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THE INFLUENCE OF MANAGERIAL LEADERSHIP ON ORGANIZATIONAL CLIMATE DURING A SUCCESSION PROCESS: A MIXED-METHODS ANALYSIS IN A PERUVIAN FAMILY BUSINESS

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ABSTRACT: This exploratory study examines the relationship between managerial leadership and organizational climate during a succession process in a Peruvian family business. Using a non-experimental mixed-methods design, a questionnaire was administered to 41 employees (excluding family members), and semi-structured interviews were conducted with owner-managers. The quantitative analysis found no significant association between the successor's managerial leadership and organizational climate, as indicated by the chi-square test ($p=0.372 > 0.05$) and Spearman's rho ($\rho=0.219$, $p=0.085$). In contrast, the qualitative data revealed that the succession process was improvised, leading to role ambiguity, low legitimacy of the successor, and a fragmented work environment. These findings suggest that, beyond leadership style, factors such as lack of planning and uncertainty play a decisive role in shaping perceptions of organizational climate. The study provides relevant empirical evidence to strengthen generational transition mechanisms in Peruvian family businesses and lays the groundwork for future research using mixed-methods approaches.

Keywords: leadership, family-businesses, organizational-climate, generational-succession, successor.

INTRODUCTION

The succession process in family businesses is a central topic of study within the organizational management research agenda, given that it represents one of the features that distinguish them from non-family organizations and is one of the main causes of their business mortality (Puig Castán, 2016).

This process goes beyond the simple transfer of functions or assets, as it involves the transmission of legitimacy, leadership, and organizational culture (Le Breton–Miller et al., 2004; Suchman, 1995; Zellweger et al., 2012). In this sense, succession should be

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understood as a strategic and symbolic transition in which structures of authority, trust, and sense of belonging are reconfigured.

Among the factors that influence the effectiveness of the succession process, managerial leadership and organizational climate play a fundamental role. Leadership, understood as the ability to influence and guide others toward common goals, is especially relevant in times of transition, when power structures and trust are being reconfigured (Northouse, 2021). Effective leadership can generate commitment, cohesion, and clarity in roles, while weak or perceived as illegitimate leadership can produce uncertainty, demotivation, and conflict within the team (Aljuhani, 2022; Yukl, 2013).

For its part, organizational climate refers to the set of shared perceptions that members of the organization hold about their work environment and interpersonal relationships (Schneider et al., 2013). Various studies show that leadership style directly influences these perceptions, shaping the emotional and social atmosphere that underpins collective performance (Chávez Santos and Chauca Valqui, 2020; García-Martínez et al., 2022; Romero Cieza and Huamán Angulo, 2020). Thus, the link between leadership and organizational climate becomes a decisive factor in the success or failure of transitions within family businesses.

In the contemporary organizational context, the interaction between leadership and organizational climate takes on strategic relevance in the face of the challenges of globalization, digitalization, and new ways of working. Technological and social transformations have reshaped expectations of leaders, who must now not only lead the process of organizational transformation (Sacavém et al., 2025), but also promote work environments characterized by trust, open communication, and emotional well-being, especially in scenarios of uncertainty and transition, such as succession processes.

Despite the relevance of the topic, there remains a significant gap in the literature, given that, although there are various international studies that associate leadership with organizational climate, few have analyzed this relationship during succession processes in family businesses, particularly in Latin America, where factors such as informality, lack of planning, and intergenerational tensions alter the dynamics between both constructs

(Lizarzaburu, 2024). This absence of empirical evidence profoundly limits our understanding of the real influence that the successor's leadership has on the perception of the work environment during leadership transitions.

In response to this gap, the present study aims to analyze the relationship between managerial leadership and organizational climate in the context of a succession process within a Peruvian family business. This study seeks to provide empirical evidence on the dynamics between both constructs in a little-explored context, contributing to strengthening theoretical models on organizational continuity and offering useful guidelines for succession management in family businesses in Latin America.

DEVELOPMENT

Family businesses are defined as organizations in which control and management are concentrated within a family, and their identity is linked to the vision and values of that family (Chua et al., 1999). These organizations have characteristics that differentiate them from non-family businesses, such as the importance of socio-emotional ties, the transmission of values, and a corporate identity linked to family history (Dyer, 1989; Gersick et al., 1997), which means that succession in this type of organization is a complex and multidimensional process involving technical, emotional, and strategic aspects.

