prepare personnel for their next roles. The remaining 25%, when prompted to explain how IDP is practiced, confirmed that tacit knowledge is best transferred when individuals under IDP are attached to a mentor. The mentor under the plan exposes the trainee to both explicit and tacit knowledge during the training period. Participants emphasized the importance of knowledge transfer to subordinates to prepare them for the future. The supporting statements from the participants are shown in Table 3.

Table 3

*Theme 1. Individual Development Plan*

Participant	Participant comments
P1	I believe it is easy to manage succession with on-the-job training, moreover, promote individual skill development. Individual development programs and management development programs have helped to reduce the time it takes to develop supervisors who ordinarily would have taken years to groom. "We employ fresh-out hires and gradually develop them to replace the aging workforce."
P3	Participant 3.stated that the company develops plans for identified groups who have the potential to go higher in the hierarchy or take a position at the upper level: "Our system prepares this personnel to be ready within a given time frame to take the next job position."
P4	At every level, there is an individual development plan that is drawn up by the supervisor for the subordinate. This plan is given a time frame for completion. Regular checks are done within the time frame to assess the progress made by the subordinate. P4 also affirmed that "before in the industry, there was external training added to the IDP and close supervision, but due to low activity and financial situation in the country, the external training has been greatly reduced."
P5	The management had long ago adopted the concept, which is beneficial today in this era of nationalization of the oil sector in Nigeria. IDP tool has long been in use to foster the realization of the succession planning objectives.
P6 and P7	Trainees have been identified and tied to the experienced people in the company that is likely to retire in a few years time. The individual development plan has been put in place for these trainees.
P8	"... Also, we develop IDPs for the understudies being followed, and they are monitored by the supervisors on the rig."
P9, P10, P23	You prepare an IDP for the mentee, and that is monitored on a quarterly basis till you are satisfied that the individual has accomplished what has been set out for him. That IDP is centered on his deficiencies, areas that the mentee needs improvement. The progress is tracked throughout the training duration.

*(table continues)*



Participant	Participant comments
P14	“...for a couple of years, we recognized the fact that people over time would have to leave because of age, years in service, we employ new hands and put them in different programs like – IDP. We also have projected program for people who will take certain positions.
P15	IDP is just putting somebody on the fast track. The IDP is a specific development program for somebody being prepared for the next position. So, when he gets to the next position, another IDP is set up for him until the trainee becomes substantive in the new position.
P17	The IDP program is an excellent program: “It is better than the mentoring part of it, because the IDP stipulates the time; there is a time limit that the trainee must follow, and he is tasked to finished assigned operational task at a given time before the trainee is allowed to progress to the next stage.”
P18 and P19	Individuals under succession program are put under IDP and mentored along the line of their chosen profession. They are regularly appraised to determine their progress and readiness to move up the ladder.
P22	“... Although the IDP is in place, some individuals under the scheme are not taking it seriously. Hence the benefit is watered down.”
P23	“I have used the IDP to develop a good number of drilling workers during my 27 years, and I am confident it is a good tool to transfer knowledge.”
P24	“I think the IDP draws the trainee closer to the mentor particularly when their goals are aligned. It builds trust and enhances personal growth... I went through IDP, and it truly made me know my supervisor more. In fact, we share personal experiences both at work and home. We sometimes discuss my growth during our time off in a cafeteria I feel strongly empowered during our discussion.”

Participant 24 put it simply: “I feel empowered when I am completing my development plan. Transformational leadership was evident when leaders use their skills to transform the younger employees. One of the participants explained the consistent application of succession planning concepts, which included training, mentoring, hands-on practices, which remain the core of effective succession planning strategies.

Participants also noted the consequences of not using succession planning to transfer knowledge could be grave.

### **Theme 2: Mentoring**

The second theme elucidates the participants' perception of mentoring as a strategy in knowledge transfer. From the interviews, I discovered that 96% (23/24) of the participants affirmed mentoring as a critical aspect of succession planning process used to influence knowledge transfer. One of the participants thought aging staffs with specialized skills are assigned a trainee to be coached and mentored. The aging employees shadow the mentee to a proficiency level. Other participants confirmed that debrief is used to capture tacit knowledge as supervisors brief the team at the end of the task. Participants emphasized the importance of knowledge transfer to subordinate to empower them and get some relief on the part of the supervisors. Sun, Pan, and Chow (2014) examined the mediating effect of psychological empowerment and organization-based esteem on the relationship between supervisory mentoring and employee performance and the moderating effect of supervisor political skill. The supporting statements from the participants are shown in Table 4.

Table 4

*Theme 2. Mentoring*

Participant	Participant comments
P1	Mentoring and coaching with hands-on practice session are accomplished through getting the subordinates to act for the managers during vacations and days out of office.
P2	Participant 2 affirmed that mentoring presents a good tool to transfer knowledge when mentee and mentor commit to the process. I think the process is not genuinely followed through because the so-called mentor did not buy into the program. Hands-on training is achieved by assigning trainees under the experienced employee in knowledge exchange.
P3	I feel mentorship set defined expectation, and each mentee Is expected to meet set training requirements and hands-on assigned within a time frame.
P4	The company sees knowledge transfer as a good thing and well supported.
P5	With the practice of succession planning, the aging work force is made to serve as mentors to the younger workforce/personnel.
P6	Participant 6 stated, "New employees are often paired up with their more experienced colleagues in a mentor/mentee relationship. The performance of the mentee is often tied to the mentors' annual appraisal."
P7	Participant 7 identified mentorship in addition to IDP and on-the-job system as methods used to transfer knowledge in the industry.
P8	Mentorship and socialization is often used by senior personnel to transfer knowledge
P9	In the drilling industry, if supervisors fail to prepare personnel adequately, the organization ends up with half-baked mentees; it would mean fewer experienced individuals are taking on higher job position not fully prepared.

