

Digital Bridges of Continuity: A Thematic Analysis of Knowledge Management, Digital Transformation, and Succession Planning in Family Businesses

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Abstract: Digital transformation is reshaping how family businesses manage knowledge for succession planning and intergenerational continuity. This scoping review examines the influence of digital transformation on knowledge management (KM) practices and succession processes in family businesses. Drawing on interdisciplinary literature published between 2000 and 2026, thematic analysis reveals that digital platforms, including knowledge repositories, enterprise social networks, cloud systems, and AI-enabled tools, enhance the codification, sharing, and accessibility of organisational knowledge, thereby supporting continuity during leadership transitions. The review also identifies key challenges, including generational digital divides, resistance to technological adoption, and limited digital literacy. To address these dynamics, the study proposes the Digital Bridge of Continuity, a conceptual model comprising knowledge architecture, knowledge flows, and knowledge culture, moderated by digital maturity, succession readiness, and family governance quality. The findings contribute to understanding how digital transformation can strengthen knowledge continuity and improve succession outcomes in family businesses.

Keywords: Digital transformation, Knowledge management, Family business, Succession planning, Organisational continuity

1. Introduction and Background

Family businesses constitute 70–90% of enterprises worldwide, contributing substantially to GDP and employment (Sharma et al., 2003; Astrachan & Shanker, 2003). They face a defining structural challenge: succession—the transfer of leadership, ownership, and embedded knowledge across generations (Handler, 1994; Le Breton-Miller et al., 2004). Tacit knowledge—know-how, cultural memory, client relationships, and operational routines—has traditionally been transferred through personal interaction, leaving knowledge transfer informal, unstructured, and vulnerable during generational transitions (Igoa-Iraola et al., 2024; Cristofaro et al., 2022). As a result, effective knowledge management (KM) has become critical for ensuring organisational continuity. Digital transformation offers new mechanisms for capturing, storing, sharing, and retrieving knowledge in ways that can support succession planning and reduce the risk of knowledge loss (Bharadwaj et al., 2013). Yet adoption of digital knowledge management practices remains uneven across family businesses (De Massis et al., 2016). Against this backdrop, this paper examines how digital transformation functions as a bridge between knowledge management and succession planning in family businesses. Specifically, it asks: ***How does digital transformation influence KM practices and succession planning in family businesses?***

2. Theoretical Framework

Three theoretical traditions underpin this study. First, KM theory, grounded in the SECI model (Nonaka & Takeuchi, 1995) and extended by Alavi and Leidner (2001), Davenport and Prusak (1998), and Earl (2001), explains how organisations create, store, and transfer knowledge. Savickas and Užienė (2024) emphasise the interconnected roles of people, culture, and technology in these processes. Second, digital transformation theory views digital integration as a systemic change in organisational processes and capabilities (Westerman et al., 2014). Porfírio et al. (2024) demonstrate that organisations can achieve digital maturity through different pathways. Third, family business succession theory conceptualises succession as a multidimensional process involving leadership development, organisational preparation, and stakeholder management (Le Breton-Miller et al., 2004). Complementing this perspective, socioemotional wealth theory explains how non-economic goals, such as family identity, legacy, and control, influence technology adoption decisions (Lasio et al., 2024; Madi, 2023). Figure 1 integrates these perspectives, illustrating how KM, digital transformation, family business succession, and socioemotional wealth collectively shape digital knowledge transfer and continuity across generations in family businesses.