These types of companies not only represent a predominant form of economic organization but also constitute a structural force in the sustainable development of nations. Their impact transcends geographical boundaries and levels of development. Globally, they are estimated to contribute more than 70% of gross domestic product (GDP) and generate around 60% of formal employment, positioning them as key players in contemporary productive and social dynamics (Asaf et al., 2023). In the European Union, family businesses produce approximately 50% of GDP and account for between 40% and 50% of private employment, demonstrating their leading role in the economic stability of the bloc (BNP Paribas Wealth Management, 2023). Similarly, in the Asia-Pacific region, it is estimated that 85% of businesses are family-owned, consolidating their position as the structural core of business

activity (Kapoor, 2021). In Latin America, this trend is particularly relevant, as more than 75% of large companies are family-owned, and their contribution to regional GDP reaches 60%, reaffirming their role as an engine of growth and resilience in economies with high levels of informality and institutional volatility (Mann, 2024).

In the Peruvian context, the centrality of family businesses is not an exception, but rather a particularly pronounced expression of this global reality. Various estimates agree that approximately 80% of micro and small enterprises (MSEs) in the country are family-owned (La Cámara, 2025), which is particularly significant considering that MSMEs represent 99.5% of all business units in Peru and generate around 48.3% of national employment (ComexPerú, 2023). In addition, according to the Inter-American Development Bank and the Association of Family Businesses, Peruvian family businesses generate between 60% and 70% of national employment. Furthermore, these organizations contribute more than 40% of the Gross Domestic Product (GDP). This scenario positions family businesses not only as an essential component of the productive fabric, but also as pillars of socioeconomic sustainability in regions where formal employment and structured development opportunities are limited (Ministerio de la Producción, 2024).

Despite the great importance of family businesses in the global economy, they face a significant challenge in terms of intergenerational survival. Studies reveal that only about 30% of these companies manage to transition to the second generation, which highlights the high failure rate in succession processes (Jaimes Bolivar and Albornoz Arias, 2024; Lizarzaburu, 2024). There are multiple reasons for this phenomenon; however, the specialized literature has consistently identified leadership as one of the critical factors behind failed transitions (Le Breton–Miller et al., 2004). According to Miller (2014), this factor is crucial, understood both in terms of leadership style and skills, and its weakness is often cited as one of the main causes of failure in the transfer of family ownership from one generation to the next. The absence of effective leadership during the generational transition process can have serious repercussions for family businesses. It has been observed that poor leadership can exacerbate intergenerational conflicts, foster resistance to

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change, and consequently undermine the valuable socio-emotional capital that distinguishes these organizations (Fries et al., 2021).

In Peru, the intergenerational survival capacity of family businesses is equally limited, with only 44% managing to pass the baton to the second generation and only 3% surviving into the third (Asociación de Empresas Familiares del Perú (AEF) and EY Perú, 2020), highlighting the fragility of these organizations in the face of succession processes. This vulnerability is exacerbated by the lack of strategic planning for future leadership, evidenced by the fact that approximately 85% of these companies lack a formal succession plan (Asociación de Empresas Familiares del Perú (AEF) and EY Perú, 2020; PricewaterhouseCoopers (PwC), 2014). The lack of clear planning is a direct indicator of insufficient leadership or a reluctance to proactively address generational transition.

Therefore, achieving successful succession does not depend solely on establishing formal structures or protocols, but on having active, visionary, and transformative leadership from the new generation of family members (Sharma and Irving, 2005).

Under this premise, contemporary literature emphasizes that the effectiveness of the transition does not depend solely on the presence of a successor, but on the leadership style that he or she adopts. In the organizational sphere, transformational leadership has been identified as a key driver of culture, aligning the strategic vision with employees' expectations for change (Allán-Baño et al., 2025; Rios Macedo and Horna Cerna, 2019). This approach not only promotes change but also strengthens commitment and emotional well-being, aspects that are particularly relevant in succession contexts, where the continuity of the business project is often threatened (Díaz Bedoya et al., 2024).

On the contrary, when leadership is exercised from a passive dimension, such as in the laissez-faire or avoidant style, the impact on the organization tends to be nil or even negative. This style is characterized by the omission of responsibilities and avoidance of decision-making, which creates a vacuum of authority and increases organizational uncertainty (Geraldo Campos et al., 2020; Vidales Flores et al., 2023). In succession scenarios, the absence of clear leadership and proactive attributes in the successor can lead

to critical difficulties that weaken internal cohesion and affect organizational performance (Klugah et al., 2025).

