



## Succession Planning for Managers in the Organization: A Case Study of the Ports and Maritime Organization

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**Abstract:** The aim of the present study was to examine a model of structural relationship between successful intelligence teaching style and students' identity mediated by basic psychological needs of students. The research method was descriptive correlational, and the study population included the faculty members (permanent instructors) of Farhangian University of Zahedan and all the male and female students enrolled at this University in 2022, with a sample size of 43 faculty members and 129 students selected through random stratified sampling. Data were collected using the Measure of Academic Identity Status (Was & Isaacson, 2008), the Basic Psychological Need Satisfaction Scale (La Guardia, Ryan, Couchman, & Deci, 2000), and the Teaching for Successful Intelligence Questionnaire (TSI-Q) (Palos & Maricutoiu, 2013). Content validity was ensured, and the reliability of the research tools was assessed using Cronbach's alpha coefficient, resulting in values of  $\alpha = 0.86$  for the Measure of Academic Identity Status,  $\alpha = 0.81$  for the Basic Psychological Need Satisfaction Scale, and  $\alpha = 0.76$  for the Teaching for Successful Intelligence Questionnaire (TSI-Q). Data analysis involved the utilization of Pearson correlation coefficient and path analysis to address the research questions. The findings demonstrated that the teaching style based on successful intelligence had a direct and significant impact on students' academic identity. Additionally, the teaching style based on successful intelligence had a direct and significant effect on students' basic psychological needs, which, in turn, had a direct and significant effect on their academic identity. Furthermore, the teaching style based on successful intelligence exerted an indirect and significant effect on students' academic identity through their basic psychological needs.

**Keywords:** Succession Planning, Competency, Assessment, Education-Based Individual Development, Managers

## Introduction

The development and transformation of organizations begin with the development and transformation of their managers. Therefore, nurturing and developing managers and employees based on new paradigms, having a corresponding mindset, and applying suitable approaches in manager development equipped with the necessary competencies to cope and deal with the complex and extensive changing environment at both domestic and global levels is a vital necessity (Ghiasi et al., 2013).

If organizations aim to survive in today's dynamic and competitive environment, numerous requirements must be considered. Among the most important of these requirements is the cultivation of successors to take on important managerial positions promptly and effectively (Jafari & Ranaei Kordshouli, 2019). Succession planning is considered a necessary need for expanding the number of potential managers and improving the quality and quantity of future managers (Hargreaves, 2005). Addressing succession planning offers various benefits to organizations, and such planning should be a top priority for them.

In general, succession planning is a beneficial strategy that has been used by trade and industry over the years to confront the challenges faced by organizations ([Neefe, 2009](#)).

Implementing a succession plan should not be equated with preselecting a particular leader or automatically assuming that an assistant principal or deputy head teacher will seamlessly move into the top position. Rather, succession planning represents both a process and an opportunity to foster leadership within and beyond the organization before any current leader departs ([Okwakpam, 2019](#)). To evaluate an institution's succession practices effectively, the existing leadership must first gain a comprehensive understanding of what succession planning involves and what it does not entail. Additionally, they should pinpoint any deficiencies within the current policy. The plan should encompass the institution's immediate response to a leadership transition, delineating the steps from the leader's decision to step down from their current role, through the interim phase, the hiring process, and ultimately, the installation of the new leader. The current leadership team should outline the various components of the proposed plan and decide which individuals or groups will be responsible for each stage of the process.

The interplay between succession planning and education forms an essential and mutually beneficial relationship. In this synergy, the fundamental tenets of strategic leadership seamlessly align with the mission of nurturing forthcoming generations. While succession planning is a concept often associated with the corporate world, its distinct significance within the educational domain lies in its role in orchestrating the orderly handover of leadership roles within schools, colleges, and educational institutions. This connection extends far beyond the mere replacement of retiring administrators or educators; it represents a purposeful strategy designed to ensure the ongoing continuity, infusion of innovation, and the sustainable growth of educational establishments ([Barton, 2019](#)).