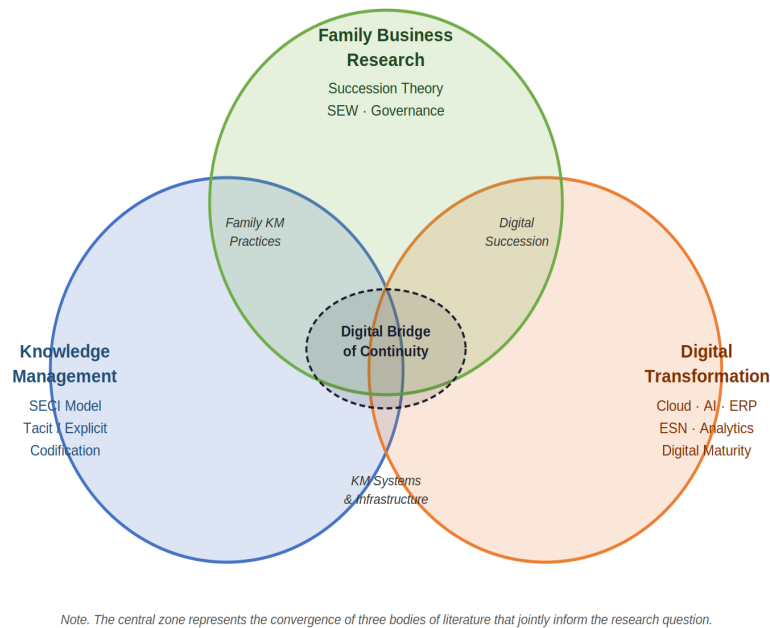


Figure 1: Theoretical Integration Map: Convergence of Knowledge Management, Digital Transformation, and Family Business Research. The central zone represents the convergence of three bodies of literature jointly informing the research question

3. Problem Statement

Despite constituting 70 to 90 percent of global enterprises and generating a substantial share of global economic activity, family businesses face a persistent KM deficit that undermines succession outcomes. Critical operational knowledge, strategic logic, and relational capital are often concentrated in senior family members and remain undocumented, unsystematised, and vulnerable to loss during generational transition (Igboa-Iraola et al., 2024; Cristofaro et al., 2022). This challenge is compounded by uneven adoption of digital knowledge management tools, where resistance to change, limited digital literacy, and data governance concerns restrict implementation (Pushparaj et al., 2025). In addition, clan culture and priorities for preserving socioemotional wealth can limit the openness required for effective digital knowledge sharing (Liu et al., 2024). The consequences are significant. At the firm level, knowledge loss during succession can lead to weakened stakeholder relationships, client attrition, supplier disruptions, and reduced competitiveness (Sharma & Rao, 2000). At a broader level, fewer than 30 percent of family businesses survive into the third generation, with knowledge discontinuity identified as a key factor (Gersick et al., 1997; Le Breton-Miller et al., 2004). As digital transformation accelerates, firms that do not develop digital KM capabilities risk widening the competitiveness gap with both nonfamily enterprises and digitally mature peers. This challenge requires a deliberate integration of digital KM into succession planning. This study proposes the Digital Bridge of Continuity as a framework for structured intergenerational knowledge transfer. It comprises three components: knowledge architecture, referring to digital systems for capturing and organising knowledge; knowledge flows, referring to transfer processes enabled by digital tools and relational conditions; and knowledge culture, referring to the values and leadership behaviours that shape engagement with digital knowledge systems. The framework is further shaped by digital maturity, succession readiness, and family governance quality, highlighting that sustainable knowledge continuity depends on the alignment of technological, organisational, and cultural factors.

4. Rationale of the Study

Three intersecting gaps justify this study. First, the intersection of digital transformation, KM, and succession in family firms remains critically underexplored; Daskalopoulos and Machek (2023) explicitly identify this as a priority research gap, noting that comprehensive frameworks addressing these domains simultaneously are scarce. Second, existing succession KM frameworks are predominantly pre-digital, treating knowledge as a relational phenomenon without adequately accounting for digital systems as mediators. This study contributes a digitally oriented conceptual update that extends pre-digital relational models to account for contemporary KM technologies and their limitations. Third, the practical urgency is acute: family businesses globally navigate

simultaneous pressures from digital disruption, generational transition, and post-pandemic restructuring, all of which demand the evidence-based frameworks this study provides.

5. Research Objectives

Main Research Objective: To examine how digital transformation influences KM practices and succession planning in family businesses, and to develop the Digital Bridge of Continuity conceptual model.

- SO1: Map the nature of organisational knowledge in family businesses and the succession-specific risks of informal KM practices.
- SO2: Evaluate digital tools for knowledge codification, storage, and transfer across the succession lifecycle.
- SO3: Identify and analyse barriers—cultural, structural, and resource-based—inhibiting digital KM adoption in family businesses.
- SO4: Synthesise the literature into the Digital Bridge of Continuity conceptual model, specifying components, moderators, and implications.