The transfer of leadership in family businesses, often marked by intense emotional tensions and interpersonal conflicts between heirs, is a complex and delicate process (Andrade C, 2002; Morales Merida, 2018). As Pantoja Villarreal et al. (2016) point out, succession is a central issue due to its complexity and the internal problems it presents, which are directly linked to the emotional and affective aspects of the process and the conflicts that arise from them. This inherent complexity, where emotional structures can be a source of conflict, requires the development of specific strategies and rigorous planning to strengthen internal cohesion and, crucially, ensure business continuity through generational succession (Moscoso García et al., 2025; Pantoja Villarreal et al., 2016).

Leadership, understood not only as the ability to lead but also as a combination of vision, empathy, and the ability to manage organizational culture, is decisive in the success or failure of succession in family businesses. In this regard, various authors highlight the importance of leadership skills in the success and continuity of any organization. Skills such as leadership ability, professional preparation, and adaptability are crucial for organizational performance and for navigating the challenges inherent in managing people and resources (Northouse, 2021; Yukl, 2013). These competencies are especially relevant in the context of family businesses, where emotional ties can interfere with business rationality (Basco, 2013). In this unique environment, often characterized by the absence of formal protocols, leadership becomes the main axis of sustainability during the succession process, since, according to Ringo and Kibambila (2025), succession planning and the current leader's willingness to retire are critical factors that ensure a smooth and structured leadership transition, which is fundamental to the long-term viability of the company.

In this regard, exploring the leader's competencies is essential to understanding leadership in family businesses, especially in the context of succession. These competencies are not only vital for day-to-day management and performance, but also take on particular importance during generational transition, which requires a dual set of skills. On the one hand, the outgoing leader must have the ability to facilitate a smooth transition and ensure

the continuity of the legacy; on the other hand, the successor must have the necessary competencies to assume leadership and project the company into the future. This continuity transcends the merely technical, including the transfer of tacit knowledge, values, and organizational culture (Cabrera-Suárez et al., 2001; Handler, 1994). This duality is even more crucial in family businesses, where less formalization and strong interdependence between family and business systems generate greater reliance on informal mechanisms (Habbershon and Williams, 1999), making leadership in its various forms the fundamental pillar for business sustainability during the succession process (Ringo and Kibambila, 2025).

Other studies, such as that by Yukl (2013) indicated that another important factor in leadership is legitimacy, understood as the shared perception that a leader is the right person for the job, not only because of the formal position they hold, but also because of their ability to represent the values of the group, inspire confidence, and act in a manner consistent with the social norms of the organization. This form of legitimacy is based on the voluntary acceptance of authority, identification with the leader, and belief in the fairness and competence of their actions. According to Suchman (1995), legitimacy is built when a leader's actions are perceived as "desirable, appropriate, or consistent with shared social values" (p. 574). In this sense, Tyler (2006) adds that legitimacy derives from the collective belief that authority and hierarchical roles are appropriate and deserve respect, as they are perceived as fair, adequate, and aligned with the social norms of the group.

In family businesses, leadership legitimacy does not automatically derive from blood ties or formal positions, but rather is built on internal recognition, emotional support, and the gradual acceptance of the various stakeholders involved. As Saeed et al. (2024), state, the legitimacy of the successor does not depend solely on their individual attributes but emerges mainly from family support, configured as an informal institutional arrangement deeply influenced by cultural norms and shared values. This symbolic and emotional support is key to the acceptance of the new leader and, therefore, to the continuity of the family business. Along the same lines, Duarte Mantilla (2023) emphasizes that a legitimate

leader is one who, in addition to integrating the family legacy with a vision for renewal, manages to build bonds of trust with both the business family and employees.

Unlike traditional organizational environments where authority can be imposed hierarchically, in family businesses, legitimacy must be actively built. It is not an inherited attribute, but rather recognition that is earned over time through behavior consistent with founding values, demonstrated experience, and the ability to generate identification and commitment (Aljuhani, 2022; Suchman, 1995). This perceived legitimacy allows the successor to exercise their role with greater acceptance, reduce internal tensions, and project an image of stability to the organization. As indicated by Marques et al. (2021) and Salvato et al. (2010), such legitimacy not only facilitates a harmonious generational transition but also contributes decisively to the sustainability and success of the succession process.