(table continues)

Participant	Participant comments
P10	Aging workforce is assigned as a mentor “to anyone that has been identified as capable and ready to move from a lower position to the next level. A buddy and a mentor are assigned to measure the trainee development and performance to determine when external training is required.
P11	Participant 11 argued that in “mentoring and coaching, a trainee is assigned a buddy, assign a coach and making them work with more experienced ones and by that, they can know the right and left of the business.”
P13	“...mentoring is used informally. For example, I have seen a situation where the supervisor performing the job will tell the trainee to do this and that, and he is watching and would also assist them.”
P14	Mentoring and coaching include the supervisor allowing the junior employee to get hands-on on the ongoing job in the presence of the mentor. The mentor gives the trainee the opportunity to understudy the practical session and subsequently allowed to perform tasks under the supervision of the mentor.
P15	Trainees are attached to understudy somebody (a mentor) for certain position. For example, when an employee is identified for career development, say a potential Assistant Driller (AD) position, the strategy used is to assign him to an old AD. Moreover, the trainee can understudy the substantive AD for a given period.
P16	The aging workforce transfers knowledge by tasking them as mentors to the newer employees. The aging workforce knows that at certain age and years of service they will leave. Giving people as assistance provides a means of training. While the younger ones are working with the experienced hands, the mentor is charged with the responsibility share technical knowledge.
P17	The mentoring system has helped a lot because knowledge has been passed to the younger ones. It makes it easy for the aging workforce to leave because they are confident that they have trained someone to take over.

(table continues)

Participant	Participant comments
P18	Higher performers are identified and assigned a mentor, whereby the trainee can perform the job of the mentee. By so doing, the supervisor build confidence in them that they can do it, encourage the mentee to work harder.
P19	Mentoring and coaching are all about communication. If the mentors are not communicating effectively with the mentee, the mentee might get it wrong.
P20	Mentoring means the personnel is understudying an older employee who shares knowledge with the trainee. The older employee allows the trainee to practices regularly under supervision until a level of proficiency is reached
P21	Mentorship allows the few people identified to take the mantle of leadership position recommended by management to shadow the old and experienced ones.
P22	Mentoring is useful and efficient when management sets a structured system that mandates the mentor to ensure the mentee is ready at a given time or drop from the position.
P23	“Mentoring is good, but I do not like the approach adopted by some senior personnel. The supervisor sends the trainee to bring spare parts while the mentor continues with the task. Hence the mentee loses the critical aspect of the work without getting another opportunity.”
P24	Simply said, “knowledge transfer is not effective because the retiring personnel does not want to share their experience.”

One of the participants explained that mentorship and socialization had been used to empower the team during knowledge transfer. Transformational leadership has a strong effect on mentoring and coaching because the influence leaders have on trainees during knowledge exchange while grooming them for a leadership position is key to the success in knowledge exchange (Badara et al., 2014, 2015). Participant 1 stated, “thorough knowledge and skills gap analysis must be conducted for each job function, and proposed candidate must be evaluated, mapped and followed up with individual

development plans to ensure the succession planning is on track.” Participant 2 pointed out, “Lack of commitment by management and key supervisors offshore in following succession planning strategies needs to be corrected.” The comments of Participants 1 and 2 clearly support Rothwell’s (2011) recommended

seven-point enhancement model, which includes (a) making a visible commitment that promotes succession planning and management, (b) using assessment criteria of present work and people requirements, (c) using an appraisal system to evaluate performance, (d) assessing future business and position requirements, (e) assessing future individual potential, (f) closing the individual development gap, and (g) appraising the success and subsequent succession development program. (p.79)

### **Theme 3: On-the-job Training**

The third theme included the participants’ perception of on-the-job-training (OJT) as a major succession planning strategy in knowledge transfer. Participant 2 affirmed that OJT modules packages include a video demonstration of drilling equipment operations, and technical books are provided for references. Trainees take the final test upon completion to test their understanding of the modules. A review of company documents revealed that one of the strategic priorities of the single unit studied includes focusing on developing competent local talent in the location where they operate, and the guiding principles include to deliver effective recruitment, succession planning, training and development programs. Muslim, Haron, Hashim, and Hassan (2015) argued that a majority of the leadership community agree that leadership development comes through a

system approach whereby individuals become exposed to developmental opportunities through experience, mentorship, and formal training.

Table 5

*Theme 3. OJT*

Participant	Participant comments
P1	Offshore, it is easier to manage succession with on-the-job training, skills development, and competency management
P2	Participants 2 sees hands on training – being assigned to work as trainee under the experienced employee and a review of OJT computer-based module
P3-24	Participants alluded to the fact that OJT is a vital knowledge transfer tool if effectively managed by the mentee and the mentor who is expected to complete and sign off a task completion form

In overall, leaders agreed mentoring, IDP and OJT are the most commonly used succession planning strategies to transfer knowledge from aging workforce to the younger employees. These methods afford the mentor and the mentee an opportunity to work individually or as a group in exchange of tacit knowledge. The participants' viewpoints corroborated Nonaka and Takeuchi's (1995) socialization, externalization, combination, and internalization (SECI) model. The SECI model is concerned with knowledge creation and involves the fluid transfer of both tacit and explicit knowledge among individual, group, and organization levels, resulting in knowledge creation. Adopting effective succession planning strategies that integrate knowledge sharing and effective communication may help improve performance and maintain competitive advantage (Coulter & Faulkner, 2014; Hall-Ellis, 2015; Joe, Yoong, & Patel, 2013).

#### Theme 4: 360-Degree Communication

The fourth theme included the participants' perception of 360-degree communication as a valuable method of ensuring top-to-bottom communication to promote knowledge sharing. Cao and Peng (2013) emphasized the importance of effective communication and feedback to assure efficient knowledge transfer at all levels to reduce knowledge tacitness. Furthermore, Nonaka and Takeuchi (1995) argued that a successful knowledge management program must translate practical experiences (tacit knowledge) into written procedures (explicit knowledge) for effective communication and maintain organizational memory. Providing quick and honest reactions to the communicated message enhances the flexibility of the parties in communication (Hudcova, 2014).

