IMPROVING KNOWLEDGE TRANSFER IN FAMILY BUSINESS SUCCESSION: THE ROLE OF DIGITAL SOLUTIONS

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EUROMA CONFERENCE 2026

30TH OF JUNE 2026, VIENNA

Finanțat de Uniunea Europeană
NextGenerationEU

GUVERNUL ROMÂNIEI

Planul Național de Redresare și Reziliență

A hundred years ago “business meant family business”, thus the adjective “family” was redundant (Aldrich & Jennings, 2003; Zellweger, 2017).

Family businesses around the globe expect a “giant succession wave... [and] many will not survive”, which could potentially have a severe impact on global business (The Economist, 2026).

AGENDA

01 RESEARCH RELEVANCE

02 LITERATURE REVIEW

03 METHODOLOGY

04 FINDINGS

05 CONCLUSION

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RELEVANCE OF THE RESEARCH AND RESEARCH GAP

Family businesses represent up to **90% of firms** globally (Zellweger, 2017)

Intergenerational **succession** remains a **major challenge** for them (Poza & Daugherty, 2010; Zellweger, 2017)

Succession is a key threat to continuity, yet **70% fail the succession** (Baltazar et al., 2023)

Knowledge transfer is vital for business continuity, but it is often **informal** and **unstructured** (Pipatanantakurn & Ractham, 2022)

RELEVANCE OF THE RESEARCH AND RESEARCH GAP

Knowledge transfer during succession is a **continuous process** (Pipatanantakurn & Ractham, 2022) → Dependent on contextual factors (organisational, individual, technological) (Rezaei, 2024)

Effective knowledge transfer processes in family businesses influence firm **innovation**, **performance** and **competitive advantage** in the digital era → **underexamined area** (Aboelmaged et al., 2024; Baltazar et al., 2023)

Knowledge-based view of the firm → Analysis of how successors absorb the family's philosophy and knowledge → **research potential** (Cabrera- Suárez et al., 2001)

Increasing **role of digitalisation** in knowledge transfer → Potential to transform succession practices → **underexplored area** (Aboelmaged et al., 2024; Baltazar et al., 2023; Capolupo, 2024)

MAIN RESEARCH QUESTION

How can the process of knowledge transfer from incumbents to successors in family businesses be made more effective in the current context of digitalisation?

AGENDA

1. Family businesses
2. Family business succession
3. Intra-organisational knowledge transfer
4. Knowledge, absorptive capacity, disseminative capacity
5. Knowledge transfer in family businesses
6. Drivers of knowledge transfer
7. Technology & digital tools helping knowledge transfer

CHARACTERISTICS OF KNOWLEDGE

(Nonaka & Takeuchi, 1995; Polanyi, 1966)

→ **Tacit knowledge** is highly personal, experience-based and difficult to formalise, as it is embedded into the individuals' insights, values and skills (Polanyi, 1966)

→ Its transfer requires **close social interactions** and **shared experiences** (Polanyi, 1966; Poza & Daugherty, 2010)

→ **Explicit knowledge** is codified and structured, which can be easily stored in documents and databases, for example, and can be easily accessed and transferred within in an organisation (Nonaka & Takeuchi, 1995)

DISSEMINATIVE AND ABSORPTIVE CAPACITIES

(Cohen & Levinthal, 1990, Minbaeva, 2007; Mu et al., 2010)

INCUMBENT = SENDER

→ **Disseminative capacity** → The ability and willingness to articulate and share knowledge in a way that is understandable to the receiver (Minbaeva, 2007; Mu et al., 2010)

→ Cumulated tacit knowledge, which was developed though decades of **experiential learning** (Cabrera-Suárez et al., 2018; Capolupo, 2024).