However, consolidating this legitimacy within the family context is not without considerable obstacles, especially during critical moments of succession. The absence of formal succession planning, the inherent difficulty in identifying a successor with the appropriate skills, and the tendency to prioritize family ties over professional merit represent significant challenges that can seriously compromise the acceptance of new leadership (Aljuhani, 2022). These factors, coupled with potential internal conflicts among family members, can generate mistrust and undermine cohesion, directly impacting the leader's ability to exert influence and ensure the continuity and long-term success of the family business.

These challenges are accentuated in the Peruvian context, where the absence of formal succession plans remains a constant (Asociación de Empresas Familiares del Perú (AEF) and EY Perú, 2020). In these scenarios, leadership is legitimized through a delicate balance that goes beyond formal authority. As highlighted by Soto Maciel et al. (2019), the success of the transition depends not only on the successor's credentials but also on the quality of family relationships and the harmony achieved during the process. Therefore, family consensus, transparency, and consistency with the historical values of the business become

the pillars on which the new leader builds their position, thus ensuring effective organizational continuity.

The way leadership is exercised during the succession process not only determines the acceptance of the new leader, but also shapes the emotional and relational environment in which employees operate. This influence is especially visible in the organizational climate, understood as the shared perception of the work environment, which is shaped by communication, management practices, interpersonal relationships, and, above all, the leadership style exercised (Ehrhart et al., 2025; Schneider et al., 2013). In this sense, the succession process in family businesses represents not only a transfer of authority but also a critical moment where leadership and organizational climate interact to define the future stability and sustainability of the organization.

In this vein, literature has documented that leadership is one of the main determinants of organizational climate (Goleman, 2000; Likert, 1967; Serrano Orellana and Portalanza Ch, 2014). The decisions, communication, and behavior of leaders set the tone for daily interactions and collective perceptions. Leadership that is consistent with group values and based on trust tends to create positive work environments, which are associated with greater job satisfaction, better organizational performance, greater innovation, higher productivity, and lower staff turnover (Parker et al., 2010; Patterson et al., 2005; Tinoco Plasencia, 2024).

In Peru, this dynamic shows similar patterns. A study conducted in a hospital in Cusco found a direct and significant relationship between strategic leadership and organizational climate (Rho = 0.599, p = 0.000), highlighting the positive impact of a participatory management style on the work environment and staff performance (De La Fuente Barreda et al., 2023). Similarly, research conducted at an industrial company in Lima revealed a very high correlation (r = 0.812) between high-performance leadership and organizational climate, confirming that leadership style directly influences perceptions of the work environment (Pereyra Lazo et al., 2022). Although these studies do not focus on family organizations, their findings are relevant, as they show that leadership influences organizational climate even in diverse organizational contexts.

This evidence is even more significant when applied to family businesses, where the organizational climate depends not only on structural factors, but also on the culture of the owning family, the values transmitted, and the prevailing leadership style (Olaz and Ortiz, 2014). This evidence is even more significant when applied to family businesses, where the organizational climate depends not only on structural factors, but also on the culture of the owning family, the values transmitted, and the prevailing leadership style (Olaz and Ortiz, 2014). In this context, the overlap between the family system (based on emotions) and the business system (based on rationality) creates an area of friction and conflict. These factors can strengthen cohesion, but they can also create tensions during succession processes, especially when decision-making is influenced by emotional ties rather than criteria of competence and meritocracy, which can lead to perceptions of favoritism or lack of transparency (Lucero Bringas, 2017).

In this sense, succession in family businesses does not only involve a functional handover, but also a symbolic reconfiguration laden with emotional expectations, loyalties, and resistance (Sharma and Irving, 2005). Therefore, the leadership exercised by the successor is decisive in maintaining trust and ensuring a healthy organizational climate. Along these lines, Hoekx et al. (2024) highlight that transformational leadership strengthens the psychological security of the team and acts as a mediator that increases employee commitment. Thus, the organizational climate should be understood as a reflection of the leadership exercised, with direct effects on morale, the institutionalization of the succession process, and the long-term sustainability of the family business.

Under this premise, it is assumed that leadership in the succession processes of family businesses not only facilitates the acceptance of the new leader but also shapes the emotional and relational environment in which employees perform their duties. However, despite the abundant literature on leadership and organizational climate, there are few studies that analyze this interaction in succession processes in Peruvian family businesses. In response to this gap, we propose a study that explores how employees perceive the successor's leadership and its influence on the organizational climate during succession.