6. Methodology

This study employs a comprehensive scoping review method to synthesise fragmented knowledge and develop a conceptual framework (Tranfield et al., 2003; Torraco, 2005). The scoping review search focused on Scopus, Web of Science, EBSCO Business Source Complete, and Google Scholar, using terms such as "family business succession," "knowledge management family firms," "digital transformation small business," and "intergenerational knowledge transfer," and spanned 2000–2026. A total of 112 sources were identified following title, abstract, and full-text screening, supplemented by 50 peer-reviewed studies through citation chaining. Thematic analysis (Braun & Clarke, 2006) generated five themes aligned to the sub-objectives: (1) the nature of knowledge in family businesses; (2) digital tools for codification and transfer; (3) succession planning practices; (4) digital transformation and succession outcomes; and (5) barriers to digital KM adoption. Themes were developed inductively from the data but were guided deductively by the sub-objectives. The scoping review in Section 2 applies the 5Cs—Coverage, Coherence, Comprehensiveness, Criticality, and Citation—and the PEEL method (Point, Evidence, Explanation, Link) throughout.

Database	Search string
Scopus	TITLE-ABS-KEY(("family business" OR "family firm*") AND ("succession planning" OR "succession") AND ("knowledge management" OR "digital transformation") AND ("barriers" OR "risks" OR "challenges"))
Web of Science	TS= (("family business" OR "family firm*") AND ("succession planning" OR "intergenerational knowledge transfer") AND ("digital transformation" OR "knowledge management") AND ("barriers" OR "risks" OR "challenges"))
EBSCO Business Source Complete	AB ("family business" OR "family firm") AND AB ("succession" OR "knowledge management") AND AB ("digital transformation") AND AB ("barriers" OR "risks" OR "challenges")
Google Scholar	"family business succession" AND "knowledge management" AND "digital transformation" AND ("barriers" OR "risks" OR "challenges")

Figure 2: Search criteria of the digital transformation on knowledge management practices and succession processes in family businesses

6.1 Inclusion and Exclusion Criteria

The inclusion and exclusion criteria indicate that peer-reviewed journal articles, peer-reviewed conference proceedings, and scholarly book chapters/preprints published between 2020 and 2026 were employed in the study. The core paper draft's scoping review spans from 2000 to 2026 and focuses on foundational theory addressing digital transformation, knowledge management, or succession planning specifically in family-owned

businesses, available in English or with an English abstract. Thereafter, studies on non-family or purely public-sector organisations without transferable insights; non-peer-reviewed grey literature/opinion pieces without identifiable methodology; studies that substantially duplicate findings already captured by a more comprehensive study from the same author group; and sources not retrievable in full text were excluded from the study.

7. Ethical Considerations

Before starting this study, an ethical clearance application was submitted to the School of Consumer Intelligence and Information Systems Research Ethics Committee of the University of Johannesburg for a secondary data research project titled “Artificial Intelligence, Libraries, Information and Knowledge Management in Higher Education Institutions/Universities”. From this main title, the sub-title “Digital Bridges of Continuity-Knowledge Management, Digital Transformation, and Succession Planning in Family Businesses: A Thematic Analysis” was coined and later approved under ethical number 2025SCiS025.

8. Results

8.1 Digital Transformation as a Bridge of Continuity

The evidence reviewed here converges on a unifying theme: the capacity of digital transformation to serve as a bridge of continuity, converting the tacit, person-dependent knowledge that defines family firm competitive advantage into codified, accessible, and transferable assets that persist across generational transitions (Savickas & Užienė, 2024). With respect to succession planning, digital transformation reduces knowledge dependency through multi-channel repositories, formalises transfer through documented inventories and digital mentoring, and mediates intergenerational exchange through shared digital spaces (Mansouri & Moufdi, 2025; Romano & D’Allura, 2025). Soluk and Kammerlander (2021) confirm that digitally mature firms experience significantly smaller performance disruptions during succession. These influences are moderated by digital maturity, governance quality, and cultural receptivity.

