How can emotions be effectively managed during succession processes? Insights from Scientific Literature

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Emotions are not mere background noise in family businesses; they form their very substrate. Socioemotional wealth (SEW) explains strategic decisions that financial logic alone cannot predict. An incumbent's identity resistance can neutralize even the best governance mechanisms. A successor's emotional dissonance silently fuels conflicts that erupt long after their causes have been buried. Parental affective support emerges, among all studied factors, as the strongest predictor of succession intentions. These findings, drawn from diverse geographic and cultural contexts, converge on a single conclusion: any succession approach that overlooks the emotional dimension remains structurally incomplete.

The documented effective strategies combine complementary levers: early anticipation of succession planning, structuring dialogue spaces to reduce unspoken tensions, aligning the successor's profile with organizational values, engaging third parties to surface and alleviate blocking emotions, and adapting interventions to specific cultural and family contexts. Developing emotional intelligence—through individual coaching, intergenerational mentoring, or conflict resolution training—serves as a transversal thread across these strategies, with empirically supported efficacy. When consciously cultivated rather than endured, *familiness* can transform from a source of tension into a sustainable competitive advantage (Habbershon & Williams, 1999).

Engaging in succession planning early, before identity-based resistance becomes entrenched

The literature consistently shows that the earlier succession planning is initiated, the less conflict it tends to generate. When succession is approached as a gradual process, discussed openly and over time, it produces significantly less anxiety than when it is postponed until a crisis (such as illness, death, or serious disagreement) renders it suddenly unavoidable (Ward, 1987; Ringo & Kibambila, 2025).

Gómez-Mejía et al. (2007) further indicate that resistance to relinquishing control is most intense during the first generational stage—that of the founder. Waiting for the incumbent to feel spontaneously ready often means waiting too long. Early intervention, before identity-related stakes become overwhelming, is therefore a condition not only for feasibility but also for effectiveness.

However, succession planning should not be reduced to its technical dimension. Even when well executed, the transfer of leadership entails a form of partial identity loss for the incumbent: letting go of a business one has built or developed implies relinquishing a part of oneself. Shepherd (2009) shows that this process resembles a genuine grieving process, with phases of gradual acceptance. Acknowledging this reality—rather than circumventing it— is a prerequisite for succession planning to achieve its intended outcomes.

Structuring spaces for dialogue to reduce emotional dissonance and unspoken tensions

Many tensions in family business succession do not stem from fundamental disagreements, but rather from misunderstandings that no one has taken the time to clarify. Unarticulated expectations, unexpressed needs, and resentments accumulated over years of shared history can, in the absence of appropriate spaces for dialogue, eventually saturate interactions at precisely the moment when succession requires clarity and trust.

In this regard, transparent, empathetic, and regular communication among the incumbent, the successor, and the extended family constitutes a central lever. Dedicated structures (such as family councils, review meetings, or off-site retreats outside the professional setting) provide opportunities for each party to express their needs and concerns within a secure environment, without the pressures of day-to-day operations short-circuiting exchanges. These moments also allow for the explicit recognition of the incumbent's past contributions, thereby facilitating their willingness to step aside.

Aligning the successor's profile with organizational values to strengthen resilience

The question of the successor's profile is often approached from a competence-based perspective: do they possess the required experience, technical knowledge, and network? While these criteria are legitimate, they are not sufficient. Research shows that another, less visible factor plays a decisive role in succession success: the congruence between the successor's personality and the underlying values of the organization they are about to lead.

Drawing on a study of 124 successors in Pakistan, Ahmad et al. (2023) demonstrate that four of the five traits in the Big Five (OCEAN) model are positively associated with succession success: openness to experience, conscientiousness (understood as diligence and a sense of responsibility), extraversion, and agreeableness. Neuroticism, the fifth trait, does not emerge as a significant predictor in this context.

This finding is particularly instructive because the congruence at stake is not generic, but contextual. A firm that values innovation will benefit more from a successor open to change; a company whose strength lies in client relationships will derive greater advantage from a naturally extraverted successor. It is therefore not the presence of a trait in isolation that produces an effect, but its alignment with the organization's specific values and needs at a given point in its history.

A successor whose personality is aligned in this way with organizational values demonstrates significantly higher levels of motivation and resilience in the face of the inevitable challenges of transition (Ahmad et al., 2023; Zellweger et al., 2012).