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This study, therefore, aims to analyze the relationship between managerial leadership and organizational climate during the succession process in a Peruvian family business. Using a descriptive approach based on organizational perceptions, it seeks to understand how this critical stage is experienced from within the organization. Given that the sustainability of economic and social development also depends on strengthening organizational capacities in micro and small enterprises, this research seeks to provide useful evidence for improving the management of generational change and promoting more stable and cohesive working conditions. In this context, the study aligns with Sustainable Development Goal No. 8 (Decent work and economic growth) by contributing to the professionalization of Peruvian family businesses, which are a key driver of formal employment and productive development in the country.

METHODOLOGY

This study is applied in nature, as it seeks to offer practical solutions to a specific problem in the organizational sphere. It is framed within a non-experimental design, given that the variables were not manipulated but observed in their natural context (Hernández Sampieri et al., 2014). Likewise, it is a cross-sectional study, as the data were collected at a single point in time, specifically in June 2024. Finally, the approach is mixed, integrating quantitative data (employee survey) and qualitative data (interviews with owner-managers), which allows for a broader understanding of the phenomenon under study (Creswell and Creswell, 2018).

The unit of analysis in this study is a Peruvian family business in the construction sector that is in the process of succession from the first to the second generation. Two variables were analyzed: managerial leadership and organizational climate. The first was analyzed in terms of the leader's competencies and legitimacy. In the case of the organizational climate, its general perception within the work environment during the succession was considered, taking into account components related to culture, power relations, and organizational trajectory.

The population consisted of 64 workers, 10 of whom belonged to the family nucleus. Inclusion and exclusion criteria were applied, considering only workers with more than one year of seniority and excluding those linked to the business family, outsourced personnel, those on vacation, or those with temporary contracts.

The final sample consisted of 41 employees, selected using probability sampling in a finite population, given that a complete list of all eligible workers was available. This technique ensures that each member has a known probability of being included, which supports the representativeness of the results and allows reliable estimates to be made based on calculations that consider the size of the population and the sampling error (Fuller, 2009).

A mixed-method instrument was used to collect information, consisting of a structured survey and semi-structured interviews. The survey was aimed at non-family employees and consisted of twenty-eight (28) items divided into two sections. The first block included dichotomous questions (Yes/No) designed to identify general perceptions about the conduct of the process and the successor's leadership. The second block incorporated items measured using a five-point Likert scale (1 = strongly disagree to 5 = strongly agree), aimed at exploring the dimensions of power, experience, and organizational culture, considered as components of the work climate in the succession context.

In addition, semi-structured interviews were conducted with two members of the family board of directors to gain a qualitative understanding of the succession process and the exercise of leadership during the transition. The interviews focused on practices, challenges, and perceptions related to the legitimacy of the new leader and his impact on the work environment.

The instrument used was designed based on the F-PEC scale of family influence (Astrachan et al., 2002), adapted to the particularities of the organizational context studied. The content validation of the instrument was carried out by three experts, who evaluated the relevance of each item based on criteria of clarity, sufficiency, consistency, methodology, and relevance. To estimate the degree of agreement among the evaluators, Aiken's V coefficient was applied, whose value was 0.95, considered optimal as it exceeded the threshold of 0.80 (Juárez-Hernández and Tobón, 2018; Penfield and Giacobbi, 2004), which shows a high

degree of agreement among the judges and confirms the content validity of the instrument, as well as its suitability for the present research. The instrument used is presented in the appendices to the article (see Appendix A and Appendix B).

This study was conducted in accordance with the ethical principles of social science research. Verbal authorization was obtained from company management, which allowed the survey to be administered to employees and interviews to be conducted with managers. Employee participation was voluntary and anonymous, with the confidentiality of the information and the non-identification of participants and the organization guaranteed at all times. In the case of managers, their participation was also voluntary, having been informed in advance of the academic purpose of the study and the confidential treatment of the data provided.

RESULTS

The results are organized based on the intersection between the successor's leadership perceptions and the organizational climate, according to the data collected in the survey administered to forty-one (41) employees. In line to explore employees' perceptions of the successor's leadership and its relationship with the organizational climate during the succession stage, this study seeks to test the following hypotheses:

H1: There is a significant association between managerial leadership and organizational climate in the context of the succession process in a Peruvian family business during the year 2024.

H0: There is no significant association between managerial leadership and organizational climate in the context of the succession process in a Peruvian family business during the year 2024.

Of all respondents, 88% perceived that the successor's leadership is related in some way to the organizational climate. However, only 16.7% indicated that they “almost always” perceive an improvement in the climate with such leadership. The majority (69.4%) indicated that this occurs “sometimes,” reflecting an influence perceived as partial or

inconsistent. In contrast, 12% of workers did not recognize any relationship between successor leadership and the work environment.

These data suggest that, although there is a general perception of leadership's influence on the climate, this influence is neither predominantly positive nor consistent.

To evaluate the relationship between the successor's managerial leadership and the organizational climate, the Chi-square test was applied. Table 1 below shows the results of this analysis.

Table 1

Chi-square correlation for hypotheses

	Value	**df**	**Asymptotic significance (bilateral)**
Pearson's chi-squared test	1,977	2	0,372
Likelihood ratio	2,340	2	0,310
Linear-by-linear association	1,904	1	0,168
Number of valid cases	41		

Source. SPSS v. 26 Own elaboration.

As shown in Table 1, the value of Pearson's chi-square test is 1.977, with an asymptotic significance (p) of 0.372. This value does not reach statistical significance ($p > 0.05$), indicating that there is no significant association between the successor's managerial leadership and the organizational climate.

Likewise, Spearman's correlation coefficient was calculated to determine the strength of the relationship, the results of which are shown in Table 2 below.

Table 2 shows that the correlation between managerial leadership and organizational climate was positive, although weak ($\rho = 0.219$), and did not reach statistical significance ($p = 0.085 > 0.05$). This result indicates that, in the sample analyzed, there was insufficient evidence to affirm the existence of a significant relationship between the two variables, which reinforces the previous finding.

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In addition, interviews with two members of the family board provide deeper insight into the environment in which the succession took place, which is essential for interpreting the quantitative results. Both statements revealed that the succession took place in a highly informal setting with a lack of planning and provisional leadership that generated uncertainty.

Table 2

Spearman's rho correlation between managerial leadership and organizational climate

		Organizational climate	Managerial leadership
Organizational climate	Correlation coefficient	1,000	,219
	Sig. (unilateral)	.	,085
	N	41	41

Source. Own elaboration.

The testimonies confirm that the change in leadership was not the result of a formal succession plan. In this regard, one of the executives interviewed stated that "it was not put in writing, but it was mentioned," referring to the fact that succession decisions were based mainly on verbal and family agreements. For his part, the other executive interviewed confirmed the absence of an established succession plan, stating that "no, that's on *standby*, we're thinking about doing it, but there's no date yet [...] all the shareholders think it's something that has to be done."

Leadership was temporarily assumed by a family member who did not wish to take on the position, which created a climate of uncertainty and hesitation in decision-making. As one interviewee pointed out, "he was honest in telling us that he was not prepared to take on the role [...] but that he was doing so because he did not want to see us arguing," which indicates a leadership style that is more conciliatory than strategic, focused on containing family conflicts rather than running the organization.

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Likewise, interviewees agreed that the absence of legitimate and sustained leadership impacted staff motivation and cohesion, mainly because family tensions filtered into the work environment, affecting the overall perception of the organizational climate.

The lack of institutionalization of the process also resulted in poorly coordinated decisions and communication difficulties. As one interviewee pointed out, "the entire immediate family works in the company [...] and that sometimes delays decisions," revealing an internal structure marked by the duality between kinship and managerial function. This overlap between the family and organizational spheres reinforced the sense of ambiguity in authority and limited the effectiveness of succession leadership.

These perceptions provide a better understanding of the organizational context in which employees evaluated the new leader and explain why the survey responses revealed an influence that was perceived as biased or inconsistent. Although statistical analyses did not show a significant association between leadership and organizational climate, qualitative testimonies help to outline a complex scenario in which the successor's crisis of legitimacy, family tensions, lack of institutionalization, and limited communication may have affected how the succession process was experienced.

DISCUSSION OF RESULTS

The findings of this study showed a weak association between the managerial leadership of the successor and the organizational climate during the succession process in a Peruvian family business. This result contrasts with the broad theoretical basis that posits leadership as one of the main determinants of organizational climate (Ehrhart et al., 2025; Goleman, 2000; Serrano Orellana and Portalanza Ch, 2014), as well as with recent research in Peruvian contexts that reports significant associations between effective leadership and favorable perceptions of the work climate (De La Fuente Barreda et al., 2023; Pereyra Lazo et al., 2022).

