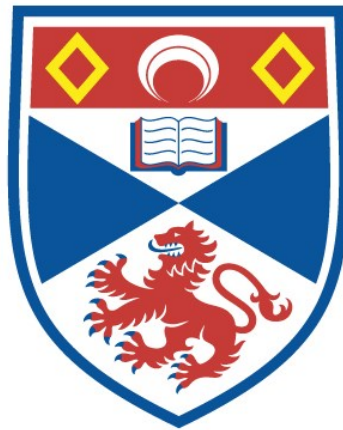# Stories of following and leading: identities and followership journeys during succession in UK universities

Samantha Ross

A thesis submitted for the degree of PhD
at the
University of St Andrews

2024

Candidate's declaration

I, Samantha Ross, do hereby certify that this thesis, submitted for the degree of PhD, which is approximately 80,000 words in length, has been written by me, and that it is the record of work carried out by me, or principally by myself in collaboration with others as acknowledged, and that it has not been submitted in any previous application for any degree. I confirm that any appendices included in my thesis contain only material permitted by the 'Assessment of Postgraduate Research Students' policy.

I was admitted as a research student at the University of St Andrews in September 2019.

I received funding from an organisation or institution and have acknowledged the funder(s) in the full text of my thesis.

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Acknowledgements

I am indebted to my family, friends and colleagues for supporting the completion of this thesis. There are a number of others I will thank directly, but some contributions have been so great that they must be immortalised here.

First thanks must go to my supervisory team, Dr Lisi Gordon, Dr Sandra Romenska and Professor Ruth Woodfield. You have each contributed previously to various forms of dissertation and now my thesis, providing precise and focused advice. Your supervision has enabled me to refine research skills which will continue to enhance my professional life – whether academic or otherwise! The completion of this PhD would not have been possible without funding from the Economic and Social Research Council and training from the Scottish Graduate School for Social Science.

The generous time and honesty given by my research participants allowed me to fully embrace the PhD experience and to re-live the complex identity work they navigated during succession. Reviewers of my work in formal procedures and at conferences have also been encouraging, taking my ideas seriously and asking constructive questions which shaped my perspectives on followership.

Karen Petersen, you are a dear friend and I want to thank you for your continuous support, encouragement, kindness and for laughing with me and at me. Thank you for the highest quality conversation, shortbread, fresh bread, brownies and embracing all St Andrews has to offer. Making frantic phone calls to one another whilst organising events has been a joy.

David Strachan, my head motivator, sommelier, smoked mackerel pate expert, Munro partner and kindred spirit. Thank you for believing in me in every way and for curating such an enjoyable and fulfilling life with me. Your dedication to my success, whilst also protecting the interests of St Andrews through your significant voluntary commitments, demonstrates your sense of duty to loved ones, something we all benefit from and do not take for granted. I am so looking forward to continuing to nurture our adventurous spirit: of course finishing the Munros, but perhaps also demolishing a house or eating dinner before the 10 o'clock news.

Auntie Nicola, Uncle Richard and Grandma Doreen, the three musketeers, thank you for watching me grow up, for the "Reese's Pieces" and for always being interested in whatever new adventure I have found. I anticipated your visits each semester because they reconnected me with my family, incentivised me to keep going and gave me an opportunity to laugh about all of the obscure personalities and situations I came across. You have always said that I am the brains of the operation, but that is only because of the encouragement and enthusiasm that you show to me. Next: a rugby career?

Nana and Grandan, thank you for the hilarious Skype attempts and successes, for the jokes (appropriate and otherwise) and for being so eager to tell me that I was your favourite Grandchild. Thank you both especially for reminding me that you were all rooting for me, encouraging me to take every opportunity available from an early age. Your support has been the best motivation I could have been given.

Daddy, thank you for being reasonable… and for teaching me the phrase "what's for you won't go by you"; this and the way that you have shared your own approach to life with me has helped me to accept setbacks and twists of fate with greater elegance. Thank you especially for encouraging me to be more honest, which has allowed me to accept that I am a faster swimmer than you. Mummy, thank you for being a role model in kindness, impatience, creativity and style. You have been quick to encourage me every time I didn't feel confident or able enough, reminding me not to settle for anything less than my best. To both of you, thank you for raising me in a way that allowed me to be the best version of myself and for encouraging me to pursue whatever seems interesting. I can't promise this is my last degree.

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Glossary

TERM	DEFINITION
Succession	The process of replacing a director or manager in a unit who is responsible for supervising staff.
Successor	The new incumbent occupying a post.
Staff	The staff members that the new incumbent supervises.
Predecessor	The person that the new incumbent replaced.
Professional service unit	The administrative units within universities.

Abstract

Succession, leadership and identity scholars have frequently attended to 'leader' experiences in their research. This is despite the impact of succession on everyday processes and staff working lives; the recognition that leadership is a joint process which unfolds among many individuals and relationships within an organisation; and the centrality of identity to staff as well as successors. Underpinned by followership theory, this thesis aims to rebalance the understanding of succession by soliciting staff and successor stories of and leading identities and behaviours during the change journey.

Grounded in constructionism, this research used 121 semi-structured interviews with 104 research participants who were professional services staff in 41 UK universities. A narrative approach to interviewing and analysis was employed to capture staff and successor experiences of succession. Thematic analysis was used across the large qualitative data set to identify findings related to the succession, identity and followership literatures.

The findings highlighted the shortcomings of succession planning within universities, advocating instead for an approach to succession which recognises the identity and behavioural transitions which staff and successors navigate during the change. A diversity of succession stakeholders, some in the form of ghosts, are identified. The findings contribute to the growing support for constructionist perspectives of leadership by showing how individuals in organisations lead, follow, and engage in different versions of their identities, regardless of their formal hierarchical role. This thesis also demonstrates a connection between following and the vision and pursuit of aspirational selves, evidencing how staff and successors contribute to the development of these selves in one another.

Chapter One: Introduction

This thesis applies followership theory to the experiences of succession from the perspective of professional staff in UK universities. It solicited the perspectives of 104 succession stakeholders within 41 UK universities to show how leading, following and identity work are influenced by the process of succession.

The fluidity and complexity of how leadership unfolds and is enacted by different individuals in an organisation is increasingly being recognised (Tourish, 2013; Sklaveniti, 2020; Stern, 2021). This includes the possibility that those not in formal leadership posts are capable of engaging with leader identities (Blom and Lundgren, 2019; Alvehus, 2021; Jaser, 2021; Larsson and Nielsen, 2021). There is, therefore, an opportunity to challenge contexts which have so far been explored with a leader-centric lens. For instance, the succession literature has focused on how 'leader' change interacts with measurable aspects of performance (Dawley et al., 2004; Giambatista et al., 2005; Kuntz et al., 2019), rather than on the experiences of employees also affected by the change or how the 'leader' becomes viewed as such.[1] The followership literature, too, has made assumptions about who and which types of individuals follow, with role-based perspectives of followership assuming that followers exist mostly at lower organisational levels (Tolstikov-Mast, 2016). This thesis addresses this leader-centrism by presenting the experiences of staff and successors, showing how leadership and followership unfold during succession, and positioning succession as a transition involving substantial identity work for multiple stakeholders. This introductory chapter will outline the research gaps addressed by this thesis and ends with an overview of each chapter to come.

Research Gaps

This thesis identifies gaps in the succession, followership and identity literatures. Addressing these gaps enabled this thesis to develop a firm understanding of the experiences of staff and successors during succession.

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[1] Throughout this thesis, 'leader' and 'follower' are placed within inverted commas to indicate where, in existing literature, the author interprets the terms to mean *formal* leader or *formal* follower.

Succession Gap

Succession is frequently described as a disruptive event which affects all types of organisations (Dawley et al., 2004; Ndofor et al., 2009; Li, 2018; Kuntz et al., 2019), but the source of this disruption and the way that it is navigated by those experiencing succession is not clear. For instance, whilst succession is described as having profound implications for colleagues (Brundrett et al., 2006; Lord et al., 2020), reported implications usually relate to productivity (Sherrer and Rezania, 2020); how this is experienced is rarely explored from the perspective of a staff member. The succession literature has focused on the quantitative evaluation of succession planning in mostly corporate contexts (Pita et al., 2016). Usually, research has consulted successors to build a picture of succession, thus overlooking the experiences of other stakeholders involved. In universities especially, there is a distinct lack of succession planning (McMurray et al., 2012; Fishman, 2019; Loomes et al., 2019), suggesting that the experience of succession might be more challenging. Consequently, this thesis positions universities as a blank slate to explore succession. This is particularly relevant for current scholars, given that a wave of baby-boomer retirements is expected in the 2020s (Taylor and Youngs, 2018), and could create issues for sectors not appropriately prepared for succession processes.

The unheard voices within succession research characterise it as an opportune area for applying followership theory to, and especially a constructionist version of followership which challenges the solicitation of only 'leaders'' perspectives (Ospina and Foldy, 2010). This thesis proposes not only to hear the unheard voices of staff during succession but also to promote the unheard voices of professional staff in university environments (Degn, 2015; Gander, 2018; Salisbury and Peseta, 2018).[2] As such, the application of followership theory in this thesis is advantageous for universities' understanding of their own succession planning procedures, as well as for stakeholder behaviours and identities during change.

Followership Gap

Followership is the study of the follower and their impact on the leadership relationship in organisations (Uhl-Bien et al., 2014). Borne out of a need to move away from the leader-

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[2] Other unheard voices in universities may include those of student users of professional service units or businesses who collaborate with knowledge transfer units, who define themselves as professional services with a remit to monetise research, rather than support students. It is not within the scope of this thesis to solicit perspectives from these stakeholders, particularly given the interest in professional identities.

centrism in the leadership literature (Tee et al., 2013; Junker and van Dick, 2014), leadership and followership scholars have examined the active roles of followers in relation to leaders (Carsten et al., 2010; Velez et al., 2022). Generally, engagement with the followership literature has been minimal (Gooty et al., 2011; Tee et al., 2013; Algebeleye and Kaufman, 2019) and there is a need to gain empirical evidence of how followers interact with someone they identify as a leader (Lapierre et al., 2012). There is also an opportunity, then, to gain empirical evidence of *how* someone identifies another as a leader, particularly at the beginning of a leadership relationship (Na-nan et al., 2016). Asking individuals, who may or may not yet have attributed leader identities to someone, for their perceptions of following and leading, may be insightful for the traditionally negative interpretations of following and how it forms (Deale et al., 2016; Essa and Alattari, 2019). For instance, whereas some claim that followers can be passive or sheep-like in comparison to leaders (Thody, 2000; Agho, 2009; Carsten et al., 2010), understanding what prompted these passive behaviours from the 'follower' perspective may challenge the relevance of passive followership.

Some have suggested that followers influence leadership outcomes from the confines of their hierarchical role (Carsten et al., 2010; Sandberg and Alvesson, 2011; Oc and Bashshur, 2013; Essa and Alatarri, 2019) but, as this thesis will argue, some of this influence may be the building blocks of leader identities rather than follower identities. Rather than using 'follower' to refer to an employee who provides constructive advice to a 'leader' (Carsten et al., 2010), scholars might consider that this employee is attempting to claim a leader identity. This aligns with those who suggest that followership and leadership are processes which all stakeholders can engage in, often momentarily and dependent on the context and social relations at that time (Blom and Alvesson, 2015; Clifton, 2017; Blom and Lundgren, 2019; Sklaveniti, 2020; Jaser, 2021). This challenges the dominant interpretation of followers as existing at hierarchically lower posts in organisations, with 'follower' used as a substitute for subordinate (Hinic et al., 2016). A research gap exists where following and leading processes have not been explored in a succession context, particularly given that the organisational structure becomes reinforced by the technical processes surrounding the appointment and arrival of a formal superior. With formal roles made more salient by the replacement of a formal postholder, it would be interesting to explore how leading and following behaviours can be identified among staff *and* successors across the organisational hierarchy during change.

Identity Gap

Scholars exploring identity in succession have explored 'leader' identities, and this has usually meant focusing on the identity of the formal successor or manager (Ibarra, 1999). In turn, this has left staff identities somewhat underexplored, which this thesis seeks to address.

In a social context such as succession, where staff and successors meet for the first time and evaluate one another's identities, the concept of identity work and the parliament of selves is relevant (Mead, in Pratt and Foreman, 2000: p. 18; Brown, 2017). For instance, the possibility of ambiguity and confusion during succession may prompt the reconfiguration of identities (Collinson, 2006). Moreover, during this time, a discussion of the self could lead to reflection over threatened, working and aspired identities (Fraher and Gabriel, 2014; Shepherd and Williams, 2016), but whether and how this is relevant to staff identities has not been explored.

Identity threats are also unexplored within succession. Although Balser and Carmin (2009) suggest that identity threats can happen when values shared with an organisation are no longer prioritised, succession nor identity fields have examined how these threats are interpreted in the transition from predecessor to successor. Succession poses identity threats for the successor, in that they may feel the need to manipulate their identity to align with staff (DeRue, 2011). It also poses threats for staff, who may feel that a change agenda challenges strongly held values (Balser and Carmin, 2009; Badara et al., 2015; Ndofor et al., 2016). This thesis intends to explore how these threats are interpreted and navigated, as well as the associated identity work.

There are also gaps in the research on leader and follower identities, both considered sub-components of one's working self-concept (Epitropaki et al., 2017). Increasingly leader and follower identities are being viewed as dynamic and distributed among individuals and levels of the organisation (Alegbeleye and Kaufman, 2019; Jaser, 2021). This characteristic of leader and follower identities has not been empirically explored in the succession context, where new leadership relationships could begin. This is despite the agreement that identity must be understood within different social contexts to avoid 'myopic pitfalls' in knowledge (Sveningsson and Alvesson, 2003; Alvesson et al., 2008: p. 12; Ybema et al., 2009). For instance, although conversation analysis has been used to identify granting and claiming of leader and follower identities within a group dynamic (Larsson and Nielsen, 2021), this has

not been explored from the perspective of a successor and staff member who are embarking on a new leadership relationship. This thesis recognises the centrality of identity to role transitions (Currie et al., 2010) and seeks to address the gap left by not exploring how staff use their identities in succession.

Purpose of this Thesis

The purpose of this thesis is to promote the unheard experiences of succession stakeholders during succession, within a scholarly field which has prioritised quantitative measures of, for example, financial performance decline (Farah et al., 2020) or resistance to change (Rafferty and Jimmieson, 2017). This has usually been in the context of corporate, sporting or family business succession processes. This thesis contributes to a growing literature by applying followership theory within a succession context such that these unheard voices could be explored within a burgeoning literature and at the outset of a leadership relationship, creating new opportunities for exploring following dynamics. The following three research questions were designed to address the gaps in the literature outlined above, in line with Sandberg and Alvesson's (2011) dialogic process of problematisation, also developing a broad understanding of successor and staff experiences of succession:

Research question one: how do succession stakeholders respond to and interpret succession?

Research question two: what do processes of following look like during succession?

Research question three: what do succession stakeholder identities look like during succession?

Research Contributions

This thesis contributes to the interlinked succession, followership and identity literatures. For the succession literature, it challenges the existing focus on succession planning, advocating for a greater understanding of experiences of succession through qualitative research, thus informing a holistic approach to succession *management*. It suggests that the poor implementation of succession planning in universities highlights how staff pursue their own aspired selves, either by making claims for change through expert power or by exiting the organisation during succession. Ghosts are introduced as a key stakeholder in the succession process, shaping the successor and the staff member's experience of the change. Overall, it advocates for a processual view of succession as a journey rather than a distinct event.

This thesis makes a practical application of followership theory, presenting empirical evidence of the engagement, and non-engagement, with the terms 'follower' and 'following'. It highlights a continued subscription to role-based perspectives of followership in the existing literature, then using a constructionist lens to empirically show how labels of 'leader' and 'follower' exist fluidly during succession processes. It encourages greater precision with the terms 'leader' and 'follower', characterising following as fleeting, voluntary, achievable regardless of status in an organisation, and directed to someone or something. It also suggests that following can be used as an avenue to reach an aspired identity.

For the identity literature, this thesis portrays succession as an unfolding transition, in terms of identity and behaviour, for staff as well as successors. It suggests that staff use their interactions with successors to position themselves as leaders, reflect on lost selves and pursue their aspired selves. The thesis argues for the existence of personal ghosts derived from lost aspired selves, as well as for the possibility of re-engaging with one's own or someone else's personal ghosts. The thesis highlights the experience of liminality and threatened identities to show the so far hidden identity work which staff engage with.

Outline of this Thesis

Chapter Two reviews the existing succession, followership and identity literatures. The focus of this chapter is to present the leader-centrism running through existing scholarship, using this to portray the opportunities for understanding experiences of and contributions to succession from new perspectives. The first section outlines the succession literature and challenges the current focus on succession planning, given the felt disruption of succession. The second section reviews the existing followership literature, arguing for a constructionist approach to followership as the most suitable for providing an alternative view of succession. The third section addresses relevant aspects of the identity literature, creating a foundation for an exploration of identities during succession and, in particular, the underexplored identities of staff during succession. Each of the first three sections of this chapter leads to a research question, followed by a section which contextualises universities as a suitable environment for exploring experiences of succession with respect to behaviours and identity.

Chapter Three presents the philosophical assumptions which shape the methodological framework of this thesis and documents what was deemed a suitable method for exploring the

research questions in Chapter Two. A constructionist epistemology and interpretivist ontology, which complements the growing view of leadership and identity as concepts which are continuously in flux, is justified. Then, the steps taken to complete 121 online interviews and the subsequent data analysis, are outlined.

Chapters Four, Five and Six present the research findings of this thesis. Chapter Four explores participant interpretations of followers and following, confirms the existing negative interpretation of the terms and presents the alternative phrases used by participants. The characterisation by successors of 'followers' as capital to be acquired leads to a discussion on the difficulties of identifying following behaviours. Successor descriptions of followers contrast with the alternative, proactive phrases used by staff to describe following. Having positioned following as a voluntary process too fleeting for permanent or reliable identification measures, the chapter then argues for a processual view of follower identities which can be directed at people, ghosts, selves, or visions. This chapter addressed the second research question which asks, *what do processes of following look like during succession?,* providing an empirical foundation for understanding followers and following in the context of university professional service units.

Chapter Five shows how the experience of the successor is moulded by succession stakeholders. It begins by introducing succession stakeholder unfamiliarity with succession and characterises it, like following, as an unfolding process which stretches over an indeterminate length of time dependent on the context. The second section shows how successors must navigate staff behaviours, knowledge and power claims. Then, a third section shows how successors navigate the ghost of predecessors and how staff contribute to this task. It shows how successors engage with following behaviours and occupy states of liminality as a result of staff behaviour. This chapter addresses the first research question which asks, *how do succession stakeholders respond to and behave during succession?*, as well as the second research question which asks, *what do processes of following look like during succession?*

Chapter Six focuses further on identity work during succession. It brings together staff experiences of grief, liminality and identity threats, connecting these to the existence of personal ghosts which succession stakeholders must navigate. Reviewing vignettes from two participants, Moira and Jacqueline, enables a closer understanding of why individuals decide

not to follow, emphasising that this is a personal choice informed by one's sense of an aspired self and interaction with organisational ghosts.[3] Dermid's vignette introduces the possibility of simultaneously leading and following a successor. Jacqueline's experience of succession is profound in demonstrating how staff can use succession as an opportunity to experiment with an aspired leader identity. The chapter emphasises the benefits of applying a followership lens to succession not solely to further understand leading and following dynamics, but also to understand the identity dilemmas and opportunities which staff navigate. This chapter answers the third research question which asks, *how do succession stakeholder identities develop during succession*?

Throughout the findings chapters there are two common threads. The first argues for the fluid and fleeting nature of leading and following identities. These are identities that any stakeholder in an organisation can engage in and which may be influenced by a succession context. A leader identity is too often attributed automatically to a formally appointed leader and is often overlooked by those who feel that their grading within a hierarchy prevents them from being able to lead. A follower identity has been interpreted as a reflex and something that the majority do, or as something that is a formal requirement of being employed. Although many individuals *do* follow, these findings chapters will rebalance the reported distribution of leader and follower identities among succession stakeholders, paying attention especially to instances where successors can be interpreted as following and staff leading. The theme of power runs throughout this discussion.

The second thread argues that succession is a transitional journey for multiple stakeholders: the successor, staff members and predecessors involved. Succession is an identity work arena which has remained unexplored for some time. Applying a followership lens to the experiences of succession stakeholders enabled the depiction of complex identity changes among staff. As a result, an identity theme runs throughout the findings.

Chapter Eight completes the reflexive approach to this research by summarising the methodological strengths and limitations of the thesis and outlining opportunities for future research. It also makes practical recommendations for improved university succession

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[3] Participants are referred to using pseudonyms throughout the thesis. See p. 80 for a more detailed discussion of this.

management. Finally, some personal reflections on completing this research are made based on Hibbert's (2021) reflexive framework.

Throughout this thesis, the term "succession stakeholders" is used. This refers to successors, staff and predecessors engaging in succession. This is intentionally done for the avoidance of any automatic labelling of, for instance, staff occupying follower roles. It is important to do this because of the unfamiliarity of the succession environment. As the literature review highlights, identities during change are subject to renegotiation by their owners and by others. Moreover, from a constructionist perspective, leadership dynamics are continuously changing and developing. With little knowledge of how individuals behave in a change context like succession, no automatic assumptions should be made about what categories of participant occupy which identity.

Chapter Two: Reviewing the Succession, Followership and Identity Literatures

Introduction

The succession, followership and identity literatures are central to the scholarly understanding of leadership. Exploring these literatures together may be insightful for the construction of leadership and identity during succession processes. This chapter will explore the existing scholarship within these literatures, highlighting opportunities for further exploration. The first section highlights the qualitative research gap and leader-centrism running throughout the existing succession literature. The second section introduces followership theory as a resolution to this gap and advocates for a constructionist approach to understanding unheard voices in organisations. The third section outlines areas of the identity literature which are relevant to succession and which lack contributions from those traditionally positioned as followers. Each of these sections leads to a research question; suitable methods for which are addressed in the methodology and methods chapter.

The Succession Literature

This section will discuss succession as a process, defining it as such and highlighting the relevant literature from different sectors. Then, it will highlight a conflict between the suggested benefits of the significant succession *planning* literature and the minimal understanding of the after-effects of succession. Overall, the section suggests that the experiences and contributions of some succession stakeholders – predecessors and staff – have been unexplored. This leads to the first research question and justifies the application of followership theory within this thesis.

Existing Interpretations of Succession

Across the public and private sectors succession is defined as the voluntary or involuntary replacement of an individual, often the key figurehead of an organisation (Hart and Uhr, 2011; Connelly et al., 2016; Farah et al., 2020), usually because of a retirement, dismissal or transition to a new role (Kuntz et al., 2019). It is widely recognised that succession is an inevitable and significant event which affects all types of organisations (Giambatista et al., 2005; Ndofor et al., 2009; Li, 2018; Farah et al., 2020). Despite this recognition, research on

succession within the public sector is sparse (Garg and Weele, 2012). Succession research has mostly been conducted in for-profit, sporting or family business contexts. Guidance from for-profit succession research is rarely applied to the public sector (Zepeda et al., 2012). This is salient in universities, where the lack of succession planning is considered a crisis (Bolton, 2000; McMurray et al., 2012; Ishak and Kamil, 2016; Loomes et al., 2019), reflecting minimal attention to succession by both scholars and practitioners (Pita et al., 2016). The following sub-sections address the possible lessons for universities from the existing succession literature.

Corporate Succession Literature

The succession literature began in a corporate context with common sense theory (Grusky, 1960), vicious cycle theory (Grusky, 1963) and ritual scapegoating theory (Gamson and Scotch, 1964). Where common sense theories assumed that succession implied the replacement of a failing leader, vicious cycle theories suggested that attempts to replace failing leaders led to organisational disruption and further succession (Grusky, 1963; Rowe et al., 2005). Ritual scapegoating attributed failure to a previous leader and assumed that succession was used to signal a need for change (Gamson and Scotch, 1964). Each of these theories is leader-centric: where common sense blames a predecessor and has high hopes for a successor, vicious cycle theory illustrates organisations as continuously in need of rescue, and ritual scapegoating positions predecessors as a reasonable sacrifice for change. These theories were borne out of conversations between the authors rather than through empirical investigation (Giambatista et al., 2004). This, as well as the conception of these theories being prior to the movement away from leader-centrism, may account for the leader-centric focus on predecessors and successors.

This centrism has been sustained, with Hutzschenreuter et al. (2012) questioning why leaders are held exclusively responsible for succession outcomes when other actors also hold responsibility. Perhaps because of the fear and disruption associated with succession (Kuntz et al., 2019), research has sought to identify the antecedents to succession (Giambatista et al., 2004; Berns and Klarner, 2017), aiming to establish key elements of a smooth transition in order to minimise this disruption (Balser and Carmin, 2009; Farah et al., 2020). There has also been a focus on understanding how definable characteristics like successor gender and socio-economic status influence post-succession performance (Georgakakis and Ruigrok, 2017). This, however, repeats the leader-centrism of the original succession theories. Scholars

have also relied on the accounts of senior management and quantitative measures of financial performance (Farah et al., 2020) or resistance to change (Rafferty and Jimmieson, 2017) within corporate succession research (Karaelvi, 2007; Li, 2018; Sherrer and Rezania, 2020). This means that qualitative exploration of the experiences of stakeholders, other than a successor, is rare within the corporate succession literature as well as in the university succession literature. The focus on measurable impacts of succession on performance is also more challenging within the public sector where there are fewer quantitative performance indicators (Farah et al., 2020). This highlights an opportunity to understand succession in different contexts.

Sporting Succession Literature

Exploration of succession in sports teams has also focused on performance. Research on coach experience and popularity (Giambatista et al., 2005) and coach relations with existing coaches (Grusky, 1960) reinforce the general leader-centrism of the succession literature by positioning the successor at the forefront. Gammelsaeter (2013) challenges this centrism by suggesting that the leadership literature has equated 'sports coaches' with 'leaders' without qualitative empirical evidence. Other sporting succession studies have focused on the impact on wins, losses and overall performance (McTeer et al., 1995; Andersen, 2011), suggesting that smooth succession processes are defined by quantitative results or financial metrics. This has left individual and broader team perspectives of sporting succession unexplored.

Family Business Succession Literature

Of the 3,214 documents returned by a Scopus search of the term 'succession' in the category 'Business, Management and Accounting', 1,203 of the results featured the term 'family business' in the title. Family business succession research has focused on the experiences of transferring social capital from parent-predecessor to child-successor (Overbeke et al., 2013; Cisneros et al., 2022), an external successor joining a line of blood relation predecessors (Boyd and Royer, 2012), and the impact of poor business performance on family relations (Williams and Mullane, 2019). Lessons from this literature have not been applied elsewhere (Giambatista et al., 2005). The benefits of a culture of knowledge transfer, structured engagement with a predecessor, continuous training, and suitably challenging recruitment processes are each transferrable lessons for non-family business succession. Engagement with a predecessor would be especially relevant for organisations which are home to long-

tenured predecessors and staff, such as universities (Fishman, 2019). Succession scholars appear to have explored organisational performance post-succession in silos, with no consideration of the public sector nor the impact of succession on stakeholders other than successors.

Temporal Portrayal of Succession

There is a conflict in the literature's temporal depiction of succession. Succession is often described as a shock event to an organisation (Querbach and Bird, 2017), followed by a series of individual events, including the exit of a predecessor and the arrival of a successor (Simkins et al., 2009). This suggests that succession involves related but separate events which happen distinctly and swiftly. Other scholarship focuses on processes which unfold among successors and their teams, including the early identification of career opportunities through succession planning (Pynes, 2004), the mental adjustment to the instability of succession (Gordon and Rosen, 1981), and the variation in attitudes and behaviours towards a successor over time (Rafferty and Jimmieson, 2017). The temporal findings of succession research so far and the calls from the literature for longitudinal explorations of the change (Schepker et al., 2017; Aravena, 2020), suggest that the term 'succession' refers to a transitional process of replacing an individual, with implications for many stakeholders across an organisation (Gothard and Austin, 2013). Yet, succession is still described as a singular 'event'. The transitional nature is rarely reflected in the duration of succession research timeframes or the participants consulted. With this in mind, this thesis considers the term 'succession process' to refer to the timespan from the announcement of an individual leaving an organisation to an indeterminate time of normalisation of workflow and emotions amongst the group.

Succession Planning Scholarship

Significant attention has been paid to succession *planning*. Succession planning has been described as an ongoing system designed to develop future replacements (Perrenoud and Sullivan, 2017). Some suggest that the relevance of succession planning will increase with a predicted wave of baby-boomer retirements in the 2020s (Taylor and Young, 2018). Also unaddressed by the succession literature is the relevance of succession planning following Covid-19. For instance, the career decisions and changes made after a period of reflection may create changes in attitudes to professional progression. Effective succession planning is often tied to the promotion of a pre-selected internal candidate, who already exists within the

organisation (Groves, 2018). The benefits of internal succession have not been explored empirically in the public sector and it is also unclear whether internal promotions would create a smoother transition for the *successor* or *other succession stakeholders*, such as inherited staff. The focus has been on the benefit for the organisation in terms of financial savings. This would be interesting to explore in universities given that, although external, non-HE experiences are interpreted as a requirement for professional staff leadership roles (Ryttberg and Geschwind, 2017), professional staff value internal and university-related expertise (Rosser, 2004; Whitchurch, 2010).[4] This suggests that there is a conflict in existing knowledge of preferences during succession. A lens which explores *experiences* of succession journeys, whether internal or external, is required.

The focus of much succession planning literature has been on how an individual successor, usually labelled automatically as a leader, can successfully make change (Querbach and Bird, 2017). Other research has explored how succession transitions can be conducted as smoothly as possible through internal promotion to reduce, for instance, identity change (Shen and Canella, 2003; Petrovsky et al., 2014; Wittman, 2018). This suggests a successor-centrism in the existing succession planning literature and highlights the tendency for leadership to be equated with formal positions of responsibility and authority, rather than being seen as a considered, socially constructed identity with influence implications (Hosking, 2007). This may also present challenges for organisations or sectors which do not prioritise the internal development of staff; for instance, universities in their treatment of professional staff progression (Gander, 2018). It would be valuable to explore experiences of succession within universities, particularly since there is concern for the sector's lack of succession planning (McMurray et al., 2012; Ishak and Kamil, 2016; Loomes et al., 2019). This would provide clarity over whether succession planning does happen, namely from the perspective of

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[4] The term 'professional staff' refers to university employees with responsibility for non-academic matters, including student-facing services like chaplaincy and religious services or student advice, as well as operational and management services like finance, human resources and estates (Baltaru, 2019). Terminology used to refer to professional staff may be subject to personal preference: Hogan (2011, 2014) notes that some accept 'university administrator', which others view as demeaning. This in itself can create confusion, though, as some scholars use the term 'administrator' to refer to senior managers (Szekeres, 2004). In this thesis, the term 'professional staff' is used to acknowledge the growing support for the phrase (Sebalj et al., 2012; White, 2012), and the growth of the profession (Curran and Prottas, 2017). The term's novelty leads some to suggest that professional staff represent a new category (Scneijderberg and Merkator, 2013; Ryttberg and Geshwind, 2019), whose roles are often undefined, ever-expanding, and undervalued.

succession stakeholders who experience the consequences of this. This research would also provide an opportunity to identify best practices for succession planning in universities.

There is very minimal understanding of the after-effects of succession. Research which does focus on the experience of succession after the appointment of a successor focuses on measurable, often financial, metrics (Farah et al., 2020). These metrics illustrate the disruption of succession on work routines and employee insecurity (Li, 2018) and performance decline (Kuntz et al., 2019). This suggests that the interest in succession planning to date has not been effectively applied in practice. Indeed, in Bridges (2018) exploration of succession planning in educational contexts, the question of why organisations continuously fail to plan for succession persists. It may be that the leader-centrism detailed so far is the root cause: by focusing on the recruitment and selection of a suitable successor, too little attention has been paid to other succession stakeholders and the after-effects of succession.

Succession Stakeholders

The preceding sub-section highlighted that a leader-centric approach to succession has prevented the voices of other succession stakeholders being present in scholarship. Succession being the beginning of potential new leadership relationships, there are other members of this influence process to consider, including staff members whose manager or director is replaced, as well as a predecessor who has been replaced (Barge and Fairhurst, 2008; Holm and Fairhurst, 2017; Busari et al., 2019). The next sub-section will address the positionalities of staff and predecessors, referred to throughout as succession stakeholders, during succession.

Staff Responses to Succession

Although it has long been accepted that succession affects employees across an organisation (Dawley et al., 2004), the extent and practicalities of this effect are unknown as minimal attention has been paid to how staff cohorts experience succession (Steffens et al., 2018). Relational leadership thinking, which recognises the value of dialogue and relationships between leaders and followers (Alvesson and Blom, 2015), has also not been applied within succession contexts, suggesting that there is a research gap in soliciting meanings of succession through language and in relation to other colleagues.

Research which has considered the perspectives of staff often assumes that staff will respond to succession with fear or shock (Boling et al., 2016). A longer time between the announcement of succession and the arrival of a successor has been found to minimise the surprise within the organisation (Ballinger et al., 2009) and this aligns with suggestions to "chunk" change into smaller initiatives (Rafferty and Jimmieson, 2017: p. 261). The underlying theme is that staff interpret succession negatively and navigate lower morale and unrest with each occurrence (Sherrer and Rezania, 2020), but this assumes a unidirectional influence of the successor on staff. Staff are positioned as recipients of succession whose attitudes, behaviours, wellbeing and work outcomes are affected without their consent or awareness (Diebig et al., 2016; Kuntz et al., 2019). This, again, leaves the voices of staff, and therefore the majority of the stakeholders affected by succession, unheard. It also overlooks any possible contributions of staff to succession and attributes responsibility for failures to a broader, inanimate, succession process. In the same way that the terms leadership and identity have become known as "empty signifiers", meaning terms which are used carelessly and so frequently that they become meaningless (Alvesson et al., 2008; Kelley, 2014: p.906), succession has become an empty signifier in that developments in organisational life have been attributed automatically to the overarching succession process, rather than explored fully. This is worsened by the exclusion of staff perspectives from succession research.

Responses from Different Groups of Staff

The literature makes very subtle nods to staff contributions to succession. Giannella et al. (2022) discuss the power which one can amass if deemed to be a leader who exhibits the existing group identity, but it is unclear whether or how the success of this alignment is interpreted or evaluated by others. Attributions of leader identities are also premature in that 'leader' is used to refer to a formal successor who is attempting to embody the group identity. This overlooks the confirmation of leadership which other stakeholders engage in (DeRue and Ashford, 2010), thus assuming that the successor has earned leadership by simply occupying the formal role.

The educational management literature is more advanced in understanding relational experiences of succession within schools (McMurray et al., 2012) in comparison to the corporate succession literature. This is a suitable foundation for exploration of succession in universities. Beginning with Hart's (1988) staged presentation of principal succession in

schools, qualitative explorations of staff and successor experiences in education sectors suggest that staff contributions may be relevant to other public sector succession journeys. Fink and Brayman (2006) illustrate the emergence of an influential subculture among staff which worked to covertly overrule or re-shape the decisions made by a successor. Macmillan et al. (2004) introduced the notion of observational staff, highlighting how schoolteachers analysed, internally and in groups, the behaviours of a principal's successor. Lastly, Meyer et al. (2009) identified the practice of teachers looking to more senior colleagues for guidance on whether to approve of a principal's replacement. There is clearly an important but unexplored social dynamic among inherited staff during succession (Potter et al., 1996; Brundrett et al., 2006; Aravena, 2020), perhaps related to referent power through identification, as discussed on p. 35.

Moreover, given that the examples referenced here demonstrate how *staff* can influence the experience of *successors*, there may be opportunities to explore the impact of this influence through a transformational leadership lens (Siangchokyoo et al., 2020; Stock et al., *In Press*). For instance, navigating the influential subcultures among staff may create additional work for the successor (Rafferty and Griffin, 2004). Equally, if staff share information with successors, this may be considered a form of intellectual stimulation (Bass, 1985) or a method of pushing successors to reach their full potential (Dvir et al., 2002). Both could be interpreted as integral to the process of shaping an existing identity into a leader identity (Avolio, 1999) or changing a successor's motive base (Burns, 1978), as suggested by transformational leadership theorists.

Progression Opportunities and Responses to Succession

The change management literature is also useful in providing insight into staff contributions to succession. Turgut and Neuhas (2020) found that employees engaged in career management behaviours, such as seeking new opportunities, if the organisational identity they held within themselves did not align with the direction of change. This suggests that staff may consider succession, particularly when it significantly alters the organisational strategy they align themselves with, as their own opportunity for development, either within or outside of the organisation. Given the minimal progression opportunities within university professional service units (Gander, 2018), as well as the average distance between institutions which prevents staff from easily moving on to a new university without uprooting their

personal life, the interest in internal progression opportunities may be exacerbated in university succession contexts. For instance, a successor's progression may create a sense of urgency among staff to find their own new role, either out of a desire for progression or of seeking to avoid a feeling of institutionalisation. Both highlight a possible chain reaction effect of succession that would exacerbate the need for succession planning, illustrating the potential portrayal of succession as a journey.

Resistance within Change

Resistance has been identified as a key response to change. The motivations for employee resistance are numerous, usually revolving around fear of the unknown (Amarantou et al., 2018) and a lack of control (Srivastava and Agrawal, 2020). Resistance can manifest in cynicism and humour (Zanin and Bisel, 2018). As with the succession literature, much of the resistance literature is tied to how managers or 'leaders' can avoid co-creating resistance. This extends the use of 'leaders' to describe formal managers and 'followers' to describe staff: for instance, Empson (2020) explores 'follower' resistance to 'leaders' in professional service firms. Similarly, Bligh et al. (2011) refer to 'follower' resistance through sabotage or upward communication (Carsten and Uhl-Bien, 2012). If employees are *resisting* 'leaders', it may not be appropriate to continue suggesting that they are following these formal leaders, or that formal leaders are leading. Tepper et al. (2006) recognise this in their use of resistant *subordinates.* The automatic connection of a post-holder with the term 'leader' is emblematic of the oversimplification of power in leadership relationships (Zoller and Fairhurst, 2007; Stern, 2021). Instead, resistant staff could be interpreted as exercising their own form of power across the hierarchy or indeed a leader identity; without prior research on the motivation behind this, there is little clarity over whether this resistance can be considered leading or following at all. Scholars should consider how and why resistance manifests among staff during succession: although the formal hierarchy may become more obvious by the arrival of a new person, the need to rely on existing staff for knowledge contradicts this hierarchy. Traditional dynamics of the organisational structure, then, may not apply.

Emotions During Succession

There has been limited exploration of emotions during succession, but there is relevant research on emotional labour during change more generally. Hochschild's (1983) seminal research on emotional labour among air hostesses has been extended to corporate change

settings, highlighting how organisational change can prevent employees from maintaining an authentic self (Turnbull, 1999). It is now accepted that change environments create emotional labour (Gabriel and Diefendorff, 2015), and can provoke subsequent processes of identity work (Larsson et al., 2020), highlighting other underexplored areas of organisational life within a succession context. Of relevance for succession may be the emotional labour involved in restructuring or reducing staff structures (Clarke et al., 2007), as well as that associated with changes in workload or increased anxiety in the workplace (Barboza-Wilkes et al., 2022). Indeed, the fear associated with succession may align with interpretations of 'followers' as distraught during change (Gilmore, 1988), but this is not well understood. Each of these catalysts of emotional labour is relevant but unexplored in the succession context.

Predecessor Influence on Succession

Reflecting on editorial transitions, Tourish (2022) cites Marx (1852) verbatim to position the predecessor and the broader past as underexplored organisational stakeholders:

> Men make their own history, but they do not make it as they please; they do not make it under self-selected circumstances, but under circumstances existing already, given and transmitted from the past. The tradition of all dead generations weighs like a nightmare on the brains of the living. (Tourish, 2022: p. 726).

Succession can evoke memories of the *good old days* among succession stakeholders. Ciulla (2020) suggests that leaders can identify organisational grief for the past and use it to form bonds with their followers. The role of emotions, and in particular grief, is worth investigating within succession, as it suggests that *successors* might be tactically using grief to engage with staff. It would also be valuable to consider whether, in universities, the successor identifies grief as an opportunity to connect with staff. Professional staff have been recognised as the holders of institutional memories and tacit knowledge (Lewis, 2014; see also p. 36 for a consideration of how this tacit knowledge relates to expert power) and this may exacerbate the grief they feel. In turn, the successor may face a larger challenge of managing the emotions of new staff members and the group as a whole (Pescosolido, 2002). This extends the possible relevance of emotional labour for both staff and successors, as discussed in the previous sub-section. Grief for a predecessor and the past, alongside other positive and negative emotions encountered during succession, are rarely explored from a staff perspective, with most of the succession literature focusing on emotions within family businesses (Bertschi-Michel et al., 2020) or the management of emotions for successful

change implementation (Smollan and Sayers, 2009). Particularly given that university staff career lengths mirror the long tenure of family business employees (Boyd and Royer, 2012), there is an argument for exploring similar emotions in succession within universities.

If grief is relevant to experiences of succession, there must be a ghost in the organisation to grieve for. Although this term has not yet been used in succession research, aspects of existing succession research suggest that ghosts may feature during the change process. In the educational management literature, an unpopular predecessor has been found to create an accepting environment for a new successor (Carsten and Bligh, 2007; Ballinger and Schoorman, 2007; Ballinger et al., 2009). In the corporate succession context, ghosts have been explored in understanding how founders of organisations continue to impact decision making post-succession (Galois-Faurie et al., 2022). This aligns with the broader claim that successors exist in the shadow of their predecessors, regardless of whether their predecessor was liked or disliked (Kim et al., 2021). This shadow is often enhanced if a predecessor has a long tenure in an organisation (Pendleton et al., 2021). Research which considers the contribution of predecessors to succession may clarify whether and how predecessors enter reality from the past (Berger and Luckmann, 1966; Montecinos et al., 2018).

Ghosts are described as immaterial beings which are core to organisational life and histories (Orr, 2014). Their non-visibility creates challenges in the control organisational actors have in moderating the haunting or spectre of ghosts. Instead, ghosts manifest in memories and stories, finding their way into perceptions and dialogue. Orr's (2014) portrayal of organisational ghosts within local government meetings highlights different ways of interpreting ghostly presences and how each type of ghost can shape one's experience of work. Given the recognition of grief within succession it would be valuable to explore the role of ghosts in succession. The most likely ghost is that of the predecessor, but how the predecessor's ghost is enacted and sustained within succession is not clear. Bell (1997) suggests that ghosts are enacted by those who hold memories of the now-ghost. This aligns with the preceding suggestion that professional staff hold on to memories, but what they do with these memories, whether this constitutes inheritance and how they affect others' experiences of succession remains unclarified. Ghosts may also interact with individual identities: given the possibility that staff and successors will navigate losses during succession (Aravena, 2020), there may be underexplored ghostly presences in this respect too.

Some research suggests that post-succession periods are characterised by inertia and a sustained influence from a predecessor, as discussed in the preceding paragraphs (Quigley and Hambrick, 2012). The existing literature suggests that levels of inertia exist particularly when a successor does not represent the values of the cohort they have joined (Giannella et al., 2022). This reinforces the need to understand the experiences of staff during succession: successors have described the environment they enter as replete with inertia, but it is not clear whether staff make the same interpretation. The continued existence of inertia post-succession is concerning, particularly given the assumption that succession planning is effective in reducing it (Groves, 2019). This suggests that either succession planning is not as effective as previously claimed, or that succession planning is not being implemented effectively. Both possibilities contribute to the need for further research which explores post-succession processes as they unfold. The literature is also limited in that it does not articulate how the influence of a predecessor reaches a successor. Concepts of leadership make clear that one individual influences another to achieve an objective. This raises the question of which individual or structure carries the influence of the predecessor to the successor, particularly when a predecessor has left an organisation and only the memory of them remains.

The Past and Succession

Organisational histories shape how staff respond to successors (Gouldner, 1954; Berger and Luckmann, 1966; Orr, 2014). These histories are often unknown to successors and difficult to navigate, particularly if a predecessor is reluctant to fully exit their previous role (Colli and Larsson, 2014). Path dependency theory also suggests that succession can break paths and create shock among succession stakeholders (Querbach and Bird, 2017), but exploration of this is, again, mostly within family businesses (Boling et al., 2016). Ciulla (2008) emphasises the need for all organisations to understand the past before embarking on a different future, and Meyer et al. (2009) suggest that an understanding of the past can enable successors to identify changes which would be accepted by their new team, thus improving the impression that staff have of the successor and perhaps also the overall efficiency of the team. The literature has not identified how successors can gain access to this knowledge of the past.

It may be that professional service staff share knowledge given their memory of institutional histories (Bolden et al., 2009) as well as the strength of staff networks (Rosser, 2004; Roberts, 2018) and their elongated careers (Fishman, 2019). If this is the case, the lens of ventriloquism (Cooren, 2012) may be relevant. For instance, Knudsen et al. (2022) suggest that organisational actors ventriloquise formal strategies or histories, by aligning themselves with elements of the past, in order to convey a certain identity to others or make sense of their own values. How these factors influence staff behaviour during succession is unclear. It would also be valuable to explore how successors and staff navigate their respective knowledge deficiencies and expertise. If university histories increase the likelihood that the culture lends itself to path preservation, the sector may benefit from understanding how knowledge can be effectively transferred.

Power Dynamics Within Succession

There has been limited exploration of power during succession processes and, in power related research, a focus on financial performance metrics is sustained. For instance, Drazin and Rao (1999) explore the impact of CEO power and organisational outputs on post-succession performance; research addressing perceptions of power during succession processes is minimal. The family business succession literature has explored power in combination with gender (Glover, 2014; Ferrari, 2019), focusing especially on predecessors who are unwilling to transfer control of the business. Muskat and Zehrer (2017) draw attention to power in knowledge transfer in family business succession, finding that owner-founders who appoint a successor have significant tacit knowledge, or expert power (French and Raven, 1959). This may be relevant for understanding the power of longstanding predecessors or staff who have amassed expert power.

These studies are starting points for research into power through succession processes, with most applying or modifying French and Raven's (1959) bases of power framework. Whereas power was previously thought of as residing within hierarchical roles, it is increasingly viewed as existing between individuals (Fleming and Spicer, 2014). There is similarity between this processual view of power (Anderson and Brion, 2014), the view of succession as a process articulated on p. 26, and the view of leadership and followership as existing outside of roles and dependent on context, argued throughout the next section. It is therefore important to discuss the possible existence of different bases of power in succession contexts.

In organisations with a clear hierarchy, like universities (Schneijderberg et al., 2017), legitimate power, where position commands respect (Lyngstad, 2015), could be heightened during succession. The replacement of a person in a position with authority may remind colleagues of the formal abilities the new incumbent has. This may encourage staff navigating succession to accept the successor more readily. However, legitimacy of dependence may also be relevant during succession processes, where a successor complies with staff because the successor does not have the means to complete a task themselves (Wilson, 2008). This is interesting because it suggests that staff may hold legitimate power, even if temporarily, over a successor during the initial transition period.

Similarly, the knowledge staff hold in comparison to a successor, particularly if the successor is an external appointment, constitutes a form of expert power (Saam, 2007). This would position staff as holding a soft, personal power over successors that enables them to influence the successor's beliefs (Wilson, 2008). A referent power lens, where one person's actions generates a desire in another to identify with them (Lyngstad, 2015), is also relevant for succession: it is possible that both staff and successors would want to show similarity with the other as a form of trust or relationship building. Without a pre-existing discussion of power in succession, important questions over the development and use of power during such change remain unaddressed.

Summary

This section has presented the extant succession literature and illustrated a concerning gap in how staff respond to succession. To ignore the perspectives of staff during succession leaves unheard voices lingering throughout succession and sustains the leader-centrism which currently exists in the literature. To this end, this section introduces the first research question for this thesis to address:

Research question one: how do succession stakeholders, including staff and successors, respond to and interpret succession?

The Followership Literature

The preceding section outlined the existing succession literature and suggested that staff contributions to succession have been overlooked. As a result, the voices of staff are unheard throughout succession. This chapter positions followership as the lens through which a fuller

understanding of succession, staff and possible following behaviours can be gained. The following section will introduce the parameters of followership, outlining the benefits of applying followership theory to literatures which feature unheard voices. It will challenge existing followership research, positioning some research as continuing to serve an understanding of leaders rather than followers. The final sub-section of this section addresses the loose use of the terms leader and follower and highlights the need to better understand and more accurately portray influence from *staff*, rather than describing influence from followers.

Followership is gaining prominence among leadership scholars after years of neglect (Na-nan et al., 2016; Algebeleye and Kaufman, 2019; Khan et al., 2019). Historically, there has been a focus on 'leader' traits and behaviours to the detriment of the understanding of 'followers' and following (Tee et al., 2013). This has been exacerbated by the leader-centric tendency to view leaders as heroes or villains who hold ultimate responsibility over the organisation (Oc and Bashshur, 2013), creating an inequality between 'leaders' and 'followers' (Rost, 2008). It is now widely recognised that greater attention must be paid to the other side of the leadership relationship (Gooty et al., 2010; Alvesson and Blom, 2015), in turn challenging the leader-centrism which has equated 'managers' with 'leaders' (Bedian and Hunt, 2006; Alvesson and Blom, 2015; Larsson et al., 2021; Larsson and Alvehus, 2023). Doing so would enable a fuller understanding of phenomena which are currently explored from mainly a 'leader' perspective.

Followers and Following
The theory and research which does exist on 'follower' perspectives has been and continues to be overtly negative (Hoption et al., 2012; Benson and Jordan, 2018; Gilani et al., 2019). Followers are depicted as in need of rescue from heroic or saviour 'leaders': Lipman-Blumen (2008: 40) suggests that in crises, followers look for a "God-like" leader. This creates an image of followers as reliant on a leader for problem-solving. Charismatic and transformational leadership especially has positioned 'followers' as infatuated with leaders and leaders' ability to nurture passion for an organisational vision (Collinson and Collinson, 2009; Blom and Alvesson, 2015). Such positioning portrays followers as a cohort of individuals who are freely available to support an agenda. This overlooks the processes by which followers decide to follow by suggesting that leaders can control this behaviour through their charisma, aligning with "God-like" perspectives of leadership where leaders

hold agency and followers do not (Tourish, 2014: p. 93). It would be interesting to explore whether succession was a crisis which prompted both staff and successors to seek refuge in the same way that these behaviours are described.