Table 6

#### *Theme 4. 360-Degree Communication*

Participant	Participant comments
P3, 5, 7, 9, 16, 18, & 24	Seven participants noted that although a new concept in the company, 360-degree communication is used to ensure top-down communication and to promote knowledge transfer.
P 1, 2, 4, 6, 8, 10-15, 17, 19-23	The other 17 participants recognized the importance of communication in Succession planning and knowledge transfer. However, they did not use the word 360-degree. They also noted that communication help to build trust and confidence in the mentees.

About 30% (7 out of 24) of the participants used the phrase *360-degree communication*. During the review, it became evident that two-way communication is critical to effective knowledge management; it helps to build confidence and enhance



commitment. Evans (2013) affirmed the effect of confidence on knowledge transfer and asserted that establishing trust is a crucial element in motivating an individual to share knowledge over other factors like vision and the length of the relationship.

### **Research Question**

The research question that guided the data collection and data analysis for this research focused on perspectives of leaders on succession planning strategies used to transfer knowledge. The interview responses revealed numerous methods used by leaders to transfer knowledge. The research question was the following: What succession planning strategies do leaders use to facilitate the knowledge transfer of aging workforce? I used 11 interview questions to answer the central research question. Twenty-four participants with over 400 years of oil-drilling experience provided rich answers and were supported by company human resource document (HR governance framework, 2016). In the following subsection, I provide participant responses to the 11 interview questions. The responses to the interview questions provided rich data that answered the research question.

**Interview Question 1: What is your perception of succession planning practice?** One hundred percent (24/24) of the participants shared the different perception of succession planning practice. According to Participant 1, “Succession planning is a novelty in the oil and gas industry, especially in the onshore support and management cadre. Participant 1 also noted that it is easier to manage succession offshore with OJT, skills development, and competency management. Participant 1 stated that appraisals and promotion drive organic growth. Participant 2 shared a personal experience:

Succession planning is a good practice if the theory is practiced by organizations. Early in my career, I had an opportunity to be selected as a possible successor to a certain job along with some of my colleagues. The process was not genuinely followed through because the so-called successor did not buy into the program; neither was there enough management will to see it through. That said, succession planning is a great way of ensuring that organizations have cover and continuity for the critical and aging workforce without any knowledge drop.

Similarly, P9 stated it was,

Not a complete progress; an appraisal is used as a way to determine high potential individuals, high flyer people we need to develop for the future. Along the line, it was discovered that the appraisal system is not genuinely meeting the purpose, seeming to give a one-sided individual perception. For example, a supervisor could provide an appraisal rating of 2 while another supervisor could rate the same employee higher say 3 or 4, which makes appraisal system ineffective.

Participant 10 shared his perception thus:

My perception about succession planning as it is being practiced in the industry today is not 100% effective because I tell people that I am not going to be here forever, I am getting close to my retirement, and I want to retire with the confidence that competent hands are available. As they say, a good leader creates another leader. The challenges we are having is; do we have the time, the patience? Some of these subordinates do not want to listen, they see us as an old school; what this man is telling me is not what I read in the books.

The other participants explained that the oil glut has recently affected the practices of succession planning and ultimately affected knowledge transfer. Much of the failure they adduced to reduced finances, resulting in cuts in the training budget.

**Interview Question 2: What is your perspective on succession planning practice as a means to promote knowledge transfer?** This question elicited several viewpoints. Participant 1, shared this:

Succession planning if executed correctly will promote knowledge transfer, but the process has to be fair, equitable, transparent and consistent. A thorough knowledge and skills gap analysis must be conducted for each job function, and proposed candidate must be evaluated, mapped and followed up with individual development plans to ensure the succession planning is on track.

Participant 19 stated,

It is all about master and apprentice system where knowledge is transferred from the experienced to the less experienced for continuity in the system. In that sense, what it means is that succession planning promotes the growth of the industry and keeps knowledge fluid, because from time to time people leave the industry either by retirement or death. It simply means that there has to be somebody on the line and adequately coached, well trained, it would not be a big shock when the older hands leave the industry.

Participants 2, 3, 4, 8, and 9 mentioned that individuals under the succession planning program receive “several tasks and specific external training designed for the trainees until attainment of the desired level of proficiency.”

**Interview Question 3: What benefit do you think succession planning brings to the company?** In response to question 3, 100% (24/24) of the participants mentioned business continuity, which reduces the impact of losing key personnel. P9 stated,

It prepares the individual to the higher job position. If supervisors fail to prepare personnel to take on the new position; it could affect the continuity of the company. In the drilling industry, if supervisors do not prepare personnel adequately, the result would be half-baked mentees; it would mean fewer experienced individuals are taking on higher job positions not fully prepared.

Participant 1 noted that succession planning guarantees business continuity. It ensures that knowledge is not domicile only in particular persons; rather, but transferred to younger generations who will ensure sustainability of the business. It also constitutes motivational factors for the identified high value and high potential employees, as they are clear on what knowledge, skills, and experience they need to advance their careers.

Participant 8 observed that succession planning serves as a contingency plan for any sudden attrition that may happen. Hence, it reduces the impact of losing key personnel. Participant 13 noted, “You cannot underestimate the benefit of succession planning.” When done right, the organization would not have the rate of downtime, the rate of failure, the rate of accident and incident becomes reduced.” The remaining participants corroborated the earlier perception shared, and one noted, “It brings about business continuity and prevent knowledge gap.”

**Interview Question 4: How have you managed the impact of aging workforce leaving the company with their wealth of knowledge?** One of the participants

explained that the company has a program in place – OJT.

For a couple of years, we recognized the fact that people over time would have to leave because of age, illness or years in service. We employ new hands and put them in different programs like – IDP and fast track. We also have projected program for people who will take certain positions e.g. Rig manager; we also have individuals who are in the fast track program, all designed to have the young ones who are being trained to replace the aging workforce. How it works is that the mentees receive hands-on training in preparation for the next position supplemented with the company OJT. Over time, as the mentee becomes capable of assuming the new position, the mentors, and the supervisor have fewer operations tasks to manage. The retiring personnel is happy leaving because they have somebody they trust who is ready to take up their role.