Within the realm of education, effective leadership stands as the linchpin of academic excellence, student accomplishments, and the overall advancement of educational institutions. School principals, superintendents, heads of academic departments, and other educational leaders wield immense influence in shaping students' learning experiences, fostering the professional development of educators, and setting the overarching direction of educational organizations. As these leaders approach retirement or pursue new opportunities, a meticulously executed succession plan emerges as the critical pivot that upholds institutional stability, fosters a climate of innovation, and empowers the emerging generation of educational leaders to carry forth the educational mission ([Ahmad et al., 2020](#); [Farashah et al., 2011](#); [Hosseini et al., 2018](#); [Onyango et al., 2014](#)).

However, it is not limited to merely identifying the next leader ([Fink & Brayman, 2004](#)); it also encompasses the development of potential successors. In the words of [Tichy \(2015\)](#), "effective

succession planning involves choosing the right individuals for the right positions at the appropriate stages of their personal and professional development" (p. 84). By implementing a deliberate and strategic action plan, organizations actively seek out potential leaders and allocate the necessary time, energy, and resources to prepare these individuals for leadership roles. Success is more likely when the emphasis lies on the ability of leaders to learn, adapt, and innovate, rather than solely relying on their proficiency in a specific job ([Ali & Mehreen, 2019](#)). When school leadership integrates a program for fostering leadership within the succession plan, it cultivates and strengthens the pool of potential leaders, ensuring that the most suitable candidate is ready to step into the vacant leadership position.

The responsibility for developing a succession plan falls on the school's leadership when it comes to hiring assistant principals, while the board bears this responsibility when hiring a head teacher or principal. This approach is proactive, not reactive. If the board has a well-structured succession plan in place, the process remains effective, irrespective of individual personalities or specific circumstances surrounding leadership changes. This approach allows the current leadership to concentrate discussions on developing future leaders based on the position's requirements rather than focusing solely on individual candidates ([Fink & Brayman, 2006](#)).

Remarkably, there has been no research or study on succession management in the Ports and Maritime Organization. The methods for selecting individuals to assume managerial positions in the Ports and Maritime Organization are lacking a cohesive scientific system. Typically, the selection of replacement individuals, often undocumented, is conducted after the departure of competent managers, without a comprehensive consideration of various relative factors, including individual and occupational competencies, organizational environment, and succession process procedures. Therefore, designing a succession management model with a developmental approach becomes essential.

Moreover, statistics indicate that there are currently 14,630 individuals actively engaged in the Ports and Maritime Organization, with 21% (3,180 individuals) holding managerial positions, and 14% (2,160 individuals) nearing retirement. On the other hand, research records indicate that there has been minimal attention to the concept of individual development in previous studies, especially those conducted in the Iranian society. Furthermore, the application of the developmental mindset as an appropriate method for implementing succession management has been largely overlooked.

In essence, the aim of this research is to address this research gap in both scientific environments and Iranian organizations. In other words, the innovation of this study lies in adding the dimension of individual development to the existing knowledge in the field of succession management. Individual development is the result of comparing the strengths and weaknesses of individuals in their current job and their potential for future progress in designing a succession management model.

The process of preparing for individual development involves planning activities with the aim of reducing the disparity between an individual's current capabilities and the requirements or essential competencies needed to fulfill job roles or occupy key positions ([Rath, 2003](#)). Moreover, individual development serves as a planning tool that simplifies the recognition, communication, and documentation of future learning necessities and chances for personal and professional growth ([Patel et al., 2013](#)).

Individual development, or professional and career development, is a continuous process focused on assessing each individual's needs and devising plans to address these requirements. This process assists individuals in evaluating their knowledge, performance, and accomplishments, as well as in devising strategies for personal, educational, and professional enhancement. Thus, by integrating individual development into the succession planning process in this research, innovation in evaluating succession planning is achieved through individuals' self-assessment and identification of their developmental needs and progress. In previous models, these evaluations were generally conducted by the organization or superiors on behalf of individuals. However, in this research, individuals voluntarily participate in their own development and advancement in collaboration with managers and the organization.