The practice of following has also been displayed as a passive, sheep-like behaviour (Carsten et al., 2010) or as the process of following directives. This suggests that following is something one is compelled to do depending on position in an organisational structure (Bjugstad et al., 2006), leading to the conceptualisation of followership as the exact opposite of leadership (Hinic et al., 2016) and an aversion among research participants to identify as followers (Alvesson and Blom, 2015). At other times, the term 'leader' is used with no consideration of the term 'follower' (for an example, see Su et al., 2019), reinforcing the passive, silent positionality conveyed by the descriptions above (Rost, 1994; Essa and Alattari, 2019). This positionality was clear within the succession literature where successors were automatically upgraded to leaders and employees were assumed to be followers (see p. 31). Without empirical evidence of individual experiences of following or being followed, these negative interpretations appear no more than assumptions. It suggests that, in the same way that Alvehus (2021) could not identify a substance to leadership, followership may be on the verge of suffering a similar fate, extending the relevance of the "empty signifier" term (p. 24). Alvesson and Blom (2022: p. 59) agree, suggesting that followership research is at risk of becoming a "hembig", a hegemonic, ambiguous term used to refer to big concepts but with little precision. There is a conflict, then, between the repeated use of 'follower' in the literature and the rare, verbal claiming of being a follower, unless in an interview setting (Harding, 2015; Ford and Harding, 2018).

Exploration of the challenges of succession has tended to overlook the complex leading and following processes and relationships outlined in the preceding sections. Consider the discussions of how *leaders* can be appropriately selected to minimise the time it takes them to integrate into an organisation (Poulin et al., 2007). Succession research may need to be careful to use terms like successor or formal leader, rather than assuming that this identity has been granted by others. Use of 'leader' also conveys a permanency to leader identities, but this does not align with the fleeting nature of identity (see p. 53). In reviewing the literature, the term 'leader' is rarely accompanied by the use of 'follower', evidencing Schedlitzki et al.'s (2017: p. 487) description of leadership as "phantasmic", given the rarity of research participants verbally claiming a follower position. For instance, Selvanathan et al. (2022)

present ways that a wider group of employees evaluate whether a 'leader' embodies the existing group identity. If the successor is to become a leader through their embodiment of an existing group identity, individuals should not be referred to as leaders until they have achieved this identity in the eyes of others. Moreover, although scholarship recognises the responsibility of employees in evaluating how far a successor embodies group identity (Giannella et al., 2022), there is little attention paid to the behaviours of employees in measuring this, nor any consideration to how employees might contribute to this embodiment. The issue here is in the automatic labelling of staff as followers, rather than considering the choice to follow or the permanency of following. This conveys a limited understanding of following in succession (Busari et al., 2019).

There is also a tendency to consider the prospect of being a leader as a goal for all employees. Some conceive of following as training to be a leader (Blackshear, 2003; Bastardoz and van Vugt, 2018; Riggio et al., 2021). This suggests that there are similarities between leading and following (Bjugstad et al., 2006; Bertlett et al., 2011; Carsten et al., 2017; Robinson et al., 2021) and that leaders must first follow (Agho, 2009), reinforcing an aversion to following by positioning leadership as a goal to work towards. This also means that on achieving 'leader' status some feel they will never follow again (Alegbeleye and Kaufman, 2019). These are static, binary, either/or interpretations of leading and following which have led to the negative interpretation of two rich processes.

The Choice to Follow
The followership field is now seeking to understand follower motivations, behaviours and identities in the context of a leadership relationship, rather than in permanent relation to a leader (Velez et al., 2022). This has led to a broad agreement that to follow is to defer to an individual identified as a leader (Larsson and Nielsen, 2021), though some do suggest that following can be directed towards non-human aspects of organisational life, such as vision (Uhl-Bien et al., 2014; Pietraszewski, 2020) and others question how often this deference happens (Einola and Alvesson, 2021). The follower then accepts a comparative level of reduced power, influence and authority (Uhl-Bien and Pillai, 2007; Alvesson and Blom, 2015; Velez et al., 2022). For some this means that followers adopt another individual's goals, therefore attributing a leader identity to that person (Bastardoz and van Vugt, 2018). Increasingly the adoption of a follower identity has been characterised as voluntary (Tolstikov-Mast, 2016; Essa and Alatarri, 2019; Blom and Lundgren, 2020) and a fragile or

fleeting commitment (Clifton et al., 2020), challenging the earlier view of followers as not in control of their decision making and the permanency of the follower status (Rost, 1994). The voluntariness of following can be identified among those who interpret inappropriate or unleaderly behaviour (Koning and van Kleef, 2015; Jolly et al., 2022), which again challenges the use of terms like 'leader misconduct' to refer to behaviours which should instead by labelled 'manager misconduct'. Despite this growing consensus, empirical studies of followership are still few in number (Oc and Bashshur, 2013), suggesting that a fuller understanding of the agency and rationale behind adopting a follower identity is required (Popper and Castelnovo, 2019). This would be particularly valuable to explore in succession given that most research views follower identities as directed at an individual person, viewed as a 'leader' (Lapierre and Carsten, 2014; Blair and Bligh, 2018; Sims and Weinberg, 2022). For instance, how do leader and follower identities form in relationships with a successor new to the organisation, or within staff who have been employed in the organisation for some time?

The choice to follow relies heavily on the context it is made in being non-coercive. For instance, Alvesson and Blom (2019) suggest that being a follower is about buying into a leader's message about what is desirable or good to do. This means that being a follower cannot be borne out of a lack of choice (for instance, following someone because there is no one else to follow (Olsaretti, 2008)), nor out of ignorance (for instance, following someone out of lack of knowledge for who else there is to follow (Raffoul, 2013)). Equally, feeling forced or coerced to follow cannot be considered followership (Blom and Alvesson, 2014). These arguments lead Blom and Lundgren (2020) to suggest that there are few instances of purely voluntary followership. This is also an element of followership worth exploring in succession where the appointment of a new formal authority may reify the organisational structure and create a feeling of obligation to follow or demonstrate support; perhaps this obligation is a form of coercion. Alternatively, succession may be a context in which the voluntariness of following is demonstrated, given the observations of staff in succession in educational contexts (see p. 30).

Implicit leadership theories (ILTs) suggest that one's past informs what one will follow in future (Junker and van Dick, 2014; Da'as and Zibenberg, 2019). ILTs lend themselves to the argument that leadership is in the eye of the beholder (de Vries and van Gelder, 2005), positioning leadership as a mental attribution which shapes how individuals engage with

someone they see as a leader (Oc and Bashshur, 2013). Implicit followership theories (IFTs) were then developed, suggesting that just as one can construct an ideal leader, an ideal follower prototype exists in our minds too (Sy, 2010; Lord et al., 2020). Leader-centrism runs throughout these theories, and they are often used to identify what nurtures follower effectiveness, rather than focusing on, for instance, how individuals become their own version of an effective follower and whether this is influenced by organisational change. ILTs do, however, speak to the agency individuals have in deciding to follow and open up the possibility that organisational members, regardless of formal position, have ideals of following. Remaining relatively unexplored is the possibility that organisational actors do *not* follow or present instead local identities (such as that of an interpreter) rather than as leaders or followers, with Larsson and Nielsen (2021: p. 9) beginning this discussion by highlighting the risks of choosing to follow.

Role-based followership

Followership can be approached from either a role-based or constructionist perspective (Uhl-Bien et al., 2014). Role-based followership views following as a role with a distinct set of behaviours (Katz and Kahn, 1978). Constructionist followership takes a more fluid approach, viewing following as a social process among individuals (Fairhurst and Grant, 2010). The next sub-sections address these approaches and present constructionist followership as the preferred lens for this thesis.

Some suggest that the negative interpretations of followers and following stem from the role-based reliance on formal positions in an organisation and the subordinance of followership (Uhl-Bien et al., 2014). This may result from Zaleznik's (1965) early work which categorised followers based on their submissiveness or passivity. Uhl-Bien et al. (2014) provide a full review of role-based followership typologies in their seminal review of followership. This literature review will not duplicate this work but show how a role-based view sustains leader-centrism, advising against the use of this approach for an exploration of staff contributions to succession. The tendency of role-based approaches to generate models of followers and following is particularly relevant for this discussion.

Kelley (1988) defined the ideal 'follower' as one who could work towards a common purpose with a 'leader', categorising followers as any of: alienated, exemplary, conformist, passive

and pragmatist individuals. These categories, though, point to the leader-centrism of early followership. Followers were considered exemplary if they consistently responded to leader needs. This suggests that, although followers might consciously identify these needs, they are presented as permanently at the disposal of leaders. It is also worth considering whether alienated followers, who engage in negative interactions with a leader, and conformist followers, who simply agree with leaders, are followers at all. If alienated individuals feel alienated from the leader and the group, it suggests that they do not identify with the values they see represented. If conformist individuals agree with another individual in the organisation out of reflex, or perhaps because they do not care, this may not be the process of making a conscious choice to follow. Being uncritical and passive in interactions with others is not robust evidence of following, particularly when the existing literature is weak in its ability to identify what prompts people to follow. Indeed, this mirrors the framework's focus on observable behaviours of individuals that researchers identify as 'followers', rather than seeking to access the internalised thought processes or perceptions of people who identify as followers. Constructionist followership, discussed on p. 44, seeks to address this shortcoming.

Chaleff's (1995, 2003) model of courageous following emphasises the ethical and legal responsibility which 'followers' have to their 'leaders', with Chaleff suggesting that followers are required to supervise their leaders from below. Some suggest that recognising followers as courageous is a positive step towards fair treatment of followers (Tolstikov-Mast, 2016). In some ways, however, this romanticises followers by suggesting that their role is to protect the organisation from a toxic leader, rather than co-construct organisational outcomes. This absolves a leader from responsibility for their fanatical behaviour. Indeed, this opposes the scholarly call for leaders and followers to take equal responsibility for organisational outcomes (Oyetunji, 2013). It is also worth considering whether, if a leader was behaving unreasonably or in an 'unleaderly' way, an employee would, in fact, be a follower. This may be a decision informed by the ILTs discussed on p. 40. Equally, there is a possibility that individuals decide not to follow; a choice which requires further investigation and emphasises the risks of follower identities (Larsson and Nielsen, 2021). This exemplifies an issue with role-based followership in that it automatically holds individuals who rank lower in the organisational structure to the follower position, overlooking the agency individuals have to follow.

Although Kellerman (2008) persists with categories of follower styles, the followership continuum she presents illustrates the fluidity of following and advocates for the choice to follow, moving away from a purely behavioural view of following. Based on a scale of low to high engagement, isolates, bystanders, participants, activists and diehards refer to the different intensities of followership which can be identified in relation to a leader. Emphasising the choice individuals have over the type of follower they are, the continuum model promotes variation in how individuals behave in different contexts. However, the connection to a formally appointed leader persists. This proposes that disengaged 'followers' are detached from work and that engaged 'followers' are either devoted to a leader or trying to unseat them. With the current, nascent understanding of follower motivations and behaviours, there is space to interrogate this continuum further. If an individual's engagement with a leader is low, it may be unrelated to a leader and related instead to personal circumstances. If an individual's engagement is high, this may also be unrelated to a leader, instead related to seeking personal development for a future post outside of the organisation. This highlights how engagement could increase or decrease over time.

Carsten et al.'s (2010) contribution to role-based approaches was through presentation of proactive and passive orientations to followership. There is some overlap between the passive orientation with Kelley's (1992) portrayal of followers as sheep, which reduces responsibility within the follower role, and the suggestion by Carsten et al. that followers defer to leaders for knowledge. If followers, in general terms, defer to leaders for knowledge, this makes the knowledge transfer role between professional staff and a successor more meaningful to explore. There is also a suggestion that passive followers are silent (Carsten and Uhl-Bien, 2012) or that silence indicates follower identities (Gunter et al., 2021). Further clarity on what motivates silence towards formal leaders is required. It would be valuable to consider whether knowledge prompted individuals to engage with leader or follower identities differently during succession, where the knowledge required for existing processes is held by staff. A deeper consideration of the relevant identity literature begins on p. 49 and is also discussed in relation to constructionist perspectives of followership in the next sub-section.

Carsten et al.'s (2010, 2014: p. 551) portrayal of proactive followers suggests that employees spend their organisational lives anticipating an opportunity to constructively challenge leader decisions or 'get the job done'. It is interesting that the parameters of proactive followers are similar to those of active citizens (Sherrod and Lauckhardt, 2009) and proactive work

behaviours (Urbach et al., 2021), suggesting that it is possible to discuss such behaviours without confining individuals to 'leader' or 'follower' roles. The objection made to Chaleff's courageous followership applies here too; if an individual proactively challenges another, a process of influence exists between the two. Therefore, it is worth recognising Blair and Bligh's (2018) qualification that challenging an idea is alone not sufficient to be interpreted as influence; instead, the attempt to voice or challenge can be viewed as an attempt to assert a leader identity which has not previously been recognised.

Although role-based views have promoted discussion on followers and followership, they have aligned with traditional concepts of leadership by ringfencing followership to hierarchically lower positions and restricting the enactment of leadership based on structural authority (Eilam-Shamir et al., 2017; Sims and Weinberg, 2022). For instance, Kelley (1992) recognises the leadership of 'followers' within the confines of their formal role, describing little leaders. Barrow et al. (2011) extend this within healthcare, illustrating the leader identity work of junior doctors through work shadowing, but without recognising this as *real* leadership. Jaser's concept of the connecting leader challenges this by creating a sense of urgency for individuals in organisations to consider their following *and* leading identities. This may also lead to a familiarisation with following and less immediacy in its negative characterisation.

The models presented here imply that followers must always exist, albeit Kellerman's followership continuum suggests that this can vary in concentration. It is not reasonable to assume that followers continuously exist when scholars do not have a full understanding of the process of deciding to follow or the motivations behind this. The subsequent paragraphs on constructionist followership respond to this by contrasting with role-based followership and presenting a more fluid and relational perspective of leading and following.

Constructionist Followership

Research on following is increasingly taking a constructionist turn to recognise that leading and following behaviours and identities can exist outside of formal hierarchical roles (Sims and Weinberg, 2022). There is also recognition of the mutual influence between leaders and followers (Tee et al., 2013), but empirical research which shows this influence, especially from a 'follower' perspective, are uncommon (Popper, 2011; Lapierre et al., 2012; Carrington

et al., 2019; Epitropaki et al., 2020; Kim et al., 2020). Beyond this there are historic and renewed calls for attention to how 'followers' influence leader emotions, behaviours and the overall leadership process (Gooty et al., 2010; Sims and Weinberg, 2022). This may be the kind of staining of the "immaculate concept of leadership" that Alvehus (2021: p. 130) calls for in his attempts to unravel the mystery and heroism of leadership. In some ways, then, constructionist empirical research which truly highlights the mutual influence among individuals in a leadership relationship has not yet reached its full potential.

From leader-centrism, an assumption has become embedded within leadership that, if leadership is to exist, followership must also exist (Kelley, 2008). The automatic attribution of leadership to post-holders in an organisational structure assumes that followers exist within lower posts in an organisation (Blom and Lundgren, 2019). Constructionist followership challenges this dyadic perspective by viewing leadership as influence among individuals and formal structures (Holm and Fairhurst, 2017). This influence is emergent and co-produced among individuals in an organisation (Shamir, 2007; Busari et al., 2019). Ashford and Sitkin (2019) exemplify the questions asked by constructionist followership, asking: if a non-formal leader leads using the same behaviours that a formal leader displays, do others consider this leadership? Their question raises the possibility that following can be done by people of varying roles, in varying situations, challenging set assumptions of who leads and who follows (Uhl-Bien, 2006; Tolstikov-Mast, 2016). This may also create implications for what can be considered leaderly behaviour, in comparison to the unleaderly behaviour discussed on

Under this lens, following is positioned as a conscious and voluntary decision to defer to another individual in the organisation (Na-nan et al., 2016; Collinson, 2017; Blom and Lundgren, 2019). This is increasingly conceptualised as a *temporary* deferral (Shamir, 2007) which any individual can engage in for even a fleeting moment in time (Larsson and Nielsen, 2021). This removes the restrictions put on leader and follower labels by role-based perspectives. From a constructionist perspective, then, a formal leader – perhaps a successor – could embrace a follower positionality through their behaviour, identity, and relation with another individual in the organisation. This would be interesting to explore in succession, particularly given the suggestion that staff approve of a successor, and that, in universities, successors may rely on staff for information . A constructionist approach to

followership should ensure that all research participants, regardless of formal organisational status, are invited to consider their own followership and leadership.

DeRue and Ashford (2010) focus on leader and follower identities which can be claimed by an individual and granted or rejected by others. The identity perspective allows any individual to claim a leader or follower identity and places no restriction on the length of time one holds that identity. Under DeRue and Ashford's conceptualisation leadership is characterised as an emergent and shared feature which exists among organisational members (Marchiondo et al., 2015). The identity construction model has been applied in some empirical research, most recently Larsson and Nielsen's (2021) conversation analysis of team meetings. Their qualitative study highlighted the risk evaluation employees make in claiming follower identities, particularly when someone in a formal leader post permits an employee to claim a leader identity, but which the employee does not feel they can claim. In contrast to role-based approaches, this permits a far more complex picture of elusive, undefined leader and follower identities to emerge (Larsson and Nielsen, 2021). Crucially, Larsson and Nielsen's research highlights the influence of local context on claims of leader and follower identities. This suggests that the local context of succession would also be an interesting environment in which to explore leader and follower identities.

Collinson's (2008) post-structuralist identity approach introduces three follower identities: conformist selves, resistant selves and disguised selves. Individuals with conformist selves believe that authority figures value their contribution. Engagement with conformist selves during succession is a possibility if staff value the opinion of the successor. Minimal existing literature discusses the role of resistant selves during succession, which is surprising given the prominence of resistance during change overall (see p. 31). Collinson proposes that followers resist through distance, dividing their personal identities from the workplace. This raises many questions for succession: when relationship building is expected but, say, values clash, do succession stakeholders resist by hiding their personal identity? It is also worth asking again whether, if resistant identities are being engaged, scholars can reasonably call those presenting these identities 'followers'.

Disguised selves may be meaningful in succession: succession stakeholders may feel the heightened self-consciousness Collinson describes an attempt to reshape their working self-concepts to align with an aspirational self (see p. 50). Successors may feel pressure to engage

in a disguised or dramaturgical self (Goffman, 1956) because of staff observations (see p. 30). Building on the discussion of power on p. 35, the underexplored power dynamics in succession may prompt successors to engage in conformist selves in relation to their superiors, but simultaneously in dramaturgical selves in relation to observational staff. This could represent a temporary engagement with referent power as successors attempt to align with staff behavioural expectations. It is important to consider the relevance of the post-structural identity approach for both staff and successors, given that leading and following relations may be disrupted by the uncertainty of succession. The possibilities outlined here are hypothetical, largely because of the paucity of literature addressing identities during succession (see p. 53).

A recent addition to the constructionist leadership literature is Jaser's (2021) *Connecting Leader*, a series of articles which challenge the categorisations of leader and follower by showing how middle managers influence simultaneously as a leader and a follower. The book builds on Jaser's (2017) work on the same concept, suggesting that the sequence of a leader influencing a follower, and assumptions of causality in this process, may have lost its relevance, given the similarities between desired leader and follower behaviours and characteristics (Carsten, 2017; Peters and Haslam, 2018). Jaser's text challenges the traditional characterisation of following as a consequence of leading, suggesting instead that following must be identified before leading. This is interesting for the existing succession literature, which has assumed that successors arrive in an organisation as 'leaders' and are followed from the beginning. In the same series, Riggio et al. (2021) highlight the possibility of leading and following as being one construct. This is worth considering in succession given the possibility for staff to decide to follow a vision they feel is compelling in a succession context, and the simultaneous possibility for staff to decide to lead through, for instance, expert knowledge.

Future Followership Research

Like succession scholarship, it is possible that followership needs to move away from a leader-centric lens. This is particularly obvious when 'follower' is used as a placeholder for employee (Lapierre et al., 2012), or when research asks 'followers' for their perspective of 'leaders', rather than of their own follower or local identities (Carsten et al., 2010). In response, alternative terms such as "constituents" (Rost, 1993), "collaborators" and

"member" (Uhl-Bien et al., 2014) have been trialled, but with no consensus reached. There is clearly a need to focus on how followers view their own identities and behaviours and whether these views align with alternative terminology, complementing the calls for further followership research (Meindl, 1995; Baker, 2007; Ghislieri et al., 2015; Na-nan et al., 2016; Tolstikov-Mast, 2016; Alegbeleye and Kaufman, 2019), which would allow those who have followed to define following.

It is also worth considering whether staff influence group identity during succession. There are increasing calls for research into how individuals identify and support leaders who embody the existing shared group identity (Hogg and Rinella, 2018). Blair and Bligh (2018) found that 'followers' helped to co-construct a group identity as well as that of the chosen leader. Scholarship has not explored what followers do with a group identity following the departure of this leader. Literature addressing crises suggests that followers develop shared identities before leaders are identified or appointed (Carrington et al., 2019). Given the disruption caused by succession, it would be valuable to explore whether staff exercise similar behaviours in developing a shared group identity – therefore leading on an identity which is either similar or different to one exercised with a predecessor – before the arrival of a successor. Although constructionist research advocates for the fluidity and fleeting nature of leader and follower identities, this has rarely been empirically demonstrated through followership (Oc and Bashshur, 2013). The focus on a need to understand 'followers' may align with Coyle and Foti's (2022) suggestion that future research should consult those with experience of following. As shown in this and the preceding section, there have been subtle nods to moments where 'followers' influence, but there has been no consideration that elements of these behaviours could be considered leading. If it is leading, where in organisational life can it be identified?

Summary

This section has introduced and problematised the existing followership literature, suggesting that leader-centrism continues to run through followership research. It has also outlined opportunities for exploring the concepts of followers and following during succession, where new relationships are potential environments for new leading and following behaviours. To that end, this section introduces the second research question:

Research question two: what do processes of following look like during succession?

The Identity Literature

This section will pull together the identity strands discussed in the preceding sections, outlining the identity literature relevant to an exploration of succession from a followership perspective. Responding to the calls for further understanding of follower identities, but without equating 'staff' with 'followers', this section reviews literature which presents the various identities that organisational actors engage with. By reviewing aspirational and provisional selves, identity threats and losses and the process of identity work and liminality, this section provides a basis for understanding staff identities during change. This section concludes by making suggestions for the use of identity in succession research, before introducing the third and final research question.

Existing Literature

Identity develops continuously and is often incomplete, but not infinitely so (Collinson, 2006; Alvesson, 2010; Wright et al., 2012; Daskalaki and Simosi, 2017; Gustafsson and Swart, 2019). This perspective has been strengthened with the continued application of post-structuralist thought to identity (Collinson, 2006). Identities are often articulated through narration, with narratives edited to reflect the individual's preferred external impression (Brown, 2018). Consequently, scholarly understanding of identity is usually rooted in talk (Ahuja et al., 2018). Despite this, and that the acceptance of identity is achieved by asking ourselves what others think of us (Beyer and Hannah, 2002), followership has not been used extensively to explore follower identities or follower influence on leader identities (Collinson, 2006).

Parliament of selves

A "parliament of selves" exist inside and outside of organisations (Mead, in Pratt and Foreman, 2000: p. 18; Floyd and Dimmock, 2011), with Knights and Clarke (2013: p. 337) also referring to organisations as an identity arena. Social contexts influence the strength of an identity at any one time, whether that be an 'internal' self or 'external' social identity (Avolio, 2007; Watson, 2008; Avolio et al., 2009). Each 'self' has specific images which shape who one might, would like, should, or fears to become in future (Ibarra, 2007; Kreiner et al., 2006; Epitropaki et al., 2017), or a self that one wished to become but did not or could not (Fraher and Gabriel, 2014). These selves guide individuals in making decisions during important transitions (Gustafsson

and Swart, 2019), each with their own boundaries to distinguish them from other selves and individuals (Ellis and Ybema, 2010; Fraher and Gabriel, 2014). It would be interesting to explore whether succession influences the working identities of stakeholders, other than successors.

Engaging with different identities is central to meaning making (Sveningsson and Alvesson, 2003): identity has been described as a navigator in difficult waters (Alvesson, 2010), a concept which protects one's basic worth and focuses attention on goals (Epitropaki et al., 2017), a temporary fix to understand and protect against vulnerabilities in society (Brown, 2018), and something which strengthens from being in different situations (Frye et al., 2007). The context of succession is interesting to consider identity within, given the possibility that the change context could influence engagement with possible selves. The next paragraphs address the different categories of identity which successors and staff may engage with during succession.

Aspirational selves

Aspirational selves, also referred to as possible selves, are the "end states" of identity (Markus and Nurius, 1986: p. 961) which incentivise experimentation with provisional selves during challenging times (Kreiner et al., 2006; Fraher and Gabriel, 2014). People often feel a desire to change their provisional self to an aspirational self, but a final aspirational self is rarely achieved (Beech, 2011). Karp and Helgo (2008) suggest that those considering their aspirational selves will question their intentions and expectations for the future. This questioning process also facilitates the consideration of selves that individuals do not wish to become or wish to avoid (Fraher and Gabriel, 2014). This reflection on the future may be more prominent during succession as successors, for instance, reconsider the direction of a unit. It has been suggested that, as a follower, one can focus more on an ideal self' and that doing so encourages quicker, more creative work (Epitropaki et al., 2017). However, this small exploration of follower identity remains tied to organisational outcomes, rather than focusing on, for instance, when individuals become followers who explore this ideal self, what prompts this experimentation with ideal selves and how these are formed subsequently. Further clarity on follower aspirational selves and the contexts they are borne within is required, particularly given the recognition that organisational change or disruption can encourage the consideration of alternative identities (Van der Steen, 2022).

Provisional selves

Provisional selves are most identifiable when individuals experiment with images of people they feel they could be in future (Epitropaki et al., 2017). This is one step behind aspirational selves, which are selves that people *know* they want to become (Ibarra, 1999). Provisional selves are therefore unrefined and rely on internal and external feedback through identity play (Shepherd and Williams, 2016; Ibarra and Barbelescu, 2010). The changes brought by succession may signal an opportunity for succession stakeholders to experiment with provisional selves as they meet new colleagues with new styles and working behaviours. Given the emergence of different values and shared group identities in succession (Simsek and Heavey, 2015), it is also a possibility that experimentation with provisional selves could be challenged or rejected. Reid et al. (2022) identified this among teachers who experimented with research identities as part of their provisional self. An understanding of staff experimentation with provisional selves may provide a clearer picture of the effects of succession on non-successors.

Identity Work and Liminality

Engaging with the selves outlined above constitutes engagement with identity work. Identity work is an iterative activity of shaping and re-evaluating the "waxing and waning" identities within individuals (Kreiner et al., 2006: p. 1032; Brown, 2017) and demonstrates how aspirational selves become provisional selves (Epitropaki et al., 2017). If any of the scenarios described above exist within succession, identity work will exist, albeit currently unexplored, among staff. Research which addresses this gap would complement existing findings on the liminality navigated by those experiencing their own role transitions (Rothausen et al., 2017), though this research has not contributed to the succession literature.

Hay and Samra-Fredericks (2016) suggest that being liminal is to become caught within processes of identity work. Liminality is therefore a temporary space or environment which one occupies whilst completing identity work (Beech, 2011; Edwards et al., 2021), occurring within and outside of the workplace; for instance, in leadership development programmes (Petrieglieri and Petrieglieri, 2010; Raelin, 2011; Knudsen and Larsson, 2022). Those experiencing liminality have described the sensation as being "in midair" or appearing conflicted and between different identities (Ibarra, 2007: p. 22; Ibarra and Obodaru, 2016; Stenner et al., 2017). Given that identity work is an activity which depends on feedback from

others and centres on manipulating how one appears in the eyes of others (Watson, 2009), it is surprising that staff identity liminality during succession is unexplored. For instance, staff may attempt to re-shape their identity as viewed by a successor to establish a strong sense of who they are or differentiate from who they were perceived as in the past. This would exemplify the feeling of being "betwixt and between" which defines liminars, the term used to refer to those navigating liminality, and the sensation of liminality generally (Kerrane et al., 2019: p. 5; Kulkarni, 2020).

Identity Threats and Subsequent Losses

Identity threats are felt by many individuals in an organisation and are usually experienced when one perceives harm to one's identity (Petriglieri, 2011). Given the potential for new values to be introduced in the organisation during succession and the assumption of change with succession, it is possible that identity threats may be experienced among succession stakeholders. Whilst Balser and Carmin (2009) found that organisational level identities can be threatened or questioned during succession, the identities of individuals experiencing succession have not been explored.

Identity threats can result in a sense of loss, possibly embedding another layer of grief within succession. This has been explored in relation to involuntary job losses (Latack et al., 1995; Fraher and Gabriel, 2014), but not in the context of succession from the perspective of either the successor or the staff member(s) around them. Lost selves can include identities that could have been but remain in the past, perhaps lingering in the organisation as a result (Grosemans et al., 2018). Losses of identity can also lead to periods of liminality (Shepherd and Williams, 2016). Indeed, Muhlemann et al. (2021) recognise that employees encounter their own identity loss during organisational change. If this is the case, succession may prompt a renegotiation of identity and liminal period among succession stakeholders. Scholars may consider exploring whether the identities occupied by predecessors and lost during succession are identifiable as ghosts (Orr, 2014). Moreover, Ibarra (2007) suggests that the literature should address instances of simultaneous losses and gains of identity. Such research might complement Jaser's work on simultaneously following and leading (see p. 47). Given that a predecessor's exit and successor's arrival often imply a change to existing processes and strategy (Brewer, 2014), this may be a trigger event for staff identity losses and gains. This would characterise succession as a process of multiple identity changes. It may

also be worth considering identity losses encountered in unsuccessful applications for internal promotions among staff and whether this affects experiences of succession among staff and successors.

Identity in Succession

Although identity is a concept relevant for all individuals in an organisation (Kulkarni, 2020), the focus has been on leader identities and their development (van Mieroop, 2019). The situatedness and incompleteness of identity have been investigated in relation to leader identity changes during promotions and other career transitions (Ibarra and Barbulescu, 2010; Daskalaki and Simosi, 2017; Gustafsson and Swart, 2019), but these studies have focused on the promoted individual and not from the perspective of others impacted by the succession. For instance, Moorhead (2019) seeks to understand how social workers develop their identity based on the expectations of others. It is not yet clear whether and how leader and follower identities develop or interact during succession, based on the expectations of other parties.

Despite long-term recognition of the tenuous and malleable nature of identity (Schwartz, 1987), existing research has rarely considered whether staff influence the development of identities held by successors (Collinson, 2006; Da'as and Zibenberg, 2019; Lord et al., 2020). Some elements of identity have been described as permeable (Kreiner et al., 2006), but how these areas are permeated, who permeates them, and in what contexts, is unclear. This aligns with Ybema et al.'s (2009) call for greater research into the contexts which shape identity. Succession provides a valuable opportunity to explore whether staff make contributions to successor identities.

The use of identity as a navigational tool is particularly interesting for succession as turbulence may encourage staff to retreat to the familiar during stressful transitions. This aligns with the notion that organisational phenomena must be understood through identity (Phillips and Hardy, 2002; Ellis and Ybema, 2010), with Currie et al (2010) advising more specifically that role transition negotiations must be understood through identity. Also unexplored are the types of identities or selves which inherited staff choose to engage with during succession transitions – it is possible that there is space for staff to experiment with aspirational selves. There is agreement that professional staff have significant expertise in their often individually crafted roles (Whitchurch, 2010; Lewis, 2014; Simon and Fitzgerald,

2014; Regan and Graham, 2018; Bossu et al. 2019a; Holmes, 2020), and as such staff are positioned as experts in their units. During succession, successors may need to learn from these experts, influencing their view of how a unit or wider institution operates. For professional staff specifically, whose identities are thus far characterised as high in responsibility and autonomy (Holmes, 2020) but are underexplored (Pitman, 2000; Graham, 2012), the identity and behaviours engaged with during succession may hold more influence than they have previously been credited for.

The succession literature has come close to articulating staff influence over a successor by creating the "squire" positionality (Weber and Moore, 2014: p. 200; Sang and Golan, 2021). Squires mediate relations between formal leaders and the teams they are responsible for and become "key followers" (Weber and Moore, 2014: p. 203). This could be interpreted as an interpersonal version of a "boundary spanner", an individual who advocates for the best interests of their own organisation as well as a partner organisation, such as a supplier (Perrone et al., 2003: p. 422). Squires are described as aids to the formal leader who share feedback from other employees and act as a confidant (Sang and Golan, 2021), nurturing trust and navigating expectations among individuals as a boundary spanner would between organisations. These behaviours, and the perception of squires being "inside the leaders' head" (Sang and Golan, 2021: p. 441), combine to give squire 'followers' influence over a 'leader'. The squire concept has two implications for follower identities during succession. Firstly, considering Collinson's (2006) disguised selves, it may be that staff engage with a squire positionality during succession to reposition themselves in the eyes of their formal leader or their colleagues. Secondly, it is worth critiquing the label of squires as 'followers'. The squire term may be an attempt to upgrade employee reputation from within the confines of a follower label, but this does not recognise the scope of influence a squire has over a formal leader. An exploration of why individuals squire and how they interpret squiring would provide further insight into processes of leading and following, in particular the identities of leaders and followers.

It is also important to consider whether other staff self-concepts, rather than their identities in relation to a successor, change during succession. An individual's career transition does not solely concern the individual and the ways in which they experiment with new or existing identities (Ibarra, 1999), but also concerns other organisational members. The identity work endured by succession stakeholders, often referred to as the dramaturgical self where

individuals can hide or more strongly portray qualities (Goffman, 1959; Collinson, 2006; Gilani et al., 2019), is a mutual process (Watson, 2008, 2009; Shepherd and Williams, 2016). Inherited staff may, therefore, experience their own identity reconfiguration. What is not clear from the succession and identity literatures is where the "backstage" is for identity configuration during succession (Leigh et al., 2021: p. 1084). For instance, during change in a computer aided design (CAD) firm, Ahuja et al. (2018: p. 995) found that staff distanced themselves from existing identities, cynically describing their jobs as being "CAD monkeys". Chen and Reay (2020) introduced the idea of "parking" a professional identity as a way of forgetting about a past self and working on a new self during organisational change. Exploring the identity play of staff during succession would align with further calls for research into professional staff identities (Holmes, 2020). This would also recognise the self-doubt which individuals may feel whilst navigating identity reconstruction following a transition (Kulkarni, 2020).

Summary

This section has addressed aspects of the identity literature relevant to succession, focusing on the parliament of selves held by organisational actors and the liminal spaces in which these selves are configured. It has also proposed that, in addition to successors, staff will navigate their own identity experimentations during succession. To that end, this section proposes the third and final research question:

Research question three: what do succession stakeholder identities look like during succession?

Universities and Succession

This chapter has referenced the possible benefits of exploring succession within universities. The following paragraphs will argue for the exploration of succession within universities owing to the lack of research so far and the calls from the literature, the profile of professional staff and the benefits of the university context for a broader understanding of succession.

Succession Planning in Universities

The paucity of succession literature is clearly apparent in the context of universities. There are minimal publications on the topic, with relevant research tending to be published within

doctoral dissertations (Richards, 2009; Carlsson, 2011; Grossman, 2014; Buckway, 2020). At the same time, succession planning has been identified as the most pressing issue facing universities as a whole (Bolton, 2000; Richards, 2009; Rothwell, 2010; McMurray et al., 2012; Grossman, 2014; Ishak and Kamil, 2016; Loomes et al., 2019). A combination of long tenured staff (Fishman, 2019), long institutional histories, particularly in ancient universities (McMurray, 2012), a preference for funding academic endeavours over administrative or professional services (Karlsson and Ryttberg, 2016), and a tendency for universities to look to other universities similar to their own for advice (Carlsson, 2011), means that the cycle of minimal succession planning continues. This has led some to suggest that universities require leadership development reconceptualisation (Beckmann, 2017; Keller, 2018; Aboromadan et al., 2020). It is perhaps unsurprising, then, that there is minimal literature which explores the experiences of succession in universities. Without formal succession planning, nor the ability to rely on measurable aspects of performance to signal succession success or failure, it is possible that universities have a festering succession problem which remains unaddressed by the literature. The impact of this on how succession is experienced by succession stakeholders is unknown.

Professional Staff

The profile of professional staff is valuable for an exploration of responses to succession. Just as employee perspectives remain unaddressed in the broader succession literature, professional staff perspectives are generally underexplored within the higher education (HE) literature (Szekeres, 2004; Kogan, 2007; Karlsson and Ryttberg, 2016). This positions professional staff as unheard voices who would benefit from the exposure of followership theory. Despite the negative characterisation of professional staff as non-academic (Conway, 2000; Sebalj et al., 2012; Dominguez-Whitehead, 2018), and not 'the same' as academics (Sebalj et al., 2012; Bossu et al., 2019b), professional staff have multiple attributes and skills which may be relevant for an exploration of succession. Using professional staff to explore experiences of succession would enable a fuller understanding of their behaviours and identities. It may be also an opportunity to explore how professional staff interpret academic successors, given this apparent divide, but also given that professional staff often have their own academic backgrounds. Their dual professional and academic identities could also create another element of liminality. Using a processual approach to followership deconstructs labels and hierarchy (Sklaveniti, 2016), meaning that professional staff can be viewed as

active members of the organisation who influence one another in different contexts (Dominguez-Whitehead, 2018). This would also work to dismantle the polarisation of staff cohorts which currently threatens collegiate university values (Welsh and Metcalfe, 2003).

Professional staff value a shared unit identity (Szekeres, 2011), stemming from their longer than average length of employment with a particular institution or unit (Sebalj et al., 2012; Trede et al., 2012; Fishman, 2019). Further evidence of this can be found in the educational management literatures, where staff use the initial succession transition to examine potential threats to their working identities and cultures (Balser and Carmin, 2009; Northfield, 2014; Gill and Arnold, 2015), vision (Corley, 2004), and environment (Kriger and Seng, 2005; Cowie and Crawford, 2008; DeRue, 2011). This could be additionally disruptive within professional service units, particularly if staff, who consider themselves as holding expert knowledge (Rosser, 2004; Botterill, 2019), perceive the successor as a threat to their everyday or as uninterested in how things have been done until now. This is plausible given that, although staff value giving feedback on change (Bathurst and van Gelderen, 2014), they are often only involved as sounding boards which do not guarantee actions from feedback (Kezar, 2012). The accumulation of local expertise suggests that future research should consider the interaction between this expertise and the power or influence which staff have over succession or successors.

Certainly, some argue that actors are motivated to follow those with information that they do not yet have (Bastardoz and van Vugt, 2018). Professional staff, as holders of tacit institutional knowledge, might also contribute to the sensemaking which successors conduct within a new environment, which has previously been considered a leadership responsibility (Sveningsson and Larsson, 2006; Larsson and Lundholm, 2013). Moreover, Larsson et al. (2011) found informal leadership among individuals who brokered knowledge to formal leaders. What makes this particularly compelling for an exploration of leadership dynamics during succession is the value placed on the information sharing function in succession plans (Grossman, 2014). If professional staff are responsible for sharing the knowledge they have developed over long careers, this could shape leadership dynamics in succession substantially. As noted on p. 35, others have considered how expert power can be identified in others (French and Raven, 1959), can shape social relations (Reed, 1996), and change fundamental organisational processes from lower organisational positions (Katz, 1998). It

would be interesting to explore how the expert power of staff over that of a successor interacts with the succession experience in both internal and external succession.

There are also suggestions that professional staff may respond favourably to succession. Staff are considered loyal to their unit and institution and familiar with high workloads and changing contexts (Whitchurch, 2007; Ryttberg and Geshwind, 2017; Veles et al., 2019). Perhaps this means that staff would feel accustomed to change. The plasticity of identities may also promote this mobility during change (Gander, 2018). Lastly, given that professional staff are classed as high autonomy seeking (Bolden et al., 2008), succession might be an opportunity for them to broaden the scope of their work. The literature on university professional staff does not provide insight into how staff might respond to succession, but the existing characterisation of these staff suggests that they are a valuable cohort to explore succession from.

Culture in Universities

The growing research interest in HE has attended to one half of HEIs (Kogan, 2007; Karlsson and Ryttberg, 2016), and the focus on academic staff (Szekeres, 2004) has created a 'bitter divide' between academic and professional staff (McInnis, 1998, 2010; Whitchurch, 2008; Jones et al., 2014; Silvey et al., 2018; Botterill, 2019). Indeed, the reliance on professional or academic labels in higher education demonstrates the damage of role-reliance more generally: it has both precluded the development of scholarly understanding of professional staff as a cohort and misrepresented them. As such, Szekeres (2006: p. 133) reframes an adage to read 'I am general staff, therefore I am not', suggesting that, like followers are considered overshadowed by leaders (Follett, 1933, in Baker, 2007), professional staff have been overshadowed by academics. Exploring succession among professional service staff enables new voices to be heard from new environments.

There are similarities between the cited collegiality of university culture and the relationship building which is demanded within the succession literature and leadership literature. Ortiz and Kalbus (2011) cite one of the main causes of disruption from succession to be the change in organisational relationships and this is accompanied by an immediacy to build positive relationships from the outset (Schepker et al., 2017). Relationship building is often discussed positively, referencing the benefits of relationships for vision and trust development (Guest,

1962; Mayer et al., 1995; Badara et al., 2015; Xu et al., 2019). The value placed on collegiality suggests there may be a higher need for relationship building during succession in universities. It is also through relationship building that successors have been identified as trying to show an understanding of their new environment (DeRue, 2011). Those who do so are more likely to be accepted as leaders by potential followers (Hollander and Julian, 1978). The literature has positioned the need for positive relationships as something that must be initiated by successors but this has not considered the possibility that staff demand this practice from successors. Indeed, the observational stance that staff adopt during succession may be an attempt to monitor whether their requests for a relationship with a successor have been fulfilled. Further clarity on relationship building processes during succession is required.

Conclusion

This chapter has provided an overview of three interlinked fields: succession, followership and identity. Gaps where 'followers' have not been addressed and leader-centrism remains rooted in research findings have been identified in these literatures. The possible benefits of taking a 'follower' perspective to these fields have been outlined, particularly in the context of university professional staff and in achieving a more balanced outlook on succession by understanding staff and successor perspectives. Three research questions were established. The first aims to broaden the scholarly understanding of the experiences of succession by seeking to understand responses to and behaviours during the change. The second question considers how practices of following materialise during succession given the possible formation of a new leadership relationship and the lack of existing literature which can define what following is and when it happens. The final research question prioritises the experience of staff members, seeking to understand staff identities during succession, especially given the nascent understanding of non-leader identities generally. The next chapter discusses suitable methodology and methods designed to address these questions.

Chapter Three: Methodology

Introduction

This chapter addresses the methodology and method chosen to explore the research questions posed in Chapter Two. The chapter is split into five sections. The first considers the research philosophy of this thesis, justifying the use of an interpretivist, social constructionist approach to qualitative interview research. It acknowledges the call for greater qualitative research into succession and positions qualitative interviewing as a suitable avenue for accessing identities through discussion and storytelling. The second addresses the ethical considerations which accompany qualitative research conducted online. The third section details the specifics of collecting longitudinal interview data from one hundred and four participants using online, in-depth, semi-structured interviews. The fourth section outlines how the vast number of transcripts were stored appropriately. The final section details the stages of data analysis completed to reach the findings presented in Chapters Four, Five and Six.

Research Philosophy

This thesis took a constructionist approach to research. Constructionists see leadership as a socially constructed and joint venture among organisational actors (Bolden and Petrov, 2014). As outlined in Chapter Two, a constructionist lens is rarely applied to succession research. Viewing leadership as dependent on the surrounding context (Corrigan, 2013) suggests that a succession context could change the leadership dynamics among organisational stakeholders. An interpretivist ontology, which falls under the broader constructionist approach, recognised how the succession context shaped the meanings which participants attributed to organisational events (Schwartz-Shea and Yanow, 2012). This approach fostered an understanding of professional staff experiences of succession through their own identity talk (van de Mieroop, 2019). This complemented the application of followership theory to succession by soliciting the contributions from all parties in a leadership relationship (Schneider et al., 2014). These philosophical underpinnings supported the longitudinal, narrative approach to interviewing for a fuller understanding of how succession unfolds and greater access to articulation of identities (McAdams, 2006).

Ontology

This section discusses the alignment between an interpretivist ontology and an exploration of the experiences of succession, providing an insight into the multiple realities which exist throughout succession.

Interpretivism seeks a diversity of voices to research questions which represent individual experiences (Geertz, 1973). Although different contributions of positivist and interpretivist approaches have been extensively debated, both are now respected as independent ways of seeing the world (Jones and Donmoyer, 2020). Interpretivists assert that researchers can only know others' interpretations of the world. Rather than seeing the world as independent of individuals, the reality discussed by participants reflects the meanings they attribute to interactions and events (Marsh and Furlong, 2002), as well as the consequences this has for their view of themselves. This means that research findings, as Geertz suggests, are a researcher's constructions of others' constructions. There were three key implications of this for designing qualitative succession research, relating to the existence of multiple realities, the pursuit of understanding and the pursuit of generalisable data.

Multiple realities

Interpretivists propose that there are multiple intersubjective realities. These develop through subjective contexts which individuals encounter throughout their experiences in organisations and which influence the interpretations they construct and communicate (Guba and Lincoln, 1982; Schwartz-Shea and Yanow, 2012). This was a valuable lens for succession as participants had competing views on the change which stemmed from their varied professional backgrounds and experiences. Interviews were a suitable method as they provided an opportunity for participants to present narratives based on previous life experiences (Ashforth et al., 2008). This meant that transcripts became storylines which had multiple chapters, plots and characters, aligning with the multiple realities observed by constructionists (Cottingham and Erickson, 2019).

This thesis identified two main stakeholders within succession: successors and inherited staff, referred to throughout this thesis as succession stakeholders. For a successor, leadership change typically meant relocation, working with new colleagues or changing work standards; staff were more concerned with their own workload, the unit vision they worked towards and their relationship with the successor. The circumstances of succession – retirement, restructures, internal progression – influenced the meaning of the change. It is valuable for

this thesis to explore the multiple realities which come with the above variations on succession. Using an interpretivist approach to succession research illustrated the complexity of these contexts and the actors within them (Aronovitch, 2012).

Understanding

Recognising the existence of multiple realities means that truth claims are difficult to make through interpretivist research (Marsh and Furlong, 2002). Hudson and Ozanne (1988) suggest that there is no potential for one single reality to align with another, suggesting that truth claims through interpretivism are an impossible task. An alternative aim is of understanding – to engage in *verstehen*, the continual search for shared meanings within conversations and cultures (Wax, 1967). Verstehen contrasts the identification of rules and regulations for organisations (Hay, 2011), instead encouraging the identification of a fuller understanding of events in organisations without prescriptive recommendations. This aligned with the aim of this thesis to provide a fuller understanding of succession from across succession stakeholders, contrasting with the leader-centric tendency to monitor measurable, definable aspects of succession.

The understanding achieved by interpretivist research is fleeting and based on momentary interactions (Hudson and Ozanne, 1988). There is similarity between this attribute of interpretivism and succession: perspectives of succession could vary from the announcement of succession to the appointment of a successor depending on, for example the succession context or their peers' responses. Succession was an unexplored opportunity to understand the meanings attributed to different sections of the succession process. There is also similarity between these understandings and the constructionist attributions of leadership and followership: Jaser's work highlighted in Chapter Two clearly outlined the possibility for leader and follower identities to be engaged with temporarily. An interpretivist approach to leading and following dynamics in succession encourages deeper understanding of these dynamics as they unfold from moment-to-moment (Clandinin and Rosiek, 2012).

An interpretivist ontology recognises how interpretations are informed by the hermeneutic circle which surrounds participants, including *die Vorwelt*, meanings we claim from our peers, and *die Folgewelt*, meanings we leave for others (Harrington, 2000; Yoshida, 2014). In succession, where relational dynamics change through the exit of a predecessor and arrival of a successor (Busari et al., 2019), an interpretivist ontology was useful given that

interpretations were influenced by: those who enjoyed or did not enjoy working with a predecessor, attitudes towards a successor, and/or a participant's personal goals in the organisation. An interpretivist ontology was valuable in recognising how participant experiences of succession are informed by their hermeneutic circle (Marsh and Furlong, 2002).

Generalisability

Applying an interpretivist lens to succession created a complexity and discomfort in not being able to generalise a set of participant experiences (Hudson and Ozanne, 1988). This discomfort has led some to suggest that interpretivism faces criticism because it is easier to criticise than to adapt to uncertainty (Smeyers, 2006). This introduced a new view to succession research, which has so far focused on the measurable aspects of succession which have generalisable potential; for example, that high rates of succession trigger feelings of disruption among staff (Friedman and Saul, 1991). Adjusting to this complexity seemed more suitable for documenting the *experiences* of staff in succession. It would have been unsuitable to generalise the experiences of staff member A, for whom a successor is replacing a twenty-year tenured predecessor, with those of staff member B, who is meeting an externally appointed successor with no university background (Lukka and Modell, 2010).

This thesis will solicit and present experiences of succession among different participants in succession, therefore exploring the multiple realities of succession and working towards a fuller understanding of the possible meanings exchanged throughout the change. Employing a narrative approach to interviews, the stories shared by participants included multiple realities of succession as well as multiple meanings associated with the change. The detail and complexity of these stories meant that a generalisable truth was not an appropriate target (Randall and Phoenix, 2009). Instead, truth referred to the version of events the participant wished to share in the interview, based on their current context, the environment of the interview (Zilber et al., 2008) and the self they wanted to craft in relation to the researcher and the characters in their story (Bucholtz and Hall, 2005).