SUCCESSOR = RECEIVER

→ The successor relies on **absorptive capacity**

→ **Absorptive capacity** → The ability to identify, assimilate and apply new knowledge (Cohen & Levinthal, 1990)

→ Woodfield et al. (2017) suggest that **knowledge sharing is bidirectional** successors share explicit knowledge gained through education and external work experience

DRIVERS OF THE KNOWLEDGE TRANSFER PROCESS

(Rezaei, 2024)

ORGANISATIONAL

→ organisational culture
→ organisational structure
→ leadership support
→ financial rewards
→ non-financial rewards

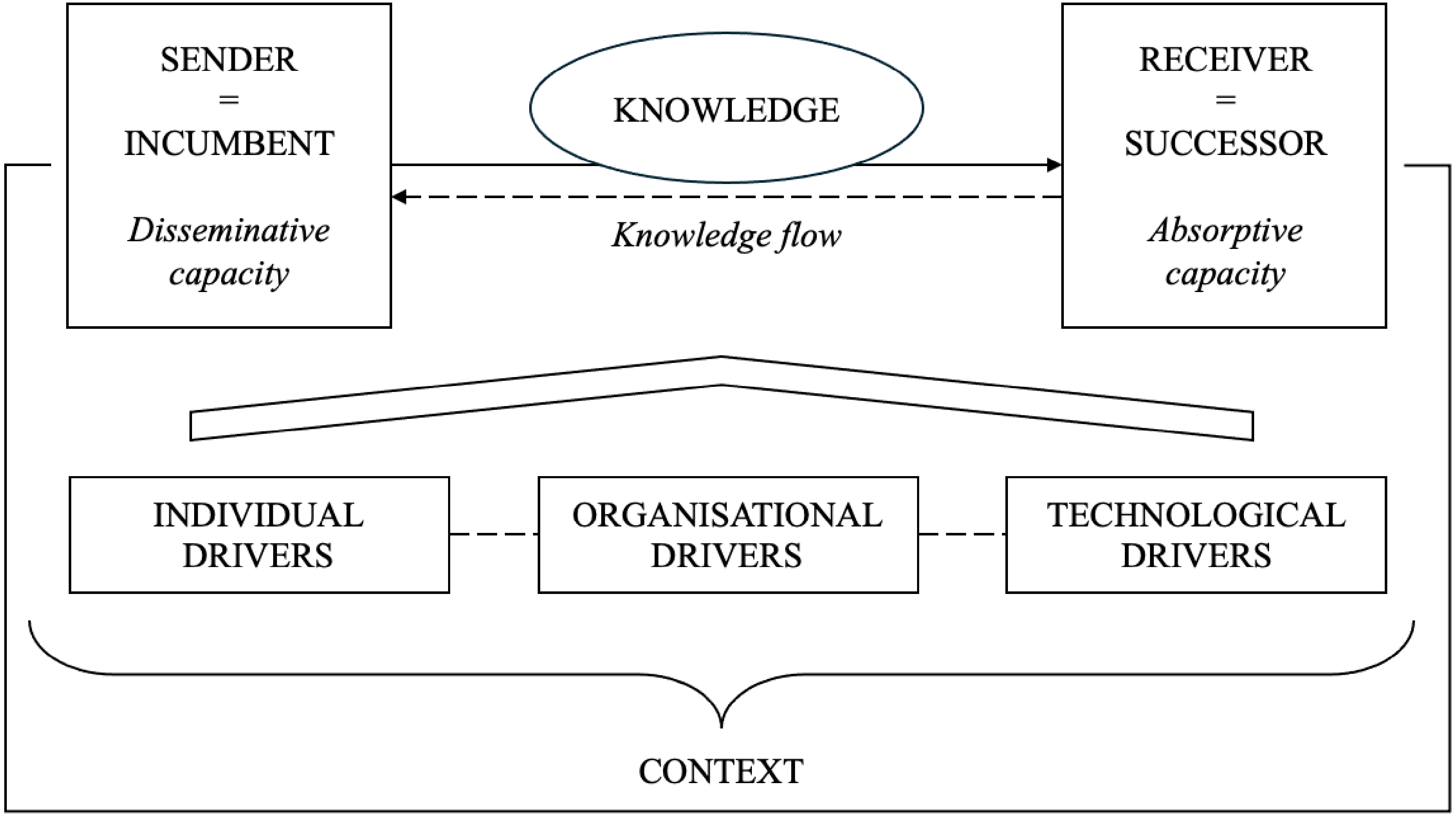
INDIVIDUAL

→ trust
→ reciprocity
→ personal motivation
→ intention

TECHNOLOGICAL

→ IT infrastructure, knowledge management systems, and Web 2.0 platforms
→ **a key enabler of knowledge sharing**, especially for codifying and distributing **explicit knowledge**

The framework of knowledge transfer during family business succession



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METHODOLOGY & RESEARCH DESIGN

Knowledge transfer in family businesses is a relatively **under-researched area**

The area lacks a comprehensive theory →
The area is in the **theory building phase**
(Voss et al., 2002)

QUALITATIVE RESEARCH DESIGN
for deeper understanding

8 case studies & 14 semi-structured interviews
on the level of family businesses

Incumbents & successors involved

Family businesses **where the succession has already happened or is ongoing** to research the strategies and mechanisms during the succession

Small & medium & large enterprises → **8 family businesses from Romania**

Family businesses coming from different industries

Different company size, succession happened or ongoing, different industries
→ **The impact of different contexts can be measured**