Additionally, in this study, by incorporating individual development into the succession management system, it addresses three primary questions that hold a central role in the competency-based selection system. These questions include: "Where am I currently?", "Where do I aspire to go?", and "What lies ahead in my future?". The third question is forward-looking in nature. By responding to these inquiries, if there exists any incongruity between the competencies individuals currently possess and the competencies required for succession, individuals must cultivate the necessary skills. In essence, individual development programs aim to bridge the gap between an individual's current actions and what they must do to acquire succession-related competencies. In summary, the implementation of this research can have the following implications for the Ports and Maritime Organization:

- It assesses the significance of the components and indicators of managerial succession.
- It identifies the fundamental elements of managerial succession.
- It outlines the managerial succession model applicable to the Ports and Maritime Organization.
- It offers insights into individual development needs and prospects for personal and professional growth within the context of succession planning.

## Material and Methods

The research methodology employed in this study is correlation, utilizing structural equation modeling to test research hypotheses. In the current quantitative phase and for the validation of the derived model,

it is imperative to subject the pattern obtained to scrutiny and examination by experts and specialists. Ultimately, retired managers and experts were selected as the statistical population for this segment. In the quantitative section, the statistical population comprised employees holding the positions of department heads and unit coordinators in the central and provincial offices of the Ports and Maritime Organization in the coastal provinces of Iran.

For the quantitative section, where the assessment of the initial succession planning model was conducted, the sample size was initially determined using Cochran's formula. Stratified random sampling was employed for data collection. In the quantitative research phase, the data collection instrument was a questionnaire. Given that the research model was exploratory, the questionnaire was developed based on the model derived in the qualitative research section. This questionnaire consisted of three main sections:

- a) Cover Letter: This section provided an explanation of the research objectives, emphasized the need for precise cooperation from the respondents, stressed the confidentiality of the information, and also highlighted the willingness to share results after analysis.
- b) General Questions: This section encompassed questions pertaining to demographic information, organizational positions, and work locations.
- c) Specialized Questions: The specialized questions were devised based on the model developed in the qualitative research section.

To ensure the content validity of the questionnaire, it was initially formulated based on scientific components. The questionnaires were then distributed among experts to gather their expert opinions regarding the phrasing of questions, the number of questions, the content of the questionnaire, the relevance of questions to the options, and the alignment of questions with the research objectives. After reviewing and considering the comments and suggestions, the final questionnaire was prepared. The content validity of the questionnaire was further validated through consultation with a supervisor, advisors, experts, and a sample of the research population. Additionally, the structural validity of the questionnaire was confirmed using exploratory factor analysis. To assess the reliability (internal consistency) of the questionnaire, a preliminary study was conducted, distributing the questionnaire among qualified employees of the Ports and Maritime Organization. The reliability of the questionnaire was then calculated using the Cronbach's alpha coefficient, resulting in a value of 0.84.

After collecting and summarizing the data, exploratory factor analysis and structural equation modeling were employed to analyze the research assumptions and test the relationships between research variables. In this research, structural equation modeling based on partial least squares was utilized for

hypothesis analysis and assessing the relationships between research variables, conducted using Smart-PLS software.

## Results

According to the results, 4.8% of the respondents were female, while 91.6% were male. Furthermore, the highest number of respondents, 51.4%, belonged to the age group of 31 to 40 years, while the lowest number, 4.8%, were in the age group over 51 years. In terms of education level, 256 individuals (69.75%) held a bachelor's degree, and 22 individuals (6%) had a doctoral degree. Additionally, in the study sample, the majority of respondents, 47.4%, had over 20 years of work experience, while the lowest number, 5.72%, had 5 to 10 years of work experience. The mean and standard deviation of the research model components in the current and desirable situations, as well as a comparison of the components in the two situations, are presented in Table 1.