Epistemology

The following paragraphs outline how the attributes of social constructionism complemented an interpretivist ontology. The constructionist emphasis on social interactions, the

prioritisation of unheard voices and the contextual nature of findings make new contributions to succession research.

Social interactions

Social constructionism highlights the contributions of social interactions to meaning making and knowledge (Virtaharju and Liirg, 2017; Irshaidat, 2019). Through social interactions, social constructionists can access the multiple realities interpretivism envisages. This relational approach is relevant to the study of leadership which unfolds among many individuals (Barge and Fairhurst, 2008; Denis et al., 2012; Holm and Fairhurst, 2017; Busari et al., 2019), but is also relevant for this succession research, where relations among networks were changing through the exit and arrival of individuals. A constructionist approach provided clarity on the source and direction of influence between these stakeholders during succession. This provided empirical evidence of instances where 'followers' influence those holding formally higher posts in the organisational hierarchy (Gergen, 2009; Carsten et al., 2010; Alvesson and Blom, 2015). This empirical evidence was valuable in that it came from the perspectives of those influencing their formal superiors as well as the successors themselves.

Unheard voices

A social constructionist approach to research has long been recognised as enabling access to unheard voices (Berkovic et al., 2020). For succession, this approach was emancipatory in seeking to understand the multiple realities of previously unsolicited voices (Lincoln et al., 2018; Blom and Lundgren, 2020). This contrasted with the solicitation of "elite" voices which has led to a leader-centrism in succession research (Ospina and Foldy, 2010; Mason-Bish, 2019: p. 264) and moved away from the assumption that there is a one-directional impact of a leader on a 'follower' (Meindl, 1995). Participating in constructionist research created meaning for those with unheard voices as they were given an opportunity to articulate unformed interpretations of events with an external party, the interviewer (Rapley, 2018); this approach meant that interviews could become an arena for sensemaking past experiences (Randall and Phoenix, 2009). This aligned with the decision to apply followership theory to succession to gain a better understanding of following processes. Lastly, and in terms of identity, constructionist interviews allow participants to talk about their identities during succession by articulating their provisional, aspired and discarded selves in different contexts (Smith and Sparkes, 2008). For staff in particular, whose lower positioning in the

organisational structure means that their research participation is requested less frequently, this allows a "too-often silenced" perspective (Frank, 2000: p. 360) to emerge in a succession context.

Context of succession

Applying constructionism to succession research accounted for the possible temporal changes associated with it. As Chapter Two argued, if succession unfolds over time, meanings associated with succession will change as the uncertainty felt at the initial announcement wanes or intensifies (Rowe et al., 2005). A longitudinal approach to succession research accounted for this, recognising that interpretations of succession were also influenced by the institutional and unit context and history (Lincoln et al., 2018). This reinforces the unsuitability of generalising findings from constructionist research (Marsh and Furlong, 2002) and highlights the importance of positioning research findings in their broader social context (McCauley and Palus, 2021). For succession research, this meant understanding the implications of different types of succession, including retirement, promotion and internal secondment (Fishman, 2019).

Reflexivity

Epistemology explores how individuals know or seek understanding of something (Guba and Lincoln, 1982). There is a responsibility for all researchers to identify the influence of the knowledge seeker (the 'self') on the knowledge sought. This responsibility has become core to reflexivity, where researchers demarcate where their understanding and experiences end and those of their participants begin (Collins and McNulty, 2020). For instance, a basic approach to research suggests that questions asked by a researcher are designed to *collect* data from participants. Research questions are, therefore, the avenue through which data reaches a researcher (Collins, 1998). The data shared by participants is not unaffected by these questions but shaped by them, requiring a balance between data collection and data generation (Mills et al., 2006). Reflexivity is a continual process of recognising when research questions and findings are shaped by the subject (experiences of succession) and when they are shaped by the researcher's own motivations (the surrounding literature, observations of what the participant has not disclosed, or the researcher's own personal experiences). Although some disagree with the idea of data generation, suggesting that only data which could have been accessed without the researcher present should be used to inform findings (Potter, 1996), this thesis recognises the interaction between researcher self and

participant behaviour, accepting that the interview is a space for meaning-making and construction of identities in front of an interested audience (Randall and Phoenix, 2009).

Reflexivity is important for constructionists because they assume some insiderness and outsiderness exists within all researchers. I, the researcher, perceived my own insiderness in relation to staff experiencing succession, having experienced a similar change in 2017 (see p. 206).[5] This and my employment in a university was a point of similarity with participants which could have shaped participant willingness to share experiences and how closely they spoke to what they perceived to be their true experience (Atkinson et al., 2003). The interviews conducted for this research, then, can be seen as opportunities for the recognition and performance of identities through storytelling (Smith, 2010), a process supported by a reaffirming other, the researcher (Frank, 2000). The interview thus becomes a space for reflecting on identity work.

This is particularly relevant where the methods employed facilitate advances in self-understanding (Enosh and Ben-Ari, 2016). Where staff have not previously been included in succession research, an interpretivist ontology encourages participants to revisit their own experiences within a relationally reflexive environment (Hibbert, 2021). This allows staff who witness or experience succession to identify their self in the change process in relation to other stakeholders, then forming an understanding of how their perceptions may have changed.[6] The use of unstructured interviews allows this sensemaking of experiences to occur through the construction of a narrative retelling of one's life story (McAdams, 2006; Smith and Sparkes, 2008). As a result, the interviews in this research became an area for both participant and interviewer to share stories, revealing oneself to oneself and to the other (Shamir et al., 2005).

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[5] Recognising that reflexivity involves deep personal reflection, the reflexivity sections of this thesis are written in the first person. This promotes this research as a vehicle for the literature and participant interpretations presented throughout.

[6] 'Witness' is not used to imply that staff adopt an observational stance during succession. The Latin derivation of witness, *testimonium*, is a clearer interpretation, meaning one who has lived through and developed understanding of something. As witnesses, staff and other succession stakeholders have expertise on their specific experience of succession.

Methodology

Informed by an interpretivist ontology and constructionist epistemology, this thesis adopted a qualitative narrative inquiry approach. For a relevant sub-group of participants, a qualitative longitudinal narrative inquiry approach was also applied.

Narrative Inquiry

A narrative inquiry approach accommodated the breadth of unknown emotions and stories which could arise in applying a qualitative lens to succession (Ding and Curtis, 2021).[7] Narrative inquiry allowed participants to share how relations developed throughout succession (Esin et al., 2014) with the flexibility of a storytelling medium (Van Heugten, 2004; Webster and Mertova, 2007; Latta et al., 2020). This complemented the intention of this thesis to explore succession across a longitudinal period. Narrative inquiry allowed participants to position themselves as whoever they felt they were in succession (a staff member, a successor, a predecessor), at different points in the process and in relation to whoever they felt relevant (colleagues, friends, family). This illustrated the many voices which are identifiable through narrative inquiry (Webster and Mortova, 2007), as well as following and leading behaviours and identities, through the metaphors, tone and repetition used in storytelling (Rogers, 2012; Monson et al., 2021). Unheard voices were prioritised through the identification of areas of omission and the source and direction of discussion (Frank, 2000; Holstein and Gubrium, 2016). This is a common approach for identity research (Clandinin and Rosiek, 2012; Ding and Curtis, 2021). The following sub-section comments on the usefulness of narrative inquiry for allowing participants to construct a narrative with a temporal lens.

Narrative inquiry also illustrates the social context of participant stories (Young et al., 2020). Broad, open-ended questions allowed participants to share thick descriptions of events (Geertz, 1973), through which they crafted a narrative in a structure which made sense to them (Clandinin and Rosiek, 2012). This flexible approach did not restrict the start and end points of narratives and portrayed succession as shaped by the past and future (Clandinin and Connelly, 2000). Creating a storyline facilitated reflection on how participant identities were shaped by succession (McAdams, 2006; Smith and Sparkes, 2008). This complemented the

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[7] The term 'story' refers to a whole tale as it is told. The term 'narrative' refers to the structure a participant created during their storytelling (Poirier and Ayres, 1997).

broad life stories which participants shared in their interview, characterising interviews as an opportunity for the researcher and participant to explore the 'compost heap' of memory (Randall, 2007: p. 612). This sensemaking also helped them understand their contributions to the change.

Qualitative longitudinal interviewing

Succession requires time to allow change to occur and settle, particularly given that conducting succession research close to the appointment of a successor can generate overly negative interpretations (Kuntz et al., 2019). Narrative inquiry promotes a fuller view from a successor appointment and considers relationship development, creating a temporal understanding of succession. This creates the possibility that participants will draw on a wide range of events relating to the change (Calman et al., 2013). A longitudinal methodology also supported the open-endedness of storytelling and shifted the power over the interview to the participant (Smith, 2010). A chronos perspective to time in succession would ask participants to place a specific time on events (Smith, 1969); for instance, "I took that post at the start of March" (Joanne, successor). The literature not being substantive enough to indicate whether participants were capable of pinpointing moments in time like this, this thesis adopted a kairos approach to time. Kairos supports fluid, contextual descriptions of events in time, perhaps when a "we had a bit of a (.) feeling or expectation that they may be leaving." (Andrew, successor; see p. 122). Exploring succession through a kairos lens aligned with the unfolding, changing nature of leadership and followership relations (Raelin, 2018; Sklaveniti, 2020; Balmer et al., 2021).

Interviews themselves were a suitable method for exploring experiences and identities during succession. Even for participants who were not classed as longitudinal and were only interviewed once, that they were asked to tell the researcher about succession promoted storytelling and realisation of changes in perspective and identities through language (Atkinson et al., 2003; Smith and Sparkes, 2008). This aligned with the relevance of aspirational and provisional selves outlined in Chapter Two, as interviews became a space to consider identity over time for both one-off and longitudinal participants. This positioned the researcher as a "traveller" in Smith's (2010: p. 96) discussion of how knowledge is accessed; rather than pointing participants to certain topics, the open-ended interview allowed the participant and researcher to create a story which represented their reflections on succession

at the time of the interview. This can be considered part of the shift away from viewing interviews as exploitative (Enosh and Ben-Ari, 2016).

Ethical Considerations

Experiences of succession could only be solicited fairly and accurately if the appropriate ethical considerations were made in advance of the data collection. This thesis was conducted under the ethical approval of the University of St Andrews Research Ethics Committee (UTREC). Participants for this research were professional staff from UK universities (see Appendix 1 for a breakdown of participant and university demographics). This section will outline the process of gaining informed consent, ensuring anonymity, participant wellbeing, and achieving rigorous research. It will also consider the implications of insider and outsider positionalities and ethical considerations relevant to the higher education (HE) sector.

Informed Consent

Informed consent is important to gain and sustain through the duration of data collection (Deakin and Wakefield, 2014). Participants were able to ask questions relating to the research during a pre-interview initial meeting, over email or before, during and after an interview. Informed consent was gained through a written consent form shared and completed prior to the interview. This form was accompanied by a participant information sheet. Providing participants with a written consent form before the interview avoided any reduction in rapport caused by reading out consent statements before asking a question (Rutakumwa et al., 2020). Participants were informed that audio would be recorded and that no video footage would be captured (SmithBattle et al., 2018). This reduced the possibility that participants would feel uncomfortable being filmed on Microsoft Teams but allowed for the observation of body language (Deakin and Wakefield, 2014).

Participants could withdraw from the research at any time and review their transcript after the interview. Two participants reviewed and adjusted their transcripts. One participant requested that their interview not be recorded. In this case, the slow interview concept was used instead, with notes taken and key phrases transcribed by hand (Young et al., 2020). In a follow-up email, key themes were confirmed with the participant. One prospective participant attended the pre-interview initial meeting but withdrew because of the mental hurdles they felt they would have to navigate if they participated. This emphasised the benefit of offering a pre-initial meeting to ensure complete comfort in participating. It also suggests that succession

research can provoke uncomfortable memories. More than twenty prospective participants attended the initial meeting but, for unknown reasons, did not arrange for a full interview or did not attend a full interview.

Anonymity

Achieving anonymity in university research settings was important to prevent defamation of character in highly networked institutions and to ensure participants did not feel they spoke wrongly of their colleagues and employer (Trowler, 2011; Natifu, 2016). Many participants had complex work histories which needed to be anonymised, particularly when participants shared the names of previous corporate employers. The stories of succession were also tied to complex changes in their unit, often including restructures, redundancies and secondments. These stories featured potentially identifiable storylines, such as accepting a new post and turning it down, following previous mentors and colleagues to other institutions, or recognisable life events. All situations, colleagues, organisations, places or family members were anonymised and placed within square brackets to signal that anonymisation had taken place, for instance [successor], [staff member 1], [colleague 1], or [previous institution]. All participants were given a pseudonym (Holian and Coghlan, 2013; Fleming, 2018). By conducting interviews online and not requiring a physical office space, the potential for others to know that a confidential interview was taking place was reduced. These measures highlighted the complexities of presenting non-identifiable results from higher education research (see Figure 1).
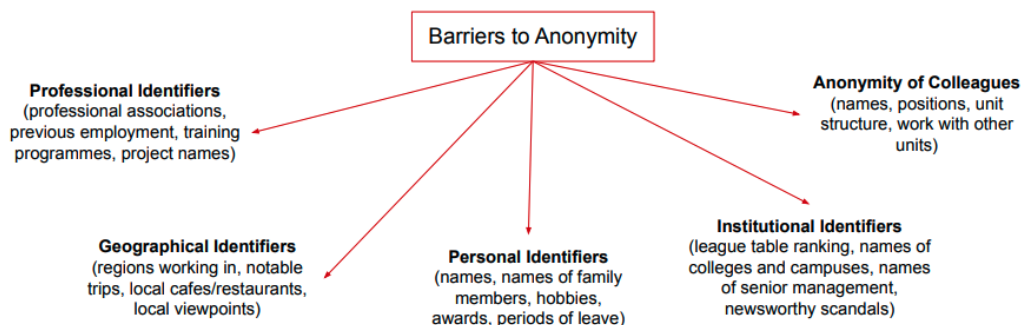
Figure 1: Factors for Anonymising Interviews from within Higher Education

Initially, full units were invited to participate in the research, but this became a barrier to anonymity. Prospective participants noted that whole unit participation in the research was

structurally similar to disciplinary investigations. This was a negative association which made participants sceptical about the motivations of the research. Whole unit participation also increased the possibility that participants could identify their colleagues in the final thesis or would ask who else had agreed to an interview (Scheper-Hughes, 2000). This could have been damaging in professional service units where there are small team sizes and an incestuous culture (Whitchurch, 2008). Research recruitment shifted to identifying individual participants at this point. Recruitment of multiple participants from the same unit or institution was coincidental and emerged naturally.

Doing no Harm

Using semi-structured interviews allows participants to feel control over their 'data' and gives them autonomy to raise relevant issues (Cao and Henderson, 2020). This has previously been effective in preventing discussions on life transitions from becoming distressing or uncomfortable (Gustafsson and Swart, 2019).

Providing control and autonomy was important in this research as it was, in all cases, the first succession-related interview they participated in. Some participants became upset during their interview or disclosed personal details, emphasising the extreme emotions in succession. These responses required active listening and often reciprocation or the offer of a break to ensure the participant did not feel alone in their emotions (Ayres, in Given, 2008; Gair, 2012). The control provided by semi-structured interviews was effective as those who did become upset responded well to the offer of a break or a change in topic.

Online Interviews

The literature is increasingly recognising online interviews as a viable first choice for a method, rather than an alternative when in-person interviews are not feasible (Deakin and Wakefield, 2014). The Covid-19 pandemic was an opportunity for qualitative researchers to develop a greater understanding of the benefits and challenges of online interviews (Madge, 2010). This method enhanced the need to monitor harm against participants as well as harm against the researcher. Participants were conscious of their increased workload arising from Covid-19 complications. This was recognised by the offer of flexible participation such as shorter interviews and freedom to reschedule whenever necessary. This also meant adjusting to interviewing participants with some uncertainty about whether they were in a room alone

or were sharing a space with a spouse or housemate. Sometimes this led to the other person in the room sharing their opinion on the question.

Researching remotely impacted the development of a researcher identity. Not being able to travel to collect data reduced the safety issues associated with meeting participants who were mostly strangers (Hanna, 2012; Seitz, 2015). However, it may also have reduced the sense of *being* a researcher. A researcher's diary was used to structure reflection (Figure 2).
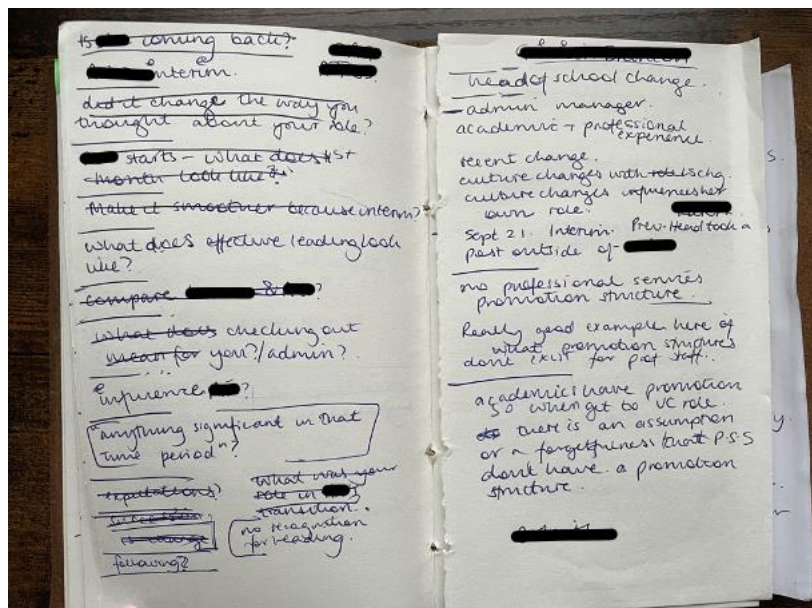
Figure 2: Researcher's Diary

When a participant did not attend a scheduled meeting, the diary was a physical method of reflecting on the feelings this created and ways of avoiding this in future (Deakin and Wakefield, 2014). The diary also facilitated the bracketing applied to interview note-taking (see p. 90). As the interviews progressed, new ways of asking questions, notable phrases and prompts for the next question were written down. This was helpful in ensuring the long narratives given by participants could be explored as fully as possible within the interview.

Insider-Outsider Reflexivity

Several elements of my researcher self were similar to those of participants (Vahasantanen and Saarinen, 2012).[8] At the time of data collection, I had been employed by and studied within universities for seven years. I held a knowledge of the sectoral challenges, context and

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[8] As on p. 66, the topic of reflexivity is discussed in the first person.

structures which those with a different employment background would not. Five participants knew me through previous employment and friendship. The remaining ninety-nine participants knew me as a researcher. Some may have positioned me as a member of staff at another institution. They asked about my role and established similarity with me by using phrases like, "with your role, you will understand" (Susan, staff). One participant who was studying for a leadership qualification asked me for advice on data collection and transcription processes. Another participant positioned me as holding knowledge on job transitions when they asked me for advice on managing a new team. My demographic status was also obvious: female participants shared gender-specific examples with me, "looking so young" (Florence, staff), and often mentioned the AURORA leadership programme, which no male participants commented on.[9] Similarities with a participant were in flux throughout the interview. I adopted a continuum approach to my own positionality, recognising my insider and outsiderness and allowing participants to comment on any perceived similarities with me (Mercer, 2007; Nowicka and Ryan, 2015; Natifu, 2016; Finefter-Rosenbluh, 2017; Nowak and Haynes, 2018).

Had I been employed full-time and worked alongside a research participant I would have considered myself more insider than outsider (Holleland and Johansson, 2019). My insiderness was maintained by knowing and being known by participants I had worked with before or had a friendship with (Natifu, 2016). From the first interview question it was obvious that participants I knew positioned me as a researcher: I asked each participant first, "tell me about your role and the change you would like to focus on today". When interviewing a participant I already knew, all five jokingly introduced themselves to me, "well, I'm [Sheila]" (Sheila, staff), followed by laughter. After this friendly exchange, participants changed their tone as though they were presenting their role to an outsider. I progressed through interviews knowing that I was bringing different identities in different concentrations to each participant (Reinharz, 1997).

I also felt differences in similarity with participants. One older, female participant described my thesis plans as "ambitious, given your other roles". I interpreted this as doubt that my plans were realistic and felt that she judged me in a way that I had not judged her. I felt relief

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[9] AURORA is a leadership development programme for female-identifying professional staff within UK universities. It has a competitive application process examining professional and personal need and was described by all who mentioned it as a key steppingstone in becoming comfortable with female leadership

that this comment was not recorded on the voice recorder as it increased the chances of me forgetting which participant made the comment. Other older female participants were more positive in their interactions with me, often keeping in touch beyond our interviews and sharing further reflections. I considered that conducting interviews online had reduced my security in a researcher identity and that this exacerbated the effect of a frivolous comment about my ambition.

Data Collection

This section will outline the method of data collection for this thesis. I conducted one hundred and twenty-one online interviews with one hundred and four professional service staff who had witnessed succession or successors who had succeeded into a role in the last twenty-four months. A detailed breakdown of participants, their category of institution and the context of the change is provided in Appendix 1. A summary of the participant sample is provided by Figure 3. The journey of participants is shown in Figure 4.

Research Category Breakdown	
Retrospective Participants	87
Longitudinal Participants	17
Total Participants	104
Retrospective Participant Breakdown	
Participant Category	
Inherited staff member	39
Successor	38
"Both"	10
Total Retrospective Participants	87
Total Retrospective Interviews	87
Longitudinal Participant Breakdown	
Participant Category	
Inherited staff member	8
Successor	5
"Both"	4
Total Longitudinal Participants	17
Total Longitudinal Interviews	34
Total Interviews	121

Figure 3: Participant and Interview Summary

Retrospective participants reflected on succession that had occurred more than twelve months prior. Longitudinal participants reflected on succession that had happened within the last twelve months and were eligible to participate in more than one interview. Most longitudinal participants did not attend their scheduled second interview. If a longitudinal participant did

not attend their second interview, they were reclassified as a retrospective participant. Those who did participate in a second interview shared less or reiterated points from the first interview. Participants who were both longitudinal and retrospective usually reflected on the succession of one person which led to another succession, either by chance or because of an organisational restructure.
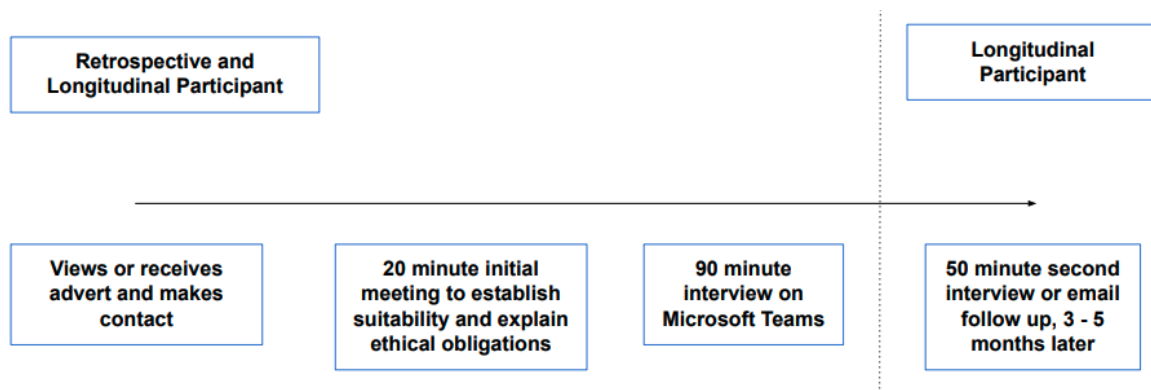
Figure 4: Participant Journey

Gaining Access

Staff and successors who had experienced succession were recruited to this research. Staff had witnessed change happening in their unit when a manager, head of team or director of unit was replaced. Successors had experienced their own role change, either in the same institution (internal) or having arrived from another institution (external). Successors had to have acquired team members for whom they had supervisory responsibility. This was consistent with the current definition of succession which asserts it as a process where an individual with management or 'leadership' responsibilities changes in some way (Connelly et al., 2016; Farah et al., 2020).

Units that were advertising for a new manager or director were contacted with a participant advert (see Appendix 3) using details from jobs.ac.uk.[10] This received little response, perhaps because of the busy period of recruitment. Details of the units who were recruiting were saved and contacted nine months after a job had been posted to allow the recruitment period to conclude. Of thirty-seven vacancies, none replied to the invitation.

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[10] Jobs.ac.uk is a website dedicated to listing professional and academic staff vacancies within UK universities.

The advert was then distributed more widely to attract individual participants. A snowball effect occurred here as participants shared the advert with their networks (Mason-Bish, 2019). A benefit of sampling professional staff was that most email addresses were publicly available online. A spreadsheet containing these email addresses for UK universities was compiled and the research advert emailed to these individuals. Lastly, the advert was circulated on LinkedIn and other university staff representative bodies (AGCAS, AMOSSHE, HESPA, PraxisAuril, etc.).[11] This took advantage of the strong networks of professional staff (Whitchurch, 2010).

Participant and Institution Sample

The general invite resulted in one hundred and twenty-one online interviews with one hundred and four professional staff. A detailed breakdown of the participant cohort and institutional information is available in Appendix 1. After distributing half of the adverts to email addresses there was a bias of successors in the participant sample against staff. This conflicted with the aim of developing a fuller understanding of succession through soliciting perspectives across the organisational structure (Eva et al., 2021). The advert was changed to recruit only staff, achieving a greater balance between successors and staff (Appendix 4).

Qualitative Interviews

Interviews allowed participants to explore their responses to succession for the first time. It was often the first time a staff member had been invited to participate in a research project.

Semi-Structured Interviews

This research used semi-structured in-depth interviews to solicit stories and narratives about succession. On average, interviews lasted sixty-seven minutes; the longest interview lasted one hundred and twenty-five minutes and the shortest interview lasted thirty-nine minutes. Semi-structured interviews allowed the interview and subsequent analysis to be co-created by the researcher and the researched (Perryman, 2011; Hanna, 2012) where participants

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[11] LinkedIn is a social networking site designed to connect individuals with colleagues, enhance one's professional network, identify relevant job opportunities, and share career related content. AGCAS (the Association of Graduate Careers Advisory Services is a membership organisation for HE student career and employment specialists. AMOSSHE (the Association of Managers of Student Services in HE) is a membership organisation for HE wellbeing and therapy counsellors. HESPA (the Higher Education Strategic Planners Association) is the representative body for staff working in strategy and planning in UK HE. PraxisAuril is a professional association for knowledge exchange staff working in UK HE. Many more regulated bodies exist for professional staff in the UK HE sector and globally.

articulated new thoughts on a topic which they had not previously had a chance to discuss and the researcher was used to prompt further reflection (Ekanem, 2007; Dominguez-Whitehead, 2018; Cottingham and Erickson, 2019). A list of prompts used during interviews is available in Appendix 2. This encouraged participants to 'step out' of their retelling (Monrouxe, 2009: p. 84), meaning that whilst they described each moment to me as if they were back in it, they would also take a step back to revisit it in hindsight and jointly with the researcher (Rinaldo and Guhin, 2019). Particularly when discussing tumultuous experiences of succession, the semi-structured interview was an ideal opportunity to hand control back to the interviewee (Vahasantanen and Saarinen, 2012).

Online interviewing

Online interviews have a mixed reputation. Critics suggest there is a reduced ability to read body language or make eye contact (Seitz, 2015; Bach et al., 2020) and a perceived reduction in the potential for interpersonal chemistry and empathy to develop (Irvine et al., 2012). This appeared to reduce during the Covid-19 pandemic as participants had become accustomed to working with their teams over a screen. Proponents of online interviewing have noted the ease of recruiting participants (Topper and Bauermeister, 2021) and a reduced time commitment without the need to travel or book meeting rooms (Vogl, 2013). This reduction in time commitment was especially important as participants reported changes in workloads developing through the Covid-19 pandemic, which were also influenced by succession (Gustafsson and Swart, 2019).

Despite criticisms of online interviewing it was clear that the online interview was still a space away from the everyday (Nash and Moore, 2018). Participants continued to share personal and professional observations with me. Participants were proactive in silencing their Microsoft Teams or email notifications, perhaps keen to embrace the ultimate disruption brought by an interview by blocking out their calendar (Blakely and Moles, 2017). This could be interpreted as participants attempting to preserve the interview environment as a space to construct and make sense of identities which developed during succession (Randall and Phoenix, 2009).

The online interview space was also frequently an *at-home* interview space and this had implications for participant openness. Participants were visibly more open in their interview

when attending from home, gauged through the length of the interview, the depth of their answers and the volume they spoke at. Most participants requested interviews on their days off, outside of work hours or on work from home days, commenting that they could speak freely as a result. In contrast, participants who interviewed from the office often straddled between being in an interview and being at work, with one participant telling their colleague he was speaking with a "key investor" instead of a researcher. Following these interruptions there was a feeling that the interview was an activity which should be hidden. Generally, the use of online interviews for this thesis supports Valkonen et al.'s (2021) argument that perspectives on online interviewing are changing. Some concerns from the qualitative interview community, such as those suggesting the need for preparatory work prior to the use of video-conferencing platforms (Seitz, 2015), are no longer required as technological literacy has generally increased during the pandemic.

Second Interviews and Follow-up

Second interviews were an opportunity for participants to share updates and reflect on prior contributions. Second interviews were shorter, aligning with the general experience of longitudinal research (Calman et al., 2013); they averaged a length of thirty-eight minutes, with the longest lasting one hundred and forty-four minutes, and the shortest lasting twenty-one minutes. Second interviews were conducted exclusively with longitudinal participants. Some interviews with longitudinal participants were rescheduled several times or did not materialise. Without reasoning from the participants, the reasoning behind this is unclear. As the first interview was online, participants may have felt less committed to attending a subsequent interview or found it easier to ignore a calendar invite than it would be to ignore a researcher who had arrived in-person. This may indicate a reduced intimacy and rapport through online interviews in comparison to in-person interviews. In place of a second interview, participants were given the opportunity to elaborate on their first interview over email (Hawkins, 2018). No participants responded to this.

Interview Reflexivity

Longitudinal research invites reflexivity over how a researcher changes during the research process (Bignold and Su, 2013; Hibbert, 2021). Just as participants navigated changes brought by succession, I also navigated changes over the longitudinal interaction with

participants and the overall duration of the research.[12] Throughout the interviews I refined phrases for asking questions and became more confident in using direct follow-up questions. I also asked myself why I identified certain phrases or comments as worth exploring further, using reflexivity to review whether my own interests were overlooking something that the participant felt was more valuable. Throughout data collection I became more content to accommodate silence in interviews, either to give the participant more thinking time or to give them time to reflect on what they had shared after a longer period of speaking. I used phrases like, "I just want to take a moment to digest that" and "Can you walk me through that in more detail?". I felt that these phrases signalled my interest in their experiences and that further reflection was welcome.

I was reflexive over my personal lifestyle choices. Particularly if completing several interviews per day I learned that I needed to prioritise outdoor exercise after the day's interviews were finished. This allowed my mind to recover from taking in significant batches of information and my body to recover from the physical effects of online interviews. I often took breaks from running to note down follow-up questions or ideas on presenting the data. Conducting longitudinal research included a process of learning how to support myself to be fully present in the interview, which could be interpreted as a form of emotion management (Scott, 2022). This was similar to using a reflexive cycle (Somekh, 2006; Bignold and Su, 2013), which helped me to manage the implications of myself and my own views on the narratives which participants shared. Reflexive practices were clear and useful in each stage of my doctoral journey.

Data Management

This section will detail the measures taken to store data securely and confidentially.

Recording Data

All interviews were recorded using the Voice Memo function on the researcher's personal laptop. The laptop was fingerprint and password protected, only accessible by the researcher. The recordings from interviews were entitled using the participant's pseudonym in a

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[12] As on p. 66, I continue to discuss reflexivity in the first person.

university managed OneDrive folder marked as confidential. The recordings will be stored within this folder until this thesis is considered passed.

Transcribing Data

A transcript was manually produced for all interviews. Transcripts reflected the full conversation by including all pauses, micropauses, half-finished sentences, and impersonations of others (Roulston, 2014). Figure 5 shows the transcribing key. Variances in tone and the intensity of laughter or a sigh were difficult to capture in written transcription, meaning that the transcribing process could never be fully complete (Esin et al., 2014). Participant names were pseudonymised. References to colleagues, places, units, previous employers or successors and predecessors were anonymised.

(.)	One second pause
(.3)	Three second pause
SR	Interviewer
PSEUDONYM	A pseudonymised participant
[Colleague], [unit], [predecessor]	An anonymised reference to a colleague, unit, place or building
Capitalised word e.g. OH	Spoken louder than the rest of the conversation
Italicised	Doing an impression
Repeated vowels e.g. Iiiii	Lengthening pronunciation
<deep breath>	A deep breath
<mumble>	A mumble or indecipherable on the recording
[Laughs]	A laugh

Figure 5: Transcribing Key

Transcription was the beginning of the researcher's familiarisation with the data (see p. 81). The several steps to transcribing are detailed in Figure 6.
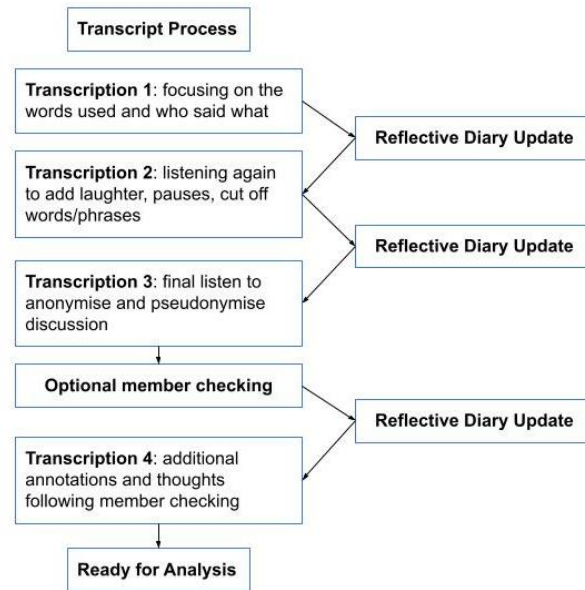
Figure 6: Transcribing Process

Participants were offered the chance to review their transcript (Wilson et al., 2016). Only two participants accepted the offer and made minor clarifications. Only the researcher had immediate access to the transcripts and audio recordings. The supervisory team could request access to these.

Data Storage

A computer assisted qualitative data analysis software (CAQDAS) approach was taken to the qualitative interview data (Silver, 2018), using NVivo Pro. This allowed transcripts and codes to be held centrally and was an efficient way of managing the data so that codes and themes could be identified without the worry or frustration of losing data (Silver and Lewins, 2014; Lochmiller, 2021). The reflective diary recorded hunches about the data (Linneberg and Korsgaard, 2019) and ensured that data analysis could progress outside of the data management software (King, 2004; Nowell et al., 2017).

Data Analysis

Data analysis did not have a specific start or end time given the interpretivist roots of this thesis (Schwartz-Shea and Yanow, 2021). The analysis of this thesis began with the researcher's initial interest in the topic and was sustained and enhanced by participant contributions. Analysis then extended throughout the writing process as ideas about the data followed a cycle of being less clear and then clarified.

An inductive approach was taken to data analysis. This relied on several stages of coding and considering the situational complexities which surrounded each extract. Though no 'right' way to conduct data analysis exists (Ekanem, 2007), a consistent approach ensured the data could be analysed with equal attention (Attride-Stirling, 2001; Nowell et al., 2017). This also meant resultant themes would be grounded in the 'rich pictures' presented by participants (Maxwell and Chmiel, 2014). I address these stages in the remaining sub-section of this chapter.

Thematic Analysis

Thematic analysis was a continuous process throughout the research (Braun and Clarke, 2006; Maxwell and Chmiel, 2014; Xu and Zammit, 2020) and is considered a flexible route to generating knowledge based on human experience (Thorne, 2000; Nowell et al., 2017; Spillane et al., 2019). Some criticise the ambiguity of the steps taken to conduct a thematic analysis (Fielden et al., 2011; Xu and Zammit, 2020). Qualitative scholars have responded by documenting their own application of thematic analysis (Braun and Clarke, 2014; Morgan and Nica, 2020; Campbell et al., 2021). This thesis followed the thematic analysis process proposed by Braun and Clarke (2006). Each recommended phase is addressed here.

Familiarisation with the data

This stage began with data collection through interviews. The complexity and detail of each individual narrative gained through the interviews meant that familiarisation with the data began with a participant's life story and the implications of succession on this story. Common patterns in stories arose quickly. Most interviews were transcribed within two weeks of the interview taking place which enabled a more accurate transcription of the tone and emotion presented by a participant. Familiarisation became easier once transcripts were pseudonymised as the stories or phrases used became memorable in the researcher's mind.

Coding generation

Coding was central to the organisation and analysis of data (Linneberg and Korsgaard, 2019). To ensure consistent coding the transcripts were reviewed multiple times and codes were defined (Figure 7). Doing this prevented the codes from becoming diluted by extracts which were relevant to other codes or codes which had not yet been created (Braun and Clarke,

2006). The size of the dataset prevented post-it note methods from being effective (Maher et al., 2018), so coding was done, initially, exclusively on NVivo. The code definitions were revisited regularly and redefined when necessary. One code, "Not Sure", was created to hold transcript extracts which seemed relevant but in unclear ways (Attride-Stirling, 2001). All other codes were latent codes, meaning that they referred to the possible interpretations of what participants were saying (Miles and Huberman, 1994).

Code	Definition
Expectation for successor to learn	Staff express their expectation that a successor should learn throughout succession.
Respect staff expertise	Successors describe themselves as in awe of or respecting staff expertise in their roles.
Extra work (to support successor)	Staff describe additional work they took on, specifically to support a successor.
No progression for professional services	A participant describes having little or no access to structural progression opportunities in universities.
Uncertainty around losing understanding	A participant describes a sense of uncertainty around losing the oversight and understanding of a predecessor because of succession.

Figure 7: Selected codes and their definitions

Although fundamental in organising the data (Maxwell and Chmiel, 2014), coding can lead to a de-contextualisation of the data (Coffey and Atkinson, 1996). To avoid this, full sentences were coded and any relevant context was noted as an annotation. For instance, possible conflicts in identities claimed through a narrative were recorded as an annotation. This ensured the preservation of the participant story (Cloutier and Ravasi, 2020). Working codes were also shared with other participants to mirror or contrast their experiences. This accelerated the process of data being shaped by both author and reader (Perryman, 2011) and rebalanced the power between the researched and the researcher (Vahasantanen and Saarinen, 2012). This changed the 'solitude' of coding and developing findings: most of this research was conducted during the Covid-19 pandemic, meaning that Monrouxe's (2009) depiction of analysing within the quiet of an office was especially salient. Discussion around transcripts and themes prevented a tunnel vision approach to the data developing.

Codes were used in different thinking models so that themes could be reached. To develop a temporal understanding of succession, participant references to, for instance, grief for a predecessor, were mapped onto a timeline (Figure 8).
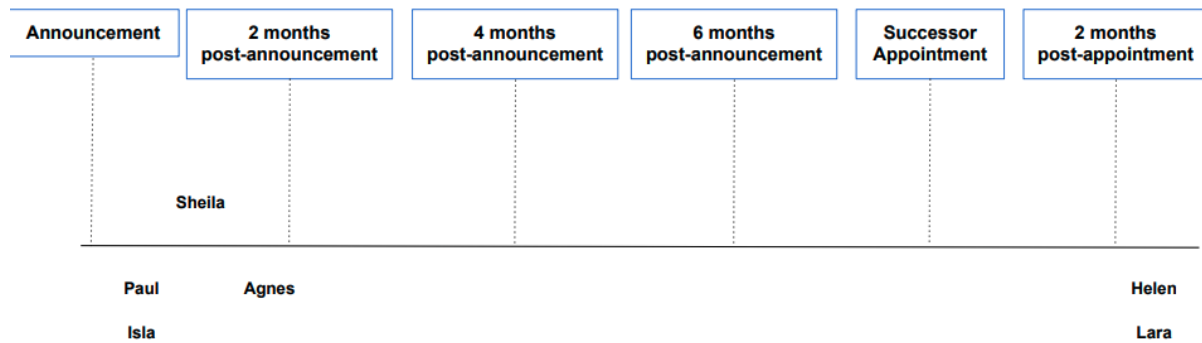
Figure 8: Identification of "Predecessor Grief" Code According to Succession Timeline

This developed researcher thinking in terms of relevant codes and in which contexts they were most identifiable. Numerous thinking models informed the final findings of the thesis. They evidenced Braun and Clarke's suggestion that codes and themes are "synthesised" from the data by the researcher (Howitt and Cramer, 2014: 383).

Searching for themes

To develop themes, codes were manually extracted from NVivo into coding tables in Microsoft Word. From here they were revised and refined. For example, the code 'Observing' became a parent code in Microsoft Word which was broken up into child codes including 'Successor feeling scrutinised', 'Successor observing', and 'example from staff'. These ensured that different types of observation presented by participants could be differentiated. This was a process of interpreting the data by asking, "What does this extract mean?" and justifying this interpretation by asking, "Why does it mean that?" in separate columns in the coding table. This was done for two hundred and twenty codes and the process repeated once more thereafter. The refined codes, those shown in Figure 9 alongside extracts representative of each code, were then re-uploaded onto NVivo Pro to ensure the data remained organised. Further thinking models were developed throughout this process, positioning data analysis as one continuous process of becoming familiar with the data. Mini reports were then written based on these thinking models to develop analysis.

Code	Selection of representative extracts
Universities do not succession plan	"I'm also very interested in the fact that we, we don't really prepare ourselves for succession at all." (Elaine, staff) "It's very obvious… that succession plan has not even being considered by their predecessor… everybody's in the same job, in the order that they started 20 years ago." (Karen, successor)
Retirement prompts succession planning	"Knowing that she was heading towards retirement, she did set the wheels in motion to try and ensure that there was a decent handover, and that there was good succession planning going on." (Jacqueline, successor) "And he had been very open with me and with his boss for the last few years that he saw me as his successor. And so, I was very much groomed as the successor." (Margaret, successor)
Pressure to present leader identity	"One of the issues you've really got to contend with is, you can only be the new boy for so long, probably the end of the first year is when that start that starts to wane." (Iain, successor) "I think it used to bother me more in my first year, because you're desperate to, desperate to prove that you are able to fulfil the role." (Toby, successor)
Hiring staff reinforced leader identity	"That'll be the next milestones, the team will be more the one I built than the one I inherited." (Paul, successor) "It was quite obvious like that she she'd be quite happy to replace them and have her own staff in." (Sheila, staff)
Covid-19 pandemic gave an opportunity to lead in a crisis	"In some ways Covid has helped me be seen more as a deputy because I had to lead in uncertain times and come up with plans to mitigate risks that no one else had really thought about before." (Camilla, successor) "There wasn't much time to think or feel about that. Really, you just were very task focused and very, you know, very occupied with that." (Maria, successor)
Difficult to build relationships in Covid-19 pandemic	"You can really help it generate and work together and support people when they're around a table. But you can't, you can't really do that in this environment." (Hamish, successor) "I can imagine it's a bit more challenging to build that relationship with a manager when you're trying to do that over Teams umm and not in the office environment (.2)" (Juliette, staff)

Figure 9: Selected lines from coding tables used during data analysis

During the process of reviewing themes, the number of relevant codes – those that were substantiated by the amount of data within them – reduced. Some were absorbed into other codes; others were not substantial enough to feature in the thesis. For example, the child code 'Easier to manage frustration' owned by the parent code 'Succession during Covid' was experienced by only three participants. Although this was a valuable observation of succession during Covid for these participants, discussion of this was outside of the scope of this thesis. This process led to the development of candidate themes: clusters of codes which appeared connected (Braun and Clarke, 2022). One candidate theme was 'Staff are more active during succession', supported by the following codes:

Theme: Staff are more active during succession		
Code name	**Definition**	**Example**
Expectations are projected by staff	Staff have expectations of the successor's behaviour, attitude, style and responses to issues	"She's got this really big expectation of me because she knows me well, and she knows who I am and everything." (Maria, successor)
Extra work (to support successor)	Staff take on additional work to support a successor and this is visible to others	"My role is to make your own as easy as possible. I want to be able to take things from you deliberate and appropriate." (Dermid, staff)
Extra work (which is hidden)	Staff take on additional work and it is not visible to others	"I ended up having I was having to take ownership of these things. But even then there's there's, you know, there'll be a, you know, there's only so far I can go?" (Rabbie, staff)
Memories of past are projected onto successor	Staff use memories of the past to make further expectations of the successor	"She left, uhh, quickly. And [line manager] was brought in to help steady things." (Philip, staff)
Staff guide successors through information	Staff feel they influence successors when they share information, perhaps socialising them into the existing way of thinking.	"We taught him and, you know, I put together information about my little piece of the world, and that kind of thing." (Adele, staff)

Figure 10: Candidate theme and associated codes

Identifying meaningful themes was reliant on a strong familiarisation with the data and the researcher's judgement on whether themes were relevant across the transcripts. This process was reliant on discussions with supervisors and developing further thinking models. Extracts from transcripts which contradicted themes were not ignored or redacted but used to refine and demarcate the relevance of the themes (Alvesson et al., 2008).

It was important to remain flexible with candidate themes and be unafraid to reshuffle where codes were positioned. For instance, the code 'Expectations are projected by staff' was meaningful in showing the unrecognised, active role of staff during succession. However, looking at the wider context of the extract highlighted that the code was more relevant in substantiating staff contributions to successor identities. The flexibility of thematic analysis allowed this code to move into what eventually became the theme 'Staff shape successor experience and identity'.

A key theme across the data was the identity experimentation encountered by staff participants. To preserve this in data analysis, vignettes which included key aspects of a storied plot, turning point or relationship with someone were produced. These vignettes are used throughout Chapters Four, Five and Six and show how identities were accessed and presented by participants through talking with the researcher (McAdams, 1993; Smith and Sparkes, 2008).

Theme definition

Following the iterative process of reviewing themes was the definition of final themes. A review of the research questions was valuable to inform themes which were relevant to the original motivations of the thesis. At this stage, candidate themes developed into defined themes. For instance, the candidate theme 'Staff are more active during succession' was revised within Theme One shown in Figure 11. Final themes were reached through a combination of data analysis and writing. These themes and their corresponding components are shown in Figure 11.
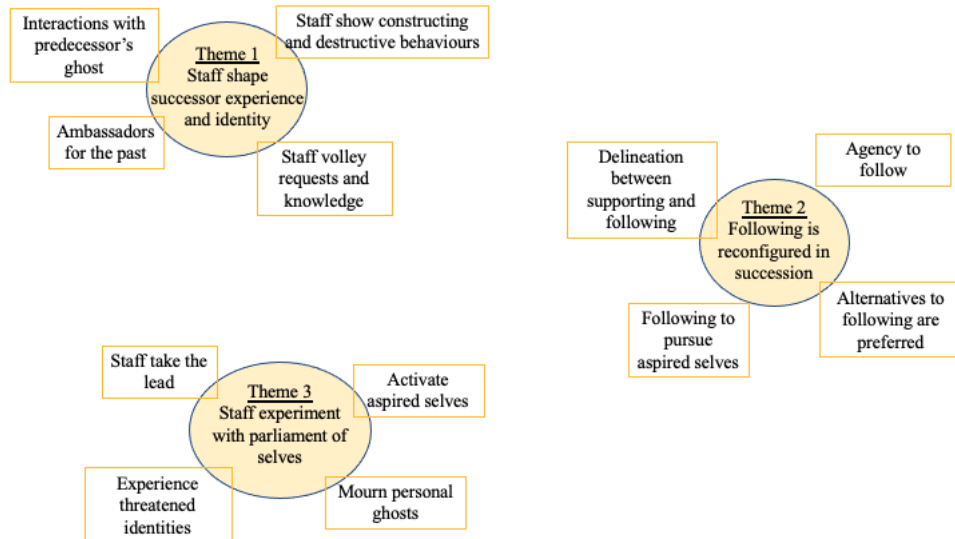
Figure 11: Final themes and their components

Presenting the Data

Data extracts were used throughout the writing up process to support the author's argument. Extracts of more than 300 words were classed as vignettes and were used to honour the narrative given by participants. Vignettes were used to allow the reader to experience the participant experiences as "mini ethnodramas" (Humphreys, 2005: p. 842), allowing the reader to feel that they understood the context being presented from first-hand experience (Jenkins et al., 2021). The use of vignettes complemented the social constructionist foundations of this thesis as they gave general context to each succession process (Finch, 1987). This was helpful in showing how unique individual succession contexts could be, but also allowed the narratives shared by participants to stretch across time, people and ghosts. Moreover, the use of vignettes was beneficial in exploring the individual experiences of succession and the identities engaged with during the process. Finch (1987) also claimed that the broader story which could be told through a vignette was useful in communicating subjective interpretations of events, rather than seeking formal solutions or statements about succession.

Research Rigour

Qualitative research trustworthiness emerged from the 'paradigm wars' between quantitative and qualitative researchers until new criteria for rigorous qualitative study were assembled in a way which accommodated the multiple realities sought (Sinkovics and Alfoldi, 2012). Guba

and Lincoln's (1982) trustworthiness criteria guided this thesis to an authentic portrayal of and engagement with participant experiences (Stewart et al., 2017). Some include reflexivity as a tenet of research rigour (Korstjens and Moser, 2018), but as this has been considered throughout this chapter already, it will not be repeated here.

Credibility

Replacing validity and reliability, credibility refers to the researcher's confidence in their findings (Stewart et al., 2017). This thesis included measures to enhance credibility throughout data collection and analysis. During data collection transcripts were generated by recording interviews. Variances in tone were captured as far as possible by listening to the recordings and reviewing the transcripts multiple times (Monson et al., 2021), (see Figure 6). A member checking process was offered to participants and two participants utilised this (Wilson et al., 2016). Transcripts were then shared with supervisors to review anonymisation and pseudonymisation accuracy (Guba, 1981). In analysis, supervisor involvement continued and credibility was achieved by reviewing transcript codes and coding tables at supervisor meetings. This resembled a "trustworthiness committee" (Unluer, 2012: p. 7; Rosenberg and Tilley, 2020). Lastly, credibility runs through the findings chapters in that they use participants words throughout. These words became familiar to the researcher through an extended process of familiarisation (see p. 82).

