



CONNECTING FAMILY PROTOCOL AND FAMILY COUNCIL TO PERCEIVED SUCCESSION SUCCESS IN FAMILY BUSINESSES THROUGH MANAGEMENT SUCCESSION PLANNING

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The aim of the research is to identify the effect of family protocol and family council toward perceived success of succession through management succession planning mediation. Family business refers to a corporation that has been controlled and owned by the same family for generations. Exercising rational business decisions while also managing the interpersonal dynamics of a family-owned enterprise is a challenging task. Achieving equilibrium between the expectations and fluctuations of family members and the company's enduring objectives is frequently imperative in this situation. The analysis conducted using quantitative analysis. The population of the research is family business successor at Surabaya. The sampling method used is purposive sampling. The respondent participated in this research is 120 respondents. The data analysed using Partial Least Square Method using SmartPLS application. The data analysis showed that family protocol and family council positively affect management succession planning. In addition, family council, family protocol, and management succession planning directly affect perceived success of succession. The finding also discovered that management succession planning also successfully mediated the relationship between family council and family protocol toward perceived success of succession.

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INTRODUCTION

Family business refers to a corporation that has been controlled and owned by the same family for generations. Running a family business is not just about making rational decisions, but also about managing complex interpersonal dynamics. Balancing family expectations with long-term business goals is essential. In Indonesia, 45% of businesses are family-owned, making it the second largest in the world after India (Sinha, 2019). As noted by Rachmawati and Suroso (2022), family businesses are common and significantly contribute to the national economy. Kussudyarsana et al. (2020) emphasized their resilience and role in employment and GDP. Government support has also encouraged their growth (Miroshnychenko et al., 2021), although they remain vulnerable to economic shocks.

Nevertheless, many have bounced back, supported by strong values and adaptability (Sukamdani, 2023). Yet, as Arcese et al. (2021) highlight, family involvement brings unique challenges, especially in succession. Aladejebi (2021) reported that only 30% survive to the second generation, and even fewer beyond that. Miscommunication and lack of trust within the family are major causes of failure, making it vital to address internal dynamics for long-term success. Therefore, identifying the key factors that influence succession success is crucial to ensure the sustainability of family businesses across generations.

Successful succession in a family business creates a strong foundation for long-term survival and growth (Aladejebi, 2021). Succession is not only a change in leadership but also involves the

transfer of values, culture, and knowledge that have built the foundation of the business over many years. Zapata-Cantu et al. (2023) stated that succession success is also related to the ability of the next generation to adapt to change and respond to business challenges. Sinha (2019) stated that around 60% of these family businesses are companies that are also managed by family members in the company. Therefore, the business operation and success are defined by the family members who joined the company. However, challenges such as conflicts of interest and internal misalignment often arise, making structured governance essential in managing leadership transition.

The establishment of a succession framework for family companies often includes key elements of governance, particularly the family protocol and the family council. Family protocol consists of written norms, principles, and regulations that govern ownership, roles, and behavior in the business, serving as a foundation for succession planning and conflict resolution. Meanwhile, the family council is responsible for strategic decisions and succession policies, ensuring alignment with family values and evaluating leadership performance (Bettinelli et al., 2023). Both governance tools provide clarity, reduce internal conflict, and increase trust during leadership transitions (Suhartanto, 2023), making them essential components to ensure continuity and long-term sustainability of the family business.

Previous research by Sallay et al. (2024) Sallay et al. (2024) and Suhartanto (2023) found that the family council has a significant impact on succession planning in family businesses. However, research by Akpan et al. (2023) and Müller et al. (2024) states that the existence of a family council does not have a significant effect on succession planning in family businesses. Findings by Ferrari (2023) and Khosa (2023) found that family protocols can have a significant influence on succession planning in family businesses. Contradictory findings were found by Mahto et al. (2023) and Liu et al. (2024) where the existence of a family protocol did not have a significant effect on succession planning in a family business. There are inconsistent results between the relationship between the family council and family protocol on succession planning in family businesses, so a mediating variable is needed to help identify the relationship between the family council and family protocol on succession planning (Liu et al., 2024; Mahto et al., 2023; Sallay et al., 2024; Suhartanto, 2023).

