


## Leadership succession from the strategic planning process

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### ABSTRACT

An investigation carried out by SEBRAE in 2015 reveals that 57% of micro and small companies in Brazil have relatives among their partners or employees. Also, a survey released by Price Waterhouse Coopers (PWC, 2021) points out that 43% of family businesses in the world do not have a defined family succession plan, 54% do not have a succession plan in place and only 12% reach the third generation. Therefore, the objective of this work is to identify the strategic planning processes to contribute to the succession of leadership in a family organization in the refrigeration industry having as its main activity the maintenance, sale and installation of air conditioners, founded in the 90's and which is heading towards its 3rd generation in the northern region of Paraná. In this way, difficulties in the family succession process will be exposed, as well as the effectiveness for the future of the organization of implementing a plan that contributes to the survival of the organization and intervenes in its performance. This is an action research type, since the researchers implemented the Strategic Planning process in the organization, allowing them to collect information as it happened, as well as later.

**Keywords:** Strategic Planning, Family Business Succession, Leadership.

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## INTRODUCTION

According to the Federal Government of Brazil, in the first four months of 2021, there are 17,173,284 active companies (GOVERNO FEDERAL, 2021). An investigation carried out by SEBRAE (2021) in 2015 reveals that 57% of micro and small companies in Brazil have relatives among their partners or employees (with or without a formal contract). Also, a survey released in 2016 by Price Waterhouse Coopers points out that 43% of family businesses in the world do not have a defined family succession plan, 54% do not have a succession plan in place and only 12% reach the third generation (PWC, 2021).

In this sense, in 2020 DataSebrae released a survey in which it presents the determinants of mortality in companies and, as a contributing factor, the deficiency in planning was presented, with 17% of companies not carrying out any planning before their opening and 59% complying with business planning for a maximum of up to 06 months (DATASEBRAE, 2021).

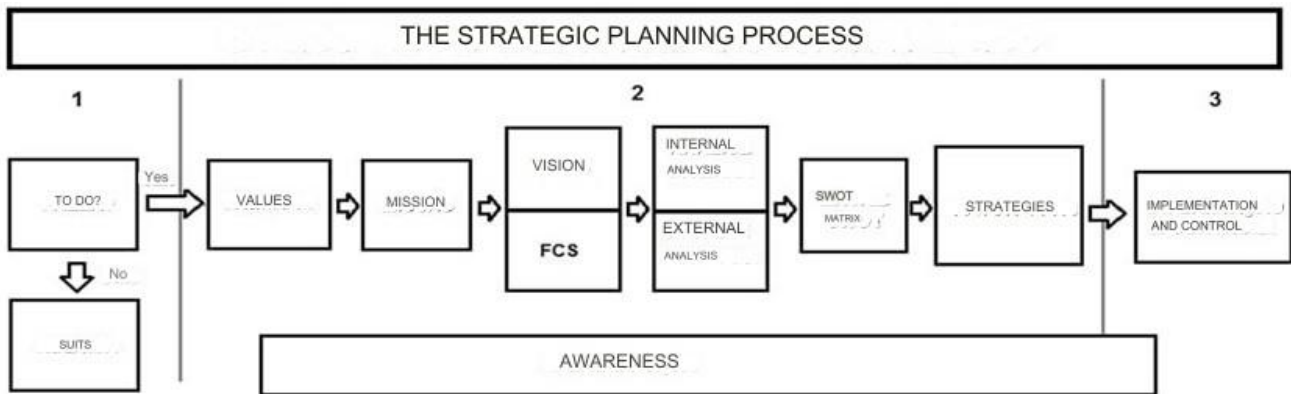
Thus, the present work aims to identify the strategic planning processes capable of contributing to the formation of leadership in succession in a family organization in the refrigeration industry, having as its main activity the maintenance, sale and installation of air conditioners, founded in the 90's and which is moving towards its 3rd generation. located in the northern region of Paraná.

Having in writing all the necessary points, the implementation of a strategic plan and aiming at the formation of leadership in family succession, it is contributive for future managers of the company, to point out paths to follow and what are the best alternatives. It is also useful for researchers in the current market and interested in the area and who want to implement it in another company in the pioneering north

## RESEARCH METHODS

It is an action research type, since the researchers implement the Strategic Planning process in the organization, allowing them to collect information as it happens, as well as later. For the development of strategic planning, the 3 moments of Pereira's strategic planning process (2010, p. 54-57) are considered.

Figure 1 - Moments of the strategic planning process



Source: (PEREIRA, 2010, p. 57).

In the figure, we observe the three moments of the strategic planning process, illustrating the process of creating a strategic plan, it is noted that sensitization occurs through the three moments. In this sense, it seeks to resolve doubts, identifying resistance and lack of knowledge of the strategic planning process of the members of the organization

## FIELD OF STUDY

The study was carried out in a family-owned company in the refrigeration parts and services sales sector. Located in the city of Cambará-PR, it currently has 12 employees, the owner and his daughter in an area that is expanding to 220m<sup>2</sup>, providing services to the entire region.

## POPULATION AND SAMPLE

Currently, the company has 12 employees, the owner and his daughter, and a wide range of customers and suppliers throughout the region.

In the study, the owner, his daughter, 1 employee from the administrative area and 2 employees from the service area will be interviewed.

## DATA COLLECTION

The methods used for data collection consist of a structured interview with owners, another with employees, a questionnaire applied to suppliers and participant observation. Following the Covid-19 protocol of the Ministry of Health, using PFF2 protective masks and maintaining distance or by digital means.



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