Transferability

Replacing generalisability, transferability relates to the potential fit of research findings in another context (Guba, 1981). Transferability was achieved by gathering the thick descriptions of the succession context for each participant so that interpretations from one context could be applied to a similar one in the dataset or in future research (Geertz, 1973). This meant deciding on meaningful categories to use as cases on NVivo, including succession contexts like retirement, restructure, internal promotion, external promotion and secondment. For some participants, more than one of these categories applied (Carcary, 2009). Using the same data collection methods across the participant cohort also promotes the transferability of the findings, particularly given that there was qualitative saturation. Saturation is a contentious term in qualitative research (Varpio et al., 2017), but the repetition of certain of participant stories, such as the temporal dynamics of succession or the avoidance of the term 'follower' across a large qualitative dataset, were significant enough to be considered saturation. Applying followership to succession also enhanced the transferability of the

research findings as it solicited a variety of different perspectives on succession (Richardson and St. Pierre, 2005; White et al., 2012).

Dependability

Dependability relates to the potential for research findings to be repeated within the dataset and representative of the raw data collected (Carcary, 2009). During the interviews, participants were also able to raise any topic and discuss their experience in their own structure. 'Bracketing' interests from other interviews on one side of the researcher diary (Berkovic et al., 2020) was a way of recording assumptions and waiting for the participant to bring it up if it was important to them. Reflexivity was also core to the production of this thesis, contributing to the dependability of the research by considering how the researcher's epistemological assumptions could have influenced the findings (Guba, 1981). This was monitored through the reflective diary. In writing up this thesis, the diagrams and descriptions of the research process were produced to ensure ease of replicability by others, for instance by using the code descriptions to promote reliable coding (White et al., 2012). Lastly, by allowing participants to structure their own narrative, it became more likely that other researchers would receive the same story if asked again, even if positioned differently based on interaction with a different researcher.

Confirmability

Confirmability is concerned with others being able to clearly identify how a researcher came to their findings (Korstjens and Moser, 2018). The trustworthiness committee were important here in asking questions of the researcher when presenting initial themes and suggesting alternative interpretations (Unluer, 2012; Rosenberg and Tilley, 2020). Confirmability also relied on a process of becoming familiar with presenting data: conference presentations and guest lectures, both online and in-person, were helpful for presenting findings to audiences were totally unfamiliar to the researcher and the topic. Continuous refinement of codes and describing findings to participants after the interview also helped to enhance the researcher's verbal and written ability to justify the findings.

Conclusion

This chapter defined a philosophical orientation which supported the research questions posed in Chapter Two. A method of data collection informed by this philosophy and the ethical challenges posed by qualitative research was justified and outlined, including

reflections on researcher positionality, data management and the process of conducting qualitative research online during a pandemic. The final section on data analysis outlined the steps taken to reach the findings discussed in Chapters Four, Five and Six, which begin on the following page.

Chapter Four: "I'm backing him. I don't think I'm following him" (Sophie): Follower Identities and Following

Introduction

The previous chapters addressed the theoretical and methodological foundations of this thesis, as well as the methods used to reach the findings discussed in Chapters Four, Five and Six. The findings chapters mostly engage with data from first interviews (see p. 203 for further reasoning) but, where second interview data is valuable – particularly for the illustration of succession, following and identity work as a journey – the use of second interview data is clearly signposted.

This chapter empirically illustrates follower identities and following, addressing the concerns raised in the literature review over the precision of the terms 'follower' and 'leader'. It highlights the low and negative engagement with the terms 'follower' and 'following' by participants, presenting the alternatives given and considering what these alternatives convey about the nature of following as a journey, rather than a permanent status. This chapter challenges the successor desire to be followed by characterising follower identities as fleeting, voluntary and usually recognised retrospectively. The penultimate section illustrates what participants followed, before using a vignette from a successor, Cally, to reinforce these arguments. Throughout, following is characterised as a process of behaviours and identities within relationships and organisational contexts, portraying it as a deeply personal identity choice connected to informal and formal power, organisational ghosts and the parliament of selves in succession stakeholder's minds.

Interpretations of Follower and Following

This section outlines participants' interpretations of and engagement with the terms 'follower' and 'following', contrasting the differences in successor and staff perceptions.

Introducing 'Follower' and 'Following'

Only two participants used the term 'follower' unprompted, "She picked me because I was the right follower for her" (Lara, staff). This could convey that formal superiors handpick their followers, conveying a lack of follower agency to follow. Stewart, a staff member who had completed a PhD in followership, commented on the ability of followers to have expertise, "as a follower, I think you learn to be a bit of a specialist" and develop their

follower style, "I've learned to be a better follower" (Stewart, staff). He automatically equated staff members as being followers, often using the term as a category for his organisational grade, "as a follower, why did I have to go through that?". He made no reference to what, specifically, he or others followed, but the quotation does suggest that one can, and should, develop expertise in the practice of following, as well as in one's formal post; perhaps this suggests that a journey of learning to identify what one interprets as leadership is core to being able to engage with a follower identity. His categorisation of staff appears to align with role-based views of following, but the idea of learning to follow and refining the process based on the relationship with another person aligns more with constructionist followership. Other participants engaged with the term "follower" once it had been introduced to them in the interview through the question, "What does the term 'following' mean to you?". Margaret referred to a co-dependent interpretation of leaders and followers, "I would probably associate it with ensuring that I have followers. A leader is only effective if they have followers." (Margaret, successor), alluding to the idea of followers as a form of capital. Margaret and Stewart were the most precise in their use of 'follower'.

Participants who were more unfamiliar with the term 'follower' used the interview as an environment for making sense of the concept in the context of their succession experience. A common response to the follower question included a follow-up question of, "Following?" accompanied by a long pause. Then came an on-the-spot exploration of the term, "That's some kind of bullshit I've come up with… I feel like I'm writing my essays for my degree again." (Lola, staff) and sometimes this seemed to be based on guesswork as suggested by phrases like, "I suppose it could mean" (Orlaith, staff). Participants did not seem to have reflected on following in a non-interview context, whether that be in the workplace or on a leadership programme. Some participants referred to following rules or an example set by others, "Here is a process that we need to follow. And those are the steps." (Elspeth, staff). Others interpreted following as a process of the successor picking up where a predecessor left, creating an image of succession as a transition between two individuals, "following on from something that's come before. Trying to learn from it and adapt it and change it." (Henry, successor). It is possible that participants defined their interpretation by immediate working priorities: for Henry, he was literally following on from a predecessor and learning a new position; for Elspeth, her relatively short tenure in her role meant she still felt she had to

learn about her role and the unit, thus followed (an internal successor, with greater expert power than she perceived herself to have) to learn more about it.

Negative Characterisations of Following

Generally, there was a negative interpretation of following across participants:

> I just don't think following is… where it's at… what I'm trying to do is like, inspire my team to achieve their best and like, help put structures in place to set them up for success… I can look at other units and places where they kind of have a lead follow mentality, and I just think, "God… it's terribly sad over there and people are unhappy". (Jessie, successor)

Although Jessie disagreed with the value of following, she also did not present a strong understanding of what following could be, nor shared any meaning beyond an immediate dislike for it. Discussions of following within her workplace may not have been extensive. When Jessie was asked to elaborate on what a "lead follow mentality" looked like, she shared instead an alternative of "inspiring people" and "supporting them to do their best". Jessie may have been drawing on these values in an attempt to cultivate the aspirational self she desired within the interview setting. Choosing to detail leadership behaviours instead of follower behaviours points to a general aversion to the term following and may also suggest that leading was a more familiar concept. Liam also did this:

> I wouldn't want my team to be followers. With any change, I think you want to take your team with you and for them to be part of that change (.) and whether they're, you know, change agents or change leaders or whatever you call it, people need to be really bought in and to understand why that change is necessary… I don't like the term following in this context. It sounds kind of lemming like and I think that's the last thing that change should be about. You should be really taking people with you rather than [them] sort of trundling, following on behind… (Liam, successor)

Although the alternative behaviours cited by successors may still be exhibited by someone claiming a follower identity, because they do not align with their assumptions of following, participants tried to avoid using the term. The negative stereotype associated with following is extended by Jessie's use of 'mentality', which conveys following as a way of life, difficult to remove oneself from. Indeed, when both participants talk about following, they talk about the followership of other people rather than themselves. As a result, following behaviours may be perceived as a mentality that it is challenging to remove one's staff from. This contrasts with the depiction of following as fleeting elsewhere in this chapter (see p. 104).

Lastly, there is a similarity between the descriptions of leading behaviours and following behaviours. For instance, Margaret describes the moment she felt followed:

> I think there was a bit of a moment just before I went on holiday three weeks ago… they both fed back that they felt that… things were working really well, we were in a good place… I've been on holiday for a week, and come back and look at [their reports], and I think, "blimey, this is great. I can go away more often" (Margaret, successor)

The similarity in the two interpretations may be a result of the continued aversion to 'following' as well as an unfamiliarity with the meaning of the concept. However, the successor tendency to define staff behaviours as followership may stem from an enthusiasm to promote their own leadership through the acquisition of followers. Staff spoke much more tentatively about their sense of their own leadership, "I think in that way, people probably do follow me a little bit, but I don't have the, I hope that I don't have the ego (.) and I definitely suffer with imposter syndrome around that" (Caitlin, staff). It is interesting that, whereas formal successors were keen to evidence how they knew they had followers, Caitlin, a staff member, cites evidence of her leader behaviour far more tentatively, suggesting that, although she is leading, she feels insecure in claiming a leader identity. Moreover, she equates leading with having an ego, which no other successor did, perhaps reflecting that her formal role prevents her from taking full ownership of a leader identity.

Desire to be Followed

Staff and successors seemed to suggest that gaining and having followers was desirable, even if the behaviours and identity associated with following were not. 'Follower' was often used plurally, creating an image of followers as existing permanently in a group. Follower was also used to refer to a team generally:

> When there's a change in leadership, it's a change in style, which means all the inherited followers are now in the wrong style. They're like, literally out of fashion. (Lara, staff)

There was minimal consideration that staff differed in when or how they followed, instead forming a "fan club" (Krystelle, staff). This disregards the choice that individuals have over whether they follow and for how long, but does suggest that one can gain a sense of shared identity among others who follow. The plural description of staff who appeared to be followers was especially common among external successors, "they felt the office is a more

positive environment" (Karen, successor), "I've got respect from the guys because of that… one of the chaps turned round and said… "it's amazing to actually have a manager who knows what he's talking about'" (Johnstone, successor). The successor quotations suggest that following was interpreted as irreversible. The sharing of positive feedback to justify how they knew they were being followed highlights the retrospective nature of being followed: staff recognise their respect for the successor after an event, share this feedback after that, and successors subsequently interpret this as evidence of following, then re-attributing a follower identity to a staff member in the interview. Therefore, although successors may desire the guaranteed followership of others, a processual, fleeting nature of engagement with a follower identity becomes clear.

Some participants interpreted followers as achievable through their own inspirational or nurturing behaviour, rather than specifying what motivated others to follow them, "And their comment was, 'You ask for the impossible, but we always manage to deliver it, and we always know there's a back-up plan'" (Paul, successor), "They were desperate [for my arrival]" (Harmony, successor). It was common for successors who entered as an interim post-holder, and for permanently appointed successors who replaced a vacant post or interim post-holder, to describe their leadership heroically. There is a sense that successors assumed that their predecessor's staff would automatically follow them in that both assume that their staff need support. No staff participants expressed a need to be rescued. It may be that successors felt that adopting a saviour identity gave them a purpose in the new environment and an opportunity to develop trust. This reiterated the perceived security of having followers, pointing to an assumption that following was not a revocable behaviour, which is challenged by the presentation of following as fleeting on p. 104. These heroic perceptions contrast with Barra's interpretation of being followed, "I'm asking myself regularly, you know, why would people follow me?" (Barra, staff). Barra was one of the few staff members who considered what would encourage people to follow him. His continuous evaluation suggests that following was not perceived to be a permanent behaviour and positions following as a behaviour which is directed at someone.

Some suggested that followers could be won or earned, "you want to be part of whatever it is that person is representing and leading you out on… I don't think you win that easily." (Maria, successor). It is interesting that Maria first describes following as a conscious decision made by a follower and then, from a successor's positionality, implies that gaining

followers relies on luck. This may be because the trust and belief involved in following someone is dependent on multiple different ILTs, creating a challenge for which the successor requires luck. Gaining followers is, therefore, dependent on the context of the team. It also raises the possibility that following is related to gaining a sense of personal identity from collective beliefs and therefore showing a follower *identity,* rather than directing follower behaviours to a successor. Through this juxtaposition of followers seeking a cause and a successor winning followers, different motivations for being and gaining a follower can begin to be identified. For instance, Paul shares a desire to individually gain followers and emphasises a permanent possession of followership:

> There's management and there's having people. You earn the right and then they'll feel comfortable with you. (Paul, successor).

> She was like, "Well, I have to ask you, because I know that you are happy about change, whereas a lot of other people find change to be quite nerve wracking…". She said, "if I can get you guys on board to help me implement this change and do it positively then great". (Caitlin, staff)

Successor perceptions of achieving leadership effectiveness seemed to be measured by the end result of all staff members becoming followers. This suggests that the decision to follow is permanent and enduring, contrasting with the depiction of following presented by staff (see p. 99 onwards). There is also an assumption of a domino effect to following, implying a lack of agency over the process beyond gaining a first follower. This may stem from what felt like high stakes to become established in an organisation. Successors felt that acquiring followers was core to a successful transition, seeking "chink[s] of hope" (David, successor) through followers. Although this suggests that successors understand the value of staff during change, it oversimplifies the processes of "getting everyone on board" (Iain, successor) and does not consider that there may be a variety of motivations to become followers. It also suggests that staff only exist within an organisation to support an agenda as followers or exist to be redeemed as followers, reinforcing the characterisation of followers as capital to be gained by a successor for their own leader identity. Perhaps the interpretations are based on a general unfamiliarity with the terms 'follower' and 'following', but such interpretations are challenged by those of staff members and the findings of the next two chapters.

With the preceding sections in mind, the next sections suggest that the fleeting, voluntary and retrospective character of following means that only those who are following can recognise followership. Rather than identifying followership in others, followership may be an aspect of

organisational life which only the follower can reliably claim, given that it unfolds as a personal journey for all. This suggests that, in the literature to date, there has been a somewhat mythical attribution of follower identities to research participants without confirmation from the 'follower' themselves or justification for such attribution.

Journeys of Following and Follower Identities

This section introduces the second interpretation of follower and following identified in the findings; that of following as a personal journey which both staff and successors embarked on. Rather than depicting following as an end goal for a mass of employees, this section considers the intricacies of follower identities, positioning them as carefully considered, sometimes strategic identities which are fleeting in the nature in which they are used and identified among succession stakeholders. In doing so, the notion of following as a journey is conveyed, both in terms of the language used to describe it, in the time which succession stakeholders take to form follower identities in individual relationships with others, and in the way that follower identities can move from one person, ghost, self or vision to another in the duration of an interaction.

The Language of "Journey"

The concept of following as a journey was extended by interpretations which referenced a journey from the past, towards a vision or alongside others, as can be identified in many of the preceding extracts. This suggested that following was an active process of a relationship, with an individual or a vision, emerging and occurring in multiple contexts. After being asked about their understanding of 'following', participants described it as a, "feeling of trust that they're going in the right direction" (Lola, staff). Following could also be interpreted as a journey towards a future self, "you're following someone to get to the same position they're in" (Katriona, staff). This aligned with the idea of following as being the pursuit of an aspired self (p. 108) in that Katriona felt that the successor created a path of progression to follow.

Another common alternative phrase to describe following was 'on board':

> If the people are following in the direction of travel for our service, then that means that we're all on board. We're all, we all understand our roles and remits and how what we're doing is in pursuit of that direction, and that overall objective and strategy. Emm, at the moment, we are not following any one strategy. (Caitlin, staff)

> I don't know if they were brought on board by the charisma and the charm and the sort of personality of a [predecessor] as the leader at that time. (Jacqueline, staff)

> I mean, I wouldn't say it was following, I would say… they're on board. So, they're accompanying me, with me, and trying to help me get there. (Saoirse, successor)

Although Caitlin and Jacqueline were negative towards the change, on board is used as a synonym for the following which did not happen in their unit. It may be that staff use on board as an alternative to following because they prefer using general terms of support rather than expressing what feels like a permanent commitment. There is also a sense of togetherness with the term, such as getting 'on board' public transport. Another interpretation recognises the equality of the term, suggesting that, whereas an individual's choice to follow someone might be considered brave, the same choice is easier to articulate as part of a wider group. Perhaps there is also greater room to hide in a choice to be 'on board' and an easier way of ceasing support. Anecdotally, successors frequently referred to buses in their description of succession, "some people want off the bus" (Toby, successor), "we didn't take the wheels off the bus" (Jimmy, successor), with another referring to a ticket for a journey through succession (see p. 118). This may suggest that the decision to follow was part of the wider succession journey and that following relationships were their own, mutual, journey of evaluating one another and recognising when one individual believed in another individual or goal.

Potential Follower Identities

The first element of the follower identity journey to present is one in which succession stakeholders recognised that they could in future follow someone. That is to say, they felt that they could enact a follower identity in relation to another when they perceived the other as leading. This addresses the assumption that following is a permanent activity.

Florence, a staff member, accepted the successor as followable when she could get a sense of the successor's style but did not have concrete evidence of this style from behaviours, "my experience with [successor] was mostly just relief that we had somebody to start like offloading things to. I liked her well enough, but I didn't yet trust her, I think is probably the right word" (Florence, staff). Florence agreed that she had followed when she saw the successor respond to the requests that she and the team made of her, "which I think… was a

really big load off her shoulders" (Florence, staff). In a second interview, Florence reactivates her follower identity using a different example, noting elements of the successor's behaviour she found favourable, particularly in comparison to the predecessor's style, "she doesn't bombard us with everything that we don't need to know." (Florence, staff). This depicts a gradual process of observing another's behaviours, considering whether the values of another align with one's own, and then exercising a follower identity at certain points of behaviour.

If someone had devised a potential follower identity, this identity could still be revised or re-evaluated, "the first couple of months was very much… waiting to see if the initial like, nice welcome face faded… and she became like, someone slightly different." (Victoria, staff). This suggests that staff observed or evaluated successors for inconsistencies in their behaviour and that following identities could be withdrawn. It also positions staff as preparing for the multiple different selves that the successor could present, not in the sense that staff exist solely to observe different versions of the successor, but in that staff appeared psychologically prepared for the possible selves others may engage with. Lastly, the voluntary nature of following is emphasised. Victoria is alluding to the voluntary choice she has to follow, as well as the time she has to make this judgement, positioning following as a considered and thoughtful process, rather than a position associated with a formal role.

Deciding to withdraw a follower identity depended on whether this identity aligned with an aspirational self:

> She was very, very quiet, like, incredibly silent… [successor] was not as open on a personal level but also on what was happening above. I realised I probably had to start closing up a little bit myself, because if someone tells you something like a secret, I can [also] tell you a secret. They're displaying trust and that makes you kind of think you can trust them. So, therefore you're allowed to tell them your own secrets as well. Someone has to show, it's a little bit of vulnerability to tell someone. So, once you've, once someone's made themselves vulnerable. You're like, "okay, recognition of this". I couldn't have that with [successor]. It seemed to be (.) **I think we could have gone there**. I think she was just kind of the person it would take a long time. And to build that trust because she wasn't forthright with her vulnerability. I was like, "oh, I should probably keep my mouth shut a little bit more". (Lara, staff. Emphasis added.)

The potential followership Lara identifies, indicated in bold, does not materialise. This extends the idea of following as a personal journey unfolding over time, as Lara imagines a version of her future self who follows the successor. She seems to discard this version of her

follower identity, as well as the leader identity she had envisaged the successor having. Her extract suggests that the principles of openness and honesty which successors looked for in followers were also those that staff looked for from successors. This suggests that it is the successor who must prove themselves to staff as followable, first deferring to staff to gain future followership. These shared principles also emphasise the fleeting nature of following as it highlights how followership behaviours can flow among stakeholders. Lara's extract raises the possibility that participants followed those who had constructed selves with similar values and could mirror behaviours. Unable to feel her vulnerability mirrored, the extract reinforces the fleeting nature of following by highlighting how it can be imagined and withdrawn. This withdrawal is narrated with a sense of loss, characterising the risk of a potential follower identity not being met. This in itself suggests that following was a reciprocal arrangement, where a follower identity had to be recognised by a leader identity.

Other participants had not ruled out following but seemed to remain indecisive about whether they could imagine themselves following in future:

> …this will sound quite archaic, but… "Do you know what gown you're going to be wearing at graduation? It needs to be the same kind of gown as the Pro Vice Chancellors. Otherwise, it's going to look… your status is going to look lower than them. And that's not appropriate."… [I'm] trying to make sure that I'm looking like I'm thinking ahead and being supportive of her and her role so that she gets the right respect and the right reaction in academia for her role… I wait to see… in terms of knowing where I'm gonna end up in this relationship… I'm not there yet. I think it might take a couple of months. But I know I'm going to try and work on it… And if doesn't work out, then I'll just accept the fact and try and make sure it's at least working operationally. And think about what the next steps are after that. (Paige, staff)

Whilst Paige is not following the successor she continues to support her to promote a smooth transition and unit function. She appears to be squiring between the successor and the existing Vice Chancellors but is clear that she is not yet identifying as a follower; her use of "not there yet" recognises this and suggests that even the notion of possibly following someone is dependent on trusting that a future self, and the relationship that this future self will exist in, aligns with one's aspirational goals. This suggests that individuals in succession need not be leading or following but could make contributions in other ways. In addition to being a voluntary choice, this extract suggests that engagement with following behaviours is reliant on extended observations of another, requiring "work" from both parties as Lara also suggested. This aligns with Paul's idea of working to earn followers (see p. 97) and adds to

the reciprocal characteristic of followership. It is interesting that Paige also alludes to a future where she is not following the successor, suggesting that much of the choice to follow involves imagining potential future relationships. This adds to the characterisation of following as a journey (p. 98), with Paige's concluding sentence showing similarity to Lara's extract in that she articulates a potential future lost self if a leader-follower relationship does not materialise. This highlights the risks of not following.

Without the ability to view oneself as a potential follower comes the choice to not follow at all:

> I just feel like I haven't got a huge amount of confidence in her leadership. I think that's what it comes down to. And therefore it makes me feel a little bit uncomfortable that I'm forced into this position of being a follower of someone that I don't really feel inclined to follow… and where does that leave me?… I probably wouldn't describe myself as a follower, but yeah, outwardly, I'll tow the line. (Jacqueline, staff)

Although Jacqueline has chosen not to follow (she engages to some extent with a disingenuous follower identity by showing support for the successor publicly, reiterating the argument that identifying followers can be fruitless), there seems to be an expectation that she would automatically have followed. After choosing not to follow, Jacqueline is clearly uncertain with how to engage in the relationship going forward. This suggests that, although engaging with a follower identity felt voluntary, exercising one's choice to not follow created greater liminality, highlighting a possible risk in not following. Jacqueline also narrates the end of her follower identity journey, in respect to this relationship, by asking "where does that leave me?". In effect, Jacqueline may be asking, "how do I reach my aspired self now?". Chapter Six addresses this question.

Retrospective Claims of Follower Identities

Discussion of following suggested that a follower identity was commonly claimed retrospectively and not as it happened. It seemed that hindsight enabled a process of sensemaking and reflection, which itself allowed for the retrospective claiming of follower identities. This may be because engagement with a follower identity was so fleeting that it was difficult to identify in the moment:

> I think it happen[ed] once in a project… and we started in a direction that he suggested. It didn't go well… I'm more than aware that [predecessor's] knowledge on the topic [is] wider than mine, they've got more experience and so I'm always keen to listen… I didn't agree with the beginning point of the project, but I followed them because at the end of the day, they set it up. Even if I knew it wouldn't work. And it did prove that it didn't work. But the amazing thing is the ability of [predecessor] to step back and say, "Maybe you are right, let's change things". (Elspeth, staff)

Elspeth only reflected on someone following her when asked if this had happened before, positioning the interview as a space for making sense of following. Her extract shows that claiming a follower identity can be fleeting in that the follower identity exists only briefly, was retrospective and based on knowledge or the ability to shape decisions.

Following could also be done retrospectively in relation to a predecessor:

> She was just really inspirational and just led by example and was like a machine in terms of the work that she did, the amount that she produced, and she just always kind of delivered against what she said she was going to do. Which, you know, I try and do that, and I now kind of expect that from other people but you rarely actually get it. (Jacqueline, staff)

Jacqueline adopted a follower identity not only when she saw the predecessor engaging in behaviours that she felt were admirable, but also when she saw the predecessor match her standards for herself. She is re-engaging with a follower identity from the past, as if she is following the predecessor's ghost and reactivating a discarded version of herself, a personal ghost, from when she and the predecessor worked together. Following is characterised as dependent on having one's expectations of style met, as well as being so fleeting that following can flow in multiple directions, including the past, and may be based on seeing similarity between oneself and another. Chapter Six will return to Jacqueline to show how the predecessor's style was desirable and informed Jacqueline's own leader identity, as well as her perception of the successor's engagement with leadership.

The retrospective references to following suggest that the interview environment was an opportunity for participants to make sense of an unfamiliar concept. Following can be seen as a journey which is reflected on post-hoc and, like accomplishments or the development of a new skill, the progress in following journeys can only be identified retrospectively.

Fleeting Follower Identities

Following could be interpreted as a journey because of the frequent negotiation of leader and follower behaviours among staff and successors. A vignette from Margaret and Ronald, a successor and staff member from the same unit, interviewed separately, highlights how leader and follower identities could be shared between one another in a relationship of two:

Vignette 1: Margaret and Ronald's Following Journey

And so, because I knew the likely incoming candidate, it felt quite easy to speak informally over a coffee and say, "look, here's what I think." And then when she was appointed, she met me and said, "Look, you know, I've thought about this. I think this is a sensible decision."…I work extremely well with [successor], who was [previous post] and feel, you know, we have a good open, constructive relationship where we can disagree, but move on and work well together. I don't know what any of that would have felt like had the people in the post different (.) and had there been an external appointment? For example, I don't know if an external colleague would have supported the same kind of outcome and how that would have felt… The way in which I support her, I think, is quite different to the way in which she supported the previous director. She and I have quite different working styles. I think, previous director probably worked more like me (.) and so she really complemented him. And so I'm trying to complement her, but in slightly different ways. And that transition, I don't think its completed. And actually, you know, in my meetings with her in the months ahead, a lot of my questions for her are like, you know, are you, are you are you getting what you need out of this? (Ronald, staff)

With [Deputy] it was slightly different because he and I work very, very closely, and kind of, I think I probably saw us more as equals than he did… So, what I decided to do was to restructure slightly… And I changed [Deputy's] title because I really wanted to signal [change]… I wanted him to really take the lead and thinking strategically about that, and changing his title was a signal to do that. He had been my closest colleague, and the one who, at the time, I thought was most likely, looking ahead to when I move on, was most likely to be able to replace me (.) so he has become the Deputy Director… [Deputy] and I work very closely on things. And you know, he's really good at what he does. And he's very competent, very bright. And I think, you know, definitely in a while, could be running the directors. (Margaret, successor)

Following can be identified in the respect that Margaret and Ronald have for one another's expertise and that both seek to ensure that each feels fulfilled in their post and relationship. Whilst Ronald's interest in changing the style of his support to the successor suggests he is following; his willingness to make recommendations for action could be interpreted as leadership in that he is advocating for the future of the unit. Margaret views Ronald as a future leader, suggesting that she may at some point follow him. Deciding to change Ronald's role based on his expertise could be considered a form of leadership which recognises *his* leader identity. Equally, Margaret's decision to implement the recommendation he makes may

be her followership of Ronald's guidance. A final interpretation may be that both Margaret and Ronald are adapting their behaviours based on their followership of the unit they belong to. In each possibility, their previous working relationship may have generated greater flexibility in accepting one another's leading and following behaviours, demonstrating that the followership journey could begin before succession, especially for internal succession processes.

The momentariness of following shown in the preceding vignette, the rich context surrounding it and the different motivations for behaviours during succession, made it challenging to determine when following happened. Following could be interpreted as fleeting as a result:

> I've had conversations, and I feel like… we've reached a conclusion, we've really reached an agreement, and they're going to take actions, and then it doesn't happen so that they're sort of saying the right stuff to, you know, keep me on side, and then they're just kind of going off and doing what they were going to do anyway. And… that's sort of what looks like they're following, but they're not really is the bit that I'm trying to kind of tackle now. (Emerald, successor)

Successors seemed to observe what they interpreted to be following behaviours and assumed that staff had taken on a follower identity. In fact, attempts to identify followers reduced progress. Emerald positions achieving followers as a challenge, prefacing Chapter Five's discussion of staff shaping the priorities of successors. Although the feeling of being followed may be reassuring for successors, "it's a really good feeling when it happens" (Nicola, successor), it may also be misleading. Indeed, the fleeting nature of engaging with a follower identity prevents anyone other than the follower, either in the moment or retrospectively, from claiming this identity.

Lastly, following can be interpreted as fleeting because follower identities can be directed to multiple different people:

> I'd say on the whole I'm very much accepted now as the deputy, but umm on occasion it can still feel a bit sort of, you know, like your (.) decision isn't final enough for them they need to go and get a further approval or they need approval by the CFO, rather than me, so that can be problematic… (Camilla, successor)

> There should be more room for flexibility because there should be possibility for dialogue and to change things. I wouldn't follow [the successor] everywhere. (Elspeth, staff)

That other people could also be followed seemed to be disorientating for Camilla, perhaps suggesting that she had developed a view of following as a permanent behaviour or occupation. In contrast, staff were more flexible in their approach to a follower identity, perhaps because they had the security of their provisional self, having not embarked on a role transition.

Conceiving of following as a journey is valuable because it accommodates the fleeting, voluntary and retrospective characteristics outlined above. "Journey" also works to reduce the assumption that following is a permanent state, positioning it as an identity which can be taken on, shared or distributed among individuals in an organisation. The term also mirrors Stewart's suggestion on p. 92 that effective followership is developed over time as individuals become more in tune with what styles of leadership they are attracted to. It emphasises that, though following and leading identities can be enacted in relation to multiple individuals in different contexts, each relationship has its own leading and following journey.

The preceding sub-sections have proposed two interpretations of following from participants: that following is undesirable, unfamiliar and designed to reinforce a sense of leader identity; and that following can also be conceived of as a journey, drawing on the fleeting, voluntary and relationship bound nature of follower identities. The next section uses the latter interpretation to elaborate more on what and who was followed during succession.

What is Followed?

This section highlights what participants shared that they followed during succession, including visions, individuals and personal ghosts.

Following A Vision

When participants discussed following they directed following behaviours towards a vision:

> When they say something that clicks with you, that's probably the beginning. And you're like, "Okay, I like where this person is going. I'm in agreement." (Lara, staff)

> Why will the organisation get better? Because they are in role? Do I believe that narrative? Do I believe they can improve? Even if I don't believe they can improve it in quite the way they're describing? Do I believe they are a force for good and can improve things? (Barra, staff)

> I think his ideas about the way in which our relationship with the rest of the university might move, I think those are good ideas. And I think he's right about the direction of travel. So yeah, yep, I'm backing him. I don't think I'm following him… I would probably rather think in terms of having a feeling of belonging and a feeling of ownership… understanding what the leader was trying to achieve, and feeling that you've taken part in the discussion about what that ought to be and that you were engaged in the enterprise. And those are all very different from just following. (Sophie, staff).

The concept of following as a journey is sustained throughout these examples, highlighting that following was connected to identifying a vision for the future which one personally believed in. This raises the possibility that following behaviours can be directed towards the vision, initially, and the successor in future. For instance, if Sophie identified delivered success from the successor's ideas, she may be likely to follow him in future. It seems that she has developed a potential follower identity in relation to the successor, choosing as a first step to follow the vision. The use of 'backing' instead of 'following' might imply a desire to reduce the personal risk involved in following someone, perhaps also reflecting the need for trust to grow before a follower identity is claimed. Whereas following something in the literal sense is a considered, intentional behaviour (following a path, following instructions), backing something could be interpreted as showing general acceptance of someone as a potential leader. Additionally, the idea of backing someone suggests a closer relationship in terms of equality: having not seen success from the successor's ideas yet, 'backing' the successor is a way of waiting to see whether the ideas materialise, or whether the successor can prove themselves, therefore gaining the trust of staff. This suggests that following was about waiting to see if another person could be trusted to deliver for the unit.

Caution is needed, then, in describing what specifically is being followed during succession. Successors were not as precise in describing what people followed:

> It's a delicate thing because it's the moment where they will trust you and go with you or not. And when you start to make those changes early on, you're kind of asking if they're coming with you. You never ask them directly but you're saying, "are you on this journey? Are you coming?" And it's a really good feeling when it happens, but it's a nervous one when, because they could

not do, and that's when you know you have more work to do. (Nicola, successor. Emphasis original)

Nicola uses 'journey' here to suggest that staff must leave the past behind ("are you coming?"), portraying following as a behaviour which moves units forward. There is a sense of jeopardy as the successor observes whether they have accrued followers, but there seems little consideration that staff are seeking a sense of identity for themselves in this journey, as the previous participants suggested.

Following Successors as a Route to an Aspired Self

Staff sought development opportunities from successors throughout the succession process. When these opportunities were realised, staff seemed to engage in following behaviours, suggesting that following was transactional and tied to the pursuit of a future self:

> [During Christopher's first interview]
> …the situation that I really didn't want to find myself in was every single x-five costing in the department goes to [Christopher].[13] [Christopher] is the x-five monkey, or the x-five organ grinder, because there's no, there's no great intellectual satisfaction in doing that work. There's no great recognition in the department, and I don't want my career to stall. So, don't make me your x-five monkey.

> [At the end of Christopher's first interview]
> We play to our strengths. We share the budgeting responsibilities between us as appropriate to the bids. So there's no work coming to me that you wish you could tick off in half an hour. Yeah, we did really well.

Staff may feel that they are owed development from successors because of the support they gave them during the transition period (see p. 127). Alternatively, succession stakeholders may see following someone or something as a way of reaching an aspirational identity. Christopher appears to entrust his journey to an aspirational self with any formal superior, suggesting that his perception of leadership is dependent on receiving developmental support. This characterises following as transactional and reciprocal in nature, perhaps also based on a sensation of trust and belief that the successor is not threatening the unit's, or his own, function or success.

When the pursuit of a future self was perceived to be denied, following behaviours were clearly withdrawn:

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[13] X-Five is a data management software used by the participant's university.

> …there was this job advertised which I felt I could easily do… I've been there a number of years. I've got new ideas. I've got ideas on what challenges we are facing, how we can improve that… the feedback I got was horrendous… she said they could only interview five people on the day and that's why they couldn't shortlist me… You know, just take, you know, get yourself familiarised with the ways of working, you know? And be genuine, don't just come and say, "we can only interview five people on the day". That's insulting. (Helen, staff)

Helen had initially been positive about a relationship with the successor, establishing similarity with her in terms of academic qualifications, gender and vision for the unit. Their relationship seemed to be built with referent power. When staff felt that successors withdrew opportunities for progression, the potential follower identity was also withdrawn. Helen's aspired self may also have been similar to that which she perceived the successor might exhibit. When Helen's aspired self becomes out of reach, this self becomes a personal ghost. Douggie has a similar experience when he is denied a secondment opportunity:

> [During first interview]
> One of the things I've picked up about her is that she identifies quick wins quite well. That's not something I'm great at… So I can see, you know, a potentially quite a good synergy there. (Douggie, staff).
>
> [During second interview]
> Her first response was, "I'm really disappointed." And I thought, "That is very different from how I would respond."… I think I feel a bit upset about that… and I don't know…if she's already got over it from her perspective or not. I can't really tell at this point. But it's quite, it's quite business like at the moment. It's actions, actions and ticking them off and getting them done. (Douggie, staff)

Douggie's interest in deferring to and learning from the successor, as well as the positive future working relationship he imagined, suggests that he had accepted the successor as someone he could follow. This portrays following as an exchange which relies on knowing that one could learn from the behaviours and skills of that person, with positive ends for the unit also. This reinforces the earlier argument that following is reciprocal, with staff who use a follower identity seeking growth towards their aspirational self in exchange. When Douggie's opportunity to go on secondment was frowned upon, he seemed to engage with a follower identity far less, as suggested by his delineation between following and simply completing work tasks. Without an opportunity to pursue his future self, Douggie did not feel he was following. His experience also raises the possibility that, rather than engaging in a leader or follower identity, Douggie enters a state of simply fulfilling his role; this challenges

the permanency of either leading or following. This also depicts two identity risks which permeate Douggie's relationship with the successor: the risk of being unable to reach an aspired self and the risk of losing a follower identity as a result.

When successors did offer staff development opportunities, they discussed their actions as their own achievement and of gaining followers:

> Some things that people have written in their annual reviews… changes in attitudes or they felt the office is a more positive environment. There is a person who was thinking of retiring, but now is saying, "I would like to stay on because I'm very excited by the change that you're bringing in. And I want to be part of that. And I want to get caught up in that" … somebody had written a lovely paragraph in their annual review that said, "it was great to hear conversation about professional development" … and it just, you know, they fundamentally wanted to stay there a little bit longer and not actually leave. And I was quite emotional reading that. Because if you can reach out to one person, I was like, "okay, we've started now… I've got this person on board now. It's taken me seven or eight months, but we've gotten there". (Karen, successor)

Although Karen feels she has invited staff to follow her, thus feeling that she controls her sense of being followed, it is possible that she is in fact meeting the expectations of staff. Perhaps they have identified shortcomings in the predecessor's legacy and wish to use succession to shape their own personal future accordingly. This can be seen as the successor compensating for previous suffering, exercising a form of legitimate power, in order to create a sense of equity between herself and staff; and simultaneously a response to the challenges left behind by a predecessor's ghost, as discussed in more detail in Chapter Five. The concept of following as a journey is also reinforced here, with references to the process of learning one another, signalling a journey towards referent power being distributed among a group. This journey also enabled staff to reactivate selves that, though perhaps not yet fully lost, were waning in strength ("and not actually leave").

Following Staff for Knowledge

In the same way that staff followed successors in order to pursue an aspired self, successors felt they could follow staff based on the type of future relationship they saw with staff member(s):

> And he was somebody that I probably could say in even in those first few weeks, say, "what's wrong with so and so?" And he'd say, "do you not mean

why are [she trails off]...?" Because he was managing part of the team with me. We were almost like colleagues, more so than him working for me…But I felt very early on, I trusted him. And I really listened to what he was telling me about the team. And I learned a lot from him… my right-hand man. (Cally, successor)

"Right-hand man" could be an alternative phrase for follower. Cally's sense that she shared ways of working with the staff member enabled her to follow him. This later led to a follower identity within Cally when he shared information which she trusted, for her own gain and for the unit. This suggests that successors also followed staff for knowledge in order to craft their own aspired identity in the unit. The use of "almost like colleagues" is an implicit recognition that the staff member became equal to Cally through information sharing, despite the formal organisational structure. Although deferring to a staff member seemed like a novelty or surprise, a successor is here accepting a staff member as followable and later following them. The extract also suggests that previous following behaviours could be reignited in new relationships, just as Jacqueline used memories of following the predecessor to inform her following of a successor (p. 166).

Staff influenced successors with their unit and institutional knowledge (Chapter Five discusses the implications of knowledge sharing for power dynamics throughout succession). Successors also pursued their own future identity when following staff knowledge:

> And that seems to be one of the core things about being a manager is the listening part. Make sure you take on board everything that everybody saying. (Johnstone, successor)

> I'll just go in and completely open-minded listening **mode** and just try and understand the culture in a department. (Emelie, successor. Emphasis added)

> I've been trying to ask the right questions about what they do and trying to demystify what goes on, which may be obvious to them because they do it every day, but not to me. (Hilda, successor)

Successors positioned these listening modes as designed to benefit staff. It is possible that successors were unfamiliar with follower behaviours and positioned themselves as learning (another proactive alternative to following) to control their identity and exert a sense of ownership over their behaviours in the eyes of staff, and perhaps also the interviewer. Following was tied, again, to the pursuit of an aspired self. Although staff had not had the

opportunity to consider if they were being followed by a successor until the interview, they felt that successors were following their knowledge:

> I don't think I would follow my Head of School. I have a respect for the position that they have, but I don't necessarily do what they tell me, and I don't mean that in a bad way. I just mean that, especially in the case of [successor], she's been there as long as I have, and she's (.) and she's also done this role before. In the case of [predecessor], there were occasions where we could say, "but we haven't done it like this." So, actually, [predecessor] was needing to follow our lead. If we're talking about following, and you know, [successor] will sometimes say, "what have we done" or "what do we do in this case", and you know, so she's following what, what we, what we would normally have done. So, I think there's a role reversal if we talk about hierarchical positions.

> With [predecessor], there was a lot of jumping over to people that are making the bigger decisions, and not actually, you know, taking note of those people who are actually dealing with it on a daily basis. Whereas [successor] does… she'll default to people or, you know, say "here, you do it", that type of thing… [In meetings] she has points where the Director of Teaching gives a report, DoR gives a report, PGT gives a report, you know, that type of thing… And they get to have their say, and she will defer to them during the committee. Asking them questions. She probably does know the answer, but it's not, you know, she gives them their place, if you see what I mean. (Orlaith, staff)

Orlaith establishes herself as on the same level as the successor, expecting that the successor will defer to her knowledge, reinforcing the idea of following as taking a step towards equality. The successor appears to attribute expert power to staff, creating a dynamic where the successor follows staff, staff engage in a leader identity, and as a result respect the successor's own leader identity. Perhaps this evidences the reciprocal nature of following, where the successor attempts to build trust and show that aspired selves can be reached through their appointment. Equally, given that Orlaith feels the successor likely already has the information, the successor may be performing a follower identity. This extract is particularly interesting in showing that there is no formal requirement for any individual in an organisation to follow; even when the successor could be interpreted as leading by giving staff an opportunity to share their opinion, staff interpret this as their own leadership. Here, a follower identity is subject to interpretation, rather than tied to a formal role.

Following People and Ghosts

There was mixed evidence which suggested that individuals followed a specific person, whether staff or successor. Some participants chose elements of another to follow, "I follow

you… that might only be 10% of your behaviour or your overall kind of personality profile… I don't have to follow every part of you." (Barra, staff). This reinforces the earlier argument that following was a voluntary choice, also extending the fleeting nature of following by suggesting that elements of a person that are followed can be distinct and perhaps fickle. Barra may be interpreting following as a process of deciding whether to entrust the unit to the successor. Following was often based on a belief in the ways of working that someone adopted, "I just feel I got the sense that, you know… our values are quite aligned (.) and I remember ending that meeting feeling really relieved." (Sheena, staff). This challenges the notion that following is an automatic, accruable behaviour which can be earned by successors from staff. Instead, Sheena could be interpreted as forming a potential follower identity during the first meeting ("the sense that"), and as a follower at times thereafter when she observes behaviours she feels aligns with these shared values. Referent power held by staff can be identified here, where there is an implicit challenge from staff to a successor to engage with a style that staff value.

Staff support of a successor's assimilation into the role was often interpreted by successors as following, "I didn't really fully understand all the processes, but, you know, I was steering the ship, you know, with them helping me" (Cally, successor). Support was usually through sharing information on the team, "whether you need it or not, I've got all this stuff that can get you up to speed on who the team are" (Barra, staff), and explaining the reasoning behind certain processes, "you have to spend a lot more time, instead of doing things, explaining things" (Bonnie, staff). These displays of support were automatic and centred around maintaining workflows and formal responsibilities, highlighting the informational power staff held. Staff seemed to position this as an obligation and there appeared to be an expectation that successors would heed the information, but it was not clear who or what this obligation was to. Successors interpreted this as an obligation to themselves, "so I now realise that actually, I should have had that expectation on someone else to help me get me set up in that induction with that information" (Lauren, successor). Is this following, or is this additional work incurred by staff who support a successor in their transition? Staff perspectives challenge whether information sharing was following:

> I'd like to see myself as a sort of a trusty supporter, so I'm quite comfortable…
> with the level of the role that I'm at. I don't, and haven't for a number of years,
> aspired to be my boss …I would see myself as a sort of trusty Lieutenant type
> thing… I can be seen as a trusted pair of hands… ask me to do the things they

want me to do, and then in the nicest possible way, leave me to it. (George, staff)

If they didn't know, how much would they need to know to get them up to speed? And even then, if it's a lot, do you give it all in one bit? Or do you kind of, you know, in one go and separate bits and so on, because my, well, I know my role. For anybody who doesn't know it, it can be quite complex. (Colin, staff)

The motivation behind information sharing was a good determinant of following. George's information sharing is a behaviour he engages with regardless of who the successor is and stems from his comfort in the role. Perhaps "lieutenant" implies that George will work as the successor asks, regardless of who it is. If this is the case, he may not be adopting a follower identity because his decision to be a lieutenant is not connected to what a successor is doing, but an attitude he takes generally. Like Paige on p. 101, George may not be following but squiring to ensure a smooth succession process. Although he is not following, he still fulfils his role, reinforcing that following is a voluntary, not formal, requirement. George does not seek an aspired self (at several points in the interview he describes his contentment with his organisational grade and experience), instead relying on his information power to position himself as a useful employee and not someone who crafts a potential follower identity. That there is no formal requirement for staff to follow, and that there is a limit to the scope that formal authorities can enthuse or motivate staff, is reiterated.

There is an interesting conflict in the way Colin describes his support. On delivery of information, the successor would be deferring to Colin, suggesting that it is Colin who is being followed. In his internal debate around the best way to deliver this information, it seems that he is trying to deliver in a way which suits the successor best, suggesting that he is deferring to the successor's preferences. He may be using a follower identity in his efforts to refine his information sharing technique for the successor's benefit, but using a leader identity when he conducts this information sharing and shapes the knowledge of the successor, who uses a follower identity. This highlights the fleeting nature of leading and following.

Douggie and Ronald's extracts help to delineate following and supporting as they specifically sought to tailor how they delivered information to a successor, "literally, just what does she need? And can I help, and sometimes I won't be able to help. But you know, there are things I can do." (Douggie, staff), "in my meetings with her… a lot of my questions… are… "are

you… getting what you need out of this? Do you feel adequately supported?" Hope she does, but… I don't know yet." (Ronald, staff). Ronald and Douggie's consultation with the successor over whether they are providing suitable forms of support can be interpreted as following the successor because they are tied explicitly to the successor's positive experience and success in the post. On the other hand, the successor's reliance on Ronald and Douggie's advice or support can be seen as the successor following them. This suggests that support should be interpreted carefully and reinforces the fleeting nature of leading and following identities among succession stakeholders. The journey of following is also evident here, with Ronald and Douggie observing the current relationship with the successor and envisioning what this could or should look like ("hope she does", "there are things I can do"). The staff members are seeking to refine, over time, the follower identity they enact in relation to the successor; perhaps they are working towards an aspirational follower identity.

In internal succession processes, although a first reading appeared to show staff following a successor, there is an argument that staff were following the previous self enacted by the successor. The lingering successor-former-colleague identity could be interpreted as a personal ghost:

> Whereas with [successor], we were like, really, we were good buddies...I always used to call him mate and I said to him, like, "oh, well I can't really call you mate, because like, you're my boss [now] and I want to respect that." (Susan, staff/successor)

> It's a very, umm, on the level kind of relationship. There's no kind of, "I'm your boss, get this done." We're all working together to get whatever done… it didn't feel like much had changed because we'd always been working together. Other than the fact that they now nip my head on a more regular basis for what's going on [laughs]. (Bonnie, staff)

It is possible that staff interpret the internal successor, who now occupies a higher status in the formal structure, as an equal because they have previously worked from the same formal status. The successor's identity as a colleague may linger as a ghost in the organisation, suggesting that, although an internal successor could feel in control of their new identity, staff were also involved in reactivating previous selves. This raises an interesting possibility that Bonnie is following the memory of her colleague rather than the provisional self he engages with, post-succession. The lingering referent power between an internal successor and staff member (ex-colleague) may mean that previous identities are followed rather than the new formal one. Internal successors appeared ready to move forward with a new, provisional self:

> In terms of developing those two relationships, it was around… resetting a little bit (.) and part of it was that exercise I mentioned, where we just looked at our responsibilities and just made sure that we were each taking care of the right stuff… it would (.3) provide, like, clarity pretty early on, rather than being unsure of who does what… so I think (.) hopefully that will have (.) got us off to a decent start… with some colleagues who I had been line managing before, some people have had real challenges (.) well, [their] wellbeing has been fluctuating. So, with those people, I said, "if you want to carry on, if you want to have any conversations with me", rather than just sort of gifting them entirely to their new line manager. I was happy for them to, yeah, to come, if they want to carry on talking to me. (Angus, successor)

Language like "resetting" is illustrative of a successor attempting to place a discarded self to one side and encouraging staff to do the same with the version of his self they held. It may also convey the end of one following journey (leaving behind the identity he held that was followed and the follower identities that went with it) and attempting to begin another following journey within a different formal post ("off to a decent start"). There is an implicit recognition by Angus of the impracticalities of doing this when he offers to continue supporting someone he is no longer responsible for, suggesting that Angus' personal ghost from his previous role could be discarded for most situations but reactivated with certain individuals. This suggests that a single follower identity may be confined within relationships: one version of a follower identity is directed at an individual and is re-evaluated throughout the relationship, discarded with, say, a change in role, and a ghostly version of this identity reactivated later. At the same time, Angus' ex-staff member may be developing a follower identity in relation to Angus' successor. The discussion of a successor, Paul, on p. 150 provides a more in-depth consideration of internal successors' ghostly and human presence, positioning this example within a discussion on liminality.