To address these inconsistencies, this study uses management succession planning (MSP) as a mediating variable to better explain the relationship between the family protocol and family council on succession success. Without a

well-defined planning structure, both the family protocol and family council may not function effectively in guiding leadership transitions. MSP provides a practical framework that connects formal rules and informal discussions, translating them into clear, actionable steps for leadership development (Habash, 2023). It ensures that succession processes are not only aligned with family values but also responsive to organizational needs. By enabling both governance mechanisms to work in synergy, MSP helps reduce internal conflict, clarify expectations, and enhance the overall likelihood of successful succession in family businesses (Suhartanto, 2023).

This research aims to identify the effect of family governance, consisting of family protocol and family council on the perceived success of succession planning with the mediation of management succession planning. This study uses a sample from Surabaya, Indonesia's second-largest city with a diverse economic landscape, to capture the varied succession dynamics across industries. The findings are expected to contribute insights into context-specific governance and succession strategies relevant to urban family businesses in emerging economies.

THEORETICAL FRAMEWORK AND HYPOTHESIS DEVELOPMENT

Institutional Theory

Institutional theory explains how organizational behavior is influenced by established norms, societal expectations, and regulatory frameworks (Glynn & D'anno, 2023; Meyer & Rowan, 1977). Organizations seek legitimacy by aligning with three pillars of institutions: normative institutions that reflect shared values and standards, cognitive institutions that encompass common beliefs and assumptions, and regulatory institutions composed of formal rules and legal requirements (Ioakeimidou et al., 2023). In family businesses, these institutional pressures can shape how succession is approached, how successors are selected, and how family values are preserved. Cultural norms, community expectations, and legal obligations collectively influence family firms to adhere to practices that are seen as acceptable and legitimate within their operating environment (Fan et al., 2021).

This research uses institutional theory to examine the relationship between family protocol and family council with the perceived success of succession, by positioning management succession planning as a mediating variable. The presence of formal structures such as protocols and councils reflect institutionalized governance within family businesses, helping to reduce ambiguity, promote transparency, and ensure

continuity during leadership transitions. Management succession planning, when embedded within these structures, aligns the internal strategic process with broader institutional expectations. This alignment enhances the perceived effectiveness of succession and supports the long-term viability of family enterprises across generations.

Family Protocol and Management Succession Planning

Family protocol is a set of shared values and principles that guide how family members interact and make decisions in the business (Matias & Franco, 2020). Without a structured process like management succession planning, these values may not be effectively implemented (Tinh et al., 2023). Management succession planning serves to operationalize the ideals of the family protocol through clear steps for identifying and preparing future leaders, while minimizing conflict and uncertainty (Aslan et al., 2023; Ferrari, 2023). Institutional theory supports this relationship, where family protocol reflects internalized norms, and management succession planning represents the organization's response through structured action (Fan et al., 2021). Empirical studies have demonstrated that family protocol significantly influences management succession planning (Matias & Franco, 2020; Tinh et al., 2023). Therefore, we hypothesize:

H1: Family Protocol has positive effect on Management Succession Planning.

Family Council and Management Succession Planning

The family council plays a critical role in facilitating structured discussions and decisions related to leadership transitions in family businesses (Aslan et al., 2023). Composed of members from the business-owning family, the council provides a formal space for expressing perspectives, resolving differences, and aligning expectations (Ferrari, 2023). Its function is further strengthened when supported by management succession planning, which helps translate family needs into concrete steps for identifying and preparing successors. This collaboration not only enables a smoother leadership transition but also reduces ambiguity and the potential for internal conflict (Aslan et al., 2023). Through institutional theory, the family council is seen as an institutionalized mechanism that reflects social norms and internal governance, while management succession planning serves as the strategic response that ensures those norms are upheld in practice (Fan et al., 2021). Prior research has shown that the family council has a significant influence on management succession

planning (Aslan et al., 2023; Tinh et al., 2023). Therefore, we hypothesize:

H2: Family Council has positive effect on Management Succession Planning.