8.2 The Nature of Organisational Knowledge in Family Businesses

Family businesses are characterised by a high concentration of tacit knowledge held by senior individuals—operational know-how, client relationships, cultural norms, and strategic logic—which creates a structural vulnerability to knowledge loss at the point of succession. Cabrera-Suárez et al. (2001) distinguish between human capital—the skills, expertise, and judgment held by individual family members—and social capital—the relational networks and trust accumulated across generations; both are critical to competitive advantage yet vulnerable to disruption during succession if not systematically managed. Cristofaro et al. (2022; 2023) empirically confirm that observation and active participation remain the dominant mechanisms for tacit knowledge transfer in family firms, and that the absence of structured digital capture tools is one of the most critical practical gaps in the field. Appleton et al. (2026) demonstrate that the form and density of a family firm’s social capital directly shape its openness to digital innovation, linking relational structures to digital transformation readiness. Mosolygó-Kiss et al. (2023) provide particularly important evidence: their Hungarian case studies reveal that founders systematically overestimate, and successors systematically underestimate the degree of strategic knowledge assimilation that has occurred—a divergence with direct implications for quality assurance in any digital KM system designed to support succession. This evidence establishes what Chirico and Salvato (2008) term “knowledge accumulation”—a dynamic capability disrupted by succession events. When accumulated wisdom exists only in senior family members’ minds and is never documented, the firm faces a single point of failure risk: critical institutional knowledge becomes permanently inaccessible at succession (Chirico, 2008). Digital KM systems directly address this vulnerability by converting tacit, person-dependent knowledge into codified, retrievable organisational assets. The tacit-dominant knowledge profile of family businesses has been shown to create a structural gap that digital transformation is uniquely positioned to bridge, providing the evidential foundation for the knowledge architecture component of the Digital Bridge of Continuity.

8.3 Knowledge Transfer in Succession Contexts

Effective knowledge transfer during succession requires both relational conditions and structured mechanisms throughout the full succession lifecycle. Handler (1994) and Morris et al. (1997) identify the quality of the incumbent-successor relationship as the most critical determinant of effective knowledge transfer. Romano and D’Allura (2025) demonstrate that family communication patterns—including openness, conflict management, and relational trust—are as important as technological infrastructure in determining the quality of transfer.

Iraola and Díez (2024) show, through a systematic review, that collective knowledge transfer approaches that combine structured documentation with participatory mechanisms significantly outperform individual mentoring alone. Mansouri and Moufdi (2025) propose a multi-phase longitudinal model spanning from early socialisation through active mentoring to post-transition consolidation, providing a temporally nuanced account of when and where digital tools should be deployed. Explanation: Institutional knowledge—routines, values, and strategic logic—is most consequential when lost (Sharma & Rao, 2000). Non-family employees as knowledge holders are frequently underappreciated; their engagement is essential for comprehensive continuity (Barnett & Kellermanns, 2006). These findings inform the knowledge flows component (SO2) and frame **Figure 3**, mapping digital tool deployment across succession phases.

KM Tool	Phase 1 Early Socialisation	Phase 2 Active Mentoring	Phase 3 Leadership Transfer	Phase 4 Post-Transition
Cloud / ECM	Primary	Primary	Secondary	Secondary
ESN / Teams	Primary	Primary	Primary	Secondary
ERP Systems	Secondary	Primary	Primary	Primary
Video / Story	Primary	Primary	Secondary	
AI-enabled KM		Secondary	Primary	Primary

■ Primary application
 ■ Secondary application
 ■ Not applicable

Note. Phases adapted from Mansouri and Moufdi (2025); tool mapping draws on Talarico et al. (2024) and Agarwal (2025).

Figure 3: Digital KM Tools Mapped onto the Succession Lifecycle. Phases adapted from Mansouri and Moufdi (2025). Primary = principal application; Secondary = supplementary application

8.4 Digital Tools for Knowledge Codification and Transfer

No single digital tool addresses all knowledge types or succession phases; a portfolio approach is required. Cloud platforms such as SharePoint and Google Workspace provide accessible, searchable storage (Alavi & Leidner, 2001); Talarico et al. (2024) confirm digitalisation supports both explicit and tacit knowledge transfer. ERP systems encode operational knowledge into structured processes; Durst and Wilhelm (2012) found that SMEs adopting ERP experienced significantly lower knowledge loss at succession. ESNs facilitate lateral knowledge flows and intergenerational dialogue. Agarwal (2025) identifies AI applications in successor evaluation, decision-making transparency, and predictive performance modelling; Ahmad et al. (2024) demonstrate that AI usage significantly enhances digital transformation outcomes when mediated by strategic agility. The applicability of tools varies critically across knowledge types and succession phases. Video documentation is particularly effective for capturing tacit and experiential knowledge in richer formats (Repas & Marič, 2025). Melina et al. (2024) note that family-specific cultural factors pose distinct challenges to AI adoption, and Shah et al. (2025) argue that investment in digital literacy is a prerequisite for the effectiveness of KM systems. The Digital Bridge of Continuity requires a contextually assembled tool portfolio for the knowledge architecture and flows components.