Participant 21 shared this perspective:

The succession planning process is in place, but they were not well managed or implemented. Few of the aging or old workforces deliberately hoard certain information, wanting to continue to be in employment due to social or economic reasons. Certain skill and experience were never shared. The young ones who are trained or been identified to take leadership position also had their flaws; few were very callous, not ambitious, not ready to be subjected to certain rules and regulations. Lastly, some personnel got to that position not because certain leadership traits were seen on them nor neither do they pass through a structured employment process, but they were there as a result of influence from certain big

boss somewhere in a position of authority. Such personnel never took succession planning seriously or with a passion.

**Interview Question 5: What strategies do you have in place to replace the aging workforce when they retire or exit the organization?** Eighty-three percent (20/24) of the participants responded that various methods that support knowledge transfer from retiring employees to younger groups are adopted. Participant 21 stated that “few of the individuals identified to take the mantle of leadership position are recommended by management to shadow the old and experienced ones.” Participant 1 pointed out, “Mid-career recruitment is the fastest but the most expensive way of replacing experienced workforce. Organically, we employ fresh-out hires and gradually develop them to replace the aging workforce.” The other 15%, one of whom was Participant 2, stated: “Unfortunately none – I only hope that my company sees it a good practice to follow through both in deeds and action.” Another viewpoint shared by Participant 3 regarding question 5 noted,

The first is succession planning; the second is an understudy. In a situation where we do not have the understudy ready, we explore executive hiring strategy. We also check the job market and source individual with the required skill-set, test and confirm that they have the knowledge and competency. We have another layer we call auditioning whereby these people go offshore to the rig to validate their competency before taking them on board to take over any key position. Participants 5, 7, and 10 said, “With the practice of succession planning, the aging work force are made to serve as mentors to the younger work force/personnel.”

One of the participants, an HR practitioner, stated, “We have a pool of experienced employees curriculum vitae (CV) we can contact for any sudden exit.” Participant 9 identified mentoring, coaching, and use of OJT as the preferred method used to replace retiring employees: “During mentorship, the supervisor has to assess the trainee to verify his readiness during the OJT phase. The OJT is computer based and uses the training package; trainee performs a practical task until confirmed competent on a particular skill.”

**Interview Question 6: What method (s) do you use to transfer knowledge from aging workers to younger employees?** Participants 11 and 14 stated that “mentoring and coaching, assign a buddy, a coach and making them work with more experienced ones and by that they can know the right and left of the business.” Participants also observed that OJT is an excellent method as an “aspect of training on their job specifics and some schedule on external courses to help expand the trainee knowledge base. The assigned buddy or mentor identifies areas of improvement and helps the trainee to improve and become technically strong.” Another participant, P12, identified “basic observations, organize in-house training; there should be synergy between the experience and the young intake” as methods adopted to transfer knowledge. P13 argued,

I can tell you right now the one we have right now, they want to keep their job, so they are not transferring anything. Each time a trainee meets his supervisor or mentor, he says he is busy, so it is quite challenging transferring knowledge from the aging workforces. The way we have managed this challenge is to give the supervisor target to get the trainee ready at a specified period. Not just make

ready, but you have to train him to be able to hold that position without any failure.

**Interview Question 7: What are the challenges you face in using the methods mentioned above to promote the transfer of knowledge from retiring employees to younger personnel?** One hundred percent (24/24) of the participants shared their perception on the challenges that, “the quality of the graduates coming out of Nigerian universities is poor; they know much theory but inferior vocational/ hands-on experience. The quality of graduates poses a challenge in training the younger personnel to replace the retiring workforce effectively.” P2 shared a different perspective: “... aging or experienced personnel not willing to pass on knowledge, headcount constraints, and lack of management commitment.” Participant 3 commented, “One of the challenges that we grapple with is the idea of commitment. Most of the aging workforce does not want to leave in the first place because they are not ready for retirement.”

Participant 3 continued,

In that instance, they try to hoard knowledge or information; they try not to pass all the information to the mentees, thereby creating knowledge gaps. Therefore, that is one of the challenges. The second aspect is that some of the subordinates are impatient and not ready to wait for the period that they are mentored to be ready for the next position. So, it is a constant challenge in today’s world where the younger generation wants to move very fast.

Participant 4 shared, “Job security: a large number of aging personnel feel threatened when a younger person comes to understudy them. In some cases, they have been known



to frustrate the trainee and make life uncomfortable for them.” Similarly, Participant 5 re-echoed fear of losing a job, and added that “lack of direction, tribalism, and lack of skill on the part of the mentor had constituted a challenge.” Participants 6 through 24 mentioned the fear of early redundancy, losing relevance, and lack of willingness, hence hoarding knowledge.

**Interview Question 8: How have you managed such challenges or obstacles?**

Participant 1 mentioned various approaches including “boot camps, modern training technology, and competency assessment management programs, and intensive training, mentoring, and coaching.” Participant 2 stated, “Share luck, patience with the employee, offsite training and review of on-the-job training modules.” Participant 3 agreed with Participant 8 who stated,

We manage this through accountability. Accountability calls applied when the mentor fails to meet those defined expectations. The mentors know the consequences when they fail to mentor their mentee effectively. The second approach is management assurance of the mentors’ job security. Management assures retiring workers of their continued employment although the trainee is technically ready to move up. They have management assurance for job continuity even if the mentee is ready for his next job. We work to constantly reassure the aging workforce and allay the fear of losing their job.

Similarly, Participant 6 stated, “Management continually assures the older workforce of the security of their jobs until retirement age is reached.” Another participant, Participant 9 reaffirmed that “the aging workforce are encouraged by

ensuring that their job is secured, motivate the aging workforce to mentor a younger one, and once fully trained, the experienced personnel is giving the opportunity to manage another location.” Participants 10 through 24 simply said, “We encourage senior personnel to pass on their knowledge knowing that someday they would have to leave either by reaching retirement age or length of service.”