Management Succession Planning and Perceived Success of Succession Process

Effective management succession planning can positively shape how an organization perceives the success of its succession process (Jasir et al., 2023). By providing a structured and well-prepared transition strategy, management succession planning fosters a sense of readiness and trust among both employees and family members during leadership change. This planning process contributes to the perceived success of succession by ensuring that future leaders are competent and that the transition is handled smoothly (Muadinohamba & Maseke, 2024). When members observe that succession is managed professionally and aligns with shared expectations, their perception of its success tends to increase (Söderström & Kock, 2023). From the perspective of institutional theory, management succession planning reflects the organization's commitment to institutional norms and its efforts to meet internal and external expectations regarding leadership continuity (Fan et al., 2021). Previous research supports this view by showing that effective management succession planning significantly enhances the perceived success of succession (Jasir et al., 2023; Muadinohamba & Maseke, 2024). Therefore, we hypothesize:

H3: Management Succession Planning has positive effect on Perceived Success of Succession.

Family Protocol and Perceived Success of Succession Process

The importance of family protocol in family firms is reflected in its influence on how the succession process is perceived by those involved (Ferrari, 2023). When family members understand, accept, and adhere to the principles outlined in the family protocol, they are more likely to view the succession process as effective and well-managed (Khosa, 2023). A clear and transparent family protocol helps build trust and clarity, leading to more positive perceptions of succession success (Jayantilal et al., 2023). Institutional theory provides a relevant lens to examine this relationship, as it highlights how internal family norms, formalized through the protocol, shape expectations and guide behavior during succession (Fan et al., 2021). The alignment between the protocol and the succession process enhances legitimacy and consistency, both internally and externally. Empirical studies support this relationship,

showing that family protocol significantly affects the perceived success of succession planning (Jayantilal et al., 2023; Muadinohamba & Maseke, 2024). Therefore, we hypothesize:

H4: Family Protocol has positive effect on Perceived Success of Succession.

Family Council and Perceived Success of Succession Process

The family council plays a vital role in shaping how family members perceive and engage in the succession process by fostering transparency, inclusiveness, and collective participation (Sallay et al., 2024). As a formal body within the family business, the family council facilitates open dialogue and shared decision-making, allowing succession planning to reflect broader family interests rather than individual agendas (Georgiou et al., 2023). This collaborative environment strengthens trust and promotes a positive perception of how succession is managed. Viewed through the lens of institutional theory, the family council represents a governance structure that aligns internal family norms with societal expectations, reinforcing legitimacy and enhancing the effectiveness of succession planning (Fan et al., 2021). Previous studies have shown that the family council significantly influences the perceived success of the succession process (Sallay et al., 2024; Suhartanto, 2023). Therefore, we hypothesize:

H5: Family Council has positive effect on Perceived Success of Succession.

Mediating Effect of Management Sucession Planning on The Relationship between Family Protocol and Family Council on Perceived Success of Succession Process

Management succession planning plays a central role in translating the principles of family protocol and the strategic functions of the family council into a structured and effective succession process. Without proper planning, the ideals in family protocols and the decisions made by the

family council may not be implemented effectively (Jhunjhunwala, 2023). MSP serves as a bridge that connects internal family values with external institutional expectations, thereby enhancing the perceived success of succession. Prior studies support that MSP mediates the influence of both family protocol and family council on how succession is perceived (Georgiou et al., 2023; Jayantilal et al., 2023). Therefore, we hypothesize:

H6a: Management Succession Planning mediates the relationship between Family Protocol on Perceived Success of Succession.

H6b: Management Succession Planning mediates the relationship between Family Council on Perceived Success of Succession

RESEARCH METHOD

Population, Sample and Data Collection

This study uses a quantitative correlational research method, which enables objective measurement and analysis of numerical data to explore the relationships between variables (Bhangu et al., 2023). The population in this research includes all successors of family businesses currently based in Surabaya. The sample consists of successors who have been actively involved in their family businesses for at least two years, ensuring that participants possess adequate understanding of the business’s internal conditions. The sampling technique used is purposive sampling, as respondents are selected based on specific criteria that align with the research objectives (Stratton, 2023).