**Table 1.** Mean and standard deviation of research model components

Variable	Current situation		Desirable situation		T value	DF	p
	M	SD	M	SD			
Determine the policy	2.23	1.02	1.54	0.96	-3.32	241	0.001
The commitment of senior managers	2.19	1.04	1.44	0.93	-3.30	242	0.001
Identify key positions	2.21	1.01	1.48	0.95	-3.31	244	0.001
Determining eligibility criteria	2.06	0.93	2.45	0.99	-4.63	240	0.001
Individual competencies	2.08	0.95	2.47	0.96	-4.61	243	0.001
Job qualifications	2.05	0.92	2.43	0.97	-4.62	241	0.001
Organizational competencies	2.07	0.94	2.44	0.98	-4.60	240	0.001
Organizational competencies	2.07	0.94	2.44	0.98	-4.60	240	0.001
Evaluation of candidates	2.49	1.01	2.69	1.01	-2.21	240	0.028
Identification of talented candidates	2.46	1.04	2.66	0.98	-2.22	241	0.021
Talent assessment and matching	2.47	1.03	2.68	1.04	-2.20	242	0.001
Personal development program	2.16	0.94	2.53	1.08	-3.99	237	0.001
Assessment of knowledge and skills	2.18	0.96	2.55	1.09	-3.98	238	0.001
Estimating development needs	2.20	0.98	2.56	1.08	-3.97	240	0.001
Succession management with individual development approach	2.23	0.84	2.55	0.95	-3.91	244	0.001

According to Table 1, in all components and in the main variable of succession management with a developmental approach, the mean of the current situation is significantly lower than the desirable state

( $p < 0.05$ ). To evaluate the initial proposed model, the second-order confirmatory factor analysis was used. The variable of succession management for managers was assessed through four dimensions: policy determination, competency criteria determination, candidate evaluation, and individual development program. Table 2 presents the fit indices of the modified model. According to Table 2, the proposed model has good fit indices, indicating the suitability of the model. The result of the  $\chi^2$  divided by the degrees of freedom is 1.92, and the RMSEA value is 0.061, which is considered an acceptable fit for the model.

**Table 2.** Fit indices of the modified model

Fit indices	X <sup>2</sup> /DF	RMSEA	NFI	CFI	GFI	AGFI
Obtained value	1.92	0.061	0.99	0.99	0.88	0.85
Accepted value	< 3	< 0.08	Close to 1	Close to 1	Close to 1	Close to 1