"I was steering the ship… with them helping me": Cally's Following Journey

The last section of this chapter pulls together the arguments made in the preceding sections. Cally's experience of succession exemplifies the engagement with a following journey. Cally's vignette highlights the pressure felt by successors to assert a leader identity and have it accepted by subsequent followers but juxtaposes this with the realities of the following journey in which staff and successors negotiate where leader and follower identities are distributed. Cally's discomfort with the temporary nature of following highlights how the mythology of followership to date has prevented practitioners from meaningfully engaging with the concept and understanding the multiple directions that a following journey can take.

So there was an incident fairly early on… there was two of my officers who sit within the senior part of my teams… So, you hope that your officers are going to be the first people that got your back. You know, [they are] the people that are in your clique, really, aren't they? Because they, they come up through the ranks and… so, you expect them to behave quite professionally, I suppose. And there was a, an incident where… there had been some interaction on Teams, a Teams chat. And I'd been implementing some new guidance for English language. I hadn't written the paper. It'd been written before (.) but I was putting this paper that had gone through the strategic team into action. So, there were some changes, some of which, of course, they didn't agree with, which is fairly normal. And they don't very often get consulted on these things, either… and I can't remember exactly what was said [on the Teams chat], but there was this sort of, umm, you know, "somebody needs to get this sorted" type thing. There's that sort of quite unprofessional language, I suppose being used (.) and of course, I knew that somebody was probably me… And I don't think in hindsight I was supposed to see that chat. I think somebody tagged me in something and then I saw the history and I thought, "whoa, whoa, what's been going on here?" That was the first thing. And then I also had one of my officers, around about the same time, go, as I would describe it over my head, not to my manager, but to the manager above, to complain about something and copied me in. I thought, "Oh, hold on a minute, surely, there's a, there's a, there's a way to do this."

…for me, there was some professional boundaries there being overstepped. And I, I've got to admit Sam I, you know, I was quite worried about it for a couple of days thinking, "How do I deal with this?" Because, you know, I, if I don't deal with the two things that happen quite quickly together, but if I don't deal with it quickly, I'm not, I may never have that presence within the team that I need, you know, if I'm not seen to be addressing behaviour, which, for me as a manager is unprofessional… as it happened, I spoke to the two individuals together, you know, which was quite fortunate (.) because they were both in the shit [laughs], but you know what I mean. I was cheesed off with both of them… I got them together and sort of said, "Look, there's a few things that I'm picking up. Can we just talk this through?"… I can't even remember exactly when the conversation was. Probably still got the notes, you know, because I would have been worried about it (.) but I addressed it quite early on.

And actually, again, in hindsight, I think that was a good thing, because quite early on they got the mustard of me, you know, and they understood that this was different. This was different to my predecessor, and I was different. I think at that point, they'd had enough dealing with me to know that I was kind, empathetic, you know, I'd been, I'd had, I'd been there probably 8, 10 weeks. So they'd seen me doing all the running the regular meetings, getting people together, consulting, they'd seen enough of me to know, "well, actually, she is a nice person", if that's the right way [to describe it], "she is a fair, kind, decent manager, but she has a line"… And that, interestingly, one of the one of the latest I spoke to she messaged me after we had the conversation to actually apologise, which was interesting. And I think because I used words like, "I didn't find it to be very professional", I focused on that professionalism within the role.

So I did feel as though they were taking me in, I could feel that. And some of them, it was more obvious how, you know, it was more obvious that they were doing it, it was a little bit

> more sort of sitting back and observing me. But equally, I do think that, you know, they say behaviour breeds behaviour as I was doing all this, you know, friendly, chatty, you know, telling them that, you know, you can tell already, I'm a storyteller. I tell little stories about this, a little bit of that, and just lightening up the meetings, I think that they then relaxed, and they, they behaved in that way themselves. It was okay, I gave them a ticket that said, "this can be relaxed and you can get to know me in this way (.) we'll, we'll be all right. We'll get through it."

Desire to be Followed

Alongside her reliance on staff for knowledge, Cally also wishes to be accepted by staff as someone they can follow. Her use of "I may never have that presence" suggests that she implicitly recognised that she had been following her staff, but that she felt a pressure to lead after the initial transition period. When her staff withdrew their acceptance of Cally as followable by going over her head and sending the messages in the Teams chat, Cally felt she had to claim this back by differentiating herself from the predecessor and establishing her style as something they could follow, "they got the mustard of me". Perhaps the formal structure creates a pressure on successors to engage with what they interpret to be leading behaviours, even if the natural instinct should be for successors to follow during the early part of the transition.

Cally's desire to be followed is also identifiable when she refers to feeling that her staff know her behaviour. She uses her knowledge of staff memories of the predecessor to differentiate her approach to work, providing an image of a future relationship (see Chapter Five for greater detail on the importance of the predecessor in this respect, as well as the role staff have in enabling this to happen). In this way she is activating the predecessor's ghost for staff who did not enjoy the previous style, providing them with a route to their aspired self. In turn, this may allow Cally to feel closer to reaching her aspired self and discarding of the predecessor's ghost.

Temporarily Following

Cally's following journey is complex because of the fluctuation of leading and following identities in the unit. She restrains her admission that she is following staff knowledge:

> Although they seemed, they quite liked the fact that I was sort of, you know, taking the helm and sort of, you know, tried to make decisions (.) and sometimes it was difficult, because I mean, you know, it was like I didn't really fully understand all the processes, but, you know, I was steering the ship, you know, with them helping me. They were sort of saying, "you need to be in with

them. They're a good person." You know, she was giving me a few little pointers. Or, dare I say, "you need to be careful of them". (Cally, successor)

Cally relied on the knowledge of staff to be able to make sensible decisions and claims a follower identity in doing so. Nicola also experienced this on two occasions, "I decided not to [take over a project] because there were two really competent people working on it, so I would just step in if there were problems", "I'm quite comfortable with asserting my position as the Director… it's totally fine to say, 'I've still got a lot to learn, I don't know about these things'. There's that weird old cliché that the boss needs to know everything." (Nicola, successor). Through reliance on staff knowledge, successors activate a follower identity and navigate the same process of accepting staff members as followable by evaluating how far they can trust the guidance given. This was also important to do in order to show a respect for the expert power among staff, developed during extended careers:

> where I know something that [successor] doesn't … it's very easy for it to become just gossipy or to overreach. And you have to be very alert to not doing that. And I will say, "…I do know for a fact that he's going to be teaching intensively next term… so if you want to catch him, this is the window of the year in which you're actually going to get his bandwidth on this." (Christopher, staff)

This suggests that successors entering knowledge intensive sectors, or those sectors with long tenure staff, may be required to respect expert power more clearly. Information delivery from staff enables successors to become integrated within a complicated network. This further evidences how staff convert their existing social capital into expert power. The tacit information sharing seems to have no end date given the specific circumstances in which most of the information would be required.

Cally then withdraws from followership behaviours when she feels that the team have chosen her superior as a leader instead, highlighting an unfamiliarity with the idea that multiple people or things can be followed at the same time. After both Cally and staff demonstrated vulnerability in their relationship, further observations led to a re-acceptance of Cally, shown in the last paragraph of the vignette. Perhaps the use of "ticket" is an invitation to staff to begin to show following behaviours, also reinforcing the journey ideology by demarcating where a following journey begins. The mutuality of following is also emphasised through Cally's use of "we"; this suggests that, after the turning point of the Teams incident, both Cally and her staff had to learn to re-engage in following behaviours. Understanding how people become accepted as followable enables clearer precision in identifying following.

Conclusion

This chapter has given an empirical understanding of followers and following in the context of succession. It presented the varied engagement with 'follower' and 'following' as well as the differences between staff and successor interpretations. The chapter presented follower identities as fleeting, engaged with voluntarily and often retrospectively, and within the confines of a relationship with another person (alive, aspired or ghostly) or vision. This chapter has also deliberately highlighted the possibility of a successor engaging with a follower identity, reinforcing that there is no *formal* obligation to lead or follow based on one's organisational grade. The next chapter extends this by arguing that, in addition to successors exhibiting a follower identity, staff mould successors' experiences of succession.

Chapter Five: Florence's "Unofficial Leader Things": How Staff Mould the Succession Experience

Introduction

This chapter shows how staff behaviours during succession were sources of identity work for successors. It demonstrates the varied contexts and experiences of succession which justify an interpretive methodology. First, this chapter establishes the parameters of succession, presenting attitudes towards the change process, proposing that succession is best conceptualised as an unfolding process. Then, the chapter presents proactive staff behaviours which shape the actions, decisions and identity work of a successor. The third section shows how ghosts interact with succession stakeholders, again shaping the successor's experience and identity work, and creating a sense of liminality for successors. Chapter Six elaborates on the impacts of ghosts and liminality for staff.

Sensemaking Succession

This section presents participant interpretations of succession. It highlights that, despite the vast succession planning literature presented in Chapter Two, universities do not engage in appropriate succession planning. It suggests that succession is a process which staff, successors and predecessors contribute to and which unfolds from prior to a succession announcement and beyond an appointment.

Unfamiliarity with Succession

Some participants had not heard the term succession used in universities before, "I've honestly, never, yeah, heard that being used." (Doreen, staff). Many knew of the term from employment elsewhere, "That's something that's still really, really alien, within the HE sector, I think, at least at this university anyway." (Jimmy, successor). As with interpretations of following, participants then made guesses about what good experiences of succession looked like, "Grooming a little buddy to take over what they are undertaking at that point, so that they know that their objective is still going to be preserved later on down the line." (Jules, staff). Like Jules, most associated succession with talent management. At the end of some interviews, several participants expressed surprise that they had so much relevant experience to share.

Participants of all backgrounds – long-term HE employees or those from a corporate background, as well as different genders and staff/successor types – agreed that there was a lack of succession planning in universities, "But inevitably it has sort of come about as a surprise and the arrangements to succeed those individuals have felt rushed. A little bit ad hoc." (Steve, successor). For some universities this was due to a lack of skill, "…don't even get me started around succession planning. We are shit at it." (Alan, successor). Other participants believed succession planning was simply not a priority, "I think there was an optimistic notion of [a succession plan] that never actually materialised." (Florence, staff). Some saw engagement with succession planning as disingenuous or weak, "the only succession conversation is literally the director saying, 'where there is loss, there's opportunity' [laughs]. But he won't have a clue what that looks like." (Caitlin, staff). This suggests that there is a general unpreparedness for and unfamiliarity with processes surrounding succession. This may have increased the intensity of the experiences presented throughout the findings chapters.

In place of a succession plan, work was often absorbed by existing staff or other teams, "their team has been distributed amongst all the other directors. A bit like, you know, the sort of spoils almost. They were eaten… their store of goodies have been separated out to everyone else." (Douggie, staff). "Goodies" portrays succession as reshuffling resources among organisational actors, elaborated further on p. 131. This caused uncertainty and frustration, "you have to think like, what are senior management thinking when they're letting us be subject to this uncertainty for so long? And why don't they promote from within?" (Sandy, staff). This frustration was exacerbated by the high number of external successors in universities, which participants interpreted as a devaluation of their expertise, "there is this…bias against internal candidates… feeling that the top person for this role COULDN'T be in the next corridor. They must be somewhere in the world, yet to be found." (Philip, staff. Emphasis original). It may be that a lack of internal progression opportunities also precludes employees from pursuing an aspired self. The lack of concrete progression opportunities for professional staff may influence the identity experimentation presented in Chapter Six. The ad-hoc nature of responding to a succession announcement generated an environment in which staff take a key role in shaping the experience, knowledge and identities of a successor.

Succession as a Process

Participants reported elements of succession which positioned it as an unfolding transition, challenging the idea of succession as a distinct HR process. One related to the pausing of decision-making after succession was announced, "there's a lot of work on hold, which has been quite frustrating." (Agnes, staff), accompanied by uncertainty over how to interact with a superior who was soon to be a predecessor, "we all thought, 'at what point does he leave and are we just sort of left spinning the plates a bit?'" (Andrew, successor). This suggests that, at the announcement of succession, staff almost immediately looked to the future where they could regain control over their work outputs. Perhaps this is where a succession and a new following journey begin to run in parallel to one another. This was confirmed by Kirsteen who decided to leave her post and then changed her mind as a result of a new director in her unit:

> I've had some people that have just gone "okay, we don't need to meet with you now (.) because you're gone." You think, "we've still got three months." And for my areas, that's a whole term. And certainly some of my managers when I advised them I'm staying, I'm pleased to say most were very happy. But you could see one or two have thought, "Oh, I've now actually got to do that thing that you've asked me for." (Kirsteen, staff/successor)

This characterises succession as a process of mentally adjusting to others' career decisions. Although it notes practical work implications, Kirsteen's extract does not consider that, after her decision to stay, staff members had to reengage with Kirsteen as a potential leader rather than as a ghost. Sometimes this adjustment started with a sense that someone may leave, "we had a bit of a (.) feeling or expectation that they may be leaving." (Andrew, successor). This suggests a greater mental adjustment to succession than practical preparation.

Some predecessors disengaged from their formal responsibilities as soon as their exit was announced:

> And I remember saying to her, "I feel like [line manager] has checked out." Because… there was one meeting I had with him in person where he actually said to me, "Do I need a pen for this?" And, and I was like, "Well, if you can't even be bothered to get a pen for my one to one, then you definitely have, your minds just not, your brain is not in the room". (Caitlin, staff)

> I was like, "you're not doing it. You're leaving." [Laughs] 'cause at this point he was leaving. I was like, "you've left, you've exited this space now." I will do this because I'm not having you jeopardise our culture and what we have

worked so hard to do. To be fair, he took that on the chin and realised he couldn't do it 'cause he wasn't in the right space to do it. (Joanne, successor)

Successors and predecessors appeared to engage in identity work before formal appointment procedures took place, changing the nature of succession to that of a process rather than a distinct event. The processual nature of succession clearly extended beyond the appointment of a successor too, "if you get told enough times in the lead up to starting a new job, 'it's okay, there's no immediate crisis', you know there's a problem. You just know it's a slow, burning, bad problem instead of a crisis." (Nicola, successor). Temporally, then, succession is best explored over time and with consideration for the way that organisational histories shape the general succession context. This is particularly relevant in the presentation of Ursa's experience of succession as navigating inheritance through the influence of staff (see p. 141).

Tensions over Identity Control

Successors seemed to suggest that succession was a defined time period for them to assert a controlled identity. They felt that this would attract or draw followers towards them, "it is something that's really important to me that you set quite early on that you're, you know, a warm, authentic, straightforward person" (Catherine, successor), "as an incoming leader you're trying to establish yourself as someone the team wants to follow and engage with and be led by" (Nicola, successor). Although a sense of control is implied, extending the argument that successors desired followers, successors gauged the existence of their leader identity through staff responses to decisions:

> I've had to make some calls on the annual budget forecast while [CFO] was on holiday, and everyone was fine for me to make that call. So, quite clearly they were happy for me to make that decision and stand by it… So, in that respect, the respect is there now. (Camilla, successor)

> But there's also a caveat here that, uh, [Steve] is still finding his feet a bit [laughs]… I have gut instinct but I'm not always sure my instinct is right. So, this is a great opportunity to have the capacity to make decisions and to make good decisions. So that is a little bit about finding my feet actually. (Steve, successor)

The extracts imply that a successor earns a permanent leader identity which cannot be revoked and that this leader identity is waiting for the successor. Neither successor recognised their reliance on staff accepting their decisions as legitimate, suggesting that there is a false sense of ownership of identity by successors. The reliance on staff acceptance is clear when it

is not given to Ursa, "they weren't really convinced that I was the alpha and it was hard for them to relax (.) and I wasn't convinced myself that I was the alpha." (Ursa, successor). The use of "alpha" is also interesting in that it implies that whilst Ursa held a beta identity, someone else held the alpha identity. The vignette discussing Ursa on p. 141 suggests that this "alpha" identity was held by the predecessor's ghost. Although successors did not explicitly recognise staff contributions to their identity, given that they gauged staff perspectives of decisions, successors may reshape their identity with each decision. This characterises successor identities as being precariously constructed, and continuously so, even if successors spoke about pursuing a final identity.

Successors also perceived recruitment of staff to be an opportunity to assert a crafted, controllable identity, "we made a further two appointments… I really have got a team that, I feel like, yeah, I've bought in, and we've got the same kind of attitude to work." (Emelie, successor). Successors felt similarity with staff they recruited, perhaps subconsciously selecting a candidate that they felt in alignment with if they had not yet been able to find alignment in their inherited team, "the good thing about her in particular is that I know about her previous experience. I know the way she'll think about certain things. Whereas coming into new people, managing new people, is a bit different" (Leo, successor). Successors appear to have been pursuing a future social identity for the group in selecting new staff, perhaps trying to achieve their own sense of belonging.

Although successors felt that recruitment was within their control, the focus on their own control overlooked the career changes which staff felt they could make given the opportunism of succession, "this department is on a bit of a journey… some people want off the bus… we were able to able to then begin hiring people who, you know, did want to work in there." (Toby, successor). By leaving and enabling a successor to recruit new staff, staff allow a successor to craft a new identity in the eyes of new employees. That Toby perceives this as a challenge suggests that successors use staff decisions as sources of identity work; that staff look to succession as an opportunity to leave or work towards an aspired self suggests that staff also use succession as an arena for identity work. In this vein, following sections challenge the sense of control which successors presented over their identities, highlighting how staff and predecessors can be perceived as sources of identity work for the successor.

Navigating Staff Actions in Succession

This section shows how staff behaviours shaped the perceptions, knowledge and actions of successors. It positions staff as holding a key role in shaping the experience of successors.

Florence: "Not Managing Her too Much": Proactive Staff Behaviours

This section introduces proactive staff behaviours which convey the influence staff have over successors. Proactive behaviours, including sharing knowledge and power claims, shape the successor's experience of succession and influence the actions taken by the successor. Successors followed staff as a result of this influence in many cases, highlighting the distribution of leading and following identities in succession. The section concludes by showing how staff used the interview to make sense of their influence over successors.

Vignette 3: Florence's Active Behaviours

My experience with [successor] was like, mostly just relief that we had somebody to start like offloading things to and I liked her well enough, but I didn't yet trust her (.) I think is probably the right word… 'Cause, I think I was being very careful about not managing her too much [laughs] because with being that, that person who's like the font of knowledge in the team, emm, I was trying really hard to, like, not overdo it and like to answer her questions rather than like telling her all the things that she doesn't know.

That's another part I suppose of this like unofficial [laughs] leader thing. So, yeah, I was on the panel for her interview and met her then (.) and then I think we managed to get one or two days, training her in person… I am an expert in what I do, emm, and regardless of my title, like people do still, you know, kind of, yeah, have that respect that, you know, I know what I'm talking about. And, and, and yeah, I've always really enjoyed that, that aspect of it.

I mean, it was a bit different for [successor] coming in because she had to just jump straight into this firefighting… it's kind of good because she's been able to, to learn a little bit more in the background and absorb kind of who we are, as a team and what we do. I'm hoping, and she's said that she's hoping as well, that we can just, like get, like, become a bit more process driven, or, you know, like, just have a bit more of a process for everything, rather than, rather than it being so reactive (.) and everybody just kind of, like, yeah, fighting whatever fires there are to fight… I'm hoping that that will happen. (.) and that that will be a good change for everybody. It was, it's been something that we've talked about the whole time that we've been there.

But [predecessor], she neither wanted to set [processes] up for herself nor, like, take anybody else's way of doing it… So, so yeah, so we've desperately needed it all this time…. by that point we had all become so convinced by the idea that as soon as [successor] came in, we were like, "we need this" [laughs]. And she was like, "Well, yeah, okay, that's great. But like, I've got more important things to do at the moment." And so,

so, yeah, I'm quite keen to see how that happens… She was very good at telling us what she was doing… agreeing that things were important, but explaining why they weren't urgent. I think because she did launch in, em, to a couple of things that were really pressing, that we did need, and, and kind of get hands on enough at the start, that it made us convinced that she would get to it.

… it's definitely not something I really thought about in terms of like the opportunity existing… the other centre that I mentioned in [other city], they have the same structure except they've also got a deputy manager… she basically does what I do. That sounds quite shiny now that I think about it… so that's kind of what I'm thinking now. But yeah, I never would have thought about it really until [successor] started… I realised that what she actually said was… that I should get a promotion… That kind of made me think about it a lot more. Because, because, yeah, up until that point, I had been doing the extras, but I'm like, a little bit resentful about them… So yes, I think having a bit of a shuffle in the team has made that feel like much less of a burden and like something that is actually an option.

[Predecessor] would [present financial information in a certain way] but not understand what he was doing and not communicate that that was why he was doing it. And [colleague] and I are both the same that we're like, we want to know what the facts are. But [colleague] gets really passionately angry like if the facts are misrepresented. So she just took it to be that like [predecessor] was blatantly lying to everyone. So, so yeah [successor] coming into that … she just was able to figure out what had been going on for the past 10 years and suddenly explained it to [colleague] in a way that she, she understood and could accept, which I think was a was a really big load off her shoulders.

Sharing Knowledge

Staff had a wealth of knowledge to share with a successor. When they did, they were usually trying to influence the successor's approach and the values they deemed important. This was different from simply sharing information about roles or responsibilities in that knowledge shared was usually accompanied by a staff member's personal recommendation for the successor to act on:

> …but the persuasion aspect of it is usually (.) just a case of okay, "this is my experience of how we've done this in the past. This is how it's worked. This is how it hasn't worked. My experience is telling me that we should go down this path, emm, and that's the option that I would strongly recommend. If you go for option B, this is the impact it might have, but it is available." (Bonnie, staff)

In Florence's vignette, she perceives knowledge sharing as enabling her to manage the successor, suggesting that the succession context challenges the traditional assumption of leaders being formal superiors and followers being subordinates. Word choices like "persuasion" and "expert" suggest that staff felt a sense of control over the perceptions and plans of a successor, therefore taking on a self grounded in expert power. Successors felt that

they were placed in a position of watching and learning as information about existing cultures and practices was shared:

> When I came in, there was a, there was a lot of mantras about high performing teams and how you deal with high performing teams, and how you look after high performing teams. So, there was a, there was an expectation, I think, a little bit of how, I think initially, how I might fit into the mantra they've been kind of working towards, and I was quite happy to kind of sit back and, and kind of hear it all and work through it with them. But it was, I found that a little bit startling, umm… I think the expectation was that… I would just be well versed in the approach they were already doing… that approach to leadership was different than mine, I guess, slightly… I kept going with it actually…. But it was interesting that I think though we were slowly moving away, we were still maybe using the approach but less of the language and the jargon because I think they'd got quite caught up in the jargon without stopping to think about what it was that they were trying to do. So, I think that may have naturally died. (Fiona, successor)

Shared knowledge could be a socialisation process established by staff members, who became gatekeepers in protecting elements of culture or work they felt ownership over. In Fiona's extract, it seems that this socialisation has a natural end point where the successor becomes trusted to implement a variation of the same culture. This suggests that, during the initial transition period, staff equip the successor with information to complete their role and informally take responsibility for initiatives from the past. There is a possibility that staff become transformational leaders by imparting knowledge onto the successor, later becoming followers when staff can see that identity changes have taken place within the successor. It is also possible that Fiona was engaging with a follower identity to demonstrate her respect for existing processes and enable her to continue learning the unit. Although Fiona seems to suggest that she was coerced into keeping existing processes, she may have narrated it this way to hide a follower identity because of her formal authority. That she follows the expertise of staff also reinforces Chapter Four's argument that follower identities were tied to an aspired self – one she hoped staff would trust to implement change. Some participants seemed to feel compelled to share tacit knowledge, aligning with Florence's eagerness to offload to the successor:

> I am there as an expert, or one of a number of experts. That's why I'm sitting in that meeting. And therefore, if I'm not saying, you know, to the [successor] or whoever, then I'm not actually doing my job… you can ignore it. Absolutely. But I at least need to say it to you, and then you can choose to ignore it rather than me (.) not even giving you the option of doing that. (George, staff)

Information sharing may stem from the knowledge-rich culture in HE, "HE kind of relies on people being… a bit more empowered as individuals because their knowledge and their expertise is valued in a different way. So, they're not just there to perform a task." (Catherine, successor). External successors especially were expected to respond favourably to shared knowledge, "[successor] has to be sort of brought up to all the university ways, which are quite different to the private sector" (Fingall, staff). The number of external appointments in universities made staff doubt whether their knowledge was truly valued, "people's expertise isn't actually valued… they've built up all that very sector specific knowledge. System specific knowledge… they've embedded themselves [in the institution]." (Celine, successor). It is possible that, given the changes implied by succession and the uncertainty which a lack of succession planning creates, staff share knowledge to successors to reinforce their own sense of contribution and sense of self within their team. Rather than, as Isla does (see p. 148), threaten a successor's identity through perceived sabotage, those who shared knowledge did this to reassert their own value, also providing a successor with information that would allow them to renegotiate their working identity.

When successors did not respond favourably to knowledge sharing, staff often felt disrespected and referred to a breakdown in their relationship:

> He didn't really understand… why I was reporting to him, didn't really want to understand… He hadn't worked in a University. And I think that became blindingly obvious that he just didn't understand some of the crucial things and the way to get things done… And I think… there's a lot of consultation that has to happen… You have to talk, you have to discuss, you have to win over… I don't think he really appreciated how much you have to do that… that was the way it was. And we all knew that. And we were used to working in that way. And we knew how things had to be done. And he just didn't pick up on it… and then he didn't navigate it. (Adele, staff)

It may be that sharing information, including around the nuances of working in a university, is a way for staff to build a relationship with the successor. Adele may also have been sharing information with the successor to transform his successor identity into that of a University professional, rather than as someone external, though it seems that this is rejected. Sharing knowledge also enabled the successor to build relationships with others throughout the unit or institution, suggesting that staff were creating an environment for the successor to craft their identity in. Whilst Chapter Four argued that succession stakeholders followed knowledge to pursue an aspired identity, this chapter illustrates who and what successors follow to achieve this identity and the risks of not doing so.

Staff Power Claims

Staff frequently made explicit or implicit claims for power from a successor, which reinforces the depiction of succession as a process of reshuffling resources, implied by Douggie on p. 122. Whereas some participants did seem to, quite politely, suggest that a change should be considered, other participants made explicit claims for change which they justified as beneficial for the unit, disguising the possible interpretation of these claims as challenges or demands. This sub-section shows how power claims relate to the pursuit of aspired selves and shape the successor experience.

The claims which, in Vignette 3, Florence made were manifestations of her expert and informational power, which were acknowledged by the team and contributed to her pursuit of an aspired leader identity. Later in the vignette, there is also evidence of legitimate reciprocal power when the successor offers a formal promotion to Florence. Though this may not have been Florence's goal, it highlights how hidden demands for change could be a gateway to an aspired self, whilst also shaping the immediate staffing priorities of a successor. Looking at claims made by staff extends the argument that successors follow staff during succession, emphasising the existence of leading and following identities across different formal roles, and suggesting that leadership succession has expert and informational power embedded within it.

The immediacy with which Florence approaches the successor with claims for change suggests that the successor is perceived as a resource for reorganising elements of work and giving staff additional influence. Successors reported that this could be done on behalf of a group, as Florence did, or for one's own gain, with Nicola, a successor, referring to power claims as "shopping lists". The presence of the predecessor's ghost also interacted with these power claims:

> I've had two or three members of staff who either kind of wanted to reopen old wounds and… hope to redress some situations, which I think, hopefully, very wisely, you know, taking those conversations in positively but… making sure that they know that I'm not going to make any swift and rash decisions. I need to actually understand what the history behind, you know, a previous offence might have been… those kind of things which… from one conversation invokes you know, six other conversations to understand what the hell this person is complaining about. (Iain, successor)

Staff clearly saw succession as an opportunity to revisit previous grievances and gain a fresh perspective on what they perceived to be unresolved issues. Staff want to moderate the successor's view of the past and, if given a chance, mobilise the successor's fresh, legitimate power to achieve change. This characterises a successor almost as a resource for making changes or asserting expert authority. Iain's extract shows how claims could be implicit, perhaps a challenge hidden by relationship building. For instance, Iain conveys a sense of feeling pressured to resolve previous issues and a tension in refraining from action. It is possible that Iain is also on a following journey in which he follows the histories he is surrounded by, whilst staff consider his authority to act (in other areas of the university) as automatic and something they can profit from.

The consideration of power claims made by staff adds an alternative interpretation to Christopher's extract in Chapter Four (p. 108). In his second interview, he shares:

> It's actually something I'm going to have to confront if I stay here is that I'm going to have to make sure that I'm a little bit more proactive about **carving out opportunities for myself**. 'Cause otherwise, you know, there are things that could happen, but won't because I don't talk myself up and take the opportunity (.) and that just is something about shifting to grade six and is part of the reason I want to move into something which is more of a technical area. People just sort of feed you work as somebody with expertise, and there's a steady stream of it that comes through rather than the sort of grade seven position where you are expected to, where there's more of an expectation on you to make things happen. To set your own agenda because I don't think it really suits my personality type. So that changes the nature of followership a little bit because it's still a managing up thing. But now, when you're managing up, you have to be more aware of what you want to take for yourself. (Christopher, staff. Emphasis added)

There is a connection between Christopher feeling unable to achieve his aspirational self ("I don't talk myself up") and a recognition that, in order to reach his aspirational self, he needs to use a combination of different powers. For instance, he needs to utilise the successor's legitimate power by "managing up" and requesting work which he feels develops him; equally, he needs to use his expert power to guide his workload and job search. This suggests that the development opportunities that he seeks from the successor in Chapter Four could also be interpreted as staff members viewing successors as a resource from which they can fulfil their own demands for work and for their career. The term 'carving out' reinforces this, illustrating that staff members feel a need to mark their authority and work towards aspired

selves during succession. Possibly this evidences a feeling of pressure to make progress with one's own career, having observed the successor reach closer to their own aspired self.

Some staff appeared to have unintentionally gained power during succession processes, which they quickly wanted to return:

> I had no line manager… she left me with pretty much nothing to do… But yeah, I just end up creating work for myself… It took almost six months or something before we got to that point, but [successor] came in and I said "Look, I built this without anyone's say so but because it needed built… now I'm in a position where I'm managing it and I don't think I should be." (Victoria, staff)

This suggests that active behaviours may be more prominent in sectors where succession planning is lacking. Without appropriate line management, Victoria found informal power to make decisions – perhaps because of a lack of hierarchy enforced by a formal successor – which becomes uncomfortable to hold when the hierarchy is reinforced by a successor's appointment. The additional responsibility for the project may not have aligned with Victoria's view of an aspired self. This is not, then, a claim for fresh power but evidence of an unexpected power claim. The extract also demonstrates the interaction between staff behaving opportunistically to make change during succession and the rearranged distribution of power across the organisational hierarchy.

Other staff felt that their own power had been challenged by the successor's arrival, particularly if they had been unsuccessful in applying for the successor's role:

Vignette 4: Richard's Team Member's Lost Identity

[During Richard's first interview]
[Team member], who applied for [my] role umm, and who has been working as part of that team for a good number of years, he was very clear with me from the start umm that (.) he felt as though he was better placed to take the job forward… he made it clear to me that he would have expected someone to come into the role that had [unit function] experience, something I absolutely didn't have, and I was very clear at the offset with the team and with uhh the interview panel I don't have that experience but what I can promise you is that I'll learn quickly… that I'd been brought in as a fresh pair of eyes… he's been a constant thorn.

It came to [staff member to introduce himself during an introductory meeting] and [laughs] I knew the disengagement within like, 10 seconds, because he started speaking [for] 47 seconds with his microphone off… And that is with (.) me AND [colleague] at various points telling him the microphone was off. Not only that, he was sitting bordering on

horizontal in his seat. Not making any eye contact with anyone [laughs]. So, so, I, I, I, I noted down, "[staff member], challenge."

Four months in he's still talking about looking for another job so (.) when he initially told me that (.) <sighs> maybe I was cheeky, I stand by it, but I did offer to help him with his CV… and then I asked what his strengths and weaknesses were. Well, Sam, the answer I got back was "I don't know"… so I said to him, "[Staff member], you've had previous management experience haven't you?" and he said, "yes, [Richard], I have yeah" and so I said, "so, you've either given me a really cheeky answer or you genuinely don't know your strengths and weaknesses, which for me is a concern." … So, I asked him to do a SWOT analysis on on on-

Sam Ross: On himself?

Richard: Yeah, uhh, the strengths finder and other things I didn't want to go down that route with him, so he submitted [the SWOT] along with a bit of an apology. I say a bit of an apology, he didn't say sorry, but he did say that he didn't come across in the way he wanted.

[During Richard's second interview]
Richard: I asked him to do a SWOT analysis on himself and that's not, that, that was not the right approach at the time. I don't know what possessed me to do that. Emm, I should have asked him to do strengths finder and I did say that to [permanent successor] when she came in… and I said that to [staff member] as well.

This could be interpreted as a failed claim of expert power through the staff member's unsuccessful application. Additionally, it is a failed attempt to pursue an aspired self, similar to Douggie's experience on p. 109, showing how lost selves can prevent the emergence of follower identities. There is a sense of the pressure of choosing to follow or be 'on board' with a successor being lifted when the permanent successor arrives. This may illustrate a feeling of increased pressure to overcome failure, build trust and pursue an aspired self during a secondment, like an identity pressure cooker. Perhaps Richard's willingness to admit to the team member that he regretted a decision enabled the team member to feel comfort with his own failures in the unit, possibly mourning the personal ghost who emerged during his unsuccessful application. Richard's fulfilment of the secondment may have appeared as an identity threat to the staff member, who viewed Richard as wearing the clothes of his personal ghost (the aspired self). Although Richard's extract is useful for showing how power claims can manifest as challenges, it is also beneficial in connecting the arguments made here with the use of succession as an arena for pursuing future selves and mourning lost selves.

Successors often used staff power claims as an opportunity to respond and subsequently assert a leader identity:

> It was so interesting coming in, and just like watching people, like, lobby you to be on their side. You know, having just, you know, "can I just have a kind of quick, quiet word?" It happens all the time… It's been little things like someone emailed me and said, "it doesn't work for me. I don't like how this thing's going around to everybody. It's on the wrong list. You know, can we do something about this?" So, I did something about it and got to change it. (Catherine, successor)

Despite recognising the influence attempts (and successes) of staff through the use of "lobby", Catherine focuses on her ability to satisfy a request and uses this to justify her leader identity. In Vignette 3, Florence and her colleagues make claims for new processes or express unhappiness with how financial information was presented: if the successor satisfies the claim, the successor enacts a follower identity and Florence a leader identity. The last paragraph of Florence's vignette also suggests that staff use these power claims to evaluate whether they could form a potential follower identity for future use. When a claim for change is recognised, Florence has led the successor and thereafter is more likely to accept *the successor* as a leader in future. This suggests that following occurs before leading, demonstrates the distribution of leader and follower identities among succession stakeholders, and also demarcates the role of power in distributing these identities.

Successors interpreted such power claims as a way of gaining followers, "I paid a lot of attention to making sure that the role she had was one that she would most enjoy, whereas my predecessor didn't bother with that… I knew it was the key to having her on board" (Emelie, successor). This was supported by an internal successor, "Last couple of years, she has felt her voice was not heard…. I think she was right… we've given her that voice, or I've given her that voice… I think she feels much more included." (Margaret, successor). Each of these successors takes ownership of their response to the request, but none consider that their success in tackling these issues is dependent on staff expert power and staff approval of subsequent action. Although staff were intentional in making power claims, just as Chapter Four suggested that Karen took credit for staff development, successors interpreted their response as a self-made success. This suggests that the identity experimentation and power of staff were overlooked by successors.

The preceding section has suggested that staff who share knowledge or make power claims were exercising influence over a successor. However, participants rarely took ownership of this influence, often using metaphors or alternative phrases to describe their behaviours. Staff also used the interview to gradually recognise their influence. For instance, when Florence justifies her leader "thing", she modifies her earlier respect for the organisational hierarchy by noting that, "regardless of my title… people… still, you know, kind of, yeah, have that respect that, you know, I know what I'm talking about". Her hesitation and clarification suggest that Florence claimed a leader identity during the interview but not as her leadership was manifesting in the moment. Participants may have been using the interview to clarify their leading identities or find a way of describing their leadership style:

> I guess the role I played, was totally like, keeping my work going without causing any unnecessary hassles and I was, you know, trusted to just look after my own stuff without much input… It was definitely a desire to look after [successor] in a weirdly maternalistic way, I guess, just because it was such a shit situation… her workload doubled overnight, with no one to really support… And that's, you know, what I could do there was just look after my own area, and try and pitch in to cover other things. (Lara, staff)

Despite earlier claims that succession impacted her "not a jot", Lara's use of "weirdly maternalistic" suggests that she is unfamiliar with supporting a formal superior, but that she recognises this unusual position. Her maternalism aligns with Paul's description of his predecessor as a "mother hen", an individual who was widely perceived to be a leader. The suggestion here is that staff know that they influence a successor in the initial part of their transition but underrepresent this to avoid infringing the organisational hierarchy or a successor's pursuit of an aspired self. This underrepresentation was also evident in the images staff concocted:

> I was maybe not so much leading but guiding. It's not as if I'm taking them by the hand. To me, leading has that connotation that you're pulling somebody along. If you're guiding someone, you're sort of side by side with them. So, I'd like to say that I'm maybe guiding them rather than leading them, because they themselves are leaders. So, they have to find their own ways to take what I've guided them to, to take that forward. (Katriona, staff)

Katriona diminished her influence through knowledge contribution, describing herself as *alongside* the successor, perhaps because of her relatively limited tenure in the unit. She does not refer to deference but to being a peer, which is interesting for the perception of successors

who lack sufficient local knowledge. The closest that a staff member came to articulating influence was to say that the successor needed to heed the knowledge shared, "In the case of [predecessor], there were occasions where we could say, 'but we haven't done it like this'. So, actually she was needing to follow our lead." (Orlaith, staff). Even still, Orlaith suggested that the successor followed "our" lead: she does not take ownership of her own influence over the successor but refers to a general influence over the successor.

This did not appear to be a gendered reluctance. Christopher was also reluctant to accept that he may have been leading the successor, particularly during instances of conflict. In his second interview, when asked if he thought he had been able to influence the successor, he shared:

> I know that she's taking direction mainly from above. And then there's the question about "okay, as her report, what have I got that I think she should be doing?"… But I'm still ultimately taking direction from her in the organisation and my workload and the line management relationships all goes the same way. I'm not in any way, setting priorities for her. So, my role is more. It's almost like being a library. In that sense. (Christopher 2, staff)

He says this despite the following comments in the first interview:

> I'm sending it back to my manager, who hasn't been being my line manager, saying, "wear your hat. What are your priorities here?... Why is this a priority? What do you want me to do?" Make it, you know, give them give her the information to make a decision rather than just making a stink out of it. (Christopher 1, staff)

"Sending it back" to the successor is an example of influence through power claims. Christopher's interpretation of influence is heavily informed by the organisational structure he exists within. If he must *return* the task (and therefore the hat which holds the influence Christopher wishes to get rid of), then he must have been, even temporarily, *wearing* the hat, presumably when negotiating the successor's priorities or through the additional work he took on. It may be that the time which passed between the two interviews allowed him to forget the tension he experienced in prioritising for the successor. Although he feels that he is still taking direction from her, it is worth contrasting this with his earlier discontentment with the work that she allocated to him ("don't make me your x-five monkey"). One might argue that, if Christopher *was* taking direction from the successor, he would not have resisted so strongly her redistribution of administration responsibilities.

Other staff seemed to talk themselves into taking ownership of their influence over a successor:

> It is kind of a high-level conversation for me to be a part of, but I'm the only person who knows how the process works, because she hasn't been through a cycle yet… whilst I'm not like the manager of the team or anything, I feel like, my input is probably more valued than hers, if that makes sense… I mean, it's not a case of me influencing her. It's, she'll come and ask me what we should do. So I wouldn't necessarily, you know, there are times where I have had to say to her, "I think we should actually do this instead", like, you know, simple things like with the webinar, like the time that we do the webinar, we need it to be most effective. She just wanted to get it out of the way in the morning. And I thought, "Well, no, because all the Latin Americans are going to be in bed. Canadians won't be up, you know, the Indians will still be in school. So no, that's not right. That's not the right time to do it". So, you know, just simple, just simple things like that. So yes, I am able to influence. (Ruaridh, staff)

The organisational hierarchy seemed to prevent staff, initially, from recognising the knowledge influence they have over a successor. This may be a sign that succession processes make the organisational hierarchy appear more salient but, given a lack of succession planning, knowledge transfer roles fall to staff. Nonetheless, although staff do not explicitly take ownership of their influence, the meaning behind word choices suggests that they view themselves as holding power over a successor.

Navigating Ghosts and the Past in Succession

This section explores how the predecessor came to be a prominent succession stakeholder through staff. It shows how a successor's identity could be shaped by the predecessor through this influence, leading to liminality for both staff and successor.

Introducing Ghosts

Successors were usually imprecise about how a predecessor influenced them, but there were implicit and explicit references to ghosts, "…the ghost of the previous director still looms large. Still a lot of people who were burned by relationships and the leadership style still talk about him a lot." (Connor, staff). The predecessor's ghostly presence could feel more prominent if they remained employed in the organisation:

> It can be quite a bit frustrating when you've got your former boss tripping in saying, "I wouldn't do that. Have you prioritised this?" I've got five hundred things I'm working on. "Have you called her yet?" "No, haven't called her

yet"… So that's a bit of a source of tension… having somebody there as well that's got their own take which is completely positive and helpful and well-meaning and constructive (.) but the spectre is always there of the predecessor… Others… have just seen me as another one on the shop floor. "Oh, you're not really in charge are you?", and it's like, "nope, absolutely not." (Paul, successor)

I felt like the people in front of me were very sensitive… somebody once said to me, when I was speaking about something, "I, I, I don't think I want to continue this conversation. Emm, I think, I think we need to stop." And the way that the person said it was like an abused person, having learnt how to deal with an abuser (.) and I wasn't being abusive. So, it was so strange. I'd heard about all these kind of behaviours, quite my way or the highway, and then I was kind of speaking about something and I remember thinking, "whoa, you don't need to stop speaking. You can just tell me you don't agree." But that's like, really, it was very early on, and I just felt, what am I dealing with here? This is really strange… maybe I'm seeing some legacy of what was a very unhealthy scenario. Or maybe I just had to tread more carefully because of what happened in the past. It was just a wakeup call for me. (Celine, successor)

When a predecessor remained in the organisation, this could be interpreted as a predecessor zombie, which threatened the successor's ability to make decisions themselves. Both Paul and Celine (internal and external appointments respectively) found that zombies and ghosts restricted their ability to pursue an aspired self. Paul is quite explicit about the "spectre" of the predecessor, whereas Celine's use of "tread" reinforces the idea of a successor navigating an unfamiliar environment, perhaps trying not to disturb the predecessor's ghost in doing so. She is also positioned as reliant on the expert power of staff, as well as the willingness of these staff to share this information (see Ursa's vignette on p. 141 for a contrasting experience). Sometimes the complications of changing roles led to predecessors wanting to re-join the successor's new team, "…did I want her back? Between you and I, no. I didn't… it wouldn't just be the ghost of a predecessor. The predecessor would have been in the team!" (Cally, successor). This provides an interesting insight into the possibility that predecessors, after leaving an organisation, may also revisit their personal ghosts, appearing as zombies to their old team and the successor. Generally, the term ghost was explicitly used to describe an unwanted or unnecessary presence of the predecessor, which successors perceived as a threat to their ability to fulfil their role.

Successor Interactions with the Predecessor's Ghost

Some staff participants had memories of a predecessor which featured extreme examples of bullying or other undesirable behaviours. Successors often felt they had to visibly differentiate themselves from the predecessor as a result:

> … I'm perceived in a relational way to what preceded me… There was a style, which was rather high handed, verging into bullying, dominating kind of behaviours… And so I have to, without always saying it in my behaviour, I need to acknowledge that there's been a thing here, I'm deliberately repairing it, even if we don't speak it, I'm doing something. And people do actually comment on it quite a lot to me… [long standing colleague] treats me differently now, and I feel like we're not quite the same as we were before. But she said, she has really said to me how much is on my shoulders to do. And so she's got this really big expectation of me because she knows me well, and she knows who I am and everything. And it's actually, it is quite (.) I feel that, I really feel that because I think, "can I do that?" You know, "can I actually be that person?" So, I'm gonna just do my best. (Maria, successor)

> Particularly if I'm talking publicly, I will say, "[Predecessor] set us off on that path." I don't stick all the bullying on it as well [laughs]. I do think there is something about letting your predecessor take credit for the things they did but being careful not to trash them. I mean, I had knowledge with the whole [unit] about bullying allegations… I ultimately ended up with an all team meeting saying, "It was completely unacceptable. It shouldn't have happened but that doesn't go outside [institution]." Umm so I, I, yeah, I think, yeah, give your predecessor the credit for the good things, take responsibility for the bad things. 'Cause at the end of the day you've got to fix them. (Alan, successor)

Emotional labour is embedded in both navigations of colleague expectations and the desire to be different from the predecessor. Both successors use provisional selves in their adjustment to a new culture, even for an internal successor like Maria. They use this provisional self to receive requests and digest knowledge, then working towards an aspirational self which works around their and their staff member's views of the predecessor's ghost, as well as the priorities they inherit. There is a continued sense of "treading" around the ghostly selves in succession, ensuring that one is not completing a controversial post-mortem of their actions.

Others were able to differentiate against the predecessor in a light-hearted way:

> I used to joke about [being] the new [predecessor]…he was very tall and very old school… I used to joke "Hi, I'm the new [predecessor]. I'm the same, only shorter", which was the joke because everyone knew I was MUCH different. Much more digitally minded. Much more outgoing (.) and I used that for longer because it kind of meant something to contrast myself with him. (Nicola, successor. Emphasis original.)

Anecdotes of a predecessor were a verbal recognition of the differences shown by a successor and were a tool for ingratiating with staff, "[predecessor] was a real character. We collected a bingo card of his… 30 to 40 sayings that he would say every single day… [successor] has seen it and will sometimes throw one in just to liven [a meeting] up." (Florence, staff). This could be seen as successors and staff being jointly destructive of a memory of an organisational ghost. The expectation on successors to differentiate from a predecessor was almost automatic, "[staff member] turned around and said… 'as long as you do everything exactly the opposite of [predecessor], you'll be great'…" (Johnstone, successor). This is another pressure placed on successors by staff, but could also be interpreted as staff differentiating themselves from the predecessor and intentionally asserting a different identity. The expectation was especially weighted if the predecessor had been in a post for a substantial length of time:

> It's actually really hard to be a director following [predecessor], because you either have to be just like [predecessor] and you'll fail because you can't be as [predecessor] as [predecessor], or you have to be so totally different, with an ego, want to make their mark, but you've got to turn a big ship, and there'll be resistance. (Nicola, successor)

This may have been exacerbated in universities where the tenure of predecessors and inherited staff was often substantial. Despite similar formal positions, Nicola does not feel the same strength of emotional labour, perhaps because Maria's internal reputation heightened her sense of duty to avoid repeating undesirable behaviours. A successor's identity was conditioned by the ghosts and memories lingering in the organisation.

Staff who Befriend Ghosts

Staff took on an ambassadorial role in which they shared not just knowledge of processes or individuals but the histories behind projects and decisions. When successors described the historical context they worked within, there was a sense of tension between the past and future. Ursa's succession experience was challenging for several reasons, but the presence of the predecessor *without* the willingness of staff to share expert knowledge was particularly clear:

Vignette 5: Navigating the Predecessor's Ghost

Somethings I would have thought were fine things to do and say, turned out not to be fine things to do and say (.) or people would respond to them in a way that I found quite surprising… They just wanted me to make decisions and I guess layered on top of that is

that my approach to making decisions is sometimes about asking questions… tell me the pros, tell me the cons and then I'll decide. So somebody had come to me to ask me to make a decision about [event], should we run [event]… so I said, "right, tell me why we should run [event]. What's great about it, what's it doing for us?" Part way through one of the members of the team was giving me feedback about it, somebody else just went, "[Ursa], we just need your leadership on this." And I was like, "well, this is how I do leadership. I need to know information before I can (.) make a decision" [laugh]. I think that's good leadership, emm, but they didn't necessarily agree.

I'd said, "you go away and do it and come back and show me what you've done", and she must have come into my office about eight different times in the course of a day to ask me questions. So, in the end I was like, "so what's going on here? You're in my office a lot.", and she said the last time she wrote a marketing leaflet… she'd written something shorter but [predecessor] didn't like it, so he basically just rewrote it and so she was trying to get to what I wanted so she did it right first time. So, I think my management style was very hands off… but [predecessor] was very top down, paternalistic and that was a very big culture shock for everybody in that team. I didn't know it was a culture shock because that's how I manage (.) and that's how everybody who has managed me has managed.

In the "you just called us a bunch of toxic bitches" meeting, one of the things they brought up was, "it just really reminded us all of a meeting with [predecessor] and we're all basically having a load of flash backs and you've traumatised us all 'cause it's like what [predecessor] would do." That is really difficult to navigate because I don't know what [predecessor] would do 'cause I wasn't here. So, I felt like I was constantly stepping into potholes that I didn't know existed until (.) KABLOOEY, and people wouldn't always tell you, "this is why we are reacting like that, because you have just reminded us of something that we are traumatised in the past".

The extracts convey a sense of struggle against behaviours developed in the past. The relational nature of succession is clear as successors experience self-doubt over whether their behavioural expectations are valid, given staff responses. There is also a feeling of growing liminality as Ursa considers whether her style will continue to conflict with staff behavioural patterns, which appear to remain governed by the predecessor's ghost. This indicates that successor efforts to reach an aspired identity after their initial appointment are precarious until they have a good understanding of the unit's history. The extract also reinforces the earlier suggestion that successors are dependent on the expert power of staff as they navigate identity work.