Data will be collected using a structured questionnaire distributed directly to respondents. The minimum sample size is determined using G*Power software for multiple regression with three predictors, a power level of 80%, and a medium effect size of 0.15, resulting in 77 respondents (Kang, 2021). To anticipate potential data loss or incomplete responses, the target sample will be rounded up to 120 respondents. Table 1 presents the respondents’ demographic.

Table 1. Respondent Demographics

Demographics	Characteristics	Frequency	Percentage
Age	< 20 years old	8	6.60%
	21 – 30 years old	59	49.20%
	31 – 40 years old	41	34.20%
	41 – 50 years old	12	10.00%
Gender	Male	98	81.70%
	Female	22	18.30%

Variables and Methodology

The variables used in this study are illustrated in the research model presented in Figure 1. All questionnaire items were measured using a four-point Likert scale ranging from 1 (strongly disagree) to 4 (strongly agree), which was designed to minimize central tendency bias and encourage clearer responses (Jebb et al., 2021). The perceived success of the succession process was measured using six items adapted from Renuka and Marath (2021), covering dimensions such as business performance, sustainability, family relationship, and satisfaction from both the retired owner and family members. Management succession planning was measured using five items from the same source, which reflect the level of preparation, communication, and support provided during the leadership transition. Family protocol was assessed through three items related to written plans, strategic guidelines, and agreements for resolving issues. Lastly, the family council variable was measured using three items focusing on structured communication, scheduled meetings, governance clarity, and formal documentation. All scale items were developed and adapted based on Renuka and Marath (2021).

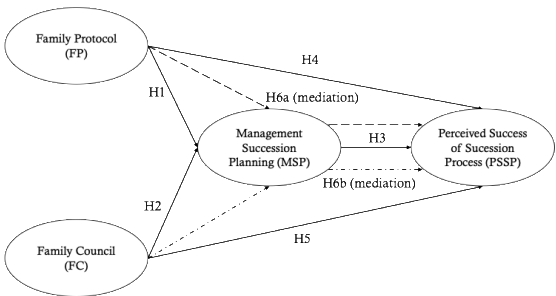


Figure 1. Research Model

This study uses Structural Equation Modeling (SEM) based on Partial Least Square (PLS) to test the hypothesis. The analysis begins with the measurement (outer) model test to check the validity and reliability of the indicators. After confirming the measurement model, the analysis proceeds with the structural (inner) model test to evaluate the relationships between constructs (Hair et al., 2022).

RESULT AND DISCUSSION

Outer Model Test

Table 2 presents the result of descriptive statistics, outer model and multicollinearity tests. The mean scores range from 3.633 to 4.400, indicating that respondents generally agree with the statements across all constructs. The table shows that all observed variables are valid and reliable. Validity is confirmed as all factor loadings exceed the recommended threshold of 0.7, indicating that each indicator effectively reflects its respective construct (Memon et al., 2021). Reliability is assessed through Cronbach's Alpha, rho_A, and Composite Reliability, with all values are more than 0.7, the accepted minimum standard (Sürücü & Maslakçi, 2020). Furthermore, the Average Variance Extracted (AVE) for each construct is greater than 0.5, indicating adequate convergent validity. This means that each construct explains more than half of the variance of its indicators, confirming that the indicators converge well in representing the same underlying concept. In addition, all VIF values are less than 5, demonstrating that multicollinearity does not occur. Table 3 shows the result of HTMT test as the discriminant validity test. All HTMT value is less than 0.90, showing that each construct is distinct from the others (Hair et al., 2022). This indicates good discriminant validity.