8.5 Digital Transformation and Succession Outcomes

Digital readiness is positively associated with succession quality; digitally mature firms experience significantly smaller performance disruptions. Soluk and Kammerlander (2021) find that family firms with strong digital infrastructure experienced significantly smaller performance dips during succession, which they attribute directly to the knowledge-continuity effects of digital systems. Exler et al. (2024) demonstrate that early and strategic succession planning significantly improves digital maturity, with trust, role clarity, and a culture of innovation identified as enabling conditions. Canjun et al. (2025) show that digital transformation enhances long-term family firm performance when mediated by dynamic capabilities, and that family control strengthens this relationship. Varshney et al. (2025) provide PLS-SEM evidence that digital transformation moderates and strengthens the relationship between KM practices and sustainable family business performance. Knowledge redundancy—creating multiple knowledge channels to reduce dependence on any single individual—is the central mechanism through which digital systems support succession outcomes (Nonaka & Takeuchi, 1995).

Porfírio et al. (2024) confirm context-specific technology selection is essential; no single optimal pathway exists. These findings provide the empirical foundation for the conceptual model's outcome layer and its three moderating conditions.

8.6 Barriers to Digital KM Adoption in Family Firms

Barriers to digital KM adoption are multi-layered and structurally intertwined, requiring integrated intervention. Pushparaj et al. (2025) identify data privacy and cultural resistance as the highest-influence barriers, both co-determined; addressing either in isolation is ineffective. Lei (2025) demonstrates that gradual, inclusive approaches produce better psychological adaptation outcomes than rapid top-down implementation. Liu et al. (2024) demonstrate that clan culture impedes the transparency required by effective digital KM systems. Mondal and Chakrabarti (2023) show that family management involvement correlates with more conservative ICT investment, compounded by the difficulty of justifying KM investment with diffuse, long-term returns (Moeuf et al., 2018). Súltowski et al. (2024) confirm that organisational culture and familism are the highest-influence factors in digital transformation outcomes in family enterprises. Barriers fall into four interacting categories: cultural (generational divides, knowledge-as-identity resistance); structural (governance complexity, SEW preservation); skill-based (digital literacy gaps); and resource-based (financial constraints, ROI uncertainty). Polanyi's (1966) insight—that we can know more than we can tell—confirms that tacit knowledge that resists codification must be addressed relationally; digital systems are supplements to, not substitutes for, human knowledge transfer. These findings directly inform the knowledge culture component of the Digital Bridge of Continuity (SO3): cultural alignment, leadership modelling, and inclusive change management are as structurally important as technology selection and implementation. Figure 4 maps the ISM-derived influence-dependence relationships among these barriers, confirming that independent and linkage barriers must be prioritised in any digital KM adoption strategy.