The key to interpreting this apparent contradiction lies in the succession process as a moderating variable. The literature has emphasized that succession should not be

understood as a one-off event, but rather as a prolonged and multidimensional transition that introduces uncertainty and instability (Le Breton–Miller et al., 2004; Sharma and Irving, 2005). In the present study, qualitative data show that succession took place in an improvised manner and without a planned structure, a situation which, according to Jaimes Bolivar and Albornoz Arias (2024) and Lizarzaburu (2024) is a critical factor in the failure of succession processes. Under these circumstances, the influence of the successor's leadership style is overshadowed by the disruptive impact of a poorly designed and executed process. In this regard, the results support the findings of Ringo and Kibambila (2025), who argue that the willingness of the outgoing leader and the existence of formal planning are essential prerequisites for the successor to exercise effective leadership.

In this context, legitimacy is a fundamental element in the succession processes of family businesses, given that authority is not transferred automatically but must be built through interaction and social recognition (Saeed et al., 2024; Suchman, 1995). In the case analyzed, qualitative evidence points to a crisis of legitimacy, since the successor, lacking formal and explicit support, had not achieved the pragmatic and cognitive legitimacy necessary for his leadership to be effectively internalized (Aljuhani, 2022; Suchman, 1995). Under these conditions, even if the successor sought to exercise positive leadership, his actions lacked the collective acceptance necessary to significantly influence perceptions of the organizational climate.

On the other hand, it is important to recognize the limitations that condition the interpretation of the results. The cross-sectional design of the study captured perceptions at a specific point in time, without reflecting the evolution of the relationship between the variables as the successor consolidated his position. A longitudinal approach would have allowed for a more accurate observation of these dynamics. Furthermore, as this is a single case study of a Peruvian family business in the construction sector, the generalizability of the findings is limited; replication in other family businesses of different sizes and sectors would be essential to assess their transferability. Additionally, although the sample size was adequate for statistical analysis, a larger sample would have increased the sensitivity of the analysis and allowed for comparisons between subgroups.

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Despite these limitations, the study makes important contributions. From an empirical perspective, it offers original evidence in the Peruvian context that complicates the relationship between leadership and organizational climate, highlighting the importance of moderating variables such as legitimacy and the formalization of the succession process. On a theoretical level, it proposes an integrative model in which understanding the climate in family businesses requires consideration of structural factors of succession (planning, communication, and clarity of roles), in addition to the individual characteristics of the leader. In practical terms, the results serve as a warning to founders and business families that the formal structuring of the succession process and the deliberate construction of the successor's legitimacy are not mere administrative practices, but necessary conditions for preserving the organizational climate and ensuring the sustainability of the business during the generational transition.

In short, this study highlights the importance of addressing succession processes from a comprehensive approach that considers both individual perceptions and organizational and family dynamics. Only through this approach will it be possible to gain a deeper understanding of the factors that affect the stability of the work environment and, ultimately, the sustainability of family businesses in Peru.

CONCLUSIONS

The results obtained using the chi-square test ($p = 0.372$) and Spearman's correlation coefficient ($\rho = 0.219$; $p = 0.085$) show that there is no statistically significant relationship between the successor's leadership and the organizational climate during the succession process. This finding suggests that the leadership exercised by the new manager failed to consolidate a coherent or consistent perception within the work environment, reflecting a weak or unstable influence on the organizational climate throughout the transition.

The context in which the succession process took place, characterized by a lack of planning, illegitimate interim leadership, and family tensions, conditioned the perceptions of the work team, affecting the way in which the leadership was exercised. This suggests

that the improvised nature of the succession contributed to the absence of a statistically significant relationship between the variables studied.

Overall, the results suggest that, although the relationship between successor leadership and organizational climate is firmly established in the literature, this link may be mediated by specific contextual factors in Peruvian family businesses, which significantly modulate the impact of leadership during succession processes. These factors need to be incorporated into future explanatory models of the work environment to gain a deeper understanding of the conditions that favor or hinder organizational continuity.

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APPENDICES

Appendix A. Questionnaire on managerial

Note. Instrument applied to non-family employees to gather perceptions on managerial leadership and organizational climate in the context of the succession process.