Table 2. Descriptive Statistics, Outer Model and Multicollinearity Test

Item	Mean	Factor Loading	Cronbach's Alpha	rho_A	Composite Reliability	AVE	VIF	VIF: Dep: MSP	VIF: Dep: PSSP
FP1	3.850	0.825	0.816	0.821	0.878	0.644	2.428		3.838
FP2	3.833	0.768							
FP3	3.992	0.794							
FP4	4.092	0.821	0.896	0.902	0.923	0.707	2.428		2.520
FC1	4.125	0.889							
FC2	4.042	0.872							
FC3	4.083	0.776							
FC4	4.083	0.861							
FC5	3.950	0.801							

PSSP1	4.275	0.783	0.881	0.885	0.907	0.584
PSSP2	4.400	0.732				
PSSP3	3.883	0.712				
PSSP4	3.633	0.785				
PSSP5	3.850	0.847				
PSSP6	3.808	0.717				
PSSP7	3.967	0.766				
MSP1	3.900	0.708	0.84	0.846	0.888	0.614
MSP2	3.900	0.778				
MSP3	3.767	0.740				
MSP4	3.825	0.888				
MSP5	3.850	0.791				

Table 3. HTMT Test

	FP	FC	PSSP	MSP
FP				
FC	0.886			
PSSP	0.871	0.818		
MSP	0.873	0.795	0.749	

Table 4. Direct and Indirect Effect

	Original Sample (O)	Standard Deviation (STDEV)	t-statistics	p-values	Remarks
Direct Effect					
FP → MSP	0.679	0.019	36.006	0.000	H1 is accepted
FC → MSP	0.174	0.018	9.634	0.000	H2 is accepted
FP → PSSP	0.399	0.036	11.135	0.000	H3 is accepted
FC → PSSP	0.380	0.016	23.122	0.000	H4 is accepted
MSP → PSSP	0.079	0.039	2.038	0.042	H5 is accepted
Indirect Effect					
FP → MSP → PSSP	0.054	0.027	1.978	0.049	H6a is accepted
FC → MSP → PSSP	0.014	0.007	2.037	0.042	H6b is accepted

Table 5. R-square and Q-square

Endogenous Variables	R Square	R Square Adjusted	Q-Square
PSSP	0.635	0.625	0.346
MSP	0.673	0.667	0.401

Table 6. f-square

Independent Variables	PSSP	MSP
FP	0.114	0.581
FC	0.157	0.038
MSP	0.006	

Inner Model Test

Table 4 presents the results of direct and indirect effects. The findings show that all hypotheses are accepted, as all t-statistics values are greater than the critical value (1.960) and the p-values are less than 0.05. Both family protocol and family council positively affect management succession planning. Likewise, family protocol, family council, and management succession planning have a positive effect on the perceived success of succession. In terms of mediation, management succession planning partially mediates the relationship between family protocol

and perceived success of succession, as well as between family council and perceived success of succession. Since both the direct and indirect effects are statistically significant, the mediation is classified as partial mediation (Hair et al., 2022). These results indicate that both family protocol and family council contribute to the perceived success of succession not only through direct influence but also indirectly through effective management succession planning.

Table 5 and Table 6 present the results of the coefficient of determination (R-square), predictive ability (Q-square) and effect size (f-square) respectively. Based on Table 5, the R-square value for management succession planning and perceived success of succession is classified as moderate, following Hair et al. (2022). The Q-square values for both variables exceed 0.25 but less than 0.5, indicating that the model has medium predictive relevance. Table 6 shows that family protocol has a large effect on management succession planning and a small effect on perceived success of succession. Family council has a moderate effect on perceived success of succession and a small effect on management succession planning. Meanwhile, the effect of management succession planning on perceived success of succession is almost none.

Discussion

The result shows that family protocol and family council both show a positive effect on management succession planning. This means that when family protocol is strengthened, the implementation of management succession planning is also likely to improve. The result is in line with previous studies by Tinh et al. (2023), Aslan et al. (2023) and Matias and Franco (2020), which found that family protocol significantly affects management succession planning. Tinh et al. (2023) argue that having formalized family protocol improves the strategic and structured nature of leadership transitions. Aslan et al. (2023) highlight its role in reducing conflicts and aligning expectations, while Matias and Franco (2020) emphasize its importance in mentoring future leaders and encouraging investment in succession efforts. Likewise, the presence of a family council also positively influences management succession planning. By providing a structured forum for communication and decision-making, the family council helps align family values with business needs. This structured approach is supported by institutional theory, which suggests that organizational practices, including succession planning, are shaped by the social norms and values in which they are embedded.