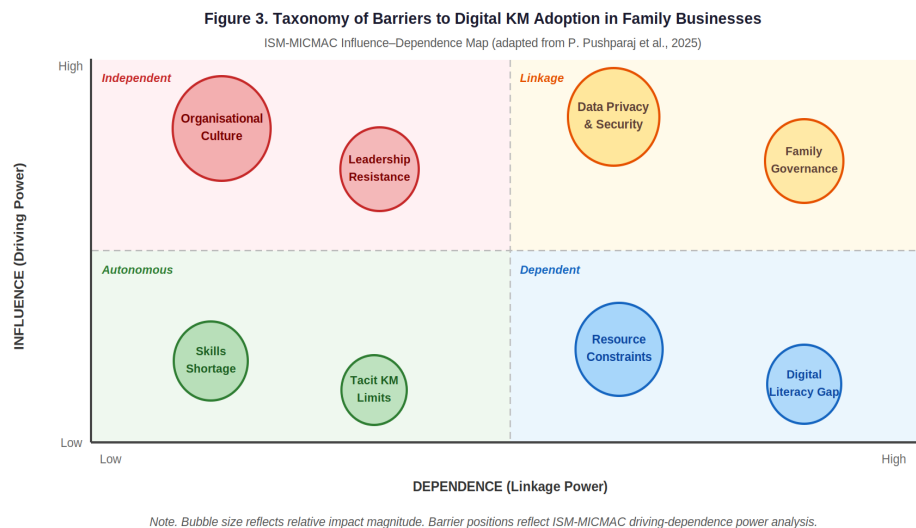


Figure 4: Taxonomy of Barriers to Digital KM Adoption in Family Businesses. Adapted from P. Pushparaj et al. (2025) ISM-MICMAC framework. Bubble size = relative impact magnitude.

9. Conceptual Model: The Digital Bridge of Continuity

The Digital Bridge of Continuity was developed from the scoping review findings and discussion. The model explains how digital transformation strengthens the relationship between knowledge management (KM) and succession outcomes in family businesses. Drawing on the work of Savickas and Užienė (2024), Ge and Campopiano (2021), and Klein et al. (2024), the model views digital transformation as an enabling mechanism that supports the transfer of knowledge from one generation to the next. It helps convert valuable organisational knowledge, including tacit knowledge, institutional memory, relationships, and strategic insights, into forms that are more accessible to successors. The model consists of three interconnected components. Knowledge architecture refers to the digital systems used to capture, organise, store, and retrieve knowledge, including platforms, classification systems, and governance structures (Talarico et al., 2024). Knowledge flows are the processes by which knowledge is shared through collaboration tools, digital documentation, and AI-supported systems. These processes depend on both technological infrastructure and trust-based relationships (Romano

& D'Allura, 2025; Mansouri & Moufdi, 2025). Knowledge culture refers to the values, attitudes, and leadership behaviours that encourage participation in digital KM and support the preservation of family legacy (Madi, 2023; Bentalha, 2025). The effectiveness of the model is influenced by three factors: digital maturity, succession readiness, and the quality of family governance (Lasio et al., 2024; Porfírio et al., 2024). When all three components work together, they support knowledge continuity, successor preparedness, and the long-term sustainability of the family business. The model, therefore, highlights the need for family businesses to invest simultaneously in technology, processes, and organisational culture.

Figure 4. Conceptual Model: The Digital Bridge of Continuity

Mediating role of digital transformation between KM practices and succession outcomes in family businesses

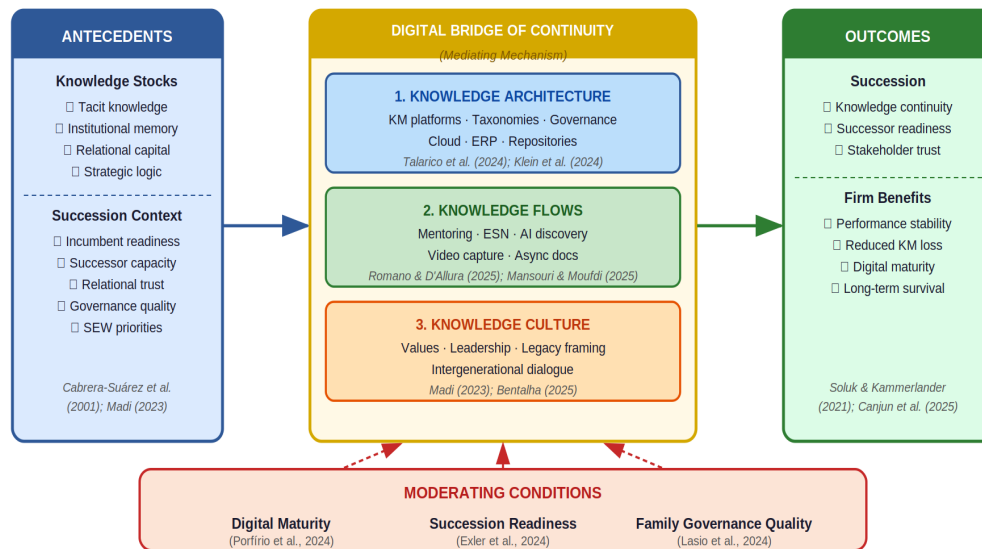


Figure 5: Conceptual Model: The Digital Bridge of Continuity. Antecedents flow through the three-component mediating mechanism (knowledge architecture, flows, and culture) to succession outcomes, moderated by digital maturity, succession readiness, and family governance quality. SEW = Socioemotional Wealth