For practitioners, this underscores the importance of explicitly reflecting on organizational values—often implicit and rarely formalized—before even initiating the process of identifying a successor.

Engaging third parties to surface and alleviate blocking emotions

One of the distinctive challenges of family businesses is that the most necessary conversations are often the most difficult to initiate internally. The overlap between family and professional roles, the emotional weight of shared histories, and the fear of hurting or being hurt render certain topics nearly impossible to address without external support. This is where the value of third-party advisors (such as consultants, psychologists, coaches, or independent board members) becomes evident: their neutral perspective enables them to articulate what stakeholders struggle to express themselves.

Clear governance structures (including family charters, succession protocols, and explicit decision-making rules) play a complementary role by depersonalizing decisions. Anchoring a choice in a principle previously accepted by all parties reduces the likelihood that it will be perceived as a personal attack (Michel & Kammerlander, 2015).

Bertschi-Michel et al. (2020) detail the concrete mechanisms underlying such support. To surface latent emotions, advisors may rely on direct confrontation of observed resistance, careful attention to nonverbal behavioral cues, the involvement of spouses, the explicit naming of perceived emotions, or referral to a psychologist when the depth of the issues so warrants.

Identifying and mitigating gender biases and sibling rivalries in successor preparation

Sibling conflicts represent one of the most frequent and challenging sources of tension in family businesses. Kellermanns and Eddleston (2004) demonstrate that they are most often rooted in perceptions of parental favoritism—typically longstanding and rarely verbalized. It is crucial to recognize that these tensions do not emerge during succession: they preexist in latent form and simply find in succession a formal context that exacerbates and makes them visible.

The gender dimension adds further complexity. Drawing on their extensive international study, Lyons et al. (2024) empirically document that being female is associated with significantly lower succession intentions, self-efficacy, and affective commitment compared to males. For firstborn daughters -in particular- even strong affective attachment to the firm does not necessarily translate into takeover intent, suggesting that persistent gender stereotypes neutralize the effect of attachment. For younger daughters, however, enhancing self-efficacy emerges as an effective lever to counteract these biases.

These findings have direct implications for practitioners: successor preparation programs that overlook gender and birth-order dynamics risk perpetuating structural inequalities, often unwittingly. Expanding the pool of potential successors requires actively identifying and neutralizing these biases, rather than relying on a selection process presented as neutral but which is not.

Adapting interventions to cultural contexts rather than imposing standardized models

Strategies for managing emotional dynamics are not culturally neutral. An approach or tool developed in one context—with its implicit communication norms, values around emotional expression, and conceptions of authority and family loyalty—does not necessarily yield the same effects when transposed elsewhere.

Yezza, Chabaud, and Calabrò (2021), drawing on a four-year longitudinal study within a Tunisian family firm, illustrate how local cultural and family structures shape the nature and intensity of emotional dissonance. In the case examined, three mutually reinforcing dimensions emerge: a strong norm of respect for elders, a predominantly patriarchal family structure, and norms valuing obedience to parental figures. Together, they create an environment in which the successor has very limited space to express negative emotions (frustration, disagreement, or personal ambition) without risking perceptions of disrespect or disloyalty. Thus, emotional dissonance here is not indicative of an individual deficit but the product of a normative system that constrains expression well before the individual has an opportunity to choose otherwise.

The authors caution against overgeneralizing beyond their case study. They note, however, that similar dynamics may arise in other contexts where hierarchical and familial norms exert strong pressure on emotional expression, without this defining an entire culture or region.

For practitioners, the implications are both methodological and ethical: before deploying support mechanisms, it is essential to understand the relational and familial norms shaping the firm in question. Offering expression spaces tailored to these norms—rather than imposing communication frameworks designed elsewhere—is a fundamental condition for relevance and respect toward those being supported.

Synthesis of Emotional Management Strategies in Succession Processes

The table below synthesizes the six strategies for managing emotional challenges identified in the literature, specifying for each the pursued objective, the target audience, the preferred timing of intervention, and the empirical references that underpin its relevance.