There was minimal identification between Ursa and her staff which reduced the existence of any referent power throughout the succession process. This restricted Ursa's ability to assert her aspired leader identity, which is partly declined because of the predecessor's haunting. She loses this aspirational self, which becomes a personal ghost, given that she was unable to complete her role as she imagined. She also enters a liminal period as she questioned the ILT

which she developed both as a follower of someone else and in her perception of her own leadership. Although it seems that Ursa's aspired leader identity was inaccessible, she does reclaim it later in the interview, commenting on the first time she felt that she was part of a team, "hiring [new staff]… for the first time since I'd arrived in [city] I felt like I was part of a team" (Ursa, successor). Her reclaiming of her aspired self suggests that the parliament of selves surrounding a successor during succession is flexible enough to include provisional, discarded and aspirational selves, as well as ghostly selves of others. This demonstrates an interaction between referent power within a team and one's personal comfort in experimenting with identities.

Some staff felt a duty to the past which intensified the pulling of history:

> …the kernel of the good stuff, how'd you keep that alive? Without the new person feeling like, "just stop projecting, stop projecting the old world onto me"… The good stuff was good for a reason… I've had quite a lot of bosses who really don't care and don't want to talk about old world at all, where the choice I then have to make is, well, if it was good, and you're just not prepared to realise it's good at this moment in time, how do I keep it alive anyway?... I'm not having you curtail something that's a force for good in this organisation. (Barra, staff)

The distinction between past and future in Barra's extract suggests that succession represents change in every instance. His perspective challenges successor perceptions of histories: whereas staff felt histories were valuable for the unit's function, successors often disagreed, "I absolutely hate the phrase when someone says, you know, 'we did that last year', or 'that's the way we've always done it'. I hate that." (Jamie, successor). The extract also conveys a fear that staff lose their place in a new world post-succession, suggesting that participants felt that their worth to the unit or university was threatened by succession. This reinforces the gatekeeper positionality mentioned earlier, which could result in well-intentioned requests:

> I was all set to just like (.) stop that programme but then, the person came and said "actually, here's a way of taking the best of that programme and taking it forwards". So, the mistake of the past was letting it continue too long, I was going to kill it, but… it's too easy to just go, "everything before me is rubbish, I'm going to do all my own stuff"… when you're new in a job, you're getting thrown things that others haven't been able to fix… the hard part, if you've been asked to do something completely different, is arguing to keep the good stuff from the past. Because people are often tempted to go for a much cleaner break. (Nicola, successor)

That successors must negotiate with staff to understand the past and identify things worth keeping speaks to the relational nature of succession. It also suggests that successors are reliant on the institutional histories which staff share. The tension in identifying valuable elements of work creates an image of a successor being surrounded by ghosts – some of which are helpful and others which are remains of lost selves. Successors usually anticipated that staff would share institutional histories with them but few discussed this process positively:

> We were laughing about the fact that we weren't allowed to (.) mention what had happened historically, you know. It's a kind of broader thing of, if we don't learn from history in general, then we're doomed to repeat the same mistakes… if I'd been told, like, you know, "okay, bear in mind, someone coming in new, not that you intend this, but they might feel threatened by the fact that, you know, you have this historical knowledge. So just be gentle with how you play it."… I was told early on by my boss that I could be quite negative in meetings. Now I would have said I was being realistic based on the fact that I had a lot of knowledge of how things did and didn't work in the University, and I'm not at all a negative, cynical person. So I really felt like I was just trying to explain to my boss who was new and other people that were brand new to the [university], "…we have tried that before. And the reason it didn't work was" … All quite objective I felt. (Emelie, staff)

As with knowledge sharing, when respect for histories was not felt, staff felt disrespected. The sharing of histories may have been exacerbated by the long tenures of staff in universities. There is an interesting tension between the apparent catharsis which staff feel in sharing histories and the restrictions which successors feel from receiving them. These extracts suggest that succession stakeholders were not prepared for the complexity of making decisions and sharing information during succession. It is also valuable to consider whether there are ghostly selves informing staff behaviour: Emelie may interpret not being allowed to speak about the past as asking her to ignore the predecessor's ghost which she (and others) feel remaining the organisation.

Internal Successor's Personal Ghosts

Internal successors had inherited staff who held longer term memories of their identity as a colleague, forcing personal ghosts into being, even if the successor did not appreciate them:

> [The post] wasn't something that I took on lightly, or necessarily willingly... I think everyone was sort of the opinion, they'd rather have somebody they knew, than somebody they didn't, leading… they didn't want to have an unknown quantity coming in. (Liam, successor)

> I think there were a lot of people who were very pleased I got it because they thought, "better the devil you know than an external person who comes in and has targets for everything". And then I think there were people who were thinking, particularly within my team, "so how's this gonna change? Is this gonna be like, all the things that we've all collectively talked about? Wouldn't it be great if we could do this? Wouldn't be great if we could do that?" …when you're an internal promotion, because people remember what you were before (.) and what they hope you do is not rock the boat, do some of the things that THEY want you to do. (Charles, successor. Emphasis original.)

For an internal successor, fulfilling requests did not accrue them favours: Charles later shared that he had "learn[ed] to operate within" the existing workflows, limiting how much change he could really make. Successors seemed to anticipate that their insiderness would accelerate the attribution of a leader identity by staff, but this seemed contingent on ideas from before the succession being realised and an element of maintaining the status quo. Internal succession journeys thus demarcated which versions of a successors' leader identity would be accepted by staff, as existing perceptions of authority both enabled and constrained the successor's ability to craft a new identity.

Similarity between successors and the new staff they recruited meant that successors felt in control over what their staff knew about them. For instance, internal successors felt that their identity from a previous post lingered among their ex-colleagues, now-direct reports, "probably six or seven new hires who have only ever known me, so that's been so much easier… the being a former colleague thing has probably melted away now" (Paul, successor). Staff contributed to this especially when they felt that internal successors would return with an additional sense of stability for the unit based on their previous behaviours, "I think it was time to have someone a bit more stable back… You ask a question, she knows the answer… it was a bit of welcome relief." (Doreen, staff). Although Paul feels that his previous identities can melt away, Doreen's extract suggests that discarded identities can be recycled in future succession processes.

Conclusion

This chapter has evidenced how staff shaped the process of successor identity work through increased proactivity during succession and the activation of the past and associated ghosts. Although proactive staff behaviours affected most successors, the ability of staff and successors to accept that staff had influence during succession was limited. The next and final

findings chapter continues to explore identity work, this time from the perspective of the staff member. It positions succession as an identity work arena for staff as well as successors.

Chapter Six: "Oscar Plus": Navigating a Parliament of Selves and Ghosts

Introduction

This chapter addresses the identity liminality which succession stakeholders encounter throughout the succession process. Through three vignettes the chapter characterises succession as an identity work journey *for* staff, building on Chapter Five's presentation of successor identity work *through* staff. The emotional labour navigated by staff and successors is also highlighted. The first section explores lost and parked selves through the lens of organisational ghosts, highlighting the inevitability of identity threats and liminality during succession. A vignette from staff participant, Moira, draws elements of grief, identity threats and personal ghosts together. This is followed by a vignette from staff participant Dermid, who demonstrates the potential to lead and follow simultaneously during succession. A third vignette from staff participant Jacqueline concludes this chapter by showing how individuals decide not to follow, also illustrating the identity work journey staff embarked on.

Parked and Lost Selves

This section presents the lost selves reported by succession stakeholders, prompted by grief and identity threats. It points to the existence of personal ghosts among staff by showing the consequences of unsuccessful power claims, complementing the discussion of successful power claims in Chapter Five.

Grieving for Ghosts

Staff expressed feelings of loss during succession. Sometimes this was a general feeling relating to how things were in the past, "when you've lost something good in many different ways, there's a period of mourning for me as an individual." (Barra, staff). Staff felt they had lost their relationship with a predecessor, "she was saying that she, you know, she's still finding it very difficult to adjust from my predecessor to me." (Catherine, successor). Staff compared their loss with the broad experience of grief, "I don't know whether that was part of the sort of, you know, grieving, but now I've come down to acceptance" (Krystelle, staff). Time spent grieving seemed to be a way of reflecting on wounds from the past and mentally preparing for the future with a successor. This highlights a hidden emotional impact of succession on staff in which they reconsidered their way of engaging with others. Grieving

could be interpreted as a liminal space where staff adjusted to a successor, parking their previous provisional self; equally, grief could be a way of extending or closing the relationship with a predecessor. Interestingly, few successors commented on grief for the superiors they lost in their own process of becoming a successor, though Paul's experience in the preceding chapter could be interpreted as such.

It may also be that grieving was symptomatic of an identity threat from succession, where staff feel they have to change their behaviour to align with a successor. For Moira, who is discussed in more detail at the end of this section, her grief of a predecessor coincided with the death of her sister, "But it's really sad because I was really, really happy in that working relationship. So, it was a, it was another loss. It was a bereavement." (Moira, staff). This is important in recognising the interdependence of personal and professional transitions, also suggesting that successors may be unaware of their (unintended) impact on staff grief. The descriptions of reflection which staff participants shared suggested that there were instances where staff were neither leading nor following, instead using the transition as a liminal space to understand the changes they were presented with. This reinforces the argument that succession is a journey, one in which stakeholders navigate different identities and their own individual transitions.

Identity Liminality Through Ghosts

This section will present experiences of liminality among succession stakeholders. It demonstrates the role of organisational ghosts in creating this liminality, as well as the different impact of internal and external succession on liminars.

Successors encountered liminality when staff projected expectations onto them which were formed with a predecessor. This reinforced the presence of ghosts during succession, adding to the argument in Chapter Five that staff shaped the successor's experience. Ursa, a successor, referenced not having had children throughout the interview and often used this as a template for her evaluation of the team she inherited, "one of the reasons I chose not to have children is because I hate having to repeat myself". This conflicts with the unwanted mother identity pushed onto her by inherited staff:

> One person in the team did tell me a few months later as part of a discussion
> we were having, emm, "[Ursa], what you don't realise is that we are a family
> and you are the head of our family and you aren't behaving like that." My

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view was (.) "this is a workplace (.) not your home (.) and I am your boss, not your mother."… That was quite challenging (.) I feel like in the past I have given new people the benefit of the doubt but I think I can pinpoint it to mid-June, so I think I got given about twelve weeks before I got written off [laughs].

I found it quite difficult to express vulnerability in front of them… it's really difficult to be vulnerable in front of people who have been very difficult to you… I was in a meeting with one of my team who said, "it's not your fault [Ursa], they just shouldn't have hired you." (.) To my FACE, so why would I be vulnerable [laughs] in front of people who say things like that?... (Ursa, successor)

This unwanted identity is similar to the paternal identity the team had become accustomed to with the predecessor (see p. 141). There is a sense that there is a ghost of a more suitable candidate lingering in staff minds. Ursa's aspired self also relies on her knowledge of the profession, which she thought staff would use to accept her legitimacy, "I'd already just assumed I was qualified". Ursa is competing against a realm of identities including: the ghost of the predecessor (projected by staff), the aspired self the institution wishes her to enact, and the aspired self she has worked towards. These threats created emotional labour for Ursa which had implications for her mental wellbeing (see p. 141). Given that Ursa's liminality seems to end when she appoints new staff (see p. 142), it is possible that liminality began when she parked an aspired leader identity (because of staff identity threats), later reclaiming it. This suggests there is a nuance between parked selves and those that are entirely lost. Lastly, the reference to familial ties in the unit illustrates the close networks of professional staff and creates a possible connection between succession in universities and the family business literature. Perhaps family business succession scholarship which explores non-familial appointments is relevant in relation to social capital transfer within long tenure teams in universities.

Staff also encountered liminality. Whereas in the preceding extracts Ursa considers the situation from a previous staff member identity ("in the past"), Isla, a staff member who threatens a successor's identity, considers what the predecessor would have done:

So, being very naughty, and independent, I went through the back door to another influencer… and said to him, "do you remember that conversation we had with the Welsh office? That's all going ahead. Now, what do you think that you'll be doing as part of that program?" And he says, "what programme?"… I explained, we sat down and we had a discussion with the Welsh office. He said, "I don't know what's happening, [Isla]. Why don't I know about it?" I

said, "Well, it's not for me to tell you". "Well, I need that money". And I said, "Well, you'll have to bid for it. It's a separate bid." [He said] "I won't be bidding for it." Right. Okay. And then I can see the email thread because my boss is not clever enough to cut me off. I can say that. But [the influencer] has gone straight to my boss and said, "Hey, what's happening?" Which has put him in a difficult position because he hasn't a clue what is happening. And [predecessor] would have been on top of that, she would have she would have been talking to the Welsh office, she would have been at Brussels when it was launched. She was one of those people, but it's all passed him by. (Isla, staff)

This attempt to reduce others' confidence in the successor may stem from Isla's own sense of identity. Staff who were closer to retirement, usually working only for financial or logistical reasons, avoided involvement in succession. It is possible that Isla was becoming a ghost who had not yet departed the organisation and was no longer prepared to engage in identity work. Isla's liminality is identifiable in that she is not supportive of the successor or the future, nor able to recreate the past. Whereas on p. 109 Douggie was seen resorting to simply fulfilling his role after the successor's arrival rather than leading or following, Isla engaged in acts of sabotage instead. This adds to the possibility that individuals can choose to not follow, which is detailed further on p. 163, suggesting that choosing to not follow can invoke liminality. Perhaps Isla's provisional self, shaped by her proximity to retirement and long tenure, was threatened by an expectation to take on additional work, which resulted in her creating an identity threat for the successor:

> Interview 1
> I thought… "Why am I being left behind her to carry it?"… I haven't got that many more years in work, might as well make the most I can of this. Sometimes it's overwhelming not having both people to go. (Isla, staff)

> Interview 2
> I feel I'm taking, being taken advantage of, not listened to. It's all very well to, you know, to say how wonderful and marvellous I am and how I'm doing a good job, but I'm not doing a good job. Nobody can possibly do a good job with that amount of work… So I feel let down in lots of ways and I keep saying to him, you know, "I need somebody to train to take over this work. I'm not going to be here." And "I need some holiday." My holidays for this year have not been approved. I asked him about it and he said, "Oh, you've got to, you've got to go to America to represent the investors." I don't have time to go to town, never mind go to America. (Isla, staff)

Isla's provisional self was threatened by the successor's desire for her to take on additional responsibility. Her identity could have been threatened because she felt a responsibility, being the only original staff member left after others chose to leave, to preserve elements of the unit which functioned well. This may have felt to be a threat to Isla's self which had developed

with her ex-colleagues and was now a personal ghost. Considering others' and personal ghosts creates an interesting image of many additional succession stakeholders, given that Isla's perceptions of succession were shaped by the unit's past and her hopes for her future. Perhaps this exacerbates the powerlessness that Isla references, another indication of her liminality. This suggests that succession stakeholders require an understanding of staff aspired identities and the level of comfort with a provisional self, mitigating the possibility of an exchange of threats.

Chapter Five presented the ghosts faced by internal successors, but for some this created a liminal space which changed the successor's view of their identity and abilities:

> [During the first interview]
> A number of staff said, "you should be the new [predecessor]." So I told everybody, "No. Doesn't pay enough and it's forced [predecessor] into early retirement. No, I wouldn't want that job." And I didn't want the job (.) and I kind of still don't want the job, but there's a team of people there that need to be fed and looked after. I was surprised by, uhh, the number of people that came to me and said the uncertainty they were feeling about losing [predecessor] and it was nice they were coming to me… soon in discussions after [predecessor] retired it became (.) clear that I felt I had a duty to [predecessor] to make sure that the [unit] continued after she'd gone. It can feel like being Penny in the Big Bang Theory. I'm the arts graduate surrounded by science engineering profs.
>
> [During the second interview]
> The honeymoon period was over pretty much straight away but I just wanted a divorce or an annulment. Now it's just an unhappy marriage of convenience, once the kids are grown up, I'm divorcing you. Sorry… There's some really great people in my institution and in my department. I've got a lot of respect for them, but it's yeah, it's just, I'm not learning. There's no one else to learn from now… [Predecessor] landed a big chunk of money before she left which is what we're reaping the benefits from with our shining new building and red brick tower across the road… Kind of a new age… maybe the era didn't end with [predecessor] and a new one started with me and [deputy]. Maybe I'm the leftovers from [predecessor]. (Paul, successor)

Paul's repeated referral to the duty he felt to his predecessor and team to sustain her legacy demonstrates the practicalities of a successor occupying their first leadership role and attempting to craft a desired identity; whilst also feeling the pressure he, as a staff member, may have placed on an external successor to sustain the achieved success. He is occupying both a staff member and successor positionality and projecting an undesired identity onto himself, which other staff participants did to external successors, "I think I was comparing a lot with how [predecessor] was and that was not helping… I kept comparing to what he

would have done in the situation" (Helen, staff). It is not only individual staff who project their memories of the predecessor onto the successor, but also a successor's memories of their previous self which restrain engagement with an aspired identity. For Paul, this was complicated by the predecessor remaining within the organisation, making what he perceived to be direct challenges on what he had or had not yet done; the predecessor's continued interaction also reactivated one of Paul's parked personal ghosts. This suggests that a predecessor's physical presence is an undesired self during succession, similar to the zombie concept mentioned on p. 138, which threatens a successor's ability to form an aspired identity. On p. 138, there is a sense of projected liminality where Paul refers to the predecessor as his former boss, as a spectre and as a predecessor. Paul may be navigating liminality in his position in relation to the successor, whilst also positioning the predecessor's new status in the organisation as liminal.

Perhaps feeling unable to work towards an aspired self is what prompts Paul to think negatively about his future in the organisation. This is supported by his desire to learn and possibly suggests that he felt he could see no one to follow. It is interesting that although he feels he has nothing left to learn, he continues to use the parental metaphors he used to describe his care for the team in the first interview. It may be that Paul has parked his paternal identity in relation to the team, continuing to use it on a surface level, now focusing more on an aspired identity he could construct outside of the organisation. Lastly, Paul was one of the few participants to comment on professional versus academic staff qualifications. It is possible that the number of ghosts surrounding him exacerbated what he perceived to be unfavourable elements of the institutional culture, such as the divide between professional and academic staff, pushing Paul to think of a future elsewhere.

Identity Threats

In addition to the existence of ghosts throughout succession, interactions with a successor could constitute identity threats. Staff who applied unsuccessfully for a successor's post demonstrate this:

> For the two posts where I've missed the level five opportunity myself I did get slightly resentful, but I was very careful not to show it (.) and I think it'd be really easy to just rock up to work and have a sulk on because they got the job and you didn't, but it wasn't anywhere near as simple as that. What I resented was their gaps in knowledge and thinking, "hang on a minute, I'm having to teach you now to do a job that I didn't get appointed for". (Fionn, staff)

Fionn may have created an aspired self by imagining herself in the successor's post throughout the application and interview process, but also in the time leading up to the application. For instance, Harmony, a successor, described one of her succession turning points as "flicking" from being her previous manager's deputy "to being his equal" whilst still occupying her deputy position. This suggests that the construction of a potential leader identity starts before an application for a post is made; perhaps when Harmony felt that there was less to learn from her formal superior, there was also less to follow. After an unsuccessful application, Fionn then had to renegotiate her provisional self, parking her aspired self. As demonstrated by Richard in Chapter Five, successors interpreted this as an initial challenge to their attempts to craft a leader identity, with the team member viewing Richard as wearing the ghost of his aspired identity. Fionn's experience causes greater liminality in that she is required to assist in constructing an aspired identity for the successor, which may be similar to the aspired identity that Fionn held and has since parked. This created greater emotional labour: as interactions with the successor developed, Fionn's aspired identity may have felt simultaneously closer and also out of reach. This is also an interesting example of an individual who does not wish to lead or follow. Fionn does not wish to lead the successor by sharing knowledge, a leadership behaviour established in Chapter Five; nor does she want to follow the successor, given that she feels that the appointment of the successor has threatened, and led to the discarding of, her aspired self. She also feels powerless to reconstruct her aspired identity whilst in a formal relationship with the successor, creating further identity liminality.

Identities that were lost or parked during the pursuit of an aspired self shaped staff relationships with successors. Lost identities were also a barrier to effective knowledge sharing. This conveys a reciprocal identity threat, where a staff member's lost identity resulted in a more challenging transition for the successor. Whereas Richard's team member on p. 132 seems to intentionally make Richard's transition more challenging, this may be because he feels his aspired identity is lost entirely; Fionn is in an interesting position of feeling forced by legitimate authority to share expert power, suggesting that she does not feel she has lost all chance of realising this identity but has parked it instead. This highlights the interaction between lost aspired selves, expert power and the successor's relationship with staff.

Identity threats also prompted liminality in staff who did not apply for a new post, where they began to experience self-doubt and evaluate their career journey so far:

Vignette 6: "Oscar Plus"

… [successor] says, "Oh, we want to have a rotating chair. So that, you know, it's a flat structure. I mean, everybody gets a say"… And I said, "I don't agree with that". Because a monthly meeting with your team, it's to set out key goals, key messages, set the direction of the office. And if I'm the chair one week, and the person who has been promoted twice above me is going down the wrong track, I feel I've got limited ability to say to her, "No, you're wrong. That's not what we mean". Or "I think that's not right"… And she just completely didn't understand where I was coming from. She just goes, "I don't know what you mean, you can't lead? Why can't you lead?" I goes, "Because I'm not a leader. I'm three people below the director. If the director is not leading it, it needs to be the deputy director. If she can't handle it, because she is being questioned, it needs to be you [the successor]. If you can't do it, for some reason, it needs to be me? What leadership do I have in that structure? How can I lead things?" I often don't know a lot of things. I'm [sub-team]. I know nothing about the [other sub-team] aspect of things… I can't lead, and I don't know three quarters of the story, because it's not part of my job.

I'd be far less anxious working in [current institution] and with the people that I know, than being the new guy in a new institution, do you know what I mean? I need to steel myself for that sort of thing… I'm performing to a small extent. And years gone past I'd call myself Oscar Plus. If I had a big day, like a big Trustee visit like Big Sir Lachlan from a Trust coming into visit, I'd wake up in the morning and be Oscar Plus and just be like, [so] I'm not very tall. I'm only five foot six and a half, I'd be six foot tall… I'm relatively fit, but I'm not as fit as I should be. I'd be ripped, do you know? I mean, I'd just be Oscar Plus for the day… So I was so motivated to change things [during last job change] so I was Oscar Plus for months, because I can do it when I want to, but it (.) maybe you need to find a motivation to do that. And I'm not yet at the point where I'm thinking I want to change things so much.

Maybe I've become institutionalised, I possibly am, but it's more it's the quality of life is fantastic. Even though I work on campus, I [have] two lovely walks home, headphones on, listen to music for 20 minutes, you know, have the kettle on within two minutes… you can't put a price on that to an extent… It still works for me, it's still a job that I enjoy… I feel… I'll make a lot of good things happen. So, I just have to find ways of relying on myself and relying on the knowledge that I'm doing a good thing and have a good quality of life. And if it ever becomes unbearable, obviously, then things change.

One interpretation of Oscar's first paragraph is that he is not following the successor. His perception of leading relied on formal responsibilities and grades of a leader being greater than those of a follower. He also suggests that he appreciated the security of not needing to know everything (as he felt that a leader needed to) and positioned staff, whom he perceived could not lead, as entitled to protection from responsibility or blame. This provisional follower identity is threatened when the successor tries to implement a rotating chair, which also conflicted with his ILTs. He challenges this suggestion, interpreting this as part of his

follower identity, but this follower identity is also rejected. This reinforces the fleeting portrayal of following in Chapter Four and also depicts the journey which staff embark on in identifying a suitable leader to follow and deciding whether they will adjust their follower behaviours if their ILTs conflict with the behaviours presented by a leader.

A comparison of the two paragraphs suggests that Oscar is evaluating the successor based on their actual behaviours as well as his aspired self, Oscar Plus. Viewing someone as less able in the post than he perceives Oscar Plus to be creates feelings of regret and reinforces how staff can lose and mourn aspired identities, even without applying for the post. It is possible that Oscar's negative interactions with the successor are unrelated to her leadership style and more closely related to his identity loss. This highlights the role of staff self-reflection during succession as well as the impact of this on successors. Oscar's sense of self may have been disrupted when changes like the rotating chair threatened his sense of familiarity with the unit and his preferred way of fulfilling his role. It may also highlight limits he places on himself, rather than applying for a promotion like the successor's post. This suggests that grief can be felt generally for a way of working and can catalyse further grieving for aspired identities which feel out of reach. It is clear that succession prompts staff to explore their own selves, indicating that succession is a transitional process for both succession stakeholders.

Personal Ghosts

Beyond losing aspirational selves, when staff members made suggested changes to work (power claims, see p. 130), which were not pursued by the successor, there was a sense that staff retreated into a state of not leading, not following and not working on an aspired identity:

> [Successor] would come up with some idea and I'd say, "Well, no, because it even says you can't do that… You can't do that for charity law reasons. Or because the Trust wound up three years ago"…and I'd say, "what we could do is this instead"… I think she thought that was me getting at her, showing her up, do you know, I mean even though there's nobody else in that conversation, it was just me and her. I wasn't, you know, flagging it to a room of people that yours might have been a terrible idea. And [Oscar's] got a great idea… So I don't feel able to support her because she's just not able to take that sort of feedback on board. (Oscar, staff)

Oscar interprets the successor's response as a threat to his local expertise, which appeared central to his provisional identity in the unit; he also used this expertise to justify his long

tenure with the same employer, or perhaps to explain why he could not be Oscar Plus. It may also be that, by making a suggestion, Oscar was experimenting with his Oscar Plus identity. This precarious identity play is dismissed when the successor responds in a negative way. It seems that staff use their expertise during succession not just to mould the experience of the successor, but also to reassert the value of their contribution to the unit. Another interpretation might be that Oscar was attempting to lead the successor when he felt he could not follow her. When his leading attempt is rejected, Oscar seems to be neither leading nor following. His reference to himself in the third person could be interpreted as him talking about a previous version of his working self, a personal ghost, which he no longer feels he can be. In these instances, staff appeared to focus on just fulfilling the formal requirements of their role:

> [Successor] has literally asked, like, "how would you define it? And what are you up to?"… I'm not sure it's [sub-team] specific that she's kind of learning about, she's just desperate to, to know what else she can try… at the moment it's just me, one of my colleagues, and then our line manager. And we're not really, we don't really have a lot of crossover. So I asked her whether we would have team meetings, but she said no, because there's no point when we're not working on things collectively, so I feel like there's a gap there because even if we're not working on exactly the same thing, you're not in the loop with what's going on… at some point, we're gonna have to start talking to each other. But I'm not sure when that will be… I found [the new relationship with the successor] hard to be honest… I'm definitely not raising things that maybe I would raise if they happened later down the line once we've got like a better understanding of one another. (Effie, staff)

Staff informally took on responsibility for ensuring the smooth functioning of the unit when successors were perceived to be unable to (see Jacqueline, p. 166). However, when for Effie and Oscar, these efforts to take on responsibility were dismissed, staff distanced themselves from the successor and the unit, implying that following was not occurring, resulting in a personal ghost (that of the self that made the power claim). The successor may have been oblivious to the personal motivations behind staff power claims or dismissing them intentionally. This creates a liminal zone for staff to exist in, where personal visions of the future are lost which interact with potential following and leading behaviours. There may also be a feeling of mourning for these lost selves, which staff felt were best equipped to promote the interests of the unit. The journey of following (and not following) is also highlighted here, with Effie considering the viability of a future follower identity.

Moira: Grieving for Ghosts

Moira's experience of succession consolidates the discussion above by highlighting how grief for a predecessor can impact the successor and demonstrates the impact of simultaneous personal grief. Grief also appears to catalyse the evaluation of one's values against those of a successor and re-activate mourning for a previously held self. Finally, Moira shows how interaction with an undesired identity, stemming from a change in working behaviours and a need to support the successor, pushes her to relate negatively to the succession journey.

Vignette 7: Moira's Grief and Mourning

[Successor] was really interested in helping me with my career. Well, I'm a 50-year-old woman with grown up children… I don't need or want my admin job to be anything other than… satisfying (.) but I think I disappointed her. She wanted someone to nurture and push through the ranks. I just want to know how we can do our jobs well… She wants to sort of pave the way for the next generation of women. She sees herself as playing this very important role in nurturing female success and her definition of success, I think, is different from my definition of success (.) because my definition is… you know, we are shaped by our life experiences… the death of [first family member] just absolutely changed everything that was, you know, a priority to me… my priority became less about career and more about (.2) finding meaning… I went on to have children and they became my focus… I [now] have two girls… I have spent the past 15 years, which basically, since [successor] was, I don't know, at school?, nurturing two young women who have additional needs… [Successor's] got her life partner doing the work of nurturing those children… I'm just saying that the majority of her day is not about that, whereas mine really was. Everything I do and the reason I want to maintain a part time job is to be there for those girls. That is my number one priority. It's not climbing the career ladder.

…unfortunately that's another part of the grieving, [predecessor has] kind of disappeared… she's quite an ambitious woman and she's been put into this new position which is full time. Extremely busy. [Predecessor's] got two young children… again… I can't believe I'm like the old maid, but you know, I'm looking at her thinking, "you're not spending time with those little children whilst they're little." She's so stressed. [Predecessor's] got no time for me… I have to respect the difference in priorities (.) but I am hurt, got to admit. I miss her as a friend, and as a colleague (.) and I have to let her go.

You know, despite the online limitations, [predecessor] was an extremely supportive person, very clear person, I felt really held by her especially through that time, the job was very clear when I was working with her… I've heard, you know, older people saying, "Oh, she's younger than me, and she's telling me what to do", and I'm an older person saying, you know, "she's NOT telling me what to do". So it's really, I'm sort of feeling that mothering aspect coming out of me. I'm trying to sort of hold her and say, "this is how maybe we should go about things". That don't feel natural to me, like being the one to guide things… I'm doing my best and I'm still finding myself being the one who's trying to figure out what the job is and being the one who's supporting her because she's overwhelmed. And you're sort of being a bit of a mummy to her if I'm honest… you know, she reminds me of like a wild horse… she's kind of scratching the dirt with her hoofs and

> sort of stomping around with her mane and snorting through her nose.… I feel like she's a
> little bit untamed.

Grief and Personal Ghosts

Succession encouraged Moira to review and reinforce her maternal values, whilst simultaneously mourning the identity and career she previously had and evaluating the strength of the successor's values. This shows that staff members conduct multi-dimensional reflection: perhaps because the successor's need for support challenged Moira to be a maternal presence in their relationship when she was overwhelmed in other areas of life; or because the predecessor, who she had previously respected, had since challenged Moira's maternal values by working overtime. The value competition taking place between Moira and the successor may be a product of the identity work and threats which emerge as they navigate a new relationship. It is possible that the use of "maternal" represents a cross of personal and professional boundaries for Moira. It is interesting that Lara and Moira choose to use this word, whereas George on p. 114 uses "lieutenant" and Douggie, on p. 115, to discuss similar, mostly supportive behaviours. There may be a general unpreparedness for supporting a formal superior, which has generated a variety of terms for the same interaction.

Another interpretation of Moira's grief may be that her personal grief for female family members (including the death of her sister noted on p. 147) makes her feel that she deserves to be "held" by another woman, and she deems that this should be the successor. This clash of expectations led to Moira using the interview to reinforce and justify her provisional self, based on her maternal values. Equally, that Moira chose an interview on followership and succession as an environment to make connections with personal grief highlights the deeply personal, and contextual, nature of choosing to follow. The journey metaphor introduced in Chapter Four can also be applied to succession in that Moira's grief from the past is extended by the succession process; her identity work is shaped as a result and her follower identity journey is moulded by ghosts.

Moira may also see her past self in the successor and predecessor, creating a frustration that they are not honouring what Moira perceived to be shared maternal values in the same way. It is also possible that the undesired identity of supporting the successor is a personal ghost reminiscent of her prior career noted in the first paragraph of the vignette. This is a ghost reactivated by succession, which creates a liminal period where Moira grieves the person she

was and re-evaluates her previous decisions. She refers to her "life experience" and her surprise that she has now become an "old maid" who evaluates the parenting techniques of other women. Moira does not feel that the successor or the predecessor is being who *she* needs them to be, prompting her to use her professional grief to revisit the suitability of the predecessor for the role. This illustrates the ability of staff to activate ghosts from different areas of life during succession, creating a true parliament of selves, including ghosts, which shape one's relationship with a successor and, ultimately, their intention to remain in the organisation .

The grief outlined above, the societal changes brought by Covid-19 and the change in working patterns in the unit threatened Moira's provisional self. The memory of her working relationship with the predecessor during the lockdown period may be another personal ghost, which seems also to be an aspired self that Moira wishes to return to. Whereas other participants seemed to exhibit threatened identities when they were denied progression opportunities, it is interesting that a situation which allows Moira to take more responsibility is in fact the identity threat. Her reference to wanting to be "held" appears similar to what she thinks the successor needs (to be "tamed"). This could be interpreted as Moira identifying the predecessor's ghost as a possible self; performing as this self would enable her to support the successor ("tame" her) in the same way that the predecessor had done for Moira. As in Chapter Five, where Fiona's staff felt an obligation to preserve existing practices in the unit, Moira may have felt an uncomfortable pressure from the predecessor's ghost to fill the support gaps the successor could not. Clearly, this invokes deep emotional labour for Moira, given that she views this as a maternal role which conflicts with what she views her formal role to be. This is similar to Lara's use of "weirdly maternalistic" on p. 135: possibly Lara felt more comfortable with this type of threat to her preferred provisional self, whereas Moira perceived this as a greater threat to her aspired self of someone who is supported in the workplace.

Dermid: Following and Leading

This sub-section uses a vignette from Dermid to show how additional work and expert power created an opportunity for Dermid to work towards an aspirational self. It also highlights how staff and successors simultaneously occupy leader and follower identities: Dermid engages with a follower identity when he directly supports a successor; a leader identity when he

takes on additional responsibilities which he views as a route to his aspirational self; and both a leader and follower identity when he advocates for the successor in front of others.

Vignette 8: Dermid's Aspirational Self

I got a good feeling about [successor's] style. She is a coach outside of this role. So, for me personally, I can get a lot from that. That's a bit selfish. But I want to grow, I want to be better, I want to learn.

… Now with [successor], it is, it is, it's our kind of path. We are on the same path. We're working in the same direction. So, now I feel motivated, I feel I've come to a new role… I believe the teams around me are functioning, I know they're functioning well. And I believe they're on board with what we do. But we are trying to bring two cities together, truly. Everybody who's preceded us has failed in that, that's why I took a big leap last year to work with [team] on top of my other responsibilities so I could start to understand the personalities and the challenges and the resistance within that team. So, I could, I always felt (.) I felt I was best equipped in this role to kind of bring people together because they knew me… which I think is important because when I've had managers in the past who I didn't want to be around, I just kind of switched off.

Leadership for me is somebody who is able to, to create a vision, share that vision, and get large teams, in our case, to buy into it… Just that kind of (.) somebody who's willing to, I guess, get their hands dirty, as well, as badly as that sounds. They want somebody willing to, to show the teams that actually when things are tough, "I've got your back here"… put the workforce and the people they're managing first over themselves, I guess. And that does sound detrimental to the individual, and I get that, but that's what people expect from me…

I've said to [successor], "my role is to make your own as easy as possible. I want to be able to take things from you deliberately and appropriately. So, you perform, I want you to focus on that rather than get bogged down with crap", I guess. So, it was just reassuring her that the services I'm running at this point, I know how they work. I know how they work well. I don't need necessarily anything from you at this stage to make the business side of things function well… There was a big gap then with our mental health provision that I volunteered for, basically. So, we had somebody leave [team]… I put my hand up, I said, "I'll take this, run with it". And that was with [successor's] support. And, yeah, again, it was just so I could, it was important that the team, I thought, had a manager who they could rely on… "whilst you find your feet, I'll carry on doing this", because it was always a manager's role. And I kind of created a system of [laughs], the budget was… I never really truly believed that the people who were writing the budgets understood them. So I kind of created a system and took ownership of that and kind of ran with it.

I said, "I'll carry on with this to a point where it's appropriate." Yeah, so just tried to reassure her, tried to make sure that it wasn't overwhelming. Tried leading [unit] as much as possible, just to make it as simple as possible… just meant that we could share that more and lighten the load and make sure she felt supported by myself.

Leading and Following Simultaneously

When Dermid's developmental requests for himself and the requests for reallocating workload are satisfied, he can be identified as following the successor, a choice informed by evaluating what his aspired self could gain from the successor's coaching experience. This reinforces the idea introduced in Chapter Four that following was motivated by the pursuit of an aspired self. Equally, Dermid may be following the vision of merging two teams together ("two cities together"), also reinforcing the journey metaphor by equating the change with a geographical shift in landscape. In doing so, he is wearing the ghostly selves of those who attempted this previously, modifying these selves with elements of his self. Some situational factors may also have prompted Dermid to follow the successor: that the successor's post was vacant for a substantial length of time, combined with a negative perception of the predecessor, suggests that Dermid and his team may have been primed to respond more positively to the successor. Perhaps the predecessor's ghost's influence had waned in importance and it was obvious to Dermid that his aspirational self was more easily accessible through the successor. Dermid's memories of the past, as well as his ability to shape a future identity, enabled him to adopt a follower identity, indicated by his desire to support the successor in her construction of her leader identity. This suggests that developmental requests and the lingering inheritance left by the predecessor interact with following behaviours. Having recognised what the successor can add to the unit, and seeing the tangible action the successor takes to develop him, Dermid engages with a follower identity by taking additional work to allow her to become integrated with the team. This depicts the transactional, reciprocal nature of followership.

Equally, the additional work Dermid takes allows him to advance others' perceptions of his leader identity. He crafts his leader identity based on his expectations of the successor, emphasising the need for leaders to "get their hands dirty" and to "put the people they're managing first over themselves". The additional work he takes on could be interpreted as the "crap" that he does not want the successor to be burdened with (following), and which he perceives leaders should dirty their hands with (leading). The suggestion here is that Dermid feels he is satisfying his own leader identity requirements by taking additional work. Although Dermid references the support that the successor gave him to do this – potentially his way of reassuring himself, and perhaps the interviewer, that he was not overstepping hierarchical role boundaries – he appears to be referencing possible dual identities where he

finds commonality with the successor's vision (therefore exerting a follower identity) and absorbs additional responsibilities to achieve his own professional ends as well as this vision (therefore exerting a leader identity). This illustrates the fluctuation of leader and follower identities among succession stakeholders and raises the possibility that he is leading and following both the successor and the unit in his decision to take on additional work. Here, the tenets of following, outlined in Chapter Four, and the concept of staff moulding the successor's experience, outlined in Chapter Five, are combined.

Dermid could also be seen as absorbing some of the successor's inheritance. Rather than sending his unfulfilled desire for input into budget decisions to the successor for her resolution, Dermid capitalises on his local knowledge and offers to take on this additional work. This could be seen as engaging directly with the predecessor's ghost, rather than asking a successor to address this legacy issue. Dermid is claiming a leader identity when he does this, and it seems to be granted by the successor who allows him to set the budget and follows his local expertise, therefore adopting a follower identity whilst her knowledge of the unit and the external view of her identity is built. It is interesting that this appears similar to the concept of squiring but can also be interpreted as a leader identity. Dermid is transferring one of the legacies that the successor would have inherited onto himself, thus sharing the impact of the predecessor's ghost on the successor's parliament of selves. He also continues to be motivated by older ghosts that were not from his most recent employment experience ("I've had managers in the past"). Like Florence, his laughter in the extract suggests that he senses a shift in identity within himself, but perhaps also an unanticipated opportunity to influence the leadership of the unit. Dermid seems to have used the interview to make sense of his influence as others did . This connects the active behaviours of staff as well as their local expertise to the following of successors, further highlighting that staff and successors can simultaneously pursue their respective aspired identities during succession. The findings suggest that succession is not only a suitable arena for exploring leading (and not leading), following (and not following), but also identity work.

Jacqueline: Liminal Leadership

In the chapter so far, experimentation with rejected, lost and aspired identities has been addressed. A vignette from staff member Jacqueline's first interview, and extracts from her second interview, create an opportunity to bring together the arguments from across the

findings chapters and show how rejected identities can become provisional and aspired identities. The vignette is particularly intriguing in portraying an explicit decision *not* to follow the successor; Jacqueline subsequently constructs her leader identity based on her experience with the predecessor. In turn, this diminishes the ability of others to associate the successor with a leader identity, but perhaps not through sabotage as Isla did on p. 149. Lastly, her transcript highlights the emotional labour incurred by staff identity work. This section concludes the findings chapters and illustrates how, just as staff can mould the successor's experience of succession, the succession journey itself can be transformative for *staff* identities, priorities and selves.

Vignette 9: Jacqueline's Liminal Leadership

We are looking at [project] just now which has got a deadline of November (.) and we've been developing that since, like, the beginning of this year. I can't even think, it's months and months and months… It just feels like it's been treading water for ages. And in the meantime, [successor's] been working on other papers and other articles. And it's just, it doesn't feel like this is of a sufficient primary focus for her. Everything's a last minute, you know, a last minute panic, which is kind of hard… It feels kind of out of, out of my control a little bit. I do to some extent, I do feel responsible. I mean, I'm, I've got a senior role within the [unit]. But at the end of the day, I'm not an academic lead. I can't write the research proposals. I can contribute to them… but, you know, the actual research proposal really kind of has to sit with her. But when it comes to the, the, the ongoing project and wrapping that up, I do, I have felt quite stressed… I did have a word with myself at the beginning of this week, so I was looking at my to-do list going, "Well, I've got all these things that are overdue on my to-do list that I'm seeing as MY responsibility. But I can't, I can't progress that, because it's sat with [successor]." I can't, I can't progress that because it's sat with her, I can't progress, you know. So there's no point in me getting stressed about these things. I can keep nagging her and I can keep reminding her, "That is still waiting for your response. This is still waiting for your input. This is still waiting for your feedback." But I literally, it's like my hands have been tied.

…I know it's unfair to compare, but working with [predecessor], she, she had a work rate and turnover rate that often I felt like I was running to keep up with, but, but, at least it was good because you sort of bounced off each other and she would deliver something. You know, she would ask for something and I would send it back to her, and then you get the feedback and you'd be able to move on. This just feels like I'm, I'm still continuing to work and to deliver at that rate as far as I'm able to and then, and then I'm just kind of blocked (.) But then it feels like my failure.

I actually reached out to this new School Manager and explained who I was, and that we were [unit].[14] And you know, [asked] what was going on with coming back to campus and it transpired that he didn't even know we existed. He didn't know, he didn't know anything about us. And when I met with him on Teams and he kind of reflected on the facts, like,

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[14] The School Manager was a colleague, not the successor.

"Oh, yeah. So I suppose you do fit within the professional services staff within the school, don't you?" I'm just like, "YEAH"… So, we've been in this little kind of bubble, which was very nicely supported and protected when we had [predecessor], who had our backs and who had those kind of good (.) I don't know, you just felt like she was able to kind of represent us to the institution… Well, I am trying, I am trying to take more responsibility for doing this myself, but it does feel a little bit like we're out on a limb. I mean, as it happens, I'm meeting with this guy, the School Manager, today, because I'd said, you know, over the summer he was in a rush, he was about to go on leave. And I said, "Well, let's get together for a coffee and let me just tell you a little bit more about the Centre and what we do."…kind of thinking "he needs to know that we exist, what we're doing", and then, "we're very capable people that might be on the job market"…. So we're trying to kind of make those links, but there isn't really any support or management structure beyond just [successor] being my boss. There's not really anybody else to talk to.

I kind of see myself, you know, [successor] is my manager (.) and she is the leader of the [unit], and therefore, you know, we need to kind of, I need to kind of work to support her in making the [unit] a success. So, in that way I am [following]… I just feel like I haven't got a huge amount of confidence in her leadership. I think that's what it comes down to (.) and, therefore, it makes me feel a little bit uncomfortable that I'm forced into this position of being a follower of someone that I don't really feel inclined to follow. You know, I mean, and you know, what, and where does that leave me? Should I be doing more to branch out on my own or look for another job? Or step up to say, "look, I'll take more of the leadership responsibility on or?" I'm not quite sure what the right way to deal with that is. So, so yeah, I probably wouldn't describe myself as a follower, but yeah, outwardly (.) I'll tow the line.

Not Following the Successor

Unable to identify behaviours or vision from the successor which align with her own perceptions of a leader identity or her standards for herself, Jacqueline is explicit that she is not following the successor. It is interesting that she refers to being "forced" into a position of following the successor, suggesting that the succession context may have reinforced the presence of the organisational structure and the formal responsibilities that come with it. Notably, she did not feel forced to follow the predecessor. Jacqueline may also not be following because, like Oscar, she feels that her aspired leader identity could fulfil the successor's role more effectively. Unlike Oscar, Jacqueline takes practical steps to achieve this aspired identity. She assumes responsibility for uncompleted work, "it feels like my failure", which is an interesting example of how staff took ownership of the unit's image. Whereas Dermid, in the preceding section, and Florence, in Chapter Five, took on additional work to support a successor in their identity formation, Jacqueline's additional work reflects her perception of the successor and her choice not to follow.

It is not the case that *not* following someone inevitably led to engagement with a leader identity: other participants who did not follow simply distanced themselves, such as Effie on

p. 155. Jacqueline's lack of faith in the successor led her to begin constructing a leader identity not only to protect the external view of the unit, but also in case she required a reliable leader identity in future employment. The vignette shows the practical steps she took to pursue her aspired self and the space which she carved in the organisational hierarchy to do this; something which unsuccessful power claimants, like Oscar on p. 153, could not do. Even successful power claimants, such as those that successor Catherine responded to on p. 134, were unable to consolidate an aspired identity as their claims were usually moderated by the formal authority of the successor. For Jacqueline, not following the successor (mostly) frees her of a felt need to respect the organisational hierarchy (unlike in Florence's Vignette 3 on p. 126), allowing her to engage in significant identity work.

Developing an Aspired Identity Through Identity Threats

Jacqueline describes the elements of the predecessor which she believes made her a good fit for the role. This suggests that any successor arriving in the unit would have to demonstrate similar attributes before Jacqueline would follow them. When the successor did not fulfil this, Jacqueline may have felt that she lost clarity over the leadership of the unit. This points to the existence of the predecessor's ghost in Jacqueline's vignette, which watches over the unit and puts pressure on her to act when the successor does not.

Jacqueline also experiences a threatened identity. It may be that Jacqueline's strong association with the existing unit identity means that threats to the unit were equally threatening to her own identity. As a result, taking responsibility for the unit is a form of self-care. When Jacqueline does not feel her reminders or suggestions are heard, her decision to merely "tow the line" indicates that Jacqueline may have engaged in a façade of following to give the successor an opportunity to work on her provisional self. This contrasts with Dermid who appeared to genuinely believe that the successor could be considered a leader. Jacqueline's attempts to allow the successor to build a provisional self seems to be repeatedly ignored, with Jacqueline adding in the second interview that their working relationship had not improved:

> The other big thing that's happening is that, and this was announced before my, my leaving, she's leaving… she kind of shared that with us just after Christmas. And we were like, "oh, okay, so what does that mean for the [unit]? What does it mean for us?" What does it mean for the, you know, what our big four year project that we've been working on, that's kind of really coming to a close now, at the end of this month.

So I had applied for this role… found out that she was leaving, I then had my interview, found out that I was leaving… And then we had this whole big mess of like, her kind of going off and telling people piecemeal that she was leaving, but not telling them that I was leaving, and them coming back [to me] going, "what do you mean she's leaving? What's going to happen?" and me going, "Oh, my God, I've got to tell you that I'm leaving as well now." And that puts me in a really awkward position.

But it's kind of reaffirmed for me that I've made the right decision [to leave] because I just couldn't keep working with her. She's just too scatty, disorganised and just doesn't think things like that through. And it just makes being the person that's kind of responsible for the operational side working alongside her, it just makes that job twice as difficult. (Jacqueline, staff)

During her relationship with the successor, Jacqueline became more withdrawn and made a decision to leave the unit. Then, when the successor announced that she was also leaving, greater responsibility to prepare for the successor's, and her own, departure, was left to Jacqueline:

I do feel like it's largely on my shoulders to try and come up with some practical solutions to all of this… I've kind of got embroiled in doing all of that… there's gonna come a point where I'm just like, "it cannot be my problem anymore". (Jacqueline, staff)

The successor's arrival almost forces on Jacqueline the need to assert more influential workplace behaviours which result in a leader identity. The successor's subsequent decision to exit reinforces this. When she tries to maintain her original provisional self, Jacqueline also feels this identity is rejected; the successor's behaviour pushes her to pursue an alternative identity, which possibly became an aspired identity when Jacqueline connected her unanticipated leadership with a future on the "job market". Jacqueline did not anticipate this identity work occurring during another's transition. Although the connection between not following and pursuing an aspired self is evident, Jacqueline suggests here that there is a limit to how far this can be sustained. This highlights the realities of not following: such a choice is characterised by a risk that the aspired self will never be formally reached within one's existing role. It is also interesting that both Jacqueline and the successor decided to leave the unit. Their decisions suggest that the formalities of the organisational hierarchy, eventually, limit the identity work that succession stakeholders can meaningfully conduct, creating a need to take practical steps to realise this identity in a different position.

Jacqueline experiences a tension between her informal leader identity, her formal staff identity and the desires of the broader institution:

> It fell in our own hands to come up with a plan as to what would then happen… for the incoming director and for myself, and for other staff involved. And I've given it a shot, you know, I put a nice little proposal together to be put forward to the Dean, but essentially they've just turned around and said, "We're not going to, you know, we're not going to fund staff positions when there isn't funding to support them", and that's it. So, there is no succession plan. (Jacqueline, staff)

Jacqueline's attempts to assert her own leader identity, where the successor had not, were also rejected by the institution. She felt her recommendations, based on her knowledge and expertise of the unit and passion for preserving the future of the unit, were ignored. That she created a plan suggests that she was attempting to advocate for the unit in the way that she had seen the predecessor do, re-activating an identity she felt was lost in the unit. Following this feeling of rejection, Jacqueline exited the organisation. This reinforces the preceding argument that there are formal limits to identity work towards an aspirational self.