THE CHARACTERISTICS OF THE PARTICIPATING FAMILY BUSINESSES

Case	Company size	Year founded	Industry	Time I-S working together	Succession stage	Interviews conducted
FB1	Small	2000	Hospitality	11 years	Ongoing succession	I1 + S1
FB2	Large	1996	Building material retail	5 years	Ongoing succession	I2 + S2
FB3	Small	1997	Water treatment services	4 years	Ongoing succession	I3 + S3
FB4	Large	1992	Construction	10 years	Completed succession	S4
FB5	Medium	1992	Automotive repair services	21 years	Ongoing succession	I5 + S5
FB6	Large	1991	Household product retail	25 years	Ongoing succession	I6 + S6
FB7	Medium	1992	Pharmacy retail	15 years	Completed succession	S7
FB8	Large	1990	Food retail	22 years	Completed succession	I8 + S8

Note: FB = family business, I = incumbent, S = successor, numbers (1-8) indicate the anonymised family business cases included in the research.

DATA ANALYSIS

To understand in depth the complexity of the process of knowledge transfer during family business succession, **a three-level abstraction process was adopted**, which is grounded in an **inductive approach** (Gioia et al., 2013; Van Maanen, 1979).

SYSTEMATICAL IDENTIFICATION OF RELATIONSHIPS AMONG ANALYTICAL THEMES THAT EMERGED FROM THE INTERVIEW TRANSCRIPTS

FIRST-ORDER CONSTRUCTS

SECOND-ORDER CONSTRUCTS (16)

THIRD-ORDER CATEGORISATION (8) ALONG THE THEORETICAL FRAMEWORK DEDUCTIVELY

EXTENDING THE FRAMEWORK WITH SPECIFIC EMPIRICAL INSIGHTS

The analytical process follows an **abductive logic**, complementing the **inductive Gioia approach** by allowing **an iterative interplay** between the empirical observations and existing theory, thus supporting the development of **new theoretical insights** that arise from surprising findings (Timmermans and Tavory, 2012; van Hulst and Visser, 2025).