Strategy	Main Objective	Target Audience	Key Timing
Engage succession planning early	Prevent the crystallization of identity resistances before they block all dialogue	Incumbent, family council	From the first generation
Structure dialogue spaces	Reduce emotional dissonance and dissipate accumulated unspoken tensions	Incumbent, successor, extended family	Throughout the process
Align successor's profile with organizational values	Strengthen successor's motivation and resilience facing transition challenges	Successor, incumbent leader	Selection and preparation phase
Engage third parties to surface and alleviate blocking emotions	Enable expression and transformation of emotions the family cannot address alone	Incumbent, successor, external advisor	All phases
Identify and neutralize gender biases and sibling rivalries	Expand the pool of potential successors and correct structural inequalities	Family, incumbent, advisor	Identification and preparation
Adapt interventions to cultural context	Ensure relevance and effectiveness of support mechanisms according to local norms	Practitioners, advisors	Throughout the process

Practical Applications: Developing Emotional Intelligence

Emotional Intelligence at the Core of Family Leadership

Emotional intelligence, conceptualized by Mayer and Salovey (1997) and popularized by Goleman (1995), refers to the ability to perceive, understand, use, and regulate one's own emotions and those of others. It comprises four components: self-awareness, self-management, empathy, and relationship management.

In family businesses, where personal and professional ties constantly overlap, this competence is particularly crucial. A systematic literature review (Lobo, 2023) confirms that emotional intelligence directly influences conflict management quality, collective decision-making, and organizational climate. In other words, a leader or successor with high emotional intelligence not only manages their own emotions more effectively but also fosters a stable relational environment around them—a prerequisite for successful transitions.

Developing Emotional Intelligence: Approaches and Tools

Several complementary approaches enable the development of emotional intelligence in family business contexts. They can be deployed individually or combined based on needs and available resources.

Individual coaching is the most documented method. An external coach helps the incumbent or successor identify recurring emotional patterns, assess their impact on others, and build context-specific regulation strategies. Recent accounts (2024) highlight programs where the incumbent is supported through ambivalent emotions around stepping aside, while the successor receives concurrent emotional intelligence training—two parallel processes that mutually reinforce each other.

Training in conflict resolution styles provides leaders with practical frameworks to defuse tensions before they take root. The Thomas-Kilmann model, for instance, distinguishes five conflict postures: accommodation, avoidance, compromise, competition, and collaboration, each suited to different situations. The ability to deploy them discerningly is itself a form of emotional intelligence. Kellermanns and Eddleston (2004) further note that task-focused conflict, when properly framed, can benefit performance.

Intergenerational mentoring is an often-underestimated vector for emotional intelligence development. Successors who learn by observing elders, participating in transmission rituals, and receiving explicit emotional guidance develop more robust emotional intelligence than those trained solely through formal programs. This tacit transmission process also ensures cultural and affective continuity across generations.

Social skills development, finally, targets concrete abilities: decoding others' emotions, adapting expressive styles to interlocutors, and negotiating without sacrificing emotional authenticity. Yezza, Chabaud, and Calabrò (2021) identify these as essential levers for overcoming emotional dissonance, especially in families where norms strongly constrain expression. Targeted programs integrated into successor support mechanisms offer direct practical applications of this research.

Across all these interventions, Bertschi-Michel et al. (2020) advise advisors to maintain dual vigilance through an emotional mediation process: Which buried emotions still impede progress? And which interventions can alleviate them? This dual questioning (surfacing, then lightening) usefully structures follow-up, while reminding that trust between advisor and stakeholders is foundational—nurtured through neutrality, empathy, and equidistance across generations.

Building an Emotionally Healthy Organizational Culture

Individual emotional intelligence development is insufficient without an organizational environment that enables its expression. Three structural commitments are essential.

The first is the explicit recognition of emotions' role in firm life. Dedicating time for expressing feelings in governance meetings, family councils, or transition reviews reduces latent tensions and enhances collective decision quality (De Massis et al., 2023). What is named can be addressed; what remains unspoken accumulates.

The second is actively promoting emotional well-being for all members, family and non-family alike. Work-life balance, recognition of individual contributions, and secure speaking spaces correlate with reduced conflict and improved performance during transitions, per the literature.

The third is clarifying roles, particularly for non-family members whose position in a family firm is structurally ambiguous. Evaluating these collaborators not only on technical skills but also on their ability to navigate emotionally charged environments acknowledges the realities they face daily.

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