Performing as the Successor

What is striking about Jacqueline's vignette is that she begins to perform the successor's role herself. Initially, Jacqueline engaged with structuring behaviours to try to influence the successor's approach to important tasks. When this was not successful, Jacqueline established a leader identity to fill the gaps left by the successor. Jacqueline then started evaluating the progress of the unit under the successor. Whereas Moira felt uncomfortable filling the skill gap she perceived to have been left by the predecessor – which on p. 156 was described as Moira performing as the predecessor's ghost – Jacqueline's evaluations could be seen as a *successful* performance of the predecessor's ghost. Others also took on this protective role, "I'm not having you curtail something that's a force for good in this organisation" (Barra, staff). This raises the possibility that organisational ghosts can be inspirational or catalyse action; moreover, this changes the character of a parliament of selves from something from which one can choose a self, to an interactive, lively array of selves and ghosts.

When participants did not feel that a successor was engaging with a leader identity, their subsequent behaviours were based on the elements of leadership they felt were lacking. For Jacqueline, this meant representing the unit to other university stakeholders, effectively positioning herself as the face of the unit. Jacqueline used her grief for the predecessor to lead

in the unit and pursue an aspired self. Jacqueline also did not see a work output equivalent to her own or the predecessor in the successor. Although at the beginning of the vignette she tried to diminish her commitment to additional work, "there's no point in me getting stressed", her proactive behaviour continued, for instance by meeting with key stakeholders across the institution or by creating a succession plan. Staff may feel compelled to protect the unit's function when they feel successors cannot. These protective measures are interesting to characterise as Jacqueline *following* the purpose of the unit, yet *leading* others in recognising the value of the unit in turn. This highlights the different directions that following can take in organisational life and it also reinforces the ability to lead and follow simultaneously.

Over time, Jacqueline refined her performance as the successor, enhancing the use of 'journey' to describe succession, following and identity work. Her evaluations of the successor were continuous and her impetus to take action grew. Thereafter, her comfort in exercising the leader identity developed, as demonstrated by her interaction with the School Manager. Although longitudinal interviews were not as popular as perhaps anticipated (see p. 204), the extracts of Jacqueline's second interview, on p. 164 – 166, show how identity work continues beyond the arrival of a successor, thus illustrating an identity work journey. Moreover, in Jacqueline's case, this journey led to another journey with a new employer. Without a second interview, the longer-term effects of succession on Jacqueline's parliament of selves would not have been identified.

Emotional Labour and Liminality

Jacqueline's leader identity is partly borne out of a sense of powerlessness. Shortly after her denial of a follower identity she conveys a feeling of being let down, "where does that leave me?". This highlighted extensive emotional labour for Jacqueline, "but then it feels like it's my failure". The disparity in responsibilities between her and the successor created liminality within Jacqueline. Perhaps a lack of identity verification from those around her (which Florence seemed to gain from her colleagues on p. 126), heightened the precariousness of Jacqueline's leader identity. For instance, her comment, "I am trying to take more responsibility" conveys a sense of strain in trying to balance her formal role with the leader identity she has acquired. As shown in Moira's vignette, emotional labour was especially prominent among staff who simultaneously held a negative interpretation of the successor and felt a need to support them.

Emotional labour was also common among those who felt there were poor interim arrangements, "We meet again two weeks later, there would be no [progress]… I was having to take ownership of these things. But even then there's… there's only so far I can go?" (Rabbie, staff). Rabbie's emotional labour came from having to manage his expectations of his own capacity and influence, and he needed to accept a lower standard of work output. Jacqueline reiterated this, "my hands have been tied", a phrase which aligns with signs of liminality and a perceived lack of agency to lead or follow. It is possible that Jacqueline's emotional labour stemmed from her desire to lead, as well as the conflict with the formal roles she and the successor held. It is meaningful to evidence how staff can navigate leading and following dynamics during succession processes, as well as their own identity work, whilst managing the input of organisational ghosts, the loss of aspired selves and showing practical displays of a leader identity.

Conclusion

This chapter has illustrated how staff navigated lost selves and threatened identities, as well as selves they aspired to. The final section presented Jacqueline's vignette which highlighted the continuous identity negotiations which occurred alongside the complex leading and following dynamics between succession stakeholders shown in Chapters Four and Five. Overall, the findings chapters suggest that identity experimentation is core to following and leading. The findings in this chapter also position succession as a complex transition for staff and successors; a process which catalyses deep self-reflection and identity work and involves different variations of ghosts not previously identified in the succession literature.

Summary of Findings

Chapter Four discussed the idea of followers and following, contrasting the successor understanding with that presented by staff. It problematised the successor interpretation of followers as measurable and challenged the permanency of the term 'following'. It highlighted that follower identities in staff *and* successors were temporary, engaged with voluntarily, directed to human and non-human actors, and driven by a desire to pursue future selves.

In Chapter Five it became obvious that staff were not only influencing successors through their active behaviours but that they were shaping the entirety of their succession experience

through their knowledge, requests, and engagement with predecessor ghosts. It positioned successors as navigating staff behaviours and recognised that participants used the research interview to make sense of succession by establishing the processual nature of the change, suggesting that a leader-centrism runs throughout discussions of the concept.

Chapter Six concluded the findings by illustrating the identity work and liminality which staff navigate during succession. It suggested that a followership lens provides access to a fuller understanding of the identity-based motivations behind staff responses to succession. It has also positioned succession as an arena for intensive identity experimentation among staff, suggesting that succession is as much a transition for staff as it is for successors.

The next chapter situates these findings within the literature discussed in Chapter Two.

Chapter Seven: Mythology and Moulding: Discussion

Introduction

This chapter discusses the research findings presented in Chapters Four, Five and Six, situating them in the succession, followership and identity literatures addressed in Chapter Two. In doing so, the thesis challenges existing portrayals of followership and provides empirical evidence of identity work, leadership and followership during succession and outside of formal hierarchical roles.

The first section explicitly addresses the research questions, introducing the terms of mythology and moulding which structure this discussion.

The second section on the mythology of followership outlines what the findings suggest should and should not be considered evidence of following identities and behaviours. The section goes on to outline following in its voluntary, fleeting and retrospective forms, positioning following as a processual journey in relation to the existing literature; moreover, it does not need to be directed to a human actor. The section concludes by contrasting the research findings with role-based perspectives of followership and then considers the meaning of following strategically to reach an aspirational self.

The third section on the moulding of succession characterises staff as moulding the experience of successors. It makes a connection between staff behaviours and the transformational impact these behaviours have on successors, extending the argument that leading and following are not restricted to formal, hierarchical roles. The section also explores the existence of ghosts, considering how ghostly and living selves shape the successor experience.

The fourth section challenges some of the practical recommendations of the succession planning literature, also considering how succession *management* can take inspiration from leadership development programmes to ensure a more processual perspective of the transition can be taken in future. This chapter is followed by a conclusion which comments on the strengths, limitations and recommendations arising from these findings.

Key Analytical Themes

Chapter Two posed three research questions which guided the identification of two key analytical themes. These themes were identified during interaction with participants, the data analysis process and the write-up stages of the research. The following sub-sections highlight the most interesting analytical themes and considers the most meaningful elements of the empirical material and key aspects of the research questions. This is intended to summarise the two most substantial findings arising from this thesis. Subsequent sections in this chapter address other elements of the literature and the relevance of the findings in finer detail.

Contributions to the Succession Literature

This thesis has made a considerable contribution to the succession literature by portraying staff, and sometimes predecessors, as shaping the experience of the successor.

It was clear from the multiple interviews and perspectives sought that these shaping behaviours influenced successor actions, whether or not any specific influenc*er* recognised this behaviour during the interview. What makes this finding more compelling is the way that successors generally addressed these shaping behaviours, referring to expectations placed on them (Fiona, p. 128; Iain, p. 130), being lobbied (Catherine, p. 134) and navigating memories from the past (Ursa, p. 140; Paul, p. 150). These descriptors suggest that successors felt that they lost a sense of control to staff, in that the parameters of what was appropriate for them to work on or have authority over were defined by staff.

In answering the first research question, *"how do succession stakeholders, including staff and successors, respond to and interpret succession?"*, this thesis suggests that, in many cases, staff responded to succession by attempting to shape the successor's actions and perceptions. Successors interpreted this as a series of challenges from across their inherited team, often allowing their decisions or actions to be influenced. This finding is important because it challenges the rigidity of how traditional

organisational hierarchies are viewed and shows, empirically, how influence can be distributed across these hierarchies. For instance, in Chapter Four, Cally, the successor, speaks to how she was influenced by inherited staff members. Equally, in Chapter Five, another successor, Ursa, uses the influence of her predecessor and inherited staff to convey her difficulty in seeing herself as a recognised *leader* of the unit. Whereas the succession literature has depicted succession as generally disruptive, and particularly for staff (Dawley et al., 2004; Ndofor et al., 2009; Li, 2018; Kuntz et al., 2019), the research findings show how staff, as individuals, create disruption for, or shape the actions of, a successor. This should encourage future scholars to explore more carefully the source and reasons behind the feeling of disruption during succession processes.

This is relevant theoretically: looking to *why* staff were able to disrupt the experiences of the successor, power dynamics become increasingly important. Applying theories of expert, informal and formal power, this thesis highlights how staff view themselves and their capabilities during succession. In answering the third research question, *"what do succession stakeholder identities look like during succession?",* these findings suggest that staff identities relied heavily on their institutional knowledge and filling the lack of institutional knowledge they perceived in the successor.

Contributions to the Followership Literature

The followership literature has been enhanced by this thesis in that it delineated the parameters of following and also identified different motivations for following behaviours.

It has made an empirical contribution by allowing participants to make sense of the concept of following during their interview. For future scholars and practitioners, this provides clarity in describing the nature of follower identities and moves towards an interpretation of following as voluntary and temporary. Crucially, the empirical evidence provided by this thesis depicts following *and* leading as processes engaged with at all levels of the organisational hierarchy. That is to say that in succession, and

possibly in non-succession contexts, staff can lead and their formal managers can follow, challenging the so far top-down, unidirectional leadership relationship (Tourish, 2014). This provides a fluid, constructionist answer to the second research question of, *"what do processes of following look like during succession?"*. This aligns with the growing number of constructionist scholars who advocate a fluid view of follower identities (Fairhurst and Grant, 2010) and away from role-based practices (e.g. Carsten et al., 2010).

By situating the discussion of following within succession, this thesis was able to clarify the motivations behind developing a follower identity within real organisational change. The findings suggest that follower identities were tied to aspirational selves, with staff and successors looking to one another, and to predecessors, to guide their identity work. This is meaningful because it suggests that there are contexts in which following behaviours are more or less likely to be engaged with, including general change contexts or those contexts with knowledge-intensive cultures.

This finding is also meaningful because it suggests that following is an inherently personal journey. It is personal in that: one must decide *whether* they have voluntarily deferred to someone else; one must decide *when* they felt they were no longer following or wished to restart following; and that one must evaluate if adopting a follower identity allowed them to make sufficient progress toward an aspired identity. This is a multi-layered challenge to the outdated notion that following is automatic (Bjugstad et al., 2006), showing instead the processual, personal and retrospective reflection that constitutes following.

In particular, this adds to Uhl-Bien et al.'s (2014) suggestion that following can be in relation to something other than another person, external to the self: the second key analytical theme confirms this by showing how following someone else can be seen as a gateway to reaching an aspired identity. Subsequently, although following

behaviours are directed to a staff member or successor, the motivation and end goal suggests that following is directed toward aspired identities.

The contributions to the followership literature are useful for future research, not just in non-succession contexts, but also for other organisational types or sectors. Scholars have recognised that succession impacts all organisations, regardless of size, type or sector (Giambatista et al., 2005; Ndofor et al., 2009; Li, 2018; Farah et al., 2020). This thesis has shown that there is value in exploring followership during succession, given the beginnings of new relationships and the connection between knowledge sharing (a common succession practice) and the subsequent identification as following or leading. It would be advisable, therefore, to replicate this research in other sectors to develop a stronger sense of following during succession, then using this as a foundation for exploring following outside of succession contexts.

This section has highlighted two key themes arising from the research findings. The remainder of this chapter elaborates on these findings and explores them in more detail, making specific connections to the vast literature explored in Chapter Two.

Mythology of Followership

This section recognises the hitherto mythology of following, addressing this by outlining the fleeting and voluntary aspects of following and the various directions which follower identities can take. The section then considers what participant behaviours during succession imply for what, perhaps, should not be interpreted as constituting a follower identity. The section concludes by demonstrating how following behaviours could be connected to the pursuit of an aspirational self.

Identifying Following

Followership scholars are increasingly aware of the imprecise understanding of what following is and how it can be identified, with Alvesson and Blom (2022: p. 59) cautioning that the term 'follower' may become a hegemonic, ambiguous concept; a "hembig". This is similar to other recommendations to prevent the term 'leadership' from becoming an "empty signifier" (Alvesson et al., 2008; Kelley, 2014: p.906). The ambiguity of following can be seen in the similarity between behaviours associated with following and leading (Bjugstad et

al., 2006; Bertlett et al., 2011; Carsten et al., 2017; Robinson et al., 2021). This adds to the mythology of followership: if following is so similar to leading, it becomes increasingly difficult for researchers or practitioners to identify when following occurs. There then develops a, perhaps impractical, reliance on organisational members specifically pinpointing when they are following (or collaborating, being honest or enthusiastic [Kelley, 1988; Agho, 2009; Wang and Peng, 2016]) and justifying why this is not leadership. Heeding calls for more precision in understanding following, this section situates the finding that following is a fleeting, voluntary and directed process alongside existing interpretations of following.

Following is Fleeting

The findings highlighted that following was fleeting in that, when identifiable in behaviour or as an identity, following was over as quickly as it began. This is similar to the interpretation of leading as only visible within the moment it occurs (Ladkin, 2010; Bathurst and van Gelderen, 2014) and aligns with the previously determined fragile characterisation of follower identities (Clifton et al., 2020). Following was also fleeting in the sense that it was identified retrospectively in the research interview, complementing suggestions that following is usually only identified in a curated setting (Harding, 2015; Ford and Harding, 2018; Alegbeleye and Kaufman, 2019). In Chapter Four, for example, Orlaith retrospectively identifies the successor as following her. Her recollection enhances the fleeting depiction of following as she recognises the unpredictability of the follower identity in the successor, as well as the unpredictability she felt in knowing when she, herself, might follow.

Following was also fleeting in that it could be seen in one individual in one moment, and then in another individual at the next moment. This aligns with relational views which see following (and leading) as a process which can be negotiated among different organisational members (Shamir, 2007; Denis et al., 2012; Clifton et al., 2020) and which is dependent on the local context (Fairhurst and Uhl-Bien, 2012; Jones et al., 2014; Larsson and Nielsen, 2021). This is important for the discussion on moulding behaviours by staff which transform successor identities and experiences (see p. 185). For instance, the negotiation of following identities which can be seen through a fleeting characteristic enables following to be interpreted throughout the organisational hierarchy. Chapter Four's vignette presenting Margaret and Ronald's turn taking in positioning themselves as followers highlighted this. This aligns with recent followership which suggested, but did not empirically evidence, how

junior staff members could direct supervisors with their local expertise, resulting in the supervisor adopting a follower identity (Sims and Weinberg, 2022). This challenges the role-based allocation of leading and following identities and suggests that following may be motivated by what an individual, whether successor or staff member, can contribute to an overall purpose.

Following is Voluntary

Participant descriptions of following complemented the growing recognition that to follow is to defer to another voluntarily (Shamir, 2007; Alvesson and Blom, 2015; Blom and Lundgren, 2020). This is useful for the upcoming clarification over what cannot be identified as following (see p. 179). For instance, Chapter Six discussed Effie who deferred to the successor's judgement but did not agree with the decision and stopped making suggestions (collaborating, to use the following behaviours cited in the previous sub-section) as a result. Effie was not following the successor willingly by exercising voluntary deference; she felt that the successor's legitimate power overruled her own informal power, therefore losing the *freedom* (Olsaretti, 2008; Raffoul, 2013) to decide to align herself with the successor's decision. Incidentally, and as is discussed further, the silence which Effie activates after her compliance with the successor's decision challenges the idea that silence represents following (Gunter et al., 2021). When Effie decides to remain silent this could be interpreted as her co-constructing a formal managerial relationship, as Tourish (2014) suggests, but she is not a follower at this point. Effie's involuntary silence also challenges the passive orientation of followership. Although as Carsten et al. (2010) argue, Effie accepts the authority of another, this does not point to Effie's true belief in the successor as someone she could follow. Contrasting with those who deem 'followers' as passive submitters (Rost, 1994; Carsten et al., 2010; Lapierre et al., 2012; Hinic et al., 2016), Effie's passivity represents her shift away from the freedom to voluntarily decide to follow (Uhl-Bien et al., 2014; Tolstikov-Mast, 2016). Overall, the findings complement calls for more careful use of 'employee' to describe an individual, and 'follower' to describe the fleeting moments where a follower identity is engaged with, by any employee (Uhl-Bien and Pillai, 2007; Tolstikov-Mast, 2016).

This substantiates the argument running through this thesis that followership to date has been somewhat careless in overlooking the voluntary, considered nature of following. For instance, Su et al. (2019) refer to the ability of leaders to lead employees, not referring to any evidence

gathered that justifies this attribution of a leader identity. The transformational leadership literature also refers to employees *under* transformational leaders, equating employee with follower (Busari et al., 2019). The alternative requires greater caution in descriptions of how employees (regardless of formal position) can engage in their own followership, as Lapierre et al. (2012) do.

The voluntary nature of following meant that succession stakeholders could choose to follow and could also choose to stop following. In Chapter Four, successor Cally's experience of her own followership, as well as feeling followed, unfollowed, and re-followed, speaks to the fleeting distribution of following identities, the choice to withdraw followership and the journey this creates. There has been some recognition of changes in willingness to follow, depending on, for instance, inappropriate leader behaviour (Koning and van Kleef, 2015). However, the notion that following identities can be engaged and disengaged is not discussed as widely. In Cally's vignette, her own and her surrounding employees' observations of one another's behaviours pointed to the observational role of staff as well as successors during succession (Macmillan et al., 2004). Observations were integral to evaluating the expert power of others in the unit (French and Raven, 1959; Lyngstad, 2017), and therefore the choice to begin displaying a follower identity. Cally initially engaged with a follower identity when she recognised expert power among staff but withdrew this when she perceived unfavourable, perhaps unleaderly, behaviours.

Simultaneously, she felt followed by staff through a sense of similarity with the team and unit culture, pointing to a generation of referent power. It is interesting that, rather than staff recognising Cally's referent power because of behaviours they desired for their future selves, staff followed Cally because Cally could be like *them*. It is possible that, having inherited an established team with long tenure across individual careers, Cally's staff were content with their provisional selves, as Isla was in Chapter Six, therefore following when these selves were preserved. When individuals desired an aspirational self, they followed someone or something that would enable this. These observations contrast with the broader succession literature which suggests that *staff* simply observe out of *fear*, aligning instead with those who argue that observations enable the identification of identity threats and opportunities (Balser and Carmin, 2009; Northfield, 2014; Gill and Arnold, 2015), and clarifying that those in positions of formal responsibility also observe for this purpose. Pinpointing when

individuals follow and broadening the view of following to include withdrawing a follower identity dispels some of the mythology of following.

Following is Directed to Someone or Something

When participants interpreted themselves as having followed, it was described as directly related to someone or something. When an individual offered tailored support to another so that *another* benefitted, this was considered following. For instance, the commitment of Douggie and Ronald in Chapter Four to identifying how they could satisfy the needs of (external and internal) successors. Their behaviours align with Sims and Weinberg's (2022) suggestion that asking another how one can help evidences a follower identity. Moreover, in Chapter Six, Ursa, a successor, refers to supporting a successor she thought was being unfairly criticised, aligning with Blair and Bligh's (2018) interpretation of following. This is interesting as it suggests that participants reflected on previous iterations of follower identities to inform their sense of whether they were being followed. Equally, it reinforces that following can be done to facilitate identity work, as Dermid demonstrates in Chapter Six.

However, it is important to qualify that a follower identity is not automatically accepted. Moira's experience in Chapter Six of trying to adopt a follower identity in relation to the successor, by taking requests for task-based work, is rebuffed when this does not align with the successor's preferred way of working. Likewise, in Chapter Six, when Fionn feels that a successor is attempting to follow her based on her local expertise, she feels uncomfortable accepting this followership because of her discarded self. This suggests that, whilst the decision to follow someone is voluntary, there is no obligation on the perceived leader to accept that follower identity. In Chapter Four Lara reinforces this: although she views a possible authenticity in a future relationship with the successor based on honesty, when this does not materialise, Lara indicates that she is less willing to follow the successor. This adds to the risky character of following (Larsson and Nielsen, 2021), in that, although following is a considered, directed choice, it may not materialise because of the co-production of accepting another's follower identity. This also brings into question the motivation behind following. If following was truly directed to an individual person, if the prospective follower's behaviours did not align with those of the perceived leader, the prospective follower might change to suit the desired leader. Whereas Douggie and Ronald are willing to do this, Moira and Lara are not. Following, then, is not just about accepting a leader's

definition of "good" (Blom and Lundgren, 2020: p. 167), but accepting that another's definition of 'good' is sufficiently similar to one's own. This suggestion is a stark contrast to those positioning following as a passive act of following procedures and instead takes steps to allow people who have followed to define following (Meindl, 1995).

The analysis delineated between those who were following a successor and those who were following a unit or vision. When a staff member offered support so that the unit continued to function, they did not perceive that they were following the successor. A staff member, Paige, was portrayed in Chapter Four as engineering a successful transition operationally, despite her hesitancy over the quality of her relationship with the successor. Paige's example aligns with the argument that a follower identity can be directed to something non-human (Uhl-Bien et al., 2014; Pietraszewksi, 2020), in that Paige accepts and overlooks the suboptimal relationship to preserve the unit's function. Dermid also showed signs of following a vision – his own variation of a previously established vision – but did this within a functioning relationship with the successor. This challenges authors who suggest that followers support 'leaders' or 'leadership agendas' (Carsten et al., 2010). For instance, Oc and Bashshur (2013) suggest that supportive followership can earn 'followers' credit from 'leaders' in future, but examples in the data suggest that further clarity is needed over whether said 'followers' were following the leader or committed to the organisation's purpose. Consider also, in Chapter Six, when Jacqueline takes on additional responsibility for sustaining operations in the unit, essentially performing as the successor. Chaleff's (2009: p. 40) 'high support, low challenge' implementer quadrant of courageous following might initially have been relevant, but Jacqueline is experimenting with a leader identity and possibly following the organisational vision, not the successor. Although Chaleff's work was a starting point in showing that 'followers' exhibit more than passive behaviours (Baker, 2007), a leader-centric focus appears to have disregarded the possibility that following can be directed to a broader organisational vision and not necessarily an individual (Uhl-Bien et al., 2014).

The context of Paige's unit is also relevant: as reported by Paige's staff member Doreen in Chapter Five, an element of succession fatigue encouraged her to follow Paige relatively quickly, who was encountering her own succession journey at the same time as her director was replaced. A sense of simultaneous followership is evident here: Doreen follows Paige because she believes in the future leadership she can provide, whilst Paige follows the function of the unit because she feels she owes stability to her re-inherited staff members.

Paige, therefore, has a belief in the unit beyond herself and her relationship with the director. This supports Jaser's (2017, 2021) concept of the connecting leader, in which middle managers experience simultaneous leader and follower identities, expanding this to be directed to individuals and visions.

Identifying those who are not Following

Chapter Four highlighted a clear aversion to the term and process of following among research participants, enabling exploration into why following was an unsuitable term, as Collinson (2017) and Blom and Lundgren (2020) encourage. The aim of this section is not to upgrade followership beyond what is reasonable or venture into "non-followers" (Alvesson and Blom, 2015: p. 277). Instead, it will draw further parameters of what following is *not*, so that the concept avoids further growth into a hembig (Alvesson and Blom, 2022) and can also be more easily differentiated from, say, leadership. Role-based scholars have called for empirical evidence of influence from a 'follower' position (Popper, 2011; Lapierre et al., 2012; Carrington, et al., 2019; Epitropaki et al., 2020; Kim et al., 2020), the implication being that, if occupying a role lower in the organisational hierarchy, influence must remain contained within the follower label. Chapter Two challenged the use of 'follower' in this way, suggesting that such use is a symptom of a staff member being automatically considered a follower and a successor automatically considered a leader. Subsequently, this section will also position the resistance or undesirable behaviours of 'followers' in the literature with similar behaviours of staff, who were not following, suggesting that the 'resistant follower' behaviour is not the behaviour of followers at all. In turn, the section argues for recognition of influence from staff to be classed as leadership rather than as 'influence from a follower position'.

Typologies of 'Followers' who are not Followers

Chapter Two questioned whether the use of follower in the term 'alienated follower' was suitable given that a staff member who felt ostracised from a leader or group likely did not feel that they had similarity with them (Kelley, 1988). Staff participants Isla and Jacqueline's experiences of differentiating themselves from a successor highlight that ostracising behaviours did not constitute followership, suggesting that the term 'follower' is avoided not only because of its negative connotations (Alvesson and Blom, 2015), but also because it does not reflect the feelings of the so-called 'follower' (Einola and Alvesson, 2021). Kelley

(1988) suggests that alienated 'followers' have negative interactions with a 'leader', but this is also challenged, as Jacqueline had no negative interactions with the successor. Using Ibarra's (1999) concept of provisional and aspirational selves, the findings highlighted how Jacqueline used a sense of alienation as an environment to craft a provisional self in, allowing her to work towards an aspirational self. In role-based followership, the same actions could be interpreted as Jacqueline following to preserve the best interest of the unit or simply get the job done (Carsten et al., 2014). There may be some truth in this, as Jacqueline was conscious of the unit's reputation and of sustaining existing practices. However, this conclusion is closely related to what followers contribute, which overlooks the importance of understanding the follower identity before exploring staff as a resource; by exploring Jacqueline's parliament of selves, her profound identity work and liminality has been illustrated .

Chaleff's (1995) typology of courageous followership is also challenged by the findings. Courage can be identified in Jacqueline's decision to take on an advocacy role for the unit, in her reflections on whether she can more formally take over leadership responsibility from the successor, and in her decision to exit the organisation. However, she does not enact a follower identity during succession; these decisions are representations of the identity work she completes, as well as the result of a lingering organisational ghost, the predecessor, shaping what Jacqueline feels needs attention. Equally, in Chapter Six, Isla's attempt to sabotage the successor's image, though courageous, is not followership. These examples challenge Carsten and Uhl-Bien's (2012) suggestion that followers with a poor-quality relationship with a 'leader' exercise less voice. These are also interesting examples to consider alongside Jolly et al.'s (2022) findings on leader misconduct. Although not necessarily a moral transgression, the perceived unleaderly behaviour shown by the successors in both examples causes Jacqueline and Isla to re-evaluate their relational identity with the successor. For instance, Isla initially felt excited to work with the successor, showing signs of support for him and what he could bring to the unit; perhaps thinking of a future where she followed him. When this does not materialise, challenging what she views as leaderly, a possible follower identity is discarded and she begins restructuring a provisional self (Petriglieri, 2011) based on her relationship with the predecessor's ghost.

Resistant Followers may not be Followers

The resistance of some participants, particularly staff, challenged the concept of 'follower' resistance. Although Tepper et al. (2006) are disciplined in their use of resistant *subordinates* (rather than followers), others have referred to active *follower* resistance through sabotage (Bligh et al., 2011) or upward communication (Carsten and Uhl-Bien, 2012). Isla's attempts to sabotage the image of the successor to his superior cannot be considered following given that she does this to prevent others from viewing the successor as successful or a suitable appointment. Moreover, beyond the sabotage attempt, throughout the interview she refers to his work style conflicting with her own. More recently, Gunter et al. (2021) described followers that do not follow, where 'followers' oppose requests or voice concerns. Oscar's relationship with the successor in Chapter Six challenges this, as well as the notion that resistant followers engage in upward communication. When the successor suggests a rotating chair concept, Oscar is vocal in his resistance to this based on his lack of formal authority. Disagreeing with the successor's values for the unit way of working, Oscar appears as neither a leader or a follower. Elsewhere, Oscar adopts a follower identity when, as Larsson and Nielsen (2021) suggest, he cites his lack of knowledge as precluding him from informally leading. His resistance, therefore, does not prevent him from occupying a follower identity. Lastly, when making suggestions to the successor or attempting to amend their ideas, Oscar asserts a leader identity based on his local expertise. Here, he is not being a resistant follower but pursuing an aspired, knowledgeable leader identity. Though he feels this identity is rebuffed, his making a suggestion should not be considered critical of management (Piderit, 2000) but as believing he has a responsibility for the unit's smooth operation. This speaks to the fleeting nature of leader and follower identities, and challenges the resistant follower category.

Oscar has motivations outside of the leader-follower dyad which prompts his behaviour. For instance, he and Isla both distance themselves from leader or follower identities by reasserting the importance of their work life balance or personal projects, aligning with Collinson's (2003) psychological wall between the public and private self. They may not be resisting but seeking to maintain the provisional self they value. Blom and Lundgren's (2020) assertion that an individual is no longer a follower when they cease to share values with a leader is relevant here. Oscar and Isla are not followers, nor resistant followers, but have "minimised" the leadership relations in the unit (Alvesson and Blom, 2015: p. 268). Moreover, the findings challenge Almeida et al.'s (2021) suggestion that resistance of a

formal leader can still be interpreted as followership: the authors suggest that resistance of a formal leader to restore organisational goals highlights the adaptive role of followership, but Jacqueline, for instance, is explicit that her resistance enables her to take on greater *leadership* responsibility and protect the organisation in doing so. Staff follower and leader identities are activated at different times and resistance is motivated by their personal view of their parliament of selves within the succession context.

Questioning What We Gain from the Term 'Follower'

Participants characterised the term 'follower' or 'following' as unfavourable, aligning with existing literature (Agho, 2009; Hoption et al., 2012; Alvesson and Blom, 2015; Benson and Jordan, 2018; Fadden and Mercer, 2018; Gilani et al., 2019). The plural discussion of followers suggests that, although existing followership literature considers collective referencing to followers to be outdated (Collinson, 2006; Na-nan et al., 2016), the practitioner community continues to discuss followers collectively. Both staff and successors were vague in their description of following, struggled to recall moments when they followed (using the interview to make sense of following and, instead, identifying it retrospectively) and generally avoided claiming follower identities, as Alvesson and Blom (2015) suggested. Participant responses also confirmed the suggestion in the literature that 'leaders' would refer to their own leadership without being able to describe how they had acquired followers (Essa and Alattari, 2019). The hesitation to use the terms 'follower' or 'following' and the unfamiliarity with them is one of the components of the mythology of followership, in that followership has become an established literature without much claiming of follower identities by participants. As a result, there was little support for Coyle and Foti's (2022) suggestion that followers could be more specific about following than leaders. This finding complements Larsson and Nielsen's (2021) proposition that labels of leader and follower may only be meaningful analytically. The alternative terms proposed by participants reinforce this further.

Instead of the term 'following', participants proposed alternative terminology, including being 'on board', which illustrated agentic, engaged and thoughtful behaviours within a leadership relationship. These terms did not align with participant assumptions on following, perhaps providing some support for those calling for alternatives to 'follower'; suggestions for which have included 'collaborator', 'constituent', 'contributor' and 'member' (Rost,

1993; Uhl-Bien et al., 2014: p. 90; Riggio et al., 2021). In the same way that Fairhurst et al. (2020: p. 607) ask what is gained from using 'leadership' instead of "collaboration" to describe collective leadership, it is worth interrogating the meanings behind participant alternatives to 'following'. 'On board' conveyed a sense of equality or mutual respect between a follower and leader, challenging Rost's (2008) suggestion that followers are not an equal participant in the leadership relationship. Sophie, a staff member, who associated with a feeling of 'belonging' (p. 107) more than following, implies that she reaches a relatively stable identity in relation to a 'leader' or perhaps a unit. This aligns with Schedlitzki et al.'s (2017) argument that identities previously interpreted as follower identities may represent a desire to reach a stable workplace self. This aligns with a core argument that following is motivated by a journey to an aspired self (p. 108). Perhaps this does not mean that the term 'follower' needs to be made redundant. Just as Alvehus (2021: p. 130) attempts to unravel the 'mystery' of leadership by challenging the need to be either leading or following, the findings suggest that greater precision in what can be considered following, what can be considered 'not following', and honesty about whether this is related to an individual, vision, or other thing, is needed to unravel the mystery of followership.

Developing precision in understanding following may require recognition that organisational actors do not need to be either leading or following. Staff participant George's behaviours in Chapter Four are similar to those of active citizens (Sherrod and Lauckhardt, 2009), in that he is actively engaged in fulfilling organisational values. Whereas Riggio et al. (2021) characterise everyday citizenship as leadership, George's interview remarks suggest that he is interested only in carrying out his role, suggested by his description of himself as a "trusty lieutenant". Given that he sees no formal requirement to engage in a follower identity, only to fulfil his formal role, can he be described as either leading or following? If not, an alternative to leading or following, and perhaps one which aligns with Ashford and Sitkin's (2019: p. 457) suggestion that scholars 'go down a level' and become comfortable with the idea that individuals can choose not to either lead or follow, may be required. This complements Larsson and Nielsen's (2021) finding that identities based on local expertise or role responsibilities, like "interpreter" (Nielsen, 2009: p. 40) may be more relevant. Given that George was mainly interested in explaining the tacit landscape to the successor, George and others like him may be interpreting the succession environment for the successor.

Similarly, Ursa, a successor participant who did not feel she could lead the team nor that she could follow the team's guidance or knowledge, challenges the dyadic nature of either leading or following. This questions the legitimacy of the claim that followership and leadership are both core to organisational function (Srinivasan and Holsinger, 2011) and that to lead, one must first follow (Agho, 2009). Instead, it is possible that the succession context can delay any engagement with leader or follower attribution. The status of being neither a leader or a follower during succession is again interesting for future research which considers the existence or non-existence of following dynamics during change.

Following to Pursue an Aspirational Self

Having outlined three tenets of following – that it is fleeting, voluntary and directed at someone or something – and discussed what should not be considered following, this section will compare the argument that following was related to an individual's pursuit of an aspirational self with the existing followership literature.

Carsten et al. (2010) and Carsten et al. (2014) suggest that a 'follower' position allows the follower to learn from a leader. Provided that this use of 'follower' is interpreted as not restricted by formal role, the desire to learn from a leader aligns with Dermid's experience of following in Chapter Six. Dermid views the successor as someone who could provide him with development opportunities, like allowing him to take responsibility for the budget. He begins, voluntarily and at different moments, to directly support the successor in her assimilation into the role (following). When this is met with recognition that he can take on additional tasks, he views the successor as a leader. This challenges the notion that following involves giving up autonomy (Bastardoz and van Vugt, 2018); in fact, Dermid follows when he is given greater autonomy. This also aligns with Jaser's (2021) suggestion that follower identities may be activated prior to leading occurring. Dermid follows first when he sees a potential leader identity. Arguably, the successor also follows (first), having identified a leader identity in Dermid based on his tacit knowledge which she can learn from. In the same way that Lara offered her follower identity to a successor on p. 100, whilst Lara's followership did not materialise, Dermid's did. This may provide an alternative rationale for why individuals behave as exemplary followers close to the beginning of their employment in a new post (Hinic et al., 2016). Individuals are not captivated by the myth of leadership or

followership but may be taking full advantage of the "identity arena" of their new organisation (Knights and Clarke, 2014: p. 337).

This also challenges the suggestion that following is not identity-boosting (Alvesson and Blom, 2015) when, for Dermid as well as Christopher and Florence in Chapter Five, following brought them closer to an aspirational self through a personal learning journey. Likewise, for Cally in Chapter Four, being guided by staff expertise constituted their leadership over her – this can be interpreted as following to achieve an aspired, knowledgeable successor identity. Her behaviour could be considered following in order to generate referent power with the existing team, who could become more willing to attribute a leader identity to Cally as a result. This aligns with Epitropaki et al.'s (2017) suggestion that 'followers' can be more active when focusing on an ideal self, positioning a 'leader' as a means to an end to achieve this self. Kelley's (1992) little leader concept applies here: Barrow et al. (2011) extended little leadership to show how junior doctors became leaders through work shadowing and temporary additional responsibilities. The participant experiences presented here, combined with the fluid perspective on leading and following which this thesis advocates, suggest that succession creates a space for *little aspired selves*, which could include a leader identity. On the argument that following behaviours are directed to someone or something (p. 177), this evidence also suggests that the 'someone' followed can be an aspired self. The pursuit of an aspired self also addresses the question of why followers are influenced (Popper, 2011). Perhaps individuals allow themselves to be influenced (becoming a follower) because they have identified an opportunity to diversify their parliament of selves. As Popper suggested, a focus on (fleeting occurrences of) follower identities in succession has clarified motivations to follow.

Moulding the Succession Experience

This section challenges arguments that succession impacts attitudes and work outcomes without staff consent (Diebeg et al., 2016; Kuntz et al., 2019), presenting the deliberate active behaviours exercised by staff during succession. This challenges the suggestion that succession disruption comes from the shock of the change (Boling et al., 2016), adding that the disruption is also felt by successors. Throughout, comparisons are made between the impact of staff behaviours and the possible transformative effects experienced by the successor.

Transformation by Staff

This section argues that, as transformational leadership scholars have theorised that 'leaders' transform 'followers', staff behaviours have a transformative effect on successor behaviour by prompting them to perform beyond the expectations of their basic role (Bass, 1985) as they assimilate into a new post. For instance, staff share knowledge with successors to enable them to reach their full potential in the role, generating optimal performance for the unit (Dvir et al., 2002). Alternatively, in ventriloquising the past, successors temporarily adopt a follower identity by internalising values from the past and shaping their successor identity or style as a consequence (perhaps to differentiate from a predecessor). Whilst attempting not to place a leader identity at the centre of this discussion, as transformational leadership critics have suggested it does (Siangchokyoo et al., 2020), the concept of transformation is useful in showing how successor experiences, behaviours and identities are shaped by leader identities held by staff.

Knowledge Sharing

Rather than influencing from a 'follower' position, staff adopted the identity of a transformational leader during succession, for instance by sharing knowledge extensively. Chapter Five illustrated how staff used their expert power to respond to successor Cally's need for basic information or tacit knowledge about the unit (Braun et al., 2013). By this characterisation, a successor fulfilled the literature's definition of a follower as someone who seeks information (Bastardoz and van Vugt, 2018) as well as the definition of a follower as someone seeking to reach an aspired self. Successors became a follower who recognised a desired similarity in resources and values in a leader (the staff member), thus following them (Deale et al., 2016). This challenges those who suggest that 'followers' moderate leader influence and shape the leadership process as it unfolds from a follower position (Meindl et al., 1985; Shamir, 2007; Gooty et al., 2010; Baker et al., 2011; Eilam-Shamir et al., 2017; Sims and Weinberg, 2022). Indeed, this also challenges Cally's interpretation of staff efforts to assist in her sensemaking (Clifton, 2017) as "steering the ship with her" (see p. 117). It is interesting that this analogy aligns with those alternatives to following on p. 98, including a sense of belonging and equality between leader and follower. This can be interpreted as staff moulding a successor's values, identities and proximity to their parliament of selves. This also resulted in identity work for the staff member, addressed later in this chapter.

The knowledge brokering that Larsson et al. (2011) identified in high tech firms was particularly relevant in Florence's vignette in Chapter Five. As an informal leader, both by her own admission and the recognition of her peers, Florence performed an explanatory function to enable the successor to understand the unit's immediate priorities (Larsson and Lundholm, 2013), also following Florence in the process. Some elements of Florence's experience align with recommendations for knowledge transfer in succession (Rothwell, 2010; Grossman, 2014), though knowledge sharing here was reactive due to poor succession planning. Florence, and others throughout Chapter Five, became effective informal leaders based on their tacit information and the persuasive arguments they could create as a result, enhancing the relevance of Oc and Bashshur's (2013) research on followership and social influence through upward feedback. Indeed, the knowledge sharing action also reinforces Pietraszewski's (2020) image of the follower as a student, drawing attention to Chapter Four's suggestion that following was a learning journey.

Overall, knowledge exchange supports the reciprocal and mutual influence between leaders and followers (Potter et al., 1996; Uhl-Bien, 2006; Baker et al., 2011; Cunliffe and Eriksen, 2011; DeRue, 2011). It challenges aspects of authority in Collinson's (2006) conformist self. Rather than assuming that conformist selves acted under the gaze of those with formal authority, the tendency for successors to heed staff knowledge and conform to staff expectations suggests that successors were conforming to the *informal* authority, but expert power, of staff. The findings provide an interesting twist on conformist selves in relation to disrupted formal dynamics and authority but also challenge the general suggestion that a follower accepts a lower level of authority (Uhl-Bien and Pillai, 2007; Alvesson and Blom, 2015; Velez et al., 2022). At the same time, elements of the conformist selves help to explain successor behaviour in followership terms. Calculated followers show similarity with those successors following staff for knowledge to reach an aspired self. The same can be said for identity-based followers who seek affirmation from staff on an aspired leader identity. Thirdly, successors who are meaning-based followers may follow staff to attempt to mitigate the disorder and disruption of their own identity transition.

Overall, the findings support the argument that factors from the past shape the responses of a group to a new leader (Gouldner, 1954; Ballinger et al., 2009; Orr, 2014), clarifying that, rather than the past permeating staff behaviours subconsciously, staff are consciously aware of the elements of the past they wish to share with successors. This complemented Cooren's (2012) notion of ventriloquism in interactions. Focusing on the ventriloquism of policy and ideology, Cooren argues that individual actor behaviour and identity is shaped by what they choose to ventriloquise. Applying ventriloquism in their discussion of organisational texts, like values or strategies, Knudsen et al. (2022) suggest that ventriloquism positions an organisational actor as having authority. In the succession context, staff ventriloquised their memories of the past (the text) to assert their own authority on existing processes as well as to shape their identities or portray certain values. Staff ventriloquism also clarifies Tourish's (2022: p. 726) argument that the past is "transmitted" in a change context; in fact, the past is brought into being intentionally by staff. For instance, in Chapter Five Maria, a successor, recounts colleagues expectations that she would be different from a predecessor; organisational actors are ventriloquising the past in order to assert the values they expect of the successor. This is a good example of how staff influence, as leaders, through expectation setting (Zaleznik, 1977). Maria's example also demonstrates how staff guided successors by structuring their sensemaking of what the organisation considered good (Giessner et al., 2016; Muhlemann et al., 2021). In the same chapter, Nicola, a successor, demonstrates how successors can ventriloquise using a predecessor's ghost by drawing similarities or differences between them.

Using the term 'ventriloquism' challenges the existing literature on nostalgia and inertia. Ventriloquism conveys an active, deliberate retelling of the past, whereas inertia positions nostalgic stakeholders as unable to separate themselves from the past and move on. What the literature described as inertia among staff, a preference to maintain existing processes (Quigley and Hambrick, 2012; Giannella et al., 2022), was instead experienced by staff as a duty to preserve positive practices. In Chapter Five, for instance, staff member Barra seeks to protect existing operations given that he does not yet have evidence that the successor has good intentions for the unit. The past is being ventriloquised: Barra may be occupying multiple identities (staff member and ghost), using himself as a vehicle for ventriloquism; alternatively, Barra could be being ventriloquised by his own memory of the predecessor's ghost.

Staff did not describe their knowledge sharing as inertia but valued their own expertise and expected the successor to also. This clarifies Ciulla's (2008) recommendation to understand the past, demonstrating that staff are the source of this demand. Ciulla (2020: p. 33) also suggests that forgetting about the past prevents actors from becoming "wounded monsters" who resent change; in fact, Barra seems to be attempting to stop himself from becoming wounded *at all* by ensuring that positive practices are not unnecessarily lost. Additionally, if, also in Chapter Five, successor Nicola had stopped a programme from operating, she would have been inviting the emergence of such wounded monsters among her staff. In succession, there is some need to accept that there may be positive intentions behind ventriloquising the past and that in turn, the succession landscape is moulded by staff who hold these memories. These histories may also be valuable in informing succession planning programmes, complementing McMurray et al. (2012) in their recognition of the complexity of staff histories.

The response of successors to the ventriloquism of the past is particularly interesting in conveying staff transformative behaviours. Ventriloquism challenged the existing depiction of successors being in control of their ability to understand what went before them as well as the identity they are able to craft. The followership of successors was demonstrated by, for example, Nicola's willingness to explore a new future for the programme mentioned above. Although Einola and Alvesson (2021) suggest that this act of deference may happen less commonly than previously assumed, the succession context may challenge this by highlighting followership across different formal roles. Successful bids by staff to preserve or change existing procedures exemplify their capacity to influence the successor and team goals, which van de Mieroop et al. (2020) consider constitutive of leadership. Rather than seeking to reduce inertia through succession planning, as suggested by Groves (2019), succession management should recognise the practical need for knowledge transfer, as well as the symbolism of sharing information from the past.

'Informal' Leadership by Staff

Knowledge sharing and ventriloquism of the past can be interpreted as informal leadership by staff, in different concentrations for each participant. In Chapter Five, staff member Victoria's desire for the successor to take back her authority over a project could be interpreted as

Victoria engaging in task-structuring (Mumford et al., 2002); she offers the successor an opportunity to assert a leader identity by fulfilling her request for a change in workload. Other staff participants showed a fleeting engagement with leadership in their persuasion (Alvesson and Blom, 2019) of successors to view work priorities in the same way (see staff member Bonnie, p. 127). Lastly, staff member Dermid's desire to own the budgeting responsibility for the unit highlights both his operational leadership (Larsson and Holmberg, 2021) and the alignment of his leader identity with the vision of the unit. These individuals are clearly active participants in succession; they challenge the successor not as followers (Carsten et al., 2014), but as individuals engaging with a leader identity to promote the interests of the unit. When staff enacted a leader identity, although it was a considered choice and an identity they were qualified to enact, they often laughed whilst describing their leadership. They may have been trying to preserve the formal authority of the successor, as Larsson and Nielsen (2021) identified in their own exploration of staff who enacted leader identities. In Chapter Six, Jacqueline claims informal leadership without hesitation, suggesting that if one had not created a potential follower identity, participants felt less of an obligation to preserve formal structures. This reinforces the argument that following was not an obligation but a voluntary choice.

The existing literature seems to have devised terminology which captures the informal leadership of those who do not have formal authority, without calling them leaders, and certainly without referring to formal leaders as followers. Jacqueline, however, structures the work of the successor, interpreted as *informal leadership* (Larsson et al., 2011); connects the formal 'leader' to an existing network of staff, interpreted as *squiring* (Sang and Golan, 2022); and exercises personal initiative in introducing her unit to new members of staff when the successor fails to do so, also interpreted as a *proactive work behaviour* (Urbach et al., 2021). Others have labelled similar behaviours as those belonging to proactive followers (Coyle and Foti, 2022) or have simply used the follower label to show how followers, too, can exercise voice as 'leaders' do (Blair and Bligh, 2018). The various descriptors for these behaviours perhaps mask the leadership and influence of individuals occupying a lower position in the organisation. The term 'informal leadership' is useful in alerting a reader to the existence of leadership outwith a formal role. However, Jacqueline's explicit rejection of the 'follower' label in this context, as well as her characterisation of her behaviours as leadership, should urge scholars to articulate leadership *as leadership*, regardless of its source in the organisational structure.

Transformation by Ghosts

Chapter Two presented evidence from the existing succession literature which suggested that staff grieve during change. It argued that grief during succession may be enhanced among professional staff, given the prominence of institutional memories (Bolden et al., 2009; Lewis, 2014) and their longer tenure, which may exacerbate grief (Fishman, 2019). Existing research on grief characterises 'followers' as distraught (Gilmore, 1988) or questioning their purpose post-succession (Carsten and Bligh, 2007), characterising staff as disrupted by succession. The findings related to organisational ghosts (Orr, 2014) challenged this by illustrating ghostly actors who, like staff, transformed the succession experience. This meant that staff were not necessarily distraught or questioning their purpose but discarding a previous relationship and the selves (both personal selves and the ghostly selves of the predecessor) associated with it. The remainder of this sub-section considers ghosts generally, before addressing ghosts from internal and external succession journeys, and then staff personal ghosts.

Findings on the predecessor's ghost extend the arguments of those suggesting that predecessors enter reality from the past (Berger and Luckmann, 1966; Montecinos et al., 2018). Rather than suggest that predecessors arrive in succession, in fact, they exist throughout the succession process, interacting with the successor through staff. This complements Bell's (1997) suggestion that organisational ghosts are enacted by those with memories of a ghost, expanding on this in that these are not only memories but are embodied in the staff cohort. It is also interesting to consider extending the ventriloquism argument from the previous section (Cooren, 2012), in that a predecessor's ghost ventriloquises a staff member and, combined with the staff member's own twist on memories of the past, the ghost impacts succession. Ghosts also enhanced the expert power that staff wield over successors; for instance, where staff member, Barra, felt a loyalty to the unit's history and recalls trusting the predecessor, he advocated for certain processes where the predecessor was not physically there to do this. This contributed to the transformation of the successor as staff pushed successors to internalise certain values they deemed core to the unit (Siangchokyoo et al., 2020).

Generally, the findings confirmed Pendleton et al.'s (2021) suggestion that the longer the tenure of a predecessor, the greater the shadow cast by the predecessor's ghost. When a predecessor was disliked, the impact of the ghost usually involved repairing or revisiting old wounds, as successor Iain suggested on p. 130. For a favoured predecessor, the ghost became a marker for how processes should be conducted, perhaps manifesting as Orr's (2014) friendly ghosts who give advice, but ventriloquised by staff, as Bonnie does on p. 127. The forthcoming discussion of Paul shows how such friendly ghosts can become unhelpful in internal succession processes (see p. 194).