DATA STRUCTURE - OWN ILLUSTRATION BASED ON THE ANALYSED INTERVIEW TRANSCRIPTS

First-order constructs	Second-order constructs	Third-order constructs
• Successors *"grew up in the family business"* • Incumbents took their children to business meetings, negotiations, business trips • Incumbents and successors had conversations about the business while travelling • Successors helped in the business during summer vacations • Successors observed their parents and employees working • Successors learned as their parents' *"shadow"* • *"Practice made [successors] masters"* • Incumbents and successors believe that both managerial and professional roles are best transferred through observation and practice, even in the current context of digitalisation	Early socialisation and experiential learning of the successor	Tacit knowledge transfer mechanisms
• Incumbents *"threw them into the deep end"* • Incumbents found important for successors to learn by doing the tasks themselves • Some successors entered the business at entry-level positions and developed by rotating their roles within the family business • Incumbents gave successors responsibility, decision-making roles and leadership roles gradually within the company (leading projects, managing operations)	Empowerment of the successor and involvement in leadership roles	Tacit knowledge transfer mechanisms
• The university education of successors is aligned with the profile of the family business • Incumbents and successors participate in managerial and professional trainings • Consultants give advice to the family business	Formal education (university, trainings, consultants)	Explicit knowledge transfer mechanisms
• Notes, to-do lists, notebooks of the incumbents • Regulations, contracts, invoices • Administrative and professional procedures • Correspondence • Financial reports • Lack of documented succession processes, except for one case, where they have a jointly developed Family Charta and Value Codex	Existing codified knowledge within the family business	Explicit knowledge transfer mechanisms

DATA STRUCTURE - OWN ILLUSTRATION BASED ON THE ANALYSED INTERVIEW TRANSCRIPTS

First-order constructs	Second-order constructs	Third-order constructs
• Incumbents naturally involved their children in the life of the family business • Incumbents wanted to familiarise successors with the realities of the family business • Incumbents wanted to show them an alternative carrier path, a plan "B", but did want to force their children to join the family business • Leadership skills *"came intuitively"* to incumbents • Incumbents transfer the knowledge which only *"exists in their heads"* through explanation and by encouraging observation	Incumbents intentionally involve the successor into the business	Disseminative capacity of incumbent
• Incumbents provide insights into the processes of decision-making • Incumbents provide insights into the process of establishing and managing partnerships • Incumbents give responsibility gradually to their successors and eventually give them leadership positions, they encourage *"learning by doing"*	Incumbents empower the successors to complete tasks	
• Successors learn through observation and practice, both from their parents and colleagues • Successors combine the theory learned at the university with practice at the family business • Successors rotate roles within the business	Successors learn mainly through experience	Absorptive capacity of successor
• Successors identify what they want to do differently from their parents • Successors bring in new ideas after they understand the business operations • Successors apply knowledge acquired through formal education	Successors introduce new ideas, changes into the family business	
• Successors introduce new ideas into the family business operations, especially digital innovations are initiated by them • There is a mutual learning between generations	Innovative ideas introduced by the successors (digital solutions)	Bidirectional knowledge flow

DATA STRUCTURE - OWN ILLUSTRATION BASED ON THE ANALYSED INTERVIEW TRANSCRIPTS

First-order constructs	Second-order constructs	Third-order constructs
• Shared values of incumbents and successors that motivate them in working together: • Patience • Trust • Positive mindset and attitude • Perseverance • Solution-oriented thinking • Shared goals	Shared values of the incumbents and successors that that enhance smooth succession	Individual drivers and shared values
• Incumbents have an emotional attachment to the business • Family business is their *"way of life"* and they want to ensure its continuity • Incumbents want to provide a possible working opportunity for their children	Motivation of the incumbents to continue the family business	Individual drivers and shared values
• Successors have a desire to prove themselves to their parents • Successors also have an emotional attachment to the business, the business is their *"sibling"* • Successors' *"heart beats together with the company"*	Motivation of the successors to take over the family business	Individual drivers and shared values
• Family harmony is more important than challenges arising in the business • Conflicts should be openly discussed, with a problem-solving mentality • Trust within the team is important • Usually, there are unwritten rules in the family business culture • There is a reinvestment mindset and a focus on growth • Caring for the environment, culture and community	Organisational culture in the family business	Organisational drivers
• The separation of family and business roles is important for both incumbents and successors • Clear role definitions are important, especially if more family members are involved • Regular meetings are held to divide tasks and track progress	Existing governance structures	Organisational drivers

DATA STRUCTURE - OWN ILLUSTRATION BASED ON THE ANALYSED INTERVIEW TRANSCRIPTS

First-order constructs

- Successors are open to digital solutions and have the capability to introduce them
- Incumbents are more comfortable if their children handle technology, they are open to their children's suggestions

→ Generational differences in adopting digital solutions

- ERP systems
- CRM systems
- Accounting software
- Digital inventory system
- Specialised platforms (insurance, procurement)
- Cloud-based repositories
- Local servers
- Own website (and online webshop)
- AI tools to support operations
- Social media presence

→ Digital solutions that support operations and decision-making

Second-order constructs

- Generational differences in adopting digital solutions
- Digital solutions that support operations and decision-making

Third-order constructs

Technological drivers: capabilities and existing digital solutions

AGENDA

FINDINGS

Empirical findings highlight that **both tacit and explicit knowledge** is essential to be transferred during family business succession.

Predominantly tacit knowledge transfer is present during succession. Managerial and professional **skills**, **insights** and operational **know-how** are primarily acquired through **active involvement**, observation and practice.

Explicit knowledge plays a significant role in the **formal education of successors**, who acquire essential knowledge during higher education that can later be leveraged within the family business.

Explicit knowledge **supports** learning processes, as company documents, procedures, as well as financial data contribute to decision making and daily operations.

FINDINGS

Digital solutions enhance the efficiency of decision-making processes. Family firms that implemented **ERP systems** report that these tools facilitate faster and more informed decision-making.

Only one of the family businesses involved in the research had **formalised documentation** regarding succession processes and the transfer of managerial responsibilities.

Bidirectional knowledge transfer is present, particularly in relation to the implementation of **digital solutions**. Successors often contribute with new ideas and knowledge related to ERP system integration, social media usage, website development, cloud-based tools.

FINDINGS

Disseminative capacity: incumbents involve successors in the family business from an early age by including them in summer work, taking them on business trips and to meetings, and by empowering them to learn the characteristics of the business through hands-on work experience.

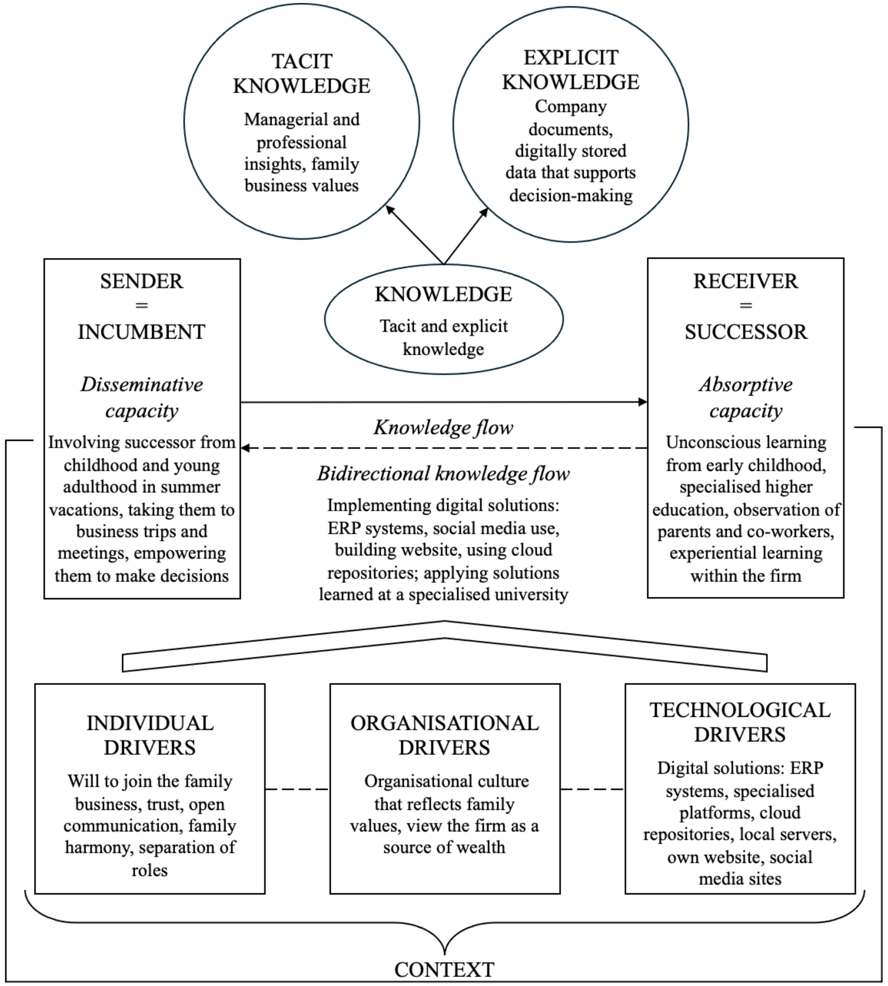
Absorptive capacity: successors acquire knowledge both unconsciously from early childhood and consciously through their higher education, observation of parents and co-workers, and experiential learning within the firm.

Individual drivers include the successor’s motivation and willingness to join the family business and assume managerial roles there, and their motivation to learn from the incumbent.

Organisational drivers are reflected in a culture shaped by family business values, such as the above-mentioned trust and open communication.

Technological drivers include the increasing adoption of digital solutions, such as ERP systems, specialised platforms, cloud repositories, local servers, company websites and social media.

FACTORS SUPPORTING THE EFFECTIVENESS OF KNOWLEDGE TRANSFER DURING FAMILY BUSINESS SUCCESSION



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CONCLUSION, LIMITATIONS AND FURTHER RESEARCH

This research contributes to the literature of family business succession by **reinforcing** and **extending** the **knowledge-based view** of succession.

→ **Tacit knowledge remains the cornerstone** of successful succession, even with the increasing existence of digital solutions within family businesses.

→ **Explicit knowledge and digital solutions do not replace tacit knowledge** transfer but rather **complement** and **enhance** it.

The findings are based on a limited number of case studies conducted within a specific regional and cultural context; therefore, the results are not generalisable.

Future research could further explore, as digital solutions evolve, how they could better support knowledge transfer during family business succession.

FUNDING

This work was supported by the project entitled
"Strengthening the digitalization of businesses in Eastern Europe – a micro and macro-level approach"
funded by the European Union – NextGenerationEU project and the Romanian Government,
under the National Recovery and Resilience Plan for Romania,
contract no. 760036/23.05.2023, cod PNRR-C9-I8-CF 198/28.11.2022,
through the Romanian Ministry of Research, Innovation and Digitalization, within Component 9, Investment I8.

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MAIN RESEARCH QUESTION

How can the process of knowledge capturing and transfer from incumbents to successors in family businesses be made more efficient in the current context of digitalisation?

SUB-QUESTIONS

What are the key **challenges** and **barriers** to effective knowledge transfer in family businesses and how to they vary across contexts?

What kind of factors influence **the disseminative capacity** of incumbents and the **absorptive capacity** of successors during family business succession?

How do **organisational**, **individual** and **technological drivers** influence the knowledge transfer process during family business succession?

What kind of **strategies** and **mechanisms** are used to **transfer** both **explicit** and **tacit** knowledge within the succession process?

Interview protocol

Succession and knowledge transfer in general

- How would you describe the **succession process** in your family business? Was it **formally** planned, or it evolved **naturally**? (Le Breton-Miller et al., 2004; Zellweger, 2017)
- What were the biggest **challenges** in **transferring knowledge** from the incumbent to the successor during the succession process? (Letonja & Duh, 2016; Neto et al., 2023)
- When did **knowledge transfer begin** – before, during or after the formal succession process? (Pipatanantakurn & Ractham, 2022)
- **What kind of knowledge** was transferred (e.g., technical, strategic, cultural)? Which was most difficult to share? (Capolupo, 2024; Wang & Jiang, 2018)

Disseminative capacity

- How would you describe your **ability** and **willingness**, as an incumbent, to clearly share your knowledge with the successor? (Mu et al., 2010)
- What **methods** did you use to share **your tacit knowledge** with the successor, and to make it more approachable and understandable to them? (Nonaka & Takeuchi, 1995; Wang & Jiang, 2018)
- How would you describe the **successors attitude** towards learning from you? (Botero et al., 2021)

Interview protocol

Absorptive capacity

- How would you describe your **ability** and **willingness**, as a **successor**, to absorb the existing knowledge about the family business? (Cohen & Levinthal, 1990; Zellweger, 2017)
- Did you, as a successor, gain **external knowledge** in order to better be able to absorb the knowledge of the family business? (e.g., higher education, training, experience at another workplace etc.) (Woodfield et al., 2017; Wang & Jiang, 2018)
- What kind of **knowledge** did you absorb more **easily** within the family business and what kind of knowledge was more **challenging** to internalise? (Cohen & Levinthal, 1990)

Knowledge flow

- As for **bidirectional knowledge sharing**, did the successor contribute to the existing knowledge of the family business with ideas that eventually enhanced business operations? (Woodfield et al., 2017)
- Can you give me examples from the family business where knowledge co-creation happened between the incumbent and the successor? (Woodfield et al., 2017)

Interview protocol

Organisational drivers

- How would you describe the **culture of your family business** in terms of openness, collaboration and learning? (Botero et al., 2021; Menkhoff & Wah, 2014)
- What **leadership styles** (participative, hierarchical, consensus-based) were adopted during succession? How did these influence knowledge sharing? (Baltazar et al., 2023; Cunningham et al., 2016)
- Were there any **formal mechanisms** in place for transferring knowledge (e.g., manuals, family charter, governance board)? (Duh & Primec, 2022; Zellweger, 2017)
- How were **non-family members** involved in the succession and knowledge transfer process? (Capolupo, 2024; Rezaei, 2024)

Interview protocol

Individual drivers

- What **motivated** the **successor** to join the family business? Was this always a plan? (Duh & Primec, 2022; Hasan et al., 2020)
- What kind of **relationship** existed between the incumbent and the successor? How did this affect knowledge transfer? (Botero et al., 2021; Loung et al., 2023)
- Did the successor bring in any new knowledge (e.g., from formal education or previous jobs)? If yes, how was this received? (Capolupo et al., 2023; Woodfield et al., 2017)
- What types of knowledge (tacit or explicit) were shared most effectively, and what role did **interpersonal trust** play in this? (Cabrera-Suárez et al., 2018; Neto et al., 2023)

Interview protocol

Technological drivers

- What kinds of **digital tools** (e.g., cloud solutions, CRM systems, AI platforms) are used in your family business to support knowledge sharing? (Aboelmaged et al., 2024; Perrin & Rolland, 2007)
- Do you find **digital solutions** more effective than traditional ones like face-to-face mentoring or using manuals, physical documents etc.? Why or why not? (Dixon, 2000; Wagner et al., 2023)
- What **challenges** have you faced in **implementing digital tools** for knowledge transfer? (Mazurkiewitz et al., 2022; Rezaei, 2024)
- How do you see **digitalisation shaping knowledge transfer** and succession in the future of your business? (Capolupo, 2024; Luong et al., 2023)