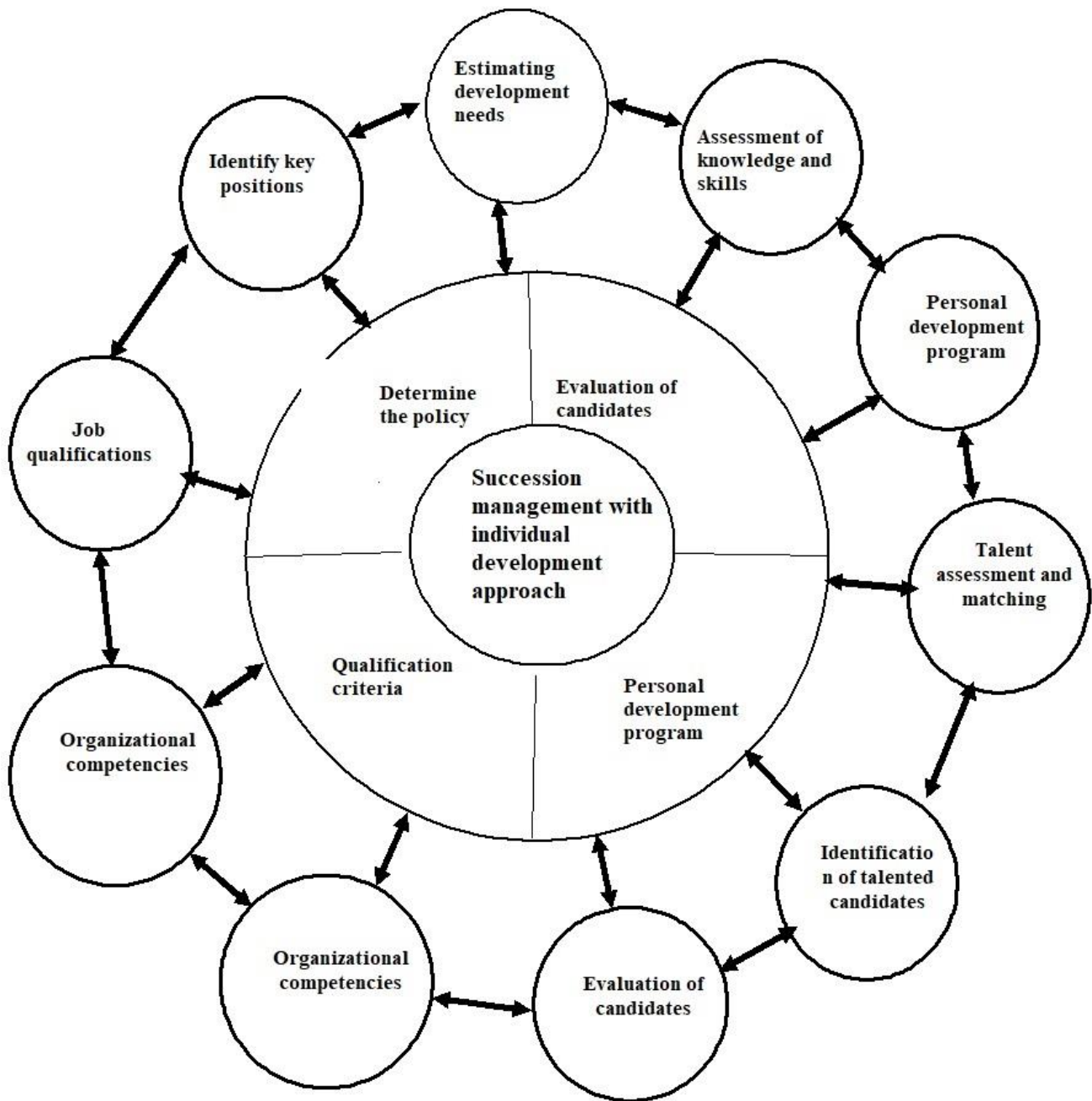
The standardized coefficients obtained from the second order confirmatory factor analysis for the four components of managerial succession are presented in Table 3.

**Table 3.** Standardized coefficients of the second-stage confirmatory factor analysis for the four components of managerial succession

Demotions	Managerial succession	
	Beta	T value
Determine the policy	0.98	18.52
Qualification criteria	0.97	18.35
Evaluation of candidates	0.86	16.46
Personal development program	0.96	16.36

According to Table 3, beta values of 0.98 for policy setting, 0.97 for competency criteria, 0.86 for candidate assessment, and 0.96 for individual development planning were obtained, and considering the t-values obtained, all of them are statistically significant ( $p < 0.01$ ). In Figure 1, the proposed model of managerial succession in the Ports and Maritime Organization is presented.





**Figure 1.** The proposed model of succession of managers in ports and maritime organization

## Discussion

The model is designed as a process, including four dimensions: setting policies, determining competency criteria, candidate assessment, and individual development planning. Here, the main focus is on



individual development planning within the organization, which is influenced by several components. Without considering these components, it cannot operate successfully and, ultimately, the organization can achieve its organizational benefits with an appropriate managerial succession model. The dimensions and components of managerial succession are shown in Figure 1. Each of these dimensions has processes that, in turn, consist of several components and influence subsequent processes. In this model, in the "Setting Policies (Strategy)" dimension, components such as senior managers' commitment, identifying key positions, designing career paths for employees, senior managers' cooperation, and attention to the managerial succession system in organizational strategies are considered. Also, barriers to the implementation of managerial succession need to be addressed. Regarding the identification of key positions, in this component, the identification of important positions at senior, middle, and operational levels to distinguish them from ordinary positions is of great importance.