Predecessors in External Succession Processes

The portrayal of predecessor ghosts throughout the findings suggested that staff mould successor decisions through their access to ghosts. This builds upon research presented in Chapter Two which suggested that successors existed in the shadow of their predecessors (Kim et al., 2021), depicting instead that staff, successors and ghostly predecessors exist equally in their contribution to the succession process. The source of the predecessor's shadow has not previously been identified, but the experiences of successor participants like Ursa, who in Chapter Five found herself stepping into "potholes" *without* the support of staff, and Joanne, who navigated "wood" *with* staff knowledge, suggests that staff are something of a gateway to predecessor ghosts (it is interesting that, despite not discussing ghosts with Joanne, her reference to a woodland extends the haunting scene of succession). This complements research which identifies the importance of orienting external successors (Gothard and Austin, 2013), perhaps demonstrating that the practical need to share information was the basis for the development of staff expert power.

Personal ghosts of staff members' previous selves accompanied the ghosts of predecessors during external succession processes, growing the parliament of selves further. Chapter Six discussed staff member Jacqueline and the liminality she navigated as she discarded the self she enacted alongside the predecessor. It is interesting that, after Jacqueline attempts to transform the successor into someone who recognises the issues within the unit (intellectual stimulation by Bass' (1985) definition), the transformation is of Jacqueline via her ventriloquism of the predecessor's ghost. She recognises the issues based on her interpretation of how the predecessor would respond, changing her behaviour and pursuing a leader identity instead. This could be a challenge to the unidirectional flow of

transformational leadership from formal leader to formal follower (Tourish, 2014); instead, transformation is contained to Jacqueline's mental schemas of a predecessor, the current succession context and the aspired self she would like to gain. Another staff member, Moira, admitted to grieving for the predecessor, challenging the argument that it is a 'leader' who uses grief to develop bonds with staff (Ciulla, 2020). In fact, the longing which both Jacqueline and Moira had for the predecessor suggested that staff used their sense of longing to attempt to transform the successor (and the various shortcomings they perceived).

External successors, like Ursa in Chapter Five, could also be interpreted as accruing personal ghosts. Ursa's liminality was particularly severe as she failed to gain affirmation from the 'elders' in her new organisation: elders usually provided affirmation of a crafted identity (Beech, 2011: p. 297), and she sought this from both the institution and her inherited staff cohort, but neither gave this affirmation. Simultaneously, Ursa reflected on the selves she had been before (Ybema et al., 2009), including a self who gave new formal leaders the benefit of the doubt; the self which felt secure in her profession; and a previous self as an academic. These discarded selves, as well as the rejected aspired self which she perceived as a leader identity during succession, assembled as a parliament of ghostly selves during the succession process. Her vignette reinforced the emotional process of re-establishing an identity (Larsson et al., 2020) as well as the potential to become stuck in a liminal space (Edwards et al., 2021). That staff *and* successors acquired personal ghosts builds upon Rothausen et al.'s (2017) suggestion that role transitions prompt liminal periods, addressing a leader-centrism in the focus of this liminal period for successors rather than staff. It is interesting that Ursa's staff seek to engage her "full person" (Burns, 1978: p. 4), but only in the sense that this full person would align with their interpretation of a desirable leader identity. Perhaps this represents a failed attempt at transformational leadership, by staff, of the successor.

This discussion of personal ghosts also challenges the existing interpretation of liminality which suggests that individuals appear to "find themselves" in a state of liminality (Hay and Samra-Fredericks, 2016: p. 409). Rather than liminality simply appearing, the findings suggest that a successor's identity is moulded by staff. This extends Ybema et al.'s (2009) suggestion that identity is simultaneously what is projected and perceived, adding that identity is also what is expected and unwanted. Moorhead's (2019) work, which found that new social workers developed their professional identity based on colleague and service user expectations, is also confirmed within the findings. It is possible that a successor, regardless

of industry or profession, may shape their identity based on staff expectations. Lastly, staff contributions to successor identity challenged the sense of control which successors felt over their identities. This aligned with the argument that any sense of identity was "tenuous" (Schwartz, 1987: p. 328; Ahuja et al., 2018: p. 991). It also challenged phrases such as Chen and Reay's (2020: p. 1543) "parking" of identities: "parking" suggests that there was a sense of choice and control in leaving identities behind. Although Ursa parked her previous professional identity deliberately as she thought it was holding her back in her new post, this engagement with identity work was prompted by staff responses to her previous identity. A redeeming feature of the concept of "parking" is that a personal ghost, parked among a parliament of selves, will remain there until reconfigured or moved elsewhere. The aspired self that Ursa wished to pursue, but had to park or discard, could be returned to in future, and it seemed that she did when hiring additional staff which made her feel that she was part of a team. Staff interactions with successor identities went beyond giving feedback, which has been suggested to inform how identities are crafted (Ibarra, 1999), to include the ventriloquism of a predecessor's ghost.

Predecessors in Internal Succession Processes

The predecessor's ghost was particularly impactful for internal successors. Successor Paul's experience in Chapter Five showed how, rather than being observed by another person, his lingering staff identity, a personal ghost, exacerbated the duty he felt to the predecessor's ghost, his team, and his dual identity as an ex-staff member; a simultaneous loss and gain within Paul's parliament of selves (Ibarra, 2007). This suggests that internal succession may prompt greater engagement with dramaturgical identity work (Goffman, 1959), as Paul attempted to prove himself to his inherited team-formerly-colleagues. This also challenges Wittman's (2018) proposition that internal promotions may not lead to identity change; Paul experienced *enhanced* identity change, with his staff identity transformed into a personal ghost, which Shepherd and Williams (2016) describe as identity lingering. The experience of participants whose predecessor remained in the organisation also contested Ballinger and Schoorman's (2007) suggestion that a leader who remained within an organisation alongside their successor would reduce the intensity of staff reactions. The extracts from internal successors across the findings suggest staff reactions were contingent on memories of the successor as a staff member.

As in Jacqueline's example, Paul's personal ghosts transformed the succession process into a liminal space. There were clear 'triggering events' for Paul's liminality (Beech, 2011: p. 287), including the scepticism of colleagues over his formal position (see Chapter Five, p. 138), as well as the attempts by the predecessor, who remained in the organisation, to check that work was still being completed. The predecessor's continued employment is sometimes referred to as a boomerang (Gothard and Austin, 2013), but here a combination of the *friendly* and *walking* organisational ghosts proposed by Orr (2014) may be more relevant. Paul's predecessor is a friendly ghost in that, whilst she gives advice, he seeks to create distance from her so that he can work towards an aspired self, for his own security and the respect of his peers. The second interview with Paul in Chapter Six where he describes himself as the "leftovers" reinforces this, suggesting that he subsequently discarded his aspired self and that this, also, became a personal ghost. This aligns with the notions of feeling structurally dead or invisible when occupying a liminal space (Ibarra and Obodaru, 2016). Given that the predecessor has not yet exited the organisation, she could also be considered to be a walking ghost in that she has only partially left the unit behind. This actively prevented Paul from implementing his own agenda, confirming that predecessors can be reluctant to let go and justifying *why* an internal successor may avoid making changes (Querbach and Bird, 2017).

Paul's experience also challenges the argument that internal promotions are generally more successful (Shen and Canella, 2003). Although staff were initially pleased that he had been appointed, as time progressed Paul felt the effects of a parliament of ghostly selves which exacerbated his liminality. He was suspended between being a staff member as well as a successor, existing as a reminder of the past and of the future (Stenner et al., 2017; Kerrane et al., 2019), belonging fully to none of these categories (Ibarra and Obodaru, 2016; Kulkarni, 2020). The challenges faced by him and Jacqueline highlight that liminality can generate within internal and external succession, for both staff and successors. In some ways, liminality becomes an inevitability within change. This partially challenges those who suggest that internal appointments can create reduced disruption than external appointments (Petrovsky et al., 2014).

Considering the personal and organisational ghosts depicted in Paul's succession experience provides further reflections for the use of transformational leadership. Transformational scholarship suggests that followers who are transformed are more or less compliant in their response (Tourish, 2014), but this is not the case for Paul. His experience appears

uncomfortable as he attempts to navigate the different desires for changes in his "motive base" (Burns, 1978: p. 20) from ghostly and living selves in the organisation. Given that the second interview views Paul as still unsure of his security in the new role, the end result of the transformation attempts appear to have been unsuccessful, but Paul's experience has certainly been shaped by these efforts.

Practicalities of Succession

This section considers findings relating to the practicalities of succession alongside the recommendations from the literature. The effectiveness of the existing succession planning literature for succession within universities is evaluated. This is followed by a proposal to approach succession in universities with a succession *management*, rather than planning, mindset, styled like a leadership development programme.

Temporal Dynamics of Succession

Although the findings confirmed that there were some distinct events within the succession process, including predecessor exit and successor arrival, confirming Simkins et al.'s (2009) and Groves' (2018) identification of these key moments, they also confirmed that attitudes and behaviours to a successor changed over time as is suggested by Rafferty and Jamieson (2017). The continuous identity work, fleeting and distributed leading and following dynamics and the journey metaphors used by participants to describe the change suggest that succession is an unfolding process, as suggested in Chapter Two. Although the shock response to succession noted elsewhere was confirmed (Boling et al., 2016; Querbach and Bird, 2017), the findings highlighted aftereffects which have been neglected in the existing literature. Exploring these aftereffects challenges the focus of the succession literature which, Chapter Two argued, has focused on recruitment processes preceding succession and the financial performance metrics thereafter (Farah et al., 2020). This thesis diverts from that tradition, responding to the calls for a longitudinal exploration of succession (Schepker et al., 2017; Aravena, 2020).

Succession Planning

This thesis confirmed that the lack of succession planning in universities recognised in Chapter Two (Bolton, 2000; Richards, 2009; Rothwell, 2010; McMurray et al., 2012; Grossman, 2014; Ishak and Kamil, 2016) remains an issue. The unfamiliarity with succession

planning and the use of interim arrangements suggests that a general unpreparedness for succession persists within universities (Carlsson, 2011; Pita et al., 2016). This may explain why staff experienced frustration or surprise when succession processes were announced (Bridges, 2018). This may be a symptom of the minimal succession planning research within universities; without such research, practitioners have not been prompted to reconsider current practices. Whilst this confirmed Kuntz et al.'s (2019) suggestion that succession creates a fear of disruption, it also suggests that this fear stems from a lack of succession planning. Staff may have been wrongfully characterised as being disrupted by succession because of the exit of a leader, when in fact the disruption to workflows has been as a result of poor workload and interim line management arrangements.

The findings also challenged some of the recommended practicalities around succession planning. Although Ballinger et al. (2009) suggest that a longer time period between succession announcement and successor appointment is beneficial, only successors agreed with this because it gave them a sense that staff were *ready* for intervention or change. This resembled heroic leader attitudes which saw some successors describe themselves as saviours who could provide this intervention (Schedlitzki et al., 2017; Schweiger et al., 2020). In contrast, in the research findings, staff felt that longer time periods delayed their ability to make decisions and progress projects, enhancing the perceived disruption arising from succession. Staff felt disempowered by these processes. Only Dermid's experience of succession, which combined an extended period of time without a formal director *and* a negative perception of the predecessor, aligned with Ballinger et al.'s (2009) argument. Generally, the findings challenged Lipman-Blumen's (2008: p. 40) suggestion that staff look for a "God-like" leader in crises by suggesting that they would have preferred to be empowered to make decisions themselves.

The research findings had implications for explorations of internal versus external succession. Although Dawley et al. (2004) suggests that internal recruitment has no impact on organisational performance, internal recruitment impacted on succession stakeholders' parliament of selves. When a staff member applied for the post a successor was successful in gaining, as described by Fionn in Chapter Six, the staff member's aspired identity was threatened, creating her own personal ghost, who watched as the successor worked on their own aspired self. This was worsened by the transformational role of staff: when staff exercised information power over a successor as Fionn did, staff were increasing the self-

efficacy of successors by equipping them with technical information to fulfil their role (Siangchokyoo et al., 2020). This created tension for those staff who felt that they could do the role more successfully, also reported by successors on behalf of staff (see Richard on p. 132). Participants also reported minimal internal progression within universities, confirming similar evidence presented in Chapter Two (Rosser, 2004; Gander, 2018), which, at the announcement of a succession process and during subsequent recruitment, was demoralising for staff. It suggests that many other professional staff will share Fionn's experience. These consequences each reduce organisational performance in ways that financial metrics used by Dawley et al. (2004) do not capture.

The presence of ghosts in the data may increase the relevance of the family business succession literature to succession planning in universities. For instance, establishing handover procedures between a predecessor and successor as family businesses do over time (Cisneros et al., 2022), or creating advice for social capital transfer between respected predecessor and external successor (Boyd and Royer, 2012; Overbeke et al., 2013), may ease the strain of the transition from long tenured predecessors faced by universities (Fishman, 2019). The argument for transferring social capital from a familial predecessor to an external successor challenges Gamson and Scotch's (1964) ritual scapegoating theory, which suggested that succession involves attributing failure to a predecessor. Staff participants often established the new collective identification by asking successors to reconsider previous mistakes or issues, but this required successors, like Alan in Chapter Five, to comment on past behaviours delicately and publicly. Successors have to navigate the complex identity work of staff as they discard previously held selves and add personal ghosts to the parliament of selves encountering succession.

Succession and Leadership Development

Succession has not previously been considered as an environment for staff identity work, nor for successor identity work prompted by staff. The suggestion in this final sub-section is that the succession process should be approached as akin to a leadership development programme, thus using succession as the first context in which higher education leadership development can be "reconceptualised" (McMurray et al., 2012; Beckmann, 2017: p. 156; Aboromadan et al., 2020). Adapting expectations around the possibilities for identity work

and the need to navigate additional non-physical actors, ghosts, would instil succession stakeholders with an approach to succession *management*, rather than planning.

Succession planning literature has drawn on leadership development cultures to recommend that "high-potential leaders" be distributed across an organisation to develop new skills (Groves, 2018: p. 9). Without endorsing the term high-potential leaders, it is worth recognising that approaching succession with a succession management mindset may enable the introduction of the fluidity of leader and follower identities to practitioners. This challenges the suggestion that there is a need for followership development programmes (Alegbeleye and Kaufman, 2019), arguing instead that the fleeting and distributed nature of leading and following throughout succession must be addressed as one. With the additional knowledge sharing requirements involved in succession, as well as the need for external successors to be connected with large new networks, succession managers must consider nominating appropriate individuals to satisfy this need. Lastly, given the lack of leadership development for professional staff within universities (Keller, 2018), interim opportunities where staff holding posts lower than the predecessor can experiment with an aspired identity would be valuable. Promoting these opportunities aligns with the view of leadership development programmes as a space for identity reconfiguration (Petriglieri and Petriglieri, 2010; Knudsen and Larsson, 2022). Moreover, based on the discussion of liminality in this chapter, liminality may be approached by leadership development practitioners as an inevitability which staff and successors must become adept at navigating.

Lastly, the disruption to workflows which was cited throughout the findings can be addressed by devising clear responsibilities and goals for staff in the interim, aligning with the learning journey which is core to leadership development programmes (Larsson et al., 2020) and transforming the succession process into a structured learning process. Perhaps this would create a recognisable route to an aspired self and also enable staff, especially, to take on responsibilities which help them to make sense of the expectations they feel from the predecessor's ghost. This also aligns with Raelin's (2011) suggestion that leadership development programmes should move out of the classroom and into practice. Overall, positioning succession as a leadership development process for the unit may allow staff and successors to identify shared values (Bolden et al., 2015). Approaching succession with a succession management mindset, driven by developmental values, would accommodate the detailed identity work and parliament of selves identified within the research findings.

Conclusion

By comparing the findings from Chapters Four, Five and Six with the literature presented in Chapter Two, this chapter has outlined contributions to the followership, succession and identity literatures. By using followership theory and an identity lens to better understand succession, the first section of this chapter argued that following, by both staff and successors, can be interpreted as the pursuit of aspirational selves. It also attempted to dispel the mythology of followership by outlining what could and perhaps could not be considered evidence of following identities and behaviours. This section suggested that such mythology has obfuscated the view of staff identity work during others' transitions. The second section of this chapter highlighted how staff and organisational ghosts shaped the succession experience of successors through knowledge sharing, ventriloquising memories of the past and generally 'informally' leading. The section argued for a recognition of these behaviours as leading, also illustrating succession as a complex parliament of living and ghostly selves. The next and concluding chapter addresses the methodological strengths and limitations of this thesis in making these contributions, also making practical recommendations for the implementation of succession *management* and practitioner engagement with followership.

Chapter Eight: Conclusion

Introduction

This thesis provided deeper insight into how succession is experienced by staff and successors. In doing so, it highlighted the importance of seeking unheard voices within change, challenging the existing portrayal of following identities, behaviours and the use of followership theory. As a result, this thesis recommends continued use of followership theory and disciplined engagement with research which rebalances the distribution of leadership and followership behaviours among organisational stakeholders. For practitioners, this thesis recommends a more holistic approach to succession management, rather than succession planning, and one which accommodates the identities of staff experiencing the change.

This concluding chapter will address the methodological strengths and limitations of this research, advocating for a shift to succession *management* in universities. Opportunities for future research based on the limitations of this thesis are made. The chapter concludes with some personal reflections on completing this research.

Methodological Strengths

This thesis adopted a qualitative, longitudinal view of succession across 41 UK universities. This permitted the exploration of perspectives of leading and following with stakeholders who have rarely been engaged in discussions of change. The strengths of this thesis pertained to the qualitative nature of its research approach and the empirical outputs from an application of followership theory.

Qualitative Succession Research

This thesis is innovative in that it explores experiences of succession among staff and successors from a followership and identity perspective. The experiences presented by the findings are valuable partly because of this focus on staff interpretations of succession, but also because succession is not traditionally explored qualitatively. By seeking participants from universities across the UK the data also increases in transferability. The data-set was varied in terms of gender, participant type, university size and ranking and geographical location of the universities. Greater transferability means that this research project and the findings which come with it may be especially relevant in the Australian university context which has similarity with the UK university sector in terms of professional staff cohort

population (Veles, 2022), relations between academic and professional staff (Botterill, 2019) and the growing desire to recognise professional staff contributions to student outcomes (Graham, 2013).

Followership

This thesis responded to the disproportionate consultation of senior management in leadership and followership research (Karaelvi, 2007; Li, 2018) by seeking participation from successors *and* staff. The requirement to adjust the participant advert to recruit only staff, and the surprise staff expressed when they were invited to participate, suggests that lower ranking employees may have assumed other, higher-ranking employees, had more relevant insights to share. If staff have previously felt that their insights were irrelevant for academic research, this may partially explain why existing literature has a saturation of 'leader' perspectives. Achieving balance in the participant sample confirmed the emergence and co-production of influence within a succession context (Shamir, 2007; Busari et al., 2019). The broader aim of identifying unheard voices through followership also allowed this thesis to address the underexplored experiences of professional staff in universities (Pitman, 2000; Szekeres, 2004; Kogan, 2007; Graham, 2012; Karlsson and Ryttberg, 2016; Silvey et al., 2018). This suggests that followership can be used as a tool not just to explore following and leading dynamics but to hear new perspectives across sectors.

This thesis could have unintentionally reinforced following as an unfavourable behaviour or process by focusing on how staff lead and successors follow. However, this was intended to display how follower identities could be distributed across the organisational hierarchy and were carefully crafted within a succession context. Care was taken to not unreasonably reposition following as an untainted, continuously helpful practice (Alvesson and Blom, 2015). The motivation was to rebalance the portrayal of succession by using perspectives beyond the successors' own. This thesis therefore challenged depictions of leadership which suggest that it exists only through formal leaders or from being restricted to descriptions of upward influence from formal followers. It empirically showed how leading and following behaviours are intermittent rather than assuming that leading and following behaviours exist permanently within someone. This thesis therefore reinforced the need to look at both sides of the leadership relationship (Gooty et al., 2010; Popper, 2011; Alvesson and Blom, 2015).

Following has not been upgraded beyond reason, then, but illustrated more equally among succession stakeholders.

Methodological Limitations

The strength of this thesis was affected by Covid-19 and the participants who were available to the research. The findings themselves were also limited, to some extent, to a succession context.

Covid-19

The context of the Covid-19 pandemic influenced the output of this thesis. Opportunities to complete a diary alongside the research were declined because of time constraints created by a Covid-enhanced workload. The use of online interviews was an obvious effect of Covid, but the impact appeared minimal: participants were still willing to share stories with emotion and animation, many sharing secrets about their personal lives. It may be that, given the aftereffects of the isolation of the Covid-19 pandemic, participants saw the interview as an opportunity to connect with someone new in what was becoming an increasingly familiar online format. Although references to the impact of Covid-19 on succession were minimal – discussion was limited to an increased anxiety to build rapport through a screen – the findings may reflect experiences of effectively *online* succession during a pandemic, the general stress associated with the pandemic, as well as the reflections which participants made on previous, pre-pandemic succession experiences. In time, this research could be repeated with in-person interviews, focusing on succession processes from outside of the Covid-19 pandemic.

Succession Context

Although perhaps not a limitation, it is worth clarifying that some of the findings relating to following, and especially those relating to developmental opportunities, may be confined to succession. The context of change may prompt individuals to be more opportunistic than they perhaps would be after building a relationship with another person. Future research could consider exploring whether participants still appear motivated to follow in order to pursue an aspired self *after* a succession process has settled down. Scholars could also consider exploring whether following based on the pursuit of an aspired self is a less viable argument in sectors with more robust succession planning or progression structures. These structures may encourage succession stakeholders to channel their need for progression through these

structures, rather than to the successor. Likewise, the existence of a predecessor's ghost and personal ghosts created through unsuccessful job applications are inevitably easier to identify during succession; the prominence of these ghosts may reduce as time passes between the successor's arrival and the interview.

Group Perspectives

Sustaining the longitudinal approach employed here, future research may consider soliciting group perspectives of succession to explore whether decisions to follow are influenced by others' decisions to follow. The individual, in-depth interviews as well as the difficulty of recruiting more than two staff members per succession journey meant that insight into how succession unfolded from the perspective of many in the same unit could not be achieved. Without a group perspective, it is more challenging to confirm, for instance, Fink and Brayman's (2006) finding that sub-groups form influential sub-cultures over a successor.

Longitudinal Interviews

Longitudinal interviews were not as effective in generating rich data as anticipated. Many participants who were eligible to participate in a second interview – if they had experienced succession in the last 12 months and could consider the succession process as still unfolding – declined the opportunity or did not attend the second interview. This may have been a result of an increased workload arising from the change or the Covid-19 pandemic. The second interviews which were completed were much shorter, consistent with the experiences of other longitudinal researchers (Calman et al., 2013). There were also few differences between longitudinal and retrospective participants in this respect: although some longitudinal participants shared further reflections on the same scenario, their overall conclusion was broadly consistent. This could be interpreted as participants feeling that the reality they presented in the first interview continued to be relevant several months later.

Longitudinal interviews were useful, though, for capturing staff participants who had decided to leave the organisation following succession. This allowed them to comment on any connection between succession and their own progression. These insights were particularly beneficial for the portrayal of succession, following and identity as a journey. Future succession research may benefit from structuring longer gaps between first and second interviews to observe more significant changes in attitude or perhaps the disappearance of organisational ghosts. Indeed, researchers may also consider conducting multiple, shorter

interviews in closer proximity to observe experiences as they occur. This did not seem to be a viable option for this research given the existing feeling of online meeting fatigue prompted by Covid-19.

The interpretations of leader and follower identities in this project were based on individual participant retelling of events during succession processes, meaning that participants often described themselves as leading without considering whether someone was following them. Future research might consider exploring leading and following during succession with a combination of observations of interactions and follow-up interviews, such as research completed by Larsson (2017), van de Mieroop et al. (2016) and Schnurr and Schroeder (2019). For instance, discussing leader and follower identities with Margaret and Ronald together, a staff and successor from the same unit displayed within a vignette in Chapter Four, would have been an interesting addition to the data. This would seek to address concerns over interpreting leadership and followership through words alone (Gjerde and Alvesson, 2020) and could increase participant reflections on leading and following closer to the moments they occur.

Practical Recommendations

This section presents three practical recommendations for universities to consider, with further detail below:

- Greater use of the term 'succession' and regular reviews of unit- and institution-level succession planning processes, with a focus on identities at work and knowledge sharing throughout.

Familiarity with succession and expectations of the succession timeline need to be managed. Being unfamiliar with succession meant that participants were surprised at the catharsis of the interview. Although beneficial to the research, organisations of universities' size should not be placing staff in a position where their first reflections on succession are made in a research interview; such reflections should be integrated within the routines of a unit. Greater discussion of succession preparations and the intricacies of the experience would enable staff and successors to feel more comfortable with and involved in the process.

- The creation of progression measures for professional staff including structured ways of applying for secondments and opportunities to shadow and connect with staff in desired posts in other universities.

The confirmation that universities rarely engage in succession planning for professional staff is concerning. Universities should capitalise on the long staff tenure and develop talent management procedures across professional service units. The creation of a culture which encourages professional staff to recognise that their experiences are transferrable across units would also enhance adaptability to change and reduce feelings of being stuck in the same role. This aligns with Lewis' (2014) advocacy for university professional services to be identified as a profession. Greater movement of staff across university roles would also create a demand for more robust knowledge transfer processes, ensuring that key information does not disappear with a long-term post-holder. Encouraging movement across posts would prompt more regular engagement in succession planning.

- The use of succession management plans, for use over the two years following an appointment, which: allocate work to other staff during interim periods to promote uninterrupted workflow; monitor individual and group meetings with a successor; and provide opportunities to reflect on changes implemented and required during succession.

A focus on succession planning in the literature has led to an ignorance of succession *management*. Succession management is an ongoing, holistic approach to succession (Gothard and Austin, 2013) which views it as a process in which there are opportunities for different stakeholders to develop new skillsets. If motivation to take on additional workload was catalysed by the culture in universities and the profile of professional staff (Holmes, 2020), clear decisions over the length of time which additional work can be allocated for would be beneficial. This could be achieved in conjunction with a programme which encourages staff to take on more responsibility during succession and recognise how this facilitates a step towards an aspired identity. The recommendations align with those of HE research in an Australian context (Loomes et al., 2019). A succession management approach does not need to focus on increasing internal promotions as others have suggested (Groves, 2018). Instead, succession management programmes should recognise the value which

universities can gain by supporting succession stakeholder identity work and enabling greater, structured, involvement in the change process.

This thesis also challenges the existing practitioner publications which encourage successors to make changes and achieve impact within the first 100 days (O'Keeffe, 2019). Rather than focusing on what individual successors can do in the initial transition period, practitioner-focused literature should be grounded with interview data from those who have experienced succession. General advice to *bond* with a team and show up as a leader extends an image of succession as a controlled, defined event. This contrasts with the active behaviours of staff and reinforces a leader-centrism which fails to consider factors from the past which influence a successor's experience. Even still, sharing information about active behaviours as a process of shaping a successor's experience and challenging them may not be easily digested by succession stakeholders: for instance, successors may use this knowledge to avoid the moulding effect of active staff behaviours which can be beneficial for unit operations. Introducing this concept to coaching and Human Resources (HR) professionals may be best positioned as a thinking model which allows HR professionals to understand the experiences of the teams and prompts a deeper respect for staff voices.

Opportunities for Future Research

There were opportunities for future research pertaining to the gender, followership, succession and HE specific literatures.

Gender

There was limited scope for this thesis to explore gender implications. The focus of this thesis was to rebalance the portrayal of succession by soliciting perspectives from stakeholders who were not traditionally consulted. This meant applying followership theory to a field which was not traditionally explored qualitatively. Some successor participants, both male and female, commented on the interaction between gender and their role. Staff usually commented on changes in gender between a predecessor and successor but without exploring meaningful differences arising as a result. At the same time, extracts which could have been interpreted as influenced by gender relations were often experienced in similar ways when the gender relations were reversed or different. Gender was often an aside to discussions of succession, leading and following and was therefore not a salient analytic category. Future

research may consider using qualitative research to extend the experiences of, for instance, gender differences between a predecessor and successor and the differences in staff attitudes (Dawley et al., 2004; Farah et al., 2020).

Followership

The continued application of followership to better understand areas of organisational life where there has been leader-centrism would also be valuable. Although the focus on staff experiences sometimes surprised staff, participants quickly realised that they had subconsciously formed opinions of following and leading. This suggests that practitioner interaction with followership is low and that the discussion of followership in research interviews should continue.

An exploration of possible connections between following and the active behaviours outlined in Chapter Five may be worthwhile. If the active behaviours are interpreted as a series of challenges being directed towards the successor, future research might consider whether the behaviours are a test of another's leadership. It would also be interesting to see at what point successors begin to make requests of and share knowledge with staff, perhaps when they feel more established within the team.

Succession

The presence of organisational ghosts in succession suggests that future succession research could consider soliciting the participation of the predecessor. It would be interesting to develop a clearer view of when the predecessor becomes a ghost (perhaps at the announcement, as Kirsteen's staff seemed to perceive;), and whether during their remaining time in the post, predecessors felt that they were transitioning into ghosts. For the predecessor's own personal closure, it would also be useful to explore whether they hold on to their discarded personal self in the new post.

Universities

It was not possible to explore the cultural divide between academics and professional services staff. Scenarios where an academic successor, someone actively engaged in research as part of their job description, entered a professional service unit, where research contributions were not part of the job descriptions existing in the unit, were not accessible within the participant cohort. There was also limited scope to seek the perspectives of students affected by changes

in professional service provisions. Given the widespread recognition of the divide between professional and academic staff and the impact that this has on relationships between the two (Dobson, 2000; Hobson et al., 2018; Silvey et al., 2018; Botterill, 2019), the implications of this dynamic on experiences of succession and following behaviours engaged with by both successors and staff would be interesting.

Chapter Two noted the paucity of literature exploring succession planning within universities. The lack of peer-reviewed publications on university succession planning has been addressed by completed doctoral theses on the topic (Richards, 2009; Carlson, 2011; Grossman, 2014; Buckway, 2020), but future research could be conducted with university HR professionals to determine the precise succession planning measures which exist or are lacking. This may mean that universities' consultation of business succession planning to date has not been effective (Whitchurch, 2009).

Personal Reflections

In this section, I make some personal reflections on completing this research, structured with Hibbert's (2021) reflexive framework. Following these reflections, I complement the parliament of selves engaged with by participants and consider the impact of completing a PhD on my own parliament of selves, living and ghostly.

Characterisations, Motivations and Commitment

In Chapter Three I noted that my first encounter with succession had been in 2017 when employed by a professional service unit whose director was retiring. As an intern, I was involved in the change simultaneously at a distance and in close proximity. I seemed to use this employment to experiment with my own aspirational self, exercising a professional identity I felt would accelerate my career after graduation. As a result, I probably felt more involved in the succession process. As colleagues resigned from the unit throughout succession, I became intrigued about the costs and practicalities of succession in universities: this was my hot motivation. This combined with a cold motivation which developed when I reviewed the literature and identified a gap, not only in *experiences* of succession generally, but in the understanding of succession in universities. Although I had left my intern post and the unit when I began collecting data, both motivations stayed with me during interviews. When participants were eager to share their dismay at their experiences of succession, my

previous intern self (a personal ghost who had been both curious and confused about the succession that was unfolding) and my researcher self (who found the gap in university succession literature compelling) were re-energised.

Grounding in the literature

I was fortunate that my engagement with the literature began when I applied for funding for a Master of Research degree and a PhD through the Scottish Graduate School for Social Science. This meant that I could read widely on succession, leadership and followership prior to the start of my doctoral study. Reviewing the identity literature came later when, through discussions with supervisors and during presentations or conferences, the way that I was speaking about my research had a clear identity angle that I had not yet articulated in the draft of my literature review.

Particularly in the first year of my PhD whilst completing this draft, my hot motivation seemed to create a sense of duty to my ex-colleagues' experiences of succession. This became obvious to me when, a year after completing it, I reviewed it to find that my attention to the lack of research on professional staff was not as compelling as I had once thought. I needed to rebalance the space held by the succession, followership, identity and university-related literatures. My priorities changed during data collection too: although participants sometimes mentioned the divide between themselves and academics, their focus was firmly on succession and how it was managed, interpreted and navigated. Learning to allow research participants to shape my priorities was core to successful transitions in other parts of my life and my ability to conduct engaging interviews and present data in a valuable way. This was also crucial in going with the flow of the evolving nature of coding and allowing myself to identify themes as my interpretations of codes and data developed (Braun and Clarke, 2022: p. 54). My experience of grounding my research in the literature depended on the belief that my literature search provided me with conversational prompts for data collection, but over time I felt more comfortable that I did not need to hold onto a literature review which would exist in the same form throughout the duration of my PhD.

Identification of Contexts

Clearly, my employment history encouraged me to choose universities and professional services units as an appropriate setting for exploring succession. I had access to units who

could advise on the best way to advertise my research and my insider status gave me some additional credibility in the eyes of participants who felt that I knew the culture and the jargon they used. However, this was not just a straightforward way of recruiting participants: I knew from the literature and from experience that professional services were under-studied and I also felt that it was a cohort in need of a succession planning review. When this was confirmed through my literature search, I felt more comfortable using a setting I was familiar with as it felt like an opportunity to make greater research contributions.

Choices about Data Collection

As outlined in Chapter Three, data was collected through longitudinal online interviews. This was where the Covid-19 pandemic had the largest impact: I often wondered whether the experience of collecting data would have differed if I had been interviewing in-person. Before starting my PhD, I had romanticised the idea of travelling to meet participants and transcribing whilst on a train to the next interview. After finishing my Master's degree and the prospects of a graduation ceremony faded, I slowly realised that I would be completing much of this journey online. I had to let that image go, parking an aspired self until in-person graduations returned, to avoid potential disillusionment with online interviewing on a laptop perched atop a chest of drawers. I made a choice to accept this situation, knowing that participants were also experiencing job and identity transitions with sub-optimal working conditions. Participants and I often shared anecdotes about precarious desk arrangements and in a strange way, it helped to build a sense of morale and rapport.

Over the course of my second year I recognised that I would not have been able to collect a qualitative sample of the same size had I been living a non-pandemic life. I felt less need to dwell on whether an in-person PhD experience would have been different: this was the context that I and my research participants were in and this was where we were going to reflect on changes in our professional lives. I attended conferences, presentations and workshops online and recognised that, although frustrating at times, I had fewer distractions and greater incentive to work on my permanent hobby, my PhD. Completing data collection online also meant that by the time I needed to write my thesis, the prospect of sitting indoors at a desk was easier to comprehend.

Approaches to Analysis

Given my insiderness in relation to succession, I was cautious throughout the analysis process to identify *why* I thought codes were relevant. Much of this caution was supported by discussions with supervisors or participation in external conferences. I wanted to be sure that the codes and themes I generated reflected the experiences of participants rather than my own. When I encountered my own succession and was simultaneously interviewing and reviewing transcripts, I began to feel and associate with the active behaviours staff participants were sharing with me. This was part of a continuous process of finding ways to suitably present findings and was not distinct from my employment. I recall sharing the initial concept of inheritance and a predecessor's ghost with a colleague; moments later they were able to articulate what they felt they had inherited during their own recent succession. I felt a sense of making an impact with my findings outside of my academic circle.

Not all initial concepts developed during analysis were helpful. Whereas participants sometimes found ease in categorising themselves as, for example, an observer or an educator, the early concepts I devised during data analysis could be tenuous. After a redraft of the first full draft of the thesis, I removed the 'novel' terms I had introduced because, after feedback from friends and colleagues, they simply were not useful. I initially introduced new terms to describe processes which I felt could not be articulated using existing ones. Several comments from different areas of my life suggested that these terms were confusing or unnecessary, and when I realised that I often used the terms only in headings, it was time to remove them. I subsequently felt more comfortable recognising where I needed to embrace being tangled in the intricacies of following and identity. If I had introduced these terms, I would have been in danger of blackboxing (Larsson and Alvehus, 2023) the data I had gathered to the detriment of the reader's full understanding of the implications of staff and successor behaviours. For instance, rather than exploring the influence of ghosts and the identity work which lay behind active staff behaviours, I termed staff responses to succession in categories of "volleying" or "educating". On reflection, I may have felt a pressure to create something new and unique, but I had forgotten that the data in and of itself was new and unique.

Reconnecting to the Literature

When I had finished transcribing, coding and re-coding interviews, I felt an anticipation to begin writing and clear my mind of the developing ideas and themes. I delayed connecting this writing to the literature, writing long, semi-descriptive, semi-analytical reviews of participant vignettes which had the greatest number of codes on NVivo. After some time, I felt able to plan findings chapters in a way that would allow me to write significant chunks of first draft material. Throughout the writing up process, I did begin to feel more comfortable with critiquing my own and others' work, accepting that first drafts were usually just a starting point for reflection.

Implications for Other Selves

I felt I navigated my own parliament of selves and ghostly selves during the completion of my PhD. In my academic, personal and professional life, I identified in different measures as a PhD candidate, manager, young woman, daughter and friend. I considered that this mix of identities aligned with the competing leader, follower, lost, threatened and aspired identities which succession stakeholders described. When I encountered my own succession journey, I developed a greater appreciation for these identities. I witnessed predecessor and successor transitions in the same workplace and considered which power claims *I* had made of the successor. Conducting this research whilst sustaining employment allowed me to reflect, away from my PhD desk. Then, as I reviewed notes from the earliest parts of my PhD during the final drafting stages, I felt as though I was accessing a personal ghost and reflected on how my thesis had changed alongside my other selves.

Concluding Remarks

This thesis has explored staff and successor experiences of succession in UK universities, contributing original empirical evidence to the succession, followership and identity literatures. There are three main contributions to highlight.

First, this research has rebalanced the discussion of succession, leadership and followership by seeking participation from staff *and* successors across universities and guiding their reflection on their leader and follower identities. This has challenged role-based perspectives of followership, especially by showing the fluidity of leadership. This relieves the pressure to

upgrade or downgrade the concepts of leadership and followership, instead suggesting that a more balanced view of the two can allow them to exist processually and in harmony.

The second contribution is a challenge to the current view of followership and leadership as permanent states. This thesis defined following as a fleeting, considered and voluntary process of seeking similarity with another or opportunities for oneself. Each of the findings chapters presented the ability of successors and staff to lead *and* follow, complementing the challenge to role-based perspectives outlined above. This enhanced the awareness of how staff moulded successors' experiences of their role transition and enabled a view of succession as a co-produced, relational experience rather than simply an HR process.

Thirdly, this thesis recognises the identity experimentation which staff navigate during succession. Succession is an arena for identity work, characterising the change as a transition for a successor *and* staff. Practitioners and institutions would benefit from pre-empting these identity experimentations and using this as an opportunity for succession stakeholders to engage reflexively with succession. Universities in particular may recognise this third contribution by tailoring succession management procedures so that they enable succession stakeholders to experiment with future identities using formal structures such as secondments or work shadowing. Universities may also encourage successors to understand the identity work, threats and opportunities staff navigate during succession, therefore accepting that liminality is an inevitable element of organisational change.

There is a pressing need for universities to focus on succession *management,* more effectively distributing talent development opportunities among professional staff and alerting all succession stakeholders to the possible changes in their behaviours and identities during change. The identification of this was made possible by followership theory, which this thesis has positioned as a powerful theory for rebalancing the voices presented in succession research.

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Appendix

Appendix 1: Participant Breakdown
Notes:
1. Original red-brick institutions are defined as institutions established in the period during world war one.
2. Red-brick institutions are defined as the British universities established in early 20th century.
3. Ancient institutions are defined as institutions established from c. 1096 to 1592.
4. Research institutions are defined as either public or private institutions, usually founded from c. 1600 to the 1950s.
5. Plate glass institutions are defined as institutions which were established in or achieved university status in the 1960s.
6. Post-92 institutions are defined as those granted university status from 1992 onwards and are usually teaching focused.
7. Within each university, cells highlighted in the same colour denote a 'case' where two participants discussed the same succession. This allowed, for example, in the case of university 5, Sheena and Colin's transcripts to be analysed together as well as independently.

University No.	Institution Category	Participant Pseudonym	Participant Type	Research Length	Unit No.	Context of Change
University 1	Post-92	Dermid	Both	Retrospective	Unit 1	External promotion
University 2	Post-92	Toby	Both	Retrospective	Unit 1	External Director change, promotion
University 3	Research	Elaine	Staff	Retrospective	Unit 1	External Manager change
		Lola	Staff	Retrospective	Unit 2	External Director change
University 4	Post-92	Hamish	Successor	Retrospective	Unit 1	Internal promotion
University 5	Public	Sheena	Staff	Retrospective	Unit 1	Manager change
		Colin	Staff	Retrospective	Unit 1	Manager change
		Isla	Staff	Longitudinal	Unit 2	External Director change
University 6	Original red brick	Krystelle	Staff	Retrospective	Unit 1	Restructure
University 7	Ancient	Tom	Staff	Retrospective	Unit 1	External Director change
University 8	Post-92	Juliette	Successor	Retrospective	Unit 1	Internal promotion
University 9	Public	Alicia	Staff	Retrospective	Unit 1	Several Director changes
University 10	Public research	Rabbie	Staff	Retrospective	Unit 1	External Director change
		Kristiina	Staff	Retrospective	Unit 2	External Director change
		Philip	Staff	Retrospective	Unit 3	External Director change
		Agnes	Both	Longitudinal	Unit 4	External Director change, internal promotion

		Susannah	Successor	Retrospective	Unit 5	Internal secondment
		Kashika	Both	Longitudinal	Unit 6	External Director change, external promotion
University 11	Public research	Fingall	Staff	Retrospective	Unit 1	External Director change
University 12	Public research	Stewart	Staff	Retrospective	Unit 1	Internal Director change
		Maria	Successor	Retrospective	Unit 2	Internal promotion
		Harmony	Successor	Retrospective	Unit 3	External promotion
University 13	Public	Lachlan	Staff	Retrospective	Unit 1	Restructure
		Ruaridh	Staff	Retrospective	Unit 1	Restructure
University 14	Public research	Connor	Staff	Retrospective	Unit 1	External Director change
University 15	Public research	Andrew	Staff	Retrospective	Unit 1	External Manager change
University 16	Post-92	Jimmy	Successor	Retrospective	Unit 1	Internal promotion, external Director change
		Jules	Both	Retrospective	Unit 2	External Director change, internal promotion
		Celine	Successor	Retrospective	Unit 3	External promotion
University 17	Red-brick	Caitlin	Both	Retrospective	Unit 1	Internal Manager change, internal promotion
		Effie	Staff	Retrospective	Unit 1	Internal Manager change
University 18	Public research	Leo	Successor	Longitudinal	Registry	External promotion
University 19	Original red brick	Sandy	Staff	Longitudinal	Marketing	Restructure
University 20	Public research	Tamara	Staff	Retrospective	Unit 1	External Manager change
		Ishbel	Staff	Retrospective	Unit 1	External Manager change
University 21	Ancient	Florence	Staff	Longitudinal	Unit 1	External director change
		Cally	Successor	Retrospective	Unit 2	External promotion
University 22	Original red brick	Mansi	Both	Retrospective	Unit 1	Internal promotion from secondment
University 23	Public research	Olivia	Successor	Retrospective	Unit 1	Internal promotion
		Margaret	Successor	Retrospective	Unit 2	Internal promotion

		Ronald	Successor	Retrospective	Unit 2	Internal director change and subsequent internal promotion
University 24	Public research	Linda	Staff	Retrospective	Unit 1	External Manager change
University 25	Ancient	Susan	Both	Retrospective	Unit 2	Promotion, looking ahead to a potential manager change
		Jamie	Successor	Retrospective	Unit 3	Promotion
		Murdo	Successor	Retrospective	Unit 4	Promotion
		Iain	Successor	Retrospective	Unit 5	External promotion
		Henry	Successor	Retrospective	Unit 6	Internal promotion
		Victoria	Staff	Retrospective	Unit 7	Internal manager change
University 26	Public research	Fiona	Both	Retrospective	Unit 1	External promotion, internal manager change
		Moira	Staff	Retrospective	Unit 2	Internal manager change
		Alan	Successor	Retrospective	Unit 3	External manager change
		Steve	Successor	Retrospective	Unit 4	Internal secondment
University 27	Ancient	Scott	Both	Retrospective	Unit 1	Internal manager change and subsequent secondment
		Katriona	Staff	Retrospective	Unit 2	Internal manager change
		Richard	Successor	Longitudinal	Unit 3	Internal secondment
		Alexander	Successor	Retrospective	Unit 1	Internal secondment
		David	Successor	Retrospective	Unit 4	External promotion
		Lauren	Successor	Retrospective	Unit 5	Internal promotion
		Catherine	Successor	Longitudinal	Unit 6	External promotion
		Saoirse	Successor	Retrospective	Unit 5	External promotion
		Tabitha	Successor	Retrospective	Unit 7	External promotion
		Sarah	Both	Retrospective	Unit 1	Internal manager change and subsequent secondment
		Fearghas	Both	Longitudinal	Unit 8	Internal promotion
University 28	Public research	Evie	Staff	Retrospective	Unit 1	Internal director change
University 29	Post-92	Jacqueline	Staff	Longitudinal	Unit 1	External manager change
University 30	Original red brick	Douggie	Staff	Longitudinal	Unit 1	External manager change

		Emerald	Successor	Retrospective	Unit 2	Internal promotion
		Karen	Successor	Longitudinal	Unit 3	External promotion
University 31	Original red brick	Paul	Successor	Longitudinal	Unit 1	Internal promotion
University 32	Public research	Doreen	Staff	Longitudinal	Unit 1	Internal and external manager changes
		Paige	Successor	Longitudinal	Unit 1	Internal promotion, her Director also an external promotion
University 33	Original red brick	George	Staff	Retrospective	Unit 1	Internal and external manager changes
		Geoffrey	Staff	Retrosepctive	Unit 2	Internal and external manager changes
		Adele	Staff	Retrospective	Unit 3	External manager change
		Barra	Staff	Retrospective	Unit 4	External Director change
		Liam	Successor	Retrospective	Unit 5	Manager changed, followed by secondment, and return to original role
		Morag	Successor	Retrospective	Unit 6	Internal promotion
		Angus	Successor	Retrospective	Unit 7	Internal promotion
University 34	Public research	Oscar	Staff	Retrospective	Unit 1	Internal Director change
		Fionn	Staff	Retrospective	Unit 2	External manager change
		Rosie	Staff	Retrospective	Unit 3	External Director change
		Elspeth	Staff	Longitudinal	Unit 4	Internal, interim manager change, also looking ahead to permanent manager change
University 35	Ancient	Christopher	Staff	Longitudinal	Unit 1	External manager change
		Sophie	Staff	Longitudinal	Unit 2	Internal manager change
University 36	Post-92	Muir	Staff	Retrospective	Unit 1	Restructure
		Kirsteen	Staff	Retrospective	Unit 2	External director change
University 37	Ancient	Sheila	Staff	Retrospective	Unit 1	External director change
		Helen	Staff	Retrospective	Unit 1	External director change
		Bonnie	Staff	Retrospective	Unit 2	External manager change
		Orlaith	Staff	Retrospective	Unit 3	Internal director change
		Lara	Staff	Retrospective	Unit 4	Internal manager change

		Ursa	Successor	Retrospective	Unit 1	External promotion
		Nicola	Successor	Retrospective	Unit 5	External promotion
		Hilda	Successor	Longitudinal	Unit 5	External promotion
		Joshua	Successor	Retrospective	Unit 6	External promotion
		Camilla	Successor	Retrospective	Unit 7	Internal promotion
		Jessie	Successor	Retrospective	Unit 8	External promotion
University 38	Plate glass	Aimee	Both	Retrospective	Unit 1	Internal manager change
		Johnstone	Successor	Retrospective	Unit 2	External promotion
University 39	Ancient	Emelie	Successor	Retrospective	Unit 1	Internal promotion
University 40	Plate glass	Charles	Both	Retrospective	Unit 1	External promotion, senior leadership change
University 41	Plate glass	Joanne	Staff	Retrospective	Unit 1	Internal secondment
		Anthony	Staff	Retrospective	Unit 2	Restructure

Appendix 2: Interview Prompts

[In no particular order]

1. Tell me a little bit about your role.
2. Walk me through the change you would like to focus on today.
3. How did others' experience the change?
4. What was the atmosphere like?
5. Have there been any challenges?
6. Have there been any surprises?
7. Would you characterise this as a transition?
8. Would you say you had a specific role in this transition?
9. What does succession mean to you?
10. What does leadership change mean to you?
11. What does following mean to you?
12. What is next for you?

PARTICIPANTS WANTED

University of
St Andrews

Project Title

Experiences of Succession in HEI Professional Service Units

This study is being conducted as part of my, Sam Ross', PhD thesis study in the School of Management at the University of St Andrews.

You are invited to participate in a research project which explores individual experiences of succession within professional service units. You would have the opportunity to participate in a series of three interviews and submit audio diaries across a period of 6 – 10 months. **You may participate in as much or as little of the research process as you prefer**.

This research promises to be a reflective, cathartic opportunity for all participants, with early access to the final findings of the thesis. If you have participated in a succession process in a professional service unit in the past 6 – 13 months, you may be interested in this research.

If you are interested, please get in contact using the details below. You will then be given a Participant Information Sheet that further details my research and have the opportunity to ask questions, before being asked whether you consent to participate.

Contact Details

Researcher: Sam Ross, Dr Lisi Gordon (Supervisor), Dr Sandra Romenska (Supervisor), Prof Ruth Woodfield (Supervisor)

Contact Details:

PARTICIPANTS WANTED

Project Title

Experiences of Leadership Change in HEI Professional Service Units

This study is being conducted as part of Sam Ross' PhD thesis study in the School of Management at the University of St Andrews. This study has been awarded ethical approval (MN15195).

If you are a professional staff member **whose line manager has recently been replaced OR whose Head of Unit / Director has been replaced**, you may be interested in participating.

This research project explores leadership change within professional service units. It provides the opportunity to participate in a 90-minute reflective. Your involvement can be adapted to your schedule. This is a cathartic opportunity to reflect on leadership change for all participants, and provides early access to the final findings of the thesis.

If you are interested, please contact me using the details below. You will then be given a Participant Information Sheet that details my research, with the opportunity to ask questions and consent to participate.

Contact Details

Researcher: Sam Ross, Dr Lisi Gordon (Supervisor), Dr Sandra Romenska (Supervisor), Prof Ruth Woodfield (Supervisor)

Contact Details: