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SUCCESSIONAL MATURITY OF FAMILY BUSINESSES: SIGNIFICANCE, THEORETICAL FOUNDATIONS, AND PRACTICAL CHALLENGES OF A MODEL BUILDING

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Purpose: The main aim of the article is to analyse the role of successional maturity in the management transition of Polish family businesses. It investigates which organisational, cultural, and emotional factors contribute to successful succession, focusing on ensuring business continuity while preserving family values.
Design/Methodology/Approach: The research methodology involves a systematic literature review and analysis of industry reports related to succession planning in family businesses. The study draws upon existing maturity models like CMMI, BPMM, and EFQM and assesses their applicability in the context of family businesses to develop a tailored successional maturity model.
Findings: The study identifies that early succession planning and the adoption of formalised maturity assessment tools significantly improve the likelihood of a successful generational transfer in family firms. It suggests a need for a specific successional maturity model incorporating both organisational and emotional readiness.
Research Limitations/Implications: The research is primarily conceptual and based on secondary data sources. Empirical validation through case studies and quantitative surveys with family businesses is recommended to confirm the proposed model's effectiveness.
Practical Implications: The article provides a framework for family businesses to assess their readiness for succession, which can guide strategic planning and risk management. The proposed model aims to support family firms in sustaining long-term competitive advantage through structured succession processes.
Social Implications: By improving the success rate of business succession, the findings could contribute to the economic stability of family firms, which are crucial for the economies of many countries, including Poland. The study also emphasises the importance of preserving family values and traditions in the business transition process.
Originality/Value: The article introduces the concept of "successional maturity" as a distinct type of organisational maturity. The proposed model integrates traditional organisational maturity frameworks with elements unique to family businesses, such as emotional readiness and value integration.
Keywords: succession planning, family businesses, successional maturity, organisational maturity, process maturity, succession management.
Category of the paper: Research paper.

1. Introduction

Family Family businesses constitute a significant pillar of the economy in many countries, including Poland. The share of such firms in the EU economy currently ranges between 68-75%, reflecting their growing role within the economic system (Haber, 2015; Więcek-Janka, Lewandowska, 2017). These entities are characterised by a unique blend of family life and business activities, which enables effective utilisation of human resources and talents in management. However, this merging of two distinct areas of entrepreneurial activity can also lead to conflicts arising from the overlap of professional and personal relationships (Jeżak, Popczyk, Winnicka-Popczyk, 2004; Zellweger, Nason, Nordqvist, 2012).

Faced with the challenges of succession, family businesses are confronted with a crucial dilemma: how to ensure continuity of management while preserving family values (Zellweger, 2017). In Poland, many companies established in the 1980s and 1990s are currently in the process of being transferred to the next generation (Lewandowska et al., 2016; PwC Polska, 2023; Bank Pekao S.A., 2024). The succession process, which is one of the most complex and sensitive moments in the life of a family business, often encounters barriers due to a lack of formalisation and delays in decision-making by the founders, which can negatively impact the stability of the enterprise (Adam, Kuchta, Stanek; PwC Polska, 2023). Furthermore, research indicates that only about 30% of family businesses in Poland successfully transition to the second generation, with a mere 6% reaching the third generation (Blikle, 2015).

Successional maturity, as an element of organisational maturity, can be defined as the comprehensive readiness of both the business and the family to undergo the succession process. This readiness encompasses both formal and emotional aspects of the firm's functioning. Successional maturity becomes a crucial factor influencing the success of generational transfer of ownership and leadership. As De Massis, Di Minin, and Frattini (2015) point out, a well-considered approach to succession not only enables companies to survive but also to adapt to a dynamically changing business environment.

2. Research objective and research methodology

The primary aim of this article is to conduct an in-depth analysis of the role of successional maturity in the process of transferring management in Polish family businesses. The author endeavours to understand which organisational, cultural, and emotional factors influence the effectiveness of succession, which is crucial for the longevity and stability of family firms. Successional maturity is defined here as an organisation's ability to prepare for generational change while maintaining the coherence of family values and operational efficiency.

The research hypothesis of this article posits the relevance of developing dedicated tools for assessing successional maturity, which will support family firms in effectively planning and implementing succession. The model proposed by the author aims not only to evaluate the current state of successional maturity but also to indicate directions for further improvement to ensure the stability and long-term development of the enterprise.

The research methodology is based on a systematic literature review and an analysis of available industry reports related to succession and the management of family businesses. The article includes a detailed review of the scientific literature, focusing on previous research concerning organisational maturity, process maturity, and change management. Particular attention was paid to the literature addressing the cultural and emotional aspects of succession, which have a direct impact on the ability of family businesses to survive generational transitions.

The starting point was an analysis of existing maturity models, such as the Capability Maturity Model Integration (CMMI), Business Process Maturity Model (BPMM), and EFQM Excellence Model, which were adapted to the context of family firms. The purpose of this review was not only to understand the theoretical frameworks of these models but also to identify gaps that could be addressed in a new model dedicated to assessing successional maturity. The analysis also included a review of Polish legislation related to succession to evaluate the impact of legal regulations on the succession process in family businesses.

Based on the results obtained, preliminary assumptions were developed for creating a successional maturity model tailored to the specific needs of family businesses in Poland. This model builds upon existing concepts of organisational and process maturity but also incorporates new elements, such as the emotional readiness of successors, the organisation's ability to manage change, and the capacity to integrate family values with business objectives.

3. Literature review (role of succession)

Succession in family businesses is not merely a formal process of transferring ownership but also a deeply rooted process in family values, involving the assumption of managerial roles and the maintenance of organisational culture (Eisenstadt, 2003; Blikle, 2015; Zellweger, 2017). The preparation of successors encompasses the development of professional competencies alongside the cultivation of family traditions, which is crucial for preserving the firm's core values. Niemczal (2015) highlights that the succession process often involves emotional tensions, particularly when intergenerational conflicts arise, which can affect the smoothness of the succession process. The literature emphasises that early involvement of successors in managing the business and the development of their soft skills can significantly increase the likelihood of successful succession (Bohdziewicz, 2014; Blikle, 2015; Zellweger, 2017; Sułkowski, Marjański, 2017; Romanowska, 2019; Thier, 2024; Bank Pekao S.A., 2024).

In recent years, Polish legislation has introduced significant changes aimed at facilitating the succession process in family businesses. A breakthrough was the enactment of the Succession Management Act in 2018, which allows for the continuation of business operations after the owner's death, significantly reducing the risk of business discontinuity (Sejm RP, 2018). This law provides enterprises with a tool to appoint a succession manager, ensuring operational continuity and minimising the risk of inheritance-related conflicts. Another significant step was the introduction of the Family Foundation Act in 2023, which allows for more efficient management of family assets and their transfer to subsequent generations without the need to divide assets (Sejm RP, 2023). These new regulations aim to support long-term succession planning and enhance the stability of family firms, as confirmed by analyses conducted by the Ministry of Development and Technology. As a result of these changes, family businesses have gained new tools to facilitate more organised and effective succession planning (Ministerstwo Rozwoju i Technologii, 2021, 2022, 2023).

The literature increasingly highlights that legal framework and the formalisation of the succession process, which are essential elements of successional maturity, can play a crucial role in ensuring the longevity of family firms (Bank Pekao S.A., 2024; Urbaniec, 2024). Despite the introduction of appropriate legal regulations, data from the Ministry of Development and Technology (Ministerstwo Rozwoju i Technologii, 2022) indicate difficulties in implementing these provisions in practice, often due to a lack of legal education among business owners and a low number of formally appointed successors. Despite growing awareness of the importance of succession planning, studies indicate that only 40-45% of Polish family firms have a formal succession plan (PwC Polska, 2023). This is often due to the reluctance of owners to transfer management, leading to delays in decision-making and insufficient preparation of successors (Their, 2024). A report by the Polish Agency for Enterprise Development (PARP, 2024) highlights that the key areas for improvement include the formalisation of succession processes and increased advisory support.

The analysis of cases where firms successfully completed the succession process revealed that the use of maturity assessment models, such as BELIEFS™ (Lewandowska, 2020), was of key importance. Companies that implemented this or similar models often engaged external advisors, which contributed to the smooth transfer of management. As noted in studies by Urbaniec (2024), collaboration with experts and the use of organisational maturity assessment tools enhance the chances of successful succession. Best practices include mentoring for successors, formal succession planning, and fostering open communication within the company (Brajer-Marczak, 2014; IFR, 2015; KPMG, 2017). These examples demonstrate that proper preparation of successors and formalisation of succession processes can significantly impact the stability and future development of family businesses in Poland (IFR, 2024).

Conducted analyses confirm that companies that plan the succession process in advance and formalise their actions have a higher likelihood of successfully transferring management to the next generation (Lewandowska, 2020; PwC Polska, 2023). In Poland, only about 30% of family businesses successfully transition to the second generation, with a mere 6% reaching the third generation (Blikle, 2015). Initiating preparations early, covering both formal and emotional aspects, significantly reduces the risk of failure in the succession process, which is crucial for the stability and further development of family enterprises (Niemczal, 2015; De Massis, Di Minin, Frattini, 2015).

Utilising external consultancy is also key, as it can support the development of comprehensive succession plans, contributing to a smoother management transition (Urbaniec, 2024). Another essential factor is preparing future successors not only in terms of management skills but also in terms of family values and organisational culture. This ensures the continuity of traditions and adaptation to a changing economic environment (Deloitte, 2017; Lewandowska, 2019a, 2019b; Roszko-Wójtowicz, 2016). Qualitative research conducted in Poland has shown that inadequate preparation of successors is one of the main reasons for failures in the succession process (Blikle, 2015).

Studies indicate that the lack of formal succession plans and delays in decision-making by founders can lead to destabilisation of enterprises during the handover of management to successors (Adam, Kuchta, Stanek, 2022; PwC Polska, 2023). As noted by Lewandowska (2020), early preparation of both the outgoing leader and the future successor is essential to minimise the risk of failure. Unfortunately, many Polish companies are still unprepared for planning long-term succession strategies, as also confirmed by industry reports (Ministerstwo Rozwoju i Technologii, 2022).

Succession in family businesses often encounters various organisational and emotional barriers that can significantly hinder the transfer of management (Thier, 2024). Niemczal (2015) points out that delays in planning arise not only from the lack of formal strategies but also from the resistance of founders themselves, who fear losing control over the company they have built over the years. Furthermore, successors often lack the necessary competencies and experience to meet the demands of managing the enterprise, which complicates the succession process even further (Blikle, 2015). There is often a lack of support in the form of training and mentoring programmes that could prepare the younger generation to take on key roles. As indicated in the studies by Urbaniec (2024), a critical element is the development of an organisational culture that supports open communication and transparency in the succession process.

4. Literature review (organisational maturity)

The concepts of organisational maturity, as well as its various types, such as process, quality, and production maturity, are closely interrelated and refer to different but complementary aspects of an organisation's functioning. All these concepts aim to assess an organisation's ability to operate efficiently, improve processes, and achieve strategic objectives. The concept of **successional maturity** is a relatively new term, making it valuable to position it within the existing, well-established types of organisational maturity.

Organisational maturity refers to the overall level of advancement of an organisation in managing all its aspects—from strategy, human resources, and organisational culture to operational management. It reflects a company's capability to achieve strategic goals through integrated management systems that enable efficient resource utilisation and adaptation to a changing environment. Organisational maturity is an overarching concept that encompasses other types of maturity, such as process, quality, and production maturity. Companies with high organisational maturity manage risk, quality, and resources more effectively, which facilitates a smoother transfer of management to subsequent generations (Fink, 2013; Leflar, Siegel, 2013; Stachowiak, 2024). Assessing organisational maturity involves areas such as customer orientation, leadership, employee engagement, and a process-based approach. Organisational maturity supports the succession process in family businesses, ensuring stability and long-term competitive advantage (Adamczyk, 2018, pp. 344-350).

Ewa Więcek-Janka and Adrianna Lewandowska (2017) propose a model of maturity for family businesses as a specific form of organisational maturity, taking into account ownership structures and family involvement in management. This model consists of five levels: from potentially family-run firms, through single-generation enterprises, to multigenerational businesses that have successfully undergone succession. Family values, which significantly influence the strategy and identity of the company, are particularly important in multigenerational enterprises where not only shares but also traditions are passed on (Więcek-Janka, Lewandowska, 2017, pp. 164-173). As firms mature, they professionalise their management by implementing formal procedures, which enhances efficiency and competitiveness.

Organisational maturity encompasses both technical and social aspects, supporting a faster adaptation to changes, particularly in the context of succession. Tomasz B. Kalinowski (2011) presents a model for assessing process maturity based on Total Quality Management (TQM) and Business Process Management (BPM), aimed at diagnosing the state of processes and identifying areas for improvement (Kalinowski, 2011, pp. 173-176). A key premise is assessing an organisation’s capability to systematically improve and enhance process efficiency using models such as Capability Maturity Model Integration (CMMI). Kalinowski emphasises that a process-oriented approach enables firms to identify strengths and weaknesses and plan improvements, thereby enhancing both operational and strategic outcomes (Kalinowski, 2011, pp. 176-179). He distinguishes between two assessment approaches: a continuous representation, focusing on selected processes, and a staged representation that evaluates the entire organisation, which is beneficial for long-term planning. The application of these models provides benefits such as better integration of management techniques and improved collaboration with stakeholders, which increases organisational competitiveness.

Adam Skrzypek (2014, 2022) analyses the concept of organisational maturity and its impact on business performance. He defines it as the level of development at which an organisation effectively applies management tools, thereby enhancing efficiency and its ability to adapt to changing market conditions (Skrzypek, 2014, pp. 8-9; 2022, pp. 52-56). This maturity relies on employee competencies, accountability, and readiness for change, which are critical for competitiveness and innovation growth (Skrzypek, 2014, pp. 9-11; 2022, pp. 56-59). According to Skrzypek, achieving higher levels of maturity enables more effective process management, leading to better resource utilisation and the ability to respond swiftly to market changes. Achieving maturity requires the implementation of a culture of continuous improvement, which should be integrated into the organisation's strategy (Skrzypek, 2022, pp. 60-63). Thus, organisational maturity not only supports the management of current processes but also allows for anticipating future challenges and adjusting strategies to dynamic conditions (Skrzypek, 2014, pp. 11-12).

In summary, organisational maturity is a process that includes the development of managerial competencies, employee training, and operational optimisation. It should be systematically monitored and developed within the company's strategy to ensure the long-term achievement of objectives.

Wiesław Łukasiński (2016) analyses the impact of organisational maturity on the effectiveness of quality management, defining maturity as the level at which an organisation manages quality-oriented processes and resources. The author developed a model consisting of five levels of quality maturity, considering criteria such as process management and customer orientation. He places particular emphasis on organisational culture, which promotes engagement in quality and cooperation, supported by strong leadership (Łukasiński, 2016). Implementing a quality-oriented approach requires change management, including employee training and adapting existing processes. The author also identifies factors that shape comprehensive quality management, the essence of quality-oriented management, and perceiving the organisation as an open system adapting to its environment. Łukasiński highlights significant links between quality maturity and organisational development, illustrated by empirical studies that show how quality-oriented management contributes to increased efficiency and long-term growth (Łukasiński, 2016).

Process maturity is a component of organisational maturity, focusing on an organisation's ability to manage and optimise its internal processes (West, 2013; Chevers, 2023). It includes evaluating the level of organisation, standardisation, and process optimisation, which leads to increased efficiency and cost reduction. Process maturity is often assessed using models like Capability Maturity Model Integration (CMMI) or Business Process Maturity Model (BPMM), which help identify the development stage of organisational processes—from chaotic and unstructured to fully optimised and managed. Through well-established management standards, these organisations are more resilient to succession risks, as their structures and procedures are defined and stabilised, making the business less dependent solely on the founder and facilitating the continuity of operations under new leadership (Szewczyk, 2018, pp. 16-17; 2023). Developing process maturity allows family businesses to better utilise resources and improve operational efficiency, which translates into greater competitiveness. Mature organisations invest in process optimisation and innovation, enabling not only survival but also growth in a changing market environment (Szewczyk, 2023, pp. 51-53).

Renata Brajer-Marczak (2014) explores the varying levels of process maturity across different organisational departments and their impact on management efficiency. She notes that implementing a process-based approach is not uniform, which can lead to disparities affecting the achievement of strategic goals. The process maturity models serve as diagnostic tools, helping to assess the current state of processes within an organisation and identify development directions (Brajer-Marczak, 2014, pp. 19-22). A key conclusion she reaches is the need to balance maturity levels across departments, which promotes better integration and increases organisational efficiency. Brajer-Marczak highlights that maturity models can be used for self-assessment and benchmarking, helping organisations identify areas for improvement. The balanced development of process maturity is crucial for improving management systems and increasing competitiveness in a changing environment (Brajer-Marczak, 2014, pp. 22-25).

Marcin Gałuszka (2011) examines various process maturity models and their application in improving organisational efficiency. He emphasises that in a complex business environment, maturity models help diagnose and enhance internal processes, which supports better resource utilisation. Gałuszka discusses six models, including international ones (Harrington, CMMI, ISO 9004) and Polish ones (Grajewski, Nowosielski, Gruchman). All these models are based on a multi-level maturity scale, allowing firms to gradually improve their processes (Gałuszka, 2011, pp. 66-69). These models assume that organisations must stabilise operations at each level before moving to the next. For example, Harrington's model includes six levels, from unknown processes to world-class processes. In contrast, CMMI offers two assessment representations—staged and continuous—which allow for comprehensive analysis, while ISO 9004 focuses on quality management and continuous improvement (Gałuszka, 2011, pp. 69-71). Despite their differences, all these models are based on core principles, such as process identification, institutionalisation, and improvement. They serve as tools for planning improvements and benchmarking, helping organisations enhance efficiency and competitiveness.

Grzegorz Grela (2013) discusses the importance of measuring process maturity to improve management efficiency. Process maturity is defined as an organisation's ability to optimally manage resources through stable and measurable processes, supporting the achievement of strategic goals. Organisations with high process maturity make better use of their resources, increasing their competitiveness (Grela, 2013, pp. 170-172). Grela analyses various process maturity assessment models, such as CMM, BPMM, and ITIL, highlighting that selecting the right model and analysing collected empirical data are critical. Research conducted on a sample of Polish firms revealed that most organisations are at a medium level of maturity—processes are identified but not always managed effectively (Grela, 2013, pp. 172-176). The author suggests that companies should strive for higher process maturity through continuous process improvement and greater stakeholder engagement. Increased process maturity supports better adaptation to market changes, which is crucial for long-term organisational development.

Paweł Mielcarek (2017) presents a model for assessing process maturity, defining it as an organisation's ability to systematically improve processes and manage resources, which leads to better results (Mielcarek, 2017, pp. 8-9). The model covers three key areas: organisational environment, process management, and obtained value, enabling a comprehensive assessment of both the entire organisation and specific processes. It consists of six levels, ranging from chaotic processes to fully optimised ones, contributing to cost reduction and better risk management. Achieving this maturity requires managerial commitment and a supportive organisational culture. Mielcarek distinguishes three primary functions of assessment: descriptive (understanding the current state of the organisation), improvement-focused (identifying areas for enhancement), and comparative (benchmarking) (Mielcarek, 2017, pp. 10-12). The model aids in process optimisation and increases organisational flexibility, which is crucial in a dynamic business environment.

Innovation Maturity focuses on an organisation's ability to generate and implement innovations. Companies with a high level of innovation maturity can systematically introduce new products, services, or processes, which translates into a competitive advantage. Models of innovation maturity involve assessing creativity, innovation management, and collaboration with external partners. Łukasz Widła-Domaradzki and Anna Tarnawa (2019) present the Innovation Maturity Index (WDI), which measures an organisation's capacity to implement innovations and enhance processes to increase competitiveness. This index evaluates infrastructure, management, relational capital, and innovation returns, analysing data on expenditures, human resources, and collaboration (Widła-Domaradzki, Tarnawa, 2019, pp. 4-12). Research conducted on a broad sample of enterprises helped refine the assessment methodology. A key finding highlights the need for continuous monitoring and adaptation of the index to better reflect changes in the level of innovation among companies. The WDI index enables benchmarking across industries and identifies areas for improvement, supporting the stimulation of innovative activities (Widła-Domaradzki, Tarnawa, 2019, pp. 13-25).