The results also show that family protocol, family council, and management succession planning have a significant and positive influence on the perceived success of the succession process.

This means that improving these factors can enhance how successful the succession is perceived by stakeholders. The findings are supported by Jasir et al. (2023), Muadinohamba and Maseke (2024) and Söderström and Kock (2023), who argue that well-executed management succession planning and supportive family structures improve perceptions of preparedness and trust in leadership transitions. Effective management succession planning helps ensure that successors are well-prepared, reduces uncertainty, and builds organizational confidence. Furthermore, family protocol provides a clear foundation for expectations and responsibilities during the transition (Muadinohamba & Maseke, 2024), while the family council ensures inclusive and transparent decision-making (Jhunjhunwala, 2023). These mechanisms collectively create a succession environment that is stable and trustworthy, contributing positively to stakeholders' perceptions of the process (Söderström & Kock, 2023).

The mediation analysis also confirms that management succession planning partially mediates the relationship between both family protocol and perceived success of succession, as well as between family council and perceived success of succession. This indicates that while family protocol and family council directly influence the success perception, a portion of their effect is channeled through management succession planning. This finding is in line with (Jayantilal et al., 2023), who state that the interaction between family governance and planning significantly shapes the effectiveness of succession in family firms. According to Khosa (2023), management succession planning serves as a vehicle to transform the principles of family protocol into strategic plans that guide the transition process. Georgiou et al. (2023) also emphasize that succession planning ensures the practical execution of family council decisions, thereby improving the application of family values and expectations in the leadership transition. These findings collectively demonstrate that structured succession planning enhances the influence of family governance mechanisms and contributes to a successful and well-perceived leadership transition.

CONCLUSION

The findings show that family protocol and family council both have a positive effect on management succession planning. Management succession planning also has a positive influence on the perceived success of succession. In addition, family protocol and family council each positively affect the perceived success of succession. The results also show that management succession planning successfully

mediates the relationship between family protocol and perceived success of succession, as well as between family council and perceived success of succession. This means that the existence of structured planning is very important to support the success of leadership transition in family businesses.

This research gives several implications, especially for family businesses. It is important for family businesses to have a clear and written protocol that can be used as a guideline to manage daily operations and solve internal problems. By following a structured protocol, all family members will know what to do when conflicts or decisions arise, so everything can run more fairly and efficiently. Besides that, the formation of a family council is also highly recommended. A regular family forum or meeting, such as once a month, can help discuss important company matters and ensure that everyone has a chance to share ideas, give input, or raise concerns. This forum will also help build a stronger sense of belonging and commitment to the business.

The involvement of the previous leader also plays an important role in the success of succession. The current leader can help the successor to be accepted more easily by introducing them to key employees and stakeholders, or even arranging informal gatherings to build trust and connection. These actions will help the new leader to adapt and gain confidence, and make the transition process smoother. In conclusion, the success of succession in family businesses is not only determined by individual readiness but also by how well the process is managed and supported by governance structures like family protocol, family council, and succession planning.

This research has some limitations. First, the data was gathered through online questionnaires, which restricted the researcher's ability to explore respondents' experiences in depth. Without follow-up questions, some details might have been missed. Future studies could use interview, or group talks to get better insights into the succession process. Second, the research was conducted solely among family businesses in Surabaya. While Surabaya serves as a major urban center with a variety of industries, the results might not entirely capture the dynamics of family businesses in other parts of Indonesia. Future studies that broaden the geographical focus could provide a more comprehensive insight into succession in various cultural and economic contexts. Third, this study focuses only on the perspective of successors. Listening to the opinions of past leaders, workers, and family members can give a more complete picture of the succession process. Lastly, this study only examined three key variables to explain perceived success of succession process. Future studies are

encouraged to explore additional factors such as family relationships, external social capital, and the perspective of non-succeeding siblings to build a more comprehensive understanding of the factors influencing succession success in family businesses (Cisneros et al., 2022; Matser et al., 2020; Ruiz-Palomo et al., 2023).

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