10. Discussion of Findings

This study found that digital transformation significantly influences knowledge management (KM) practices and succession planning in family businesses. Digital technologies help convert tacit, person-dependent knowledge into codified, accessible organisational assets, reducing the risk of knowledge loss during generational transitions (Chirico, 2008). Through digital repositories, enterprise systems, collaboration platforms, and AI-supported tools, family firms can improve knowledge continuity and successor preparedness (Soluk & Kammerlander, 2021). The findings further show that effective digital KM depends not only on technology but also on organisational culture, governance quality, and digital readiness (Exler et al., 2024; Varshney et al., 2025). Barriers such as cultural resistance, limited digital literacy, resource constraints, and data security concerns remain significant challenges to adoption (Pushparaj et al., 2025). Digital technologies, therefore, complement rather than replace relational forms of knowledge transfer, which continue to rely on trust, communication, and mentoring (Romano & D'Allura, 2025; Mansouri & Moufdi, 2025). These findings are integrated into the Digital Bridge of Continuity model, which explains how knowledge architecture, knowledge flows, and knowledge culture work together to support intergenerational knowledge transfer. The model highlights that knowledge continuity, successor readiness, and long-term business sustainability are strengthened when these elements are supported by digital maturity, succession readiness, and effective family governance. This review integrates KM, digital transformation, and family business succession into a unified framework, extending succession KM theory through the Digital Bridge of Continuity, which emphasises the interdependence of knowledge architecture, flows, and culture. In practice, the findings position digital KM as a succession risk-management and legacy-preservation strategy. Family firms should adopt a phased approach that combines knowledge documentation, knowledge-sharing mechanisms, and cultural change, as technology alone is insufficient for successful succession.

11. Conclusion

This study established that in today's knowledge economy, digital transformation affects knowledge management practices and succession planning in family enterprises. The study established that digital transformation is shifting KM practices from informal, person-dependent processes to codified, accessible organisational assets, bringing significant benefits to succession planning. The researchers suggest that digitally mature companies experience fewer performance disruptions during leadership transitions and that digital transformation strengthens the relationship between knowledge management practices and organisational performance. The study notes that the adoption of digital knowledge management is interconnected, including cultural resistance, limited digital literacy, and the preservation of socioemotional wealth. Digital technologies support and enhance, rather than replace, relational forms of knowledge transfer. The Digital Bridge of Continuity model integrates these findings in three interconnected strands: knowledge architecture, knowledge flows and knowledge ecosystems. Digital maturity, succession readiness, and the quality of family management influence the model's efficiency. The study recommends that digital KM be integrated into succession planning from the outset as a form of institutional stewardship, preserving the knowledge, values and skills that make family businesses resilient and sustainable for generations to come.

12. Recommendations

Three recommendations are offered for family businesses and their advisors. First, there is need to embed digital KM in succession planning from the outset, before leadership transition is imminent. Exler et al. (2024) demonstrate that firms with longer planning horizons achieve significantly higher digital maturity and stronger business model innovation outcomes. Second, conduct a knowledge audit before selecting digital KM tools, distinguishing between explicit knowledge suited to repositories, tacit knowledge requiring video documentation or structured mentoring, and relational knowledge requiring ESN-based capture; Porfirio et al. (2024) confirm that context-specific tool portfolios substantially outperform generic adoption programmes. Third, invest in digital literacy and knowledge culture simultaneously and across all generations; Shah et al. (2025) confirm that without this investment, even sophisticated KM systems fail to deliver succession continuity benefits, and framing digital documentation as institutional stewardship—preserving the family's legacy—substantially reduces incumbent resistance (Lei, 2025; Mansouri & Moufdi, 2025; Mondal & Chakrabarti, 2023; Varshney et al., 2025; Shah et al., 2025; Melina et al., 2024).

Ethics Declaration: Although ethical clearance was obtained by the co-author in accordance with institutional requirements for the broader research project, this study itself did not require additional ethical clearance as it used publicly available data and involved no human participants or sensitive information.

AI Declaration: AI tools were used only for language refinement. The analysis, interpretation, and conclusions remain solely the responsibility of the author(s).

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