SURVEY – QUESTIONNAIRE

WORK AREA: OPERATIONS ☐ ADMINISTRATION ☐

INSTRUCTIONS: Read each section carefully and respond by selecting the option that best reflects your opinion, marking an "X" in the corresponding box or square.

This survey is ANONYMOUS and for academic purposes, so please answer honestly.

Section I: Mark with an "X" the option that best represents your opinion regarding each statement, considering the following alternatives:

1: YES, 2: NO

N°	Preguntas	1= YES	2=NO
1	I recognize the family members who are most actively involved in the company's day-to-day operations.		
2	I believe that the successors in management are taking charge and making decisions in their respective areas.		
3	I believe that the transfer of power to the successor has been carried out in an orderly and planned manner by the previous manager.		
4	The successor manager is characterized by his leadership, ability to adapt to change, and professional preparation.		
5	The previous general manager established guidelines and policies that are still in place today.		
6	The responsibilities and roles of the successor manager have been well defined.		
7	The company formally communicated the family succession and new management to all employees.		
8	The new leader represents the business legacy left by the previous CEO.		

9	There is a mechanism in place to evaluate the business actions of the successor CEO.
10	The members of the company's board of directors can reach interesting agreements and a consensus that meet the needs of the company
11	There is trust, commitment, and respect among the members of the company's board of directors
12	There is a leader in the company's management
13	Conflicts among members of the company's management family end on good terms
14	The company's business actions are updated regularly

Block II: Mark with an "X" the option that best represents your opinion, considering the following scale:

1: Never / Strongly disagree, 2: Rarely / Disagree, 3: Sometimes / Neither agree nor disagree, 4: Almost always / Agree, 5: Always / Strongly agree

N°	Questions	1	2	3	4	5
1	The majority of the company's shareholding (or ownership) is held by the founder's family.					
2	The current owners (successors) will retain ownership of the company.					
3	Most of those who run the company are relatives of the founder.					
4	Succession in the management of the company is strengthening the relationship between family members.					
5	Current management practices are proving to be more effective than the founder's management style.					
6	The successor manager involves the entire family in various business coordination meetings.					
7	Some members of the business family are not interested in assuming management responsibilities.					
8	The family influences the company's business.					
9	The members of the business family share similar values.					
10	The members of the business family are willing to go above and beyond what is expected of them to ensure that the					

	objectives are successful.
11	Employees can participate in the decision-making process of the family business.
12	Employees are loyal to the company.
13	Employees are constantly involved in the company's business.
14	Employees understand and support the business family's decisions about the future of the company.

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Appendix B. Semi-structured interview guide for family board members

Note: Guide used to conduct interviews with family board members to explore the succession process and the exercise of leadership during the transition.

INTRODUCTION:

This instrument is part of an academic research project aimed at analyzing the succession process and the exercise of managerial leadership in a family business, as well as its relationship with the organizational climate. Therefore, we request your participation by answering each question objectively and specifically.

The information provided will be confidential and private, and will be used exclusively for academic and scientific purposes.

We appreciate your kind participation.

INSTRUCTIONS:

Below are twelve (12) questions related to the research topic. Answers may be provided in general terms, based on your experience and perception.

NAME OF INTERVIEWEE:…….

POSITION:……

1. In the context of the company's sector, what aspect of the industry is most attractive to the company?

Competitors, customers, suppliers, substitute products, etc.

2. What legal aspects favor the organizational succession of the company?

Company bylaws

3. Is there strategic succession planning in the company?

Objectives and actions that the company has for succession

4. What is the organizational culture like in the succession of the company?

Relationship between the owner and successor of the company (motivation, disposition, management skills, etc.)

5. What skills should a successor to a family business have?

Training, experience, and interactions with the owner

6. How is the transfer of ownership and capital carried out in a succession?

Transfer, process, and installation of the new management. In addition, define share ownership

7. Is there a teamwork approach in the company?

Values, harmony, collaboration, trust.

8. Does the leadership of the owner and successor in the company take precedence?

Transformational leadership

9. Does the family influence the company's decision-making?

Commitment to the business and family financing.

10. Are there family meetings and councils in the company?

Frequency, rules, values, responsibilities

11. Do you perceive that internal collaborators feel motivated in the company?

Organizational climate and its elements that best define business succession

12. How are conflicts handled in the company?

Rivalry, inheritance management, and conflicts within the family.

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