**Interview Question 9: How do senior personnel share tacit knowledge in your company?** One hundred percent (24/24) of the participants corroborated that tacit knowledge is shared through mentoring, hands-on, OJT, and debriefing. Perspective is uniform in all responses received under question 9 and showed consistency in the technique used, which goes to confirm the importance of mentoring and hands-on training as a key element of succession planning and knowledge transfer. Lawal, Thompson, and Thompson (2016) emphasized the need for mentorship as a means for career development. Lawal et al. identified in their research that classroom, OJT, and online training were the most critical components of leadership development. They advocated the use of shadow manager attached to a substantive manager to step in when operations so demand or when necessitated by sudden departures or promotions. The preceding argument was supported by the responses received, which confirmed that mentoring and hands-on practice sessions through getting the subordinates to act for their managers during vacations and days out of office are a good strategy to pass on knowledge, according to Participant 1.

**Interview Question 10: From your experience, how have you managed tacit knowledge with your team?** This question elicited similar responses as in question 9.

One of the participants stated as agreed on by the others, “Mentoring and coaching with hands-on practice session through getting the subordinates to act for their managers during vacations and days out of office.” All participants added that seminars and discussion groups have been instrumental in knowledge transfer. Participant 6 commented, “After action review and documentation of a task carried out by experienced personnel is one of my key emphases in managing tacit knowledge.” According to Rothwell et al. (2015), mentorship helps in the transfer of technical knowledge and in improved interpersonal relationships from soon-to-be retired groups to the younger mentees to prepare them to assume a higher organizational role. Wheeler and Cooper (2016) saw mentoring as a strategy to support retention, succession planning, job satisfaction and career enhancement. Wheeler and Cooper further noted that an efficient mentoring strategy promotes cordial personal engagement in work conversations and relationships directed at enhancing career satisfaction, professional development, and improved practice.

**Interview Question 11: Tell me about other methods you have adopted to ensure effective knowledge transfer.** Participants agreed on incentivizing the knowledge transfer through rewards and recognition including promotions, cash awards, acting allowances, international work experience and cross-functional training and skills acquisition. Participant 2 pointed out, “Ensuring that all new entrants are assigned a willing mentor; guarantee the mentor that training new employee will not put his job at risk.” Participant 3 identified other methods of knowledge transfer such as, “We adopt 360-degree communication. Sometimes we pass info, but we do not have the time to

verify understanding of the communication. The 360 approach is to ensure that the communication passed is correctly received and decoded by the receiver.” Participants 6, 7 and 8 identified e-learning, job rotation, and buddy systems as alternative methods used.

### **Discrepant Cases**

During the interviews and review of transcribed data, I recorded two discrepant cases that suggest no succession planning policy exists and an aging workforce does not transfer knowledge. Participant 2 made utterances that affirmed indifference in the existence of succession planning policy in the company. In response to question 5 regarding methods used to transfer knowledge, Participant 13 retorted, “I can tell you right now, the aging workforce want to keep their jobs, so they are not transferring anything.” In dealing with this discrepant case, I verified the statements with the participants and applied the sense making data analysis technique (Grolemond & Wickham, 2014).

### **Summary**

The research question I answered in the presentation of findings for this study was: What succession planning strategies do leaders use to influence knowledge transfer? The findings from this qualitative research study revealed individual development plans (IDP), mentoring, on-the-job training, and 360-degree communication as the primary succession planning strategies used to transfer knowledge. Furthermore, the findings identified the role of IDP structured along the lines of a specific job line and the role of mentorship in building trust during knowledge exchange. Chapter 5 includes the

interpretation of findings, limitations of the qualitative study, recommendations, implications, and conclusion.

## Chapter 5: Discussion, Conclusions, and Recommendations

The purpose of this case study was to explore how a succession planning program contributes to knowledge transfer and development of expertise for business continuity and prevents loss of knowledge in the oil-drilling sector. This study included face-to-face semistructured interviews and review of company documents and physical artifacts within an oil-drilling company. Twenty-four experienced in-service professionals with cumulative experience of over 400 years participated in the study and shared their experiences and perspectives. This chapter presents a detailed explanation of the findings and limitations of the study. Additionally, this chapter addresses recommendations for professional practice as well as future studies, the implications for social change, and the conclusion of the study.

### **Interpretation of Findings**

Succession planning has remained a critical strategy in influencing knowledge transfer and ensuring business continuity. Interview responses indicated that succession planning is a great way of ensuring that organizations have cover and continuity for the critical and aging workforce without any knowledge drop. Participants corroborated Alvani et al.'s (2016) assertion that the main aim of comprehensive succession planning is to ensure knowledge transfer within the organization. Similarly, Sabir and Kalyar (2013) asserted that taking policy initiatives that would promote organizational learning through enhanced business practices such as succession planning and knowledge transfer could result in bridging the knowledge gap and increasing competitive advantage, employee retention, and job satisfaction. Patriotta et al. (2013) noted that the transfer of

locally created knowledge and best practice to the rest of the organization heightens the organization's ability to exploit its knowledge base and improve performance.

All participants in this current study suggested that oil-drilling operative and front-line supervisors must embrace a well-structured mentoring process. Rothwell et al. (2015) argued that mentorship helps in the transfer of technical knowledge and improves interpersonal relationships between soon-to-be retired groups and younger mentees to prepare them to assume a higher organizational role. Similarly, Wheeler and Cooper (2016) saw mentoring as a strategy to support retention, succession planning, job satisfaction, and career enhancement.

Brondyk and Searby (2013) argued that mentoring involves the exchange of knowledge, skills, and social interaction over time during knowledge transfer. The primary objective of mentoring is to develop identified individuals, train them, provide feedback, and share experiences through coaching to create a self-reliant workforce to fill the leadership gap. Ramalho (2014) added that mentoring is an effective low-cost means of making the most of a company's in-house experience and developing the potential of the workforce. One of the participants in the current study reported that mentorship strategies need to be aligned with the mentee and organizational goal. Participant 3 stated, "I feel mentorships set defined expectations, and each mentee is expected to meet training and hands-on assigned within a time frame."