Implementation Maturity refers to an organisation's ability to effectively transform innovative ideas, technologies, or projects into real, functioning products, services, or processes. This includes the ability to manage the entire implementation process—from testing and prototyping to full-scale deployment and integration with existing organisational structures. Examples of assessment models that help measure this level include Technology Readiness Levels (TRL) and the Implementation Maturity Model. Adam Mazurkiewicz et al. (2010) presents the Implementation Maturity Assessment (SDW) methodology, which aims to determine the readiness level of technology for implementation. It focuses on evaluating technical aspects and the advancement of R&D activities, without considering business models. The methodology is based on TRL and Engineering Manufacturing Readiness Levels (EMRL), enabling a comprehensive assessment of implementation readiness. The SDW method consists of two stages: a general assessment using control questions and a detailed evaluation that includes more advanced criteria (Mazurkiewicz et al., pp. 5-10). The results assist in planning commercialisation and minimising risks. The use of this method enhances innovation and competitiveness through the effective implementation of research findings (Mazurkiewicz et al., pp. 16-17).

HR Maturity focuses on the effectiveness of human resource management, including recruitment, employee development, talent management, and organisational culture (Kearns, 2010). Models such as the HR Maturity Model help assess an organisation's capacity to maximise its employees' potential. Bogdan Nogalski and Przemysław Niewiadomski (2019) analyse the maturity level of enterprises in managing human resources, emphasising that strategic management includes the optimal use of employee potential and continuous skill enhancement (Nogalski, Niewiadomski, 2019, pp. 155-159). According to the authors, organisations implementing a culture of continuous improvement (kaizen) can maintain a competitive advantage. The research methodology, based on self-assessment, allows companies to determine their maturity level in HR management, considering factors such as employee engagement and training effectiveness. Firms that actively engage employees achieve higher efficiency and innovation (Nogalski, Niewiadomski, 2019, pp. 160-164). Implementing continuous improvement strategies increases employee satisfaction and better resource utilisation, which supports the achievement of long-term goals.

Quality Maturity concerns an organisation's ability to manage quality in a comprehensive and integrated manner (Skrzypek, 2013). This means systematically implementing and improving quality management systems (e.g., ISO 9001). Quality maturity relates to an organisational culture where quality is a priority and to the methods and tools for quality management used in everyday operations. Katarzyna Hys (2016) analyses models of quality maturity that help organisations assess and improve their quality management practices. She emphasises that the maturity of the quality management system is crucial for organisational performance, enabling systematic monitoring and process improvement. She discusses, among others, the ISO 9004 model, which includes five levels of maturity, ranging from a lack of formalisation to best practices leading to long-term success (Hys, 2016, pp. 175-180). Hys indicates that adaptation and continuous process improvement are essential for maintaining competitiveness. Organisations with a quality-oriented approach respond more quickly to market changes, improving operational results. Models such as EFQM and Deming can enhance an organisation's ability to manage quality, as well as its flexibility and survival in a competitive market (Hys, 2016, pp. 181-184).

In addition to the types of organisational maturity mentioned above, other types are distinguished in management and quality sciences:

- Production Maturity relates to managing production and technological processes, including resource optimisation, waste reduction (lean management), and the integration of modern technologies such as Industry 4.0 (Gajdzik et al., 2025).
- Project Maturity refers to an organisation's ability to manage projects, including resources, schedules, and risks. Models like the Project Management Maturity Model (PMMM) assess project execution effectiveness (Pries & Quigley, 2012; Price, 2014).
- Digital Maturity encompasses the integration of new technologies (AI, data analytics) within the organisation, supporting better decision-making and adaptation to changing market conditions (Chevers, 2023; Gajdzik et al., 2025).
- Strategic Maturity involves the ability to formulate and implement strategies and adjust plans to market conditions, helping achieve long-term objectives (West, 2013).
- Risk Management Maturity focuses on identifying and managing risks, enabling organisations to anticipate threats related to operations, finances, and regulations (Hopkinson, 2010; Bąk, Jedynak, 2023).
- Sustainability Maturity assesses an organisation's ability to integrate sustainability principles, minimise environmental impact, and promote Corporate Social Responsibility (CSR) (Loura, Dickinson, 2019; Rao et al., 2024).
- Relational Maturity focuses on managing relationships with clients and partners, which is crucial for effective supply chain management (Bourne, 2009).

5. Discussion and future research

Each of the types of maturity mentioned in the previous subsection plays an important role in organisational management and can be measured using specialised models and tools (Hopkinson, 2010; Loura, Dickinson, 2019; Van Nuland, Duffy, 2020; Bąk, Jedynak, 2023; Crawford, 2021; Stachowiak, 2024). In practice, many organisations utilise these maturity models. These models not only help to manage more effectively but also to achieve long-term strategic goals and build a competitive advantage. Maturity models are not only tools for improvement but also key elements of development strategies in a changing market environment. In this way, the conducted literature analysis confirms the validity of the research hypothesis posed at the beginning of the article.

Table 1.
Types of organisational maturity

Type of maturity	Descryption	Models used	Key benefits
Organisational	Refers to the overall level of an organisation's advancement in managing aspects such as strategy, organisational culture, and human resources. It encompasses leadership, change management, and customer orientation.	BELIEFS™, Capability Maturity Model Integration (CMMI), European Foundation for Quality Management (EFQM)	Stability, long-term competitive advantage, improved change management.
Process	Focuses on managing internal processes. Models help assess the level of standardisation and optimisation of processes.	Capability Maturity Model Integration (CMMI), Business Process Maturity Model (BPMM)	Efficiency, cost reduction, improved readiness for succession.
Innovation & implementation	Relates to the organisation's ability to implement innovations. It includes managing creativity and collaboration with partners.	Innovation Maturity Index (IMI), Technology Readiness Levels (TRL)	Better utilisation of employee potential, increased innovation.
HR	Assesses the effectiveness of human resource management, including recruitment, employee development, and organisational culture.	HR Maturity Model	Lepsze wykorzystanie potencjału pracowników, wzrost innowacyjności.
Quality	Refers to comprehensive quality management.	ISO 9004, EFQM, Deming	Increased flexibility, ability to survive in the market.

Source: own study based on literature review.

The concept of organisational maturity and process maturity can serve as a starting point for developing an effective model of succession maturity. These two types of maturity encompass a broad range of organisational management aspects, including leadership, organisational culture, change management, and human resource development. These elements are crucial for successful succession in family businesses, where it is essential not only to prepare successors but also to adapt the entire organisation to new leadership. It appears that existing models can be utilised in the creation of a succession maturity model, such as:

- Capability Maturity Model Integration (CMMI), used to assess the maturity of organisational processes, can be adapted to evaluate a company's readiness for succession.
- Business Process Maturity Model (BPMM) can be applied to assess succession management in family businesses, focusing on the standardisation and optimisation of succession procedures.
- EFQM Excellence Model is useful in evaluating overall organisational maturity, including quality management, which is crucial for ensuring smooth succession.

- ISO 9004:2018 focuses on enhancing an organisation's ability to achieve sustainable success through quality management, encompassing leadership, employee engagement, and strategic planning. This model can be used to assess succession readiness, as it promotes continuous improvement and long-term planning, facilitating smooth succession and fostering a quality culture that enhances organisational stability.

In light of the limitations in the current literature, further research should focus on developing tools for assessing succession maturity that allow for a more objective evaluation of a company's readiness to pass on management to the next generation (Kalinowski, 2011; Szewczyk, 2018). Empirical analyses on the effectiveness of various succession strategies are also necessary to identify best practices for Polish family businesses. Additionally, leveraging modern technologies, such as artificial intelligence, can support the succession planning process, particularly in risk assessment and the identification of potential challenges (PwC Polska, 2023).

As part of ongoing research into the succession maturity of family businesses, the authors plan to develop a comprehensive model that will enable a systematic assessment of a company's readiness to undergo the succession process. The primary objective of the planned study is to develop a measurement tool that will allow for the evaluation of succession maturity levels in family businesses. The inspiration for creating such a model comes from previous analyses highlighting the critical role of formalising succession processes and preparing both successors and the organisations themselves for this transition (Lewandowska, 2020; Szewczyk, 2018).

The planned tool will be based on existing models of organisational maturity assessment, primarily such as BELIEFS™ and the Process and Enterprise Maturity Model (PEMM) (Adamczyk, 2018; Kalinowski, 2011). The succession maturity model will be tailored to the specific characteristics of family businesses, taking into account key aspects such as the emotional readiness of senior leaders, successors' competencies, and the formalisation of succession processes. The model will consist of five maturity levels:

1. Initial (lack of formal succession processes).
2. Repeatable (basic processes identified but lacking full formalisation).
3. Defined (formalisation of the succession plan and definition of roles).
4. Managed (monitoring and optimisation of succession processes).
5. Optimising (continuous improvement and adaptation to changing conditions).

To develop assessment indicators, the methodology similar to that used in the Innovation Maturity Index (Widła-Domaradzki, Tarnawa, 2019) will be applied. The indicators will encompass structural aspects (organisational readiness and succession plan formalisation), emotional aspects (senior leader's readiness to transfer control and the preparation level of successors), and relational aspects (support level from family members and employees) (Gałuszka, 2011; Grela, 2013; Szewczyk, 2023).

The assessment of succession maturity will involve a quantitative approach using surveys and a qualitative approach through in-depth interviews. Surveys will target owners and successors of Polish family businesses, aiming to identify key variables influencing the succession process. The plan includes collecting data from at least 200 enterprises, allowing for statistical analysis (PwC Polska, 2023). In-depth interviews with business owners and experts in management and business psychology will provide insights into the subjective experiences related to the succession process (Blikle, 2015; Urbaniec, 2024).

Advanced statistical methods are planned for data analysis, such as multiple regression (to determine the relationships between individual factors and the level of succession maturity), correlation analysis (to identify key determinants of succession), and case studies in the form of an in-depth analysis of specific family businesses that have either successfully or unsuccessfully undergone the succession process (Niemczal, 2015).

From existing organisational and process maturity models, the proposed succession model adopts the following elements:

- *Structural approach:* similar to BPMM models, this model includes the formalisation of processes, systematic planning, and monitoring of organisational readiness.
- *Process approach:* the methodology for assessing the degree of organisation and optimisation of internal processes is borrowed, allowing the identification of key areas for improvement, similar to CMMI models.
- *Continuous improvement:* the model is based on the principle of continuous process enhancement, akin to quality models (e.g., ISO 9004), which helps family businesses better manage generational transitions.

What is new in the succession maturity model are elements that consider the specific nature of family businesses, such as:

- *Emotional and relational readiness:* the model considers psychological aspects and the dynamics of family relationships (including the senior leader's readiness to transfer the business and the successor's preparation to take on a leadership role).
- *Integration of family values:* the model takes into account cultural and axiological aspects of business management, which distinguishes it from more technical and process-oriented organisational maturity models.
- *Adaptability to change:* the model emphasises flexibility and the organisation's ability to adapt to dynamic changes in the market environment, which is particularly crucial in the context of multi-generational business management.

6. Conclusions

The conclusions drawn from the analysis indicate that succession plays a crucial role in ensuring the longevity and stability of family businesses. Succession, as a process of transferring management and values to the next generation, requires careful preparation, as the future of the company depends on its proper execution. Early succession planning and the application of appropriate assessment tools, such as organisational maturity models, significantly increase the chances of successful leadership transition and maintaining business continuity.

In this context, there emerges a need to distinguish the category of succession maturity as a specific type of organisational maturity. Succession maturity combines elements of human resource management, strategic planning, and building organisational culture, which are essential for a smooth transfer of leadership and continuity of business operations. This is particularly important in family businesses, where the transfer of management encompasses not only organisational structures but also family values and traditions.

To address these needs, it is essential to develop a new model of succession maturity that builds upon existing concepts such as Capability Maturity Model Integration (CMMI) and Business Process Maturity Model (BPMM), while also taking into account the unique characteristics of family businesses. The new model will draw from well-established approaches to assessing organisational and process maturity but will be enriched with new elements, such as the emotional readiness of the family to transfer control, the ability to adapt in a dynamic environment, and the management of family values. This model will thus serve as a comprehensive tool supporting the succession process, enhancing management efficiency and the long-term competitiveness of family enterprises.

The innovation of the proposed succession maturity model lies in creating a new tool that goes beyond existing organisational and process maturity models by integrating elements specific to family businesses. The model combines organisational, emotional, and relational aspects, making it more holistic and tailored to the unique challenges of succession in family enterprises.

This article represents the initial phase of a broader research project, the primary objective of which is to develop an effective model of succession maturity for family businesses. This model will form the foundation for a comprehensive tool for measuring and managing succession maturity. It aims to serve advisors and entrepreneurs planning succession within their firms.

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