Additionally, job descriptions for each of the key positions are necessary for the identification and compatibility of candidates for each job. In this model, in the "Determining Competency Criteria" dimension, components such as individual competencies, job competencies, and organizational competencies are addressed. For individual competencies, components such as ethics, leadership, religion and beliefs, intelligence and talent, personality traits, personal and social skills, knowledge and expertise (education), physical and fitness ability, creative and analytical thinking, creativity, self-confidence, guidance, futurism, flexibility, commitment, motivation to serve, problem-solving and decision-making, responsibility and accountability, efficiency (useful and effective experiences), and verbal expression and negotiation skills are considered.

Concerning job competencies: under-subjects such as effective communication, job enthusiasm and idealism, organizational self-awareness, performance management, stress and pressure management, risk-taking, adaptability, jihadist and revolutionary spirit, familiarity with modern technologies, foreign language, and teamwork management have been emphasized. Regarding organizational competencies, under-subjects such as external organizational awareness, goal-oriented and desire for goal achievement, understanding of organizational missions, innovation, the existence of a career development system, openness of the system, IT-centeredness, strategic thinking, desirable organization, networking, implementation of change management, participation, an empowerment approach with the promotion of employees' knowledge and skills, communication skills, organizational learning, and the ability to establish useful communication with superiors and subordinates, familiarity with modern technologies, and maintaining internal environmental dynamism are highlighted.

In this model, in the "Candidate Assessment" dimension, there are components related to identifying promising candidates and assessing and matching their talents with the job. Concerning the status of candidate identification, it includes evaluating the individual performance of candidates, assessing personal characteristics, evaluating the educational qualifications of applicants and job candidates, organizational skills, problem-solving abilities, teamwork spirit, and management potential, as well as social influence and the evaluation of their job experiences. Regarding talent assessment and alignment, it emphasizes on strategic orientation indices, the characteristics of talented individuals, alignment between talent and job, and the evaluation of technical and managerial professions.

In this model, in the "Individual Development Planning" dimension, there are components related to assessing knowledge and skills, meeting development needs, and implementing individual development plans. Concerning the assessment of knowledge and skills, indices such as the technical skills needed by managers, the human skills required by managers, and the perceptual skills needed by managers are considered. Regarding self-development, the focus is on examining goals and strategic needs of the organization, individual knowledge and skill development, with an emphasis on simultaneous agreement between managers and employees in self-development. In terms of implementing development plans (knowledge and skills), it highlights indices such as advanced courses, virtual and remote training (innovative methods), university education, playing managerial roles, participating in social groups, active involvement in activities, coaching and in-service training, and participation in scientific and practical conferences.

Prominent features of this model include a "process-oriented" approach, "comprehensiveness," and an "emphasis on individual development planning" compared to other previously conducted models, both in Iran ([Dehghanpour Farshah, 2011](#)) and internationally ([Huynh, 2016](#); [Johnson et al., 2018](#); [Parfitt, 2017](#); [Taylor & McGraw, 2004](#); [Titzer et al., 2013](#)). This model strives to provide a comprehensive framework by examining both internal and external best practices and selecting the best and most suitable cases.

Furthermore, the approach to the development of managerial individuals in this model emphasizes identifying knowledge and skills, meeting development needs, and implementing individual development plans with a focus on self-declaration and simultaneous agreement between managers and employees, enabling the evolution of knowledge and skills of talented individuals for strategic positions. Most importantly, the use of this model for managerial succession in the Ports and Maritime Organization helps officials create a cohesive framework for succession planning and discovering, developing, and retaining these valuable human assets. This, in turn, enables them to address emerging challenges and needs effectively.

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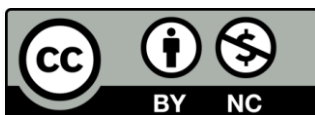
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