Ross (2013) stated that a good mentoring program relies heavily on organizational purpose and is streamlined to meet the business goals. Extant literature indicated that mentoring could take place in a variety of ways including formal programs such as

traditional mentoring in which seasoned professionals mentor nascent professionals in a one-on-one interaction, or through structured group and peer mentoring (Spring, 2014). Janssen et al. (2016) observed that both formal and informal mentoring offers behavioral, attitudinal, and career benefits for protégés and mentors. Janssen et al. proposed a developmental network approach to further the advantage of mentoring by understanding the interplay between mentoring dyads and the context. The findings from the study indicated that the company and senior personnel should adopt informal mentoring integrated in the individual development plan (IDP).

There is an IDP in place in the participating company to promote knowledge transfer from the aging workforce to younger employees who are ready to move up the ladder. The mentors prepare IDP to look at where the personnel need to be next. The IDP is designed for the mentee, and the progress is monitored on a quarterly basis until the supervisor is satisfied that the individual has accomplished what has been set out for him or her. The IDP is centered on areas in which the mentee needs improvement. The progress made by the trainee is tracked throughout the duration of the program.

Participants in the current study confirmed that the IDP is used within the company to prepare certain levels of leadership, particularly mid-level. Kronz (2014) pointed out that creating and developing leaders from within could help the organization to develop a talent pipeline. Kronz suggested that potential leaders must be flexible in changing business strategies, particularly in multimarket organizations. Similarly, Kippist (2013) observed that adequate management development and succession planning of managers with PhDs might provide a cadre of leaders who are motivated and have the



skills and knowledge required to meet the challenges in providing an efficient and responsive health care service.

The findings regarding 360-degree communication affirmed that in leadership development, the participating company uses the 360-degree communication approach to ensure information dissemination by way of knowledge transfer. Participant P3 in the current study revealed that “sometime we pass information, but we do not have the time to verify the understanding of the communication.” The 360-degree approach is used to ensure that the communication passed is correctly received and decoded by the receiver through feedback from the recipient.

Alvani (2016) suggested a structured top-to-bottom communication channel during knowledge transfer. Furthermore, Hudcova (2014) recommended some communication criteria to promote knowledge transfer: (a) immediate feedback (interaction) whereby quick and honest reaction to the communicated message supports flexibility of the parties in communication, (b) spontaneity in communication, and (c) balanced dialogue that enhances a two-way interactive approach that ensures that the parties listen to each other and show respect. Turiago-Hoyos, Thoene, and Arjoon (2016) noted that when a knowledge worker is self-managed and receives ongoing feedback, he or she accepts instruction and guidance and is coachable.

Similarly, Cao and Peng (2013) emphasized the importance of effective communication and feedback to ensure efficient knowledge transfer at all levels. Supporting the importance of communication, Eckblad and Golovko (2016) argued that tacit knowledge can be overly dependent on localized face-to-face contacts in

interorganizational collaborations during knowledge transfer. Eckblad and Golovko further emphasized the value of face-to-face communication between individuals, which facilitates the transmission of knowledge across agents, firms, and industries.

The findings indicated some succession planning and knowledge transfer challenges. First, the quality of the graduates coming out of Nigerian universities is poor; they know theory but have minimal vocational/hands-on experience. Second, there has been inadequate commitment on the part of management because of financial and headcount constraints. Third, there has been reluctance and selfish attitudes in knowledge sharing because of fear that younger employees will take over jobs when fully trained. Corner (2014) affirmed that the problems encountered by management are pinned down to the fear of economic downturn that has resulted in cutting down on talent development initiatives including training, mentoring, and coaching programs. Liu et al. (2015) added that there are various difficulties and challenges involved in any knowledge transfer process, including the willingness to transfer and the attractiveness of the source, the lack of absorptive capacity and learning intent by the recipient, the quality of the relationship, and causal ambiguity.

Finally, the findings regarding succession planning strategies used by the company to overcome the challenges faced during knowledge transfer included the following: (a) adopting a formal mentoring strategy, (b) introducing incentives to motivate mentees, (c) fostering trust in mentor/mentee relationships, (d) adopting on-the-job training supplemented with external training, and (e) enhancing 360-degree communication by the leaders. Patriotta et al. (2013) argued that the transfer of locally

created knowledge and best practice to the rest of the organization heightens the organization's ability to exploit its knowledge base and improve performance. This assertion is consistent with the company strategy of using debriefing and a cookbook detailing a step-by-step procedure on how a task can be performed. The cookbook includes pictures of how a task was previously performed. The offshore installation manager and team prepare this cookbook, which is shared with any new employee coming to the facility for the first time.

### **Limitations of the Study**

The study was limited to a single unit drilling company with over 250 employees in the Nigerian oil and gas sector. The 24 participants had a broad range of experience spanning over 400 years. Most of the participants had experience from another oil-drilling company that operated in a similar human resource management style.

The other limitation for the qualitative study can be researcher bias arising from personal knowledge of the oil-drilling company operations. My knowledge of the phenomenon and the social setting presented a potential bias. To prevent this, I avoided asking leading questions or preempt participants' answers to the questions. I managed this bias by bracketing, as recommended by Onwuegbuzie and Byers (2014) to reduce personal bias. These potential limitations would not affect the transferability of findings in this case study to future studies, which are wholly dependent on the reader's perception and personal interpretation (Marshall & Rossman, 2016).

### **Recommendations**

The first recommendation for future research is to extend the study to the junior employees who are working under a mentor in a formal mentoring process. More research is needed on how drilling contractors can use other methods like focus groups and cookbook to influence knowledge transfer. The participants reported that senior employees were mentoring personnel in an informal manner, which weakens the process. It is imperative that future mentoring efforts are well structured and documented for tracking purposes. Hands-on training is the most commonly used development strategy for future leaders. More research was needed on other influences on leader's strategies like focus group and use of cookbook to transfer tacit knowledge in the oil drilling sector.

The second recommendation for future research is to conduct a study in a larger group involving other oil-drilling companies in Nigeria. The research participants agreed that succession planning has great influence in knowledge transfer and performance if practiced correctly. Although succession planning is recognized as part of the company strategic effort in managing leadership development, participants noted that there is much to be desired. Extending research to other drilling companies might lead to a better understanding of how succession planning practices are used by the other companies to influence knowledge transfer.

The third recommendation for future studies is to research other drilling contractors in Nigeria to explore different perceptions on the effective use of OJT in knowledge transfer and succession planning practices. The qualitative study participants noted during the interview that mentorship has a mediating role in fostering OJT. Drilling

contractor leaders should consider the influence mentors have on individual development through OJT modules and thus create a key performance indicator to measure the effectiveness of the OJT program. The mediating role of transformational leadership in knowledge exchange viewed through the lens of mentorship needs to be further explored. Such research would further strengthen the implication of the transformational theory on the influence leaders have on trainees during knowledge exchange while grooming them for leadership positions (Badara et al., 2014, 2015).

The fourth recommendation for future studies is to research the cause and effect of succession planning on knowledge transfer, employee retention, behavior, and performance in the drilling industry. Burmeister and Deller (2016) affirmed that research in knowledge transfers in organizations is scarce, the nature and antecedents of knowledge retention processes are poorly understood, and the required conceptual framework is lacking. Buttressing Burmeister and Deller's statement, Rothwell (2011) argued that most organizations do not give adequate attention and commitment to developing technical skills by adopting succession planning from the outset.

The fifth recommendation for future research is to study the implications of individual development plans mapped against specific developmental skill-sets that meet organizational needs. Participants observed that the practices of IDP needed to be fine-tuned to achieve the desired result of transferring knowledge and promoting technical skills. Rothwell (2011) noted that the shortage of technically experienced drilling workers and the exit of aging workforce members could present a significant challenge to top management if there is no immediate action to prepare the next generation of leaders.

Similarly, regarding leadership development plan, Kippist (2013) observed that adequate management development and succession planning of managers with PhDs might provide a cadre of leaders who have the motivation, skills, and knowledge required to meet the challenges of providing services.

The sixth recommendation for research is to study the effect of 360-degree communication in succession planning efforts. Some of the senior managers interviewed agreed that 360-degree communication has the power to convey internal information and promote knowledge transfer. Alvani (2016) argued that a structured communication channel during knowledge transfer, top to bottom approach is vital to knowledge creation. Buttressing the need for 360-degree communication, Hudcova (2014) listed the following communication criteria to promote knowledge transfer: (a) immediate feedback (interaction) whereby quick and honest reactions to the communicated message support flexibility of the parties in communication, (b) spontaneity in communication, and (c) balanced dialogue that enhances a two-way and interactive approach that ensures that the parties in communication listen to each other and show respect. 360-degree feedback has several advantages over single-rated feedback methods (Kanaslan & Iyem, 2016). 360-degree feedback allows for divergent perceptions or feedback as opposed to a single individual. The multi-rated feedback offers varied perceptions from different angles, which create a broader overview of an employee's performance and effectiveness of the communication process.

## **Implications**

### **Contribution to Business Practice**

The many in-service skilled workers from the 1980s era, who would be able to pass on their valuable skill sets are leaving the industry at a projected rate of 45 percent or higher, which makes it critical for industry leaders to double their effort to prepare younger employees (Babey, Hagel, Montilla, Robins, & Harris, 2016). Kim et al. (2013) noted that the shortage of skilled workers would increase as the global workforce ages and fewer younger workers are available to meet the demand. They argued that the hallmark of a successful enterprise relies on the degree to which it generates, develops, maintains, grows, and protects its knowledge base and develops core skills and competencies.

Similarly, Rothwell (2011) noted that the shortage of technically experienced drilling workers and the exit of aging workforce members could present a significant challenge to top management if there is no immediate action to prepare the next generation of leaders. The findings from the participants' interviews on the influence of succession planning on knowledge transfer indicated that succession planning practice needs to be restructured and made effective. The oil-drilling companies need succession planning to transfer technical skills. Rothwell affirmed that most businesses had not given sufficient attention and commitment to developing technical skills by adopting a proper succession planning strategy.

The implication for positive social change includes the potential to impact oil-drilling practices by contributing to enhance succession planning and knowledge transfer

initiatives. The individuals developed for leadership roles would add to the organization talent bench and lessen knowledge gaps while ensuring business continuity. The findings from the qualitative study participant interviews revealed that mentoring is crucial in technical skill development. The participants further observed that mentoring programs have a positive influence on the behavior and development of mentees and promote alignment with organizational goals. Ibidunni et al. (2016) suggested that employees with mentors experience a variety of positive organizational outcomes that includes increased job performance, greater job satisfaction, organizational commitment, personal learning, and reduced turnover intentions. The oil-drilling company could use the qualitative study results to restructure existing succession planning policies and make them more adequate.

### **Contribution to Individuals**

The significance to the employees of the drilling companies is that improving succession planning through mentoring and coaching has the advantage of enhancing knowledge transfer and individual readiness for the next job position. The participants revealed that mentoring enhances the transfer of explicit and tacit knowledge with the support of the leaders. Burns (1978) noted that transformational leaders seek to develop their subordinates. Evidently, when employees are developed, they are more likely to advance in their careers and be ready to move into higher-level positions within the organization. Tarus (2014) pointed out that mentoring is used to help protégés to advance in their careers through supportive learning and hands-on practices to improve skills and ability.



**Contributions to Society**

The oil-drilling contractor leaders need to have in place a structured program that would identify and develop leaders across all employment levels. The qualitative study participants affirmed that leadership development programs like IDP and OJT are critical to training potential leaders within the organization. Such enhanced programs must strive to produce individuals with the technical and administrative knowledge to step into the shoes of retiring workers. Moreover, such levels of knowledge prepare the younger employees to be employable in society or stand alone as business executives in their communities.

**Contribution to Theory**

The study findings revealed that there are not enough formal succession planning and mentoring programs that effectively support knowledge transfer. The qualitative approach adopted for this study provided a solid basis for initial data collection that would inform further research on the relationship between succession planning and knowledge transfer. According to Mayan (2016), qualitative researchers work inductively from individual cases and a preexisting framework or a particular theory. Further research is needed to expand the relationship between succession planning and strategies used to transfer knowledge in the oil-drilling sector. Wheeler and Cooper (2016) argued that mentoring supports retention, succession planning, job satisfaction, and career enhancement. Wheeler and Cooper further noted that an efficient mentoring strategy promotes cordial personal engagement in work conversations and relationships directed at enhancing career satisfaction, professional development, and improved practice.

The findings from the qualitative study filled a gap in the literature by providing knowledge about lack of a structured succession planning program in the oil-drilling sector. Additionally, the qualitative study findings provided insights regarding how mentoring and on-the-job training could be improved to meet the leadership development needs of companies. I recommend a skills gap analysis must be conducted for each job function, and proposed candidates must be evaluated, mapped, and followed up with individual development plans to ensure the succession planning is on track. Additionally, I recommend a focused recruitment, onboarding boot camps, on-the-job training, modern training techniques, and competency assessment management programs, mentoring, coaching, and appraisals. Incentivizing the knowledge transfer through rewards and recognition include promotions, cash awards, acting allowances, international work experiences, and cross-functional training and skills acquisition.

### **Conclusions**

The emergent themes elucidate how improved succession planning supplemented by mentoring, OJT, and IDP at the drilling company might contribute to the career advancement of younger employees. Feedback from the research participants provided valued information on how succession planning strategies can influence knowledge transfer in the company. It was noted by the participants that succession planning influences knowledge transfer by mentoring, coaching, implementing a well-structured IDP and OJT.

The leaders entrusted with developing leaders need to reappraise the strategies adopted and provide a supportive framework that communicates clarity, solves problems,

and promotes integrity. Implementing effective succession planning strategies supplemented by mentoring and OJT in the drilling industry would have a lasting advantage on the quality of employees, strengthen the talent bench, and benefit both the organization and society. The organization needs to encourage transformational leadership prettified with an incentive to overcome the challenges associated with knowledge transfer. Qu, Janssen, and Shi (2015) added that transformational leaders enable followers to focus on goal attainment, sound ethical norms, and personal sacrifice towards goal achievement. Qu et al. asserted that achieving individual goals through transformational leaders could leverage knowledge transfer under an effective succession planning process. Similarly, Hayati, Charkhabi and Naami (2014) affirmed that the relationship between transformational leadership and work engagement in organization showed transformational leadership was related to follower work engagement, particularly when follower was creative, innovative, and proactive.

The results contribute to existing body of knowledge regarding how drilling industry leaders used succession planning to influence knowledge transfer for business continuity. An organization's failure to incorporate the identified knowledge transfer methods could result in failure of succession planning strategies and create significant knowledge gap. Effective and efficient succession planning and mentoring program, supplemented by IDP and OJT may assist in the development of future leaders. Younger employees in the drilling industry may have better opportunity to become substantive in their new role and be prepared to take up new role in other sectors.

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## Appendix A: Interview Protocol

**Interview:** Influence of succession planning on technical knowledge transfer. I adopted the following protocol.

- A. The face-to-face meeting began with an introduction and an overview of the research topic.
- B. I informed the participants of my concern of their time, and I thanked them for accepting to participate in the study
- C. I informed participants of the confidentiality of the recorded interview and other information received.
- D. To start the interview, I announced the participants' identifying code (P1), the date, and the time of the interview.
- E. I inform members that the conversation would last for approximately 45 minutes to obtain responses to the 11 interview questions and allow time for follow-up questions.
- F. I informed participants that member checking is to ensure understanding of the questions, and confirm the answers provided by the participant are correct as recorded. I confirmed the correctness of the response through e-mail with transcribed data attached, and I requested participating members to verify the accuracy of the recorded information within five working days.
- E. I closed the interview sessions by thanking the participants for granting me time out of their busy schedules to conduct the interviews.

## Appendix B: Interview Questions

The following research question will guide the research: What succession planning strategies do leaders use to influence knowledge transfer in the oil-drilling company?

1. What is your perception of succession planning practice?
2. What is your perspective on succession planning practice as a means to promote knowledge transfer?
3. What benefit do you think succession planning brings to the company?
4. How have you managed the impact of an aging workforce leaving the company with their wealth of knowledge?
5. What strategies do you have in place to replace the aging workforce when they retire or exit the organization?
6. What method(s) do you use to transfer knowledge from aging employees to younger employees?
7. What are the challenges you face in using the methods you just mentioned to promote the transfer of knowledge from retiring employees to younger personnel?
8. How have you managed such challenges or obstacles?
9. How do senior personnel share tacit knowledge in your company?
10. From your experience, how have you managed tacit knowledge with your team?
11. Tell me about other methods you have adopted to ensure effective knowledge transfer.

## Appendix C: E-mail Invitation to Potential Participants

Good day to you,

My name is Robinson Ejakpomewhe, a Health and Safety professional and a doctoral student at Walden University. I am conducting a study on the influence of succession planning on technical knowledge transfer in the oil-drilling sector. I would like to gain your perspective on the practice of succession planning (SP), and how SP has influenced knowledge transfer in your company. ***The selection criteria would be based on employment levels from management to senior stall level who have worked between 5 and 10 years and above.*** Therefore, I would like to engage individuals with proven experience in the industry to achieve the desired goal of bringing their experience to bear on the outcome of my research. The purpose of this study is to help organizations create better strategies for an effective succession planning and technical knowledge transfer.

My research involves an interview that would last between 30 and 60 minutes. If you are willing to participate, I will arrange for us to speak at a convenient time and place to you. During the interview, I would ask you several questions about your current experience, how you see succession planning practiced, and how experienced individuals have shared and transferred knowledge within your organization. I would also ask you to share your experiences on any potential barriers to knowledge transfer techniques. All information provided would be confidential, no names used instead codes would be assigned to maintain confidentiality. If you consent to voice recording, you have my commitment to destroy all files or tape after transcribing the information. After the interview, I will conduct a participant check to confirm the accuracy of the information received.

If you are willing to participate in this research project, and if you have any questions, please contact me via reply e-mail as soon as convenient so that I may complete my research as soon as possible.

I thank you for your consideration and your contribution towards the improvement of succession planning strategies and knowledge transfer processes in the oil-drilling industry.

Best regards,

Robinson Ejakpomewhe  
Walden Student