

NEXTGEN Tourism

Skills for Tourism Business Succession

Course Curriculum



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Welcome to Part 3 of the Next GEN Tourism Curriculum

Phase 3 People, Leadership & Relationships

This part focuses on the people side of succession, helping learners manage leadership continuity, relationships, communication and knowledge transfer.

Modules in this part



Module 4: Leadership Transition & Business Continuity

Core topics

- ✓ Successor identification and development
- ✓ Leadership handover
- ✓ Business stability



Module 5: Family, Teams & Stakeholder Relationships

Core topics

- ✓ Family and stakeholder communication
- ✓ Conflict management
- ✓ Trust and (tacit) knowledge transfer

PART 3
PHASE 3

Phase 3

People, Leadership
and Relationships

A photograph of a man in a blue and black plaid shirt over a white t-shirt, smiling as he receives a set of keys with a red keychain from another person whose hand is visible. The background shows a modern interior with a staircase. The image is partially obscured by a teal diagonal overlay on the left and bottom.

Module 4

Leadership Transition
and Business
Continuity

People, Leadership and Relationships

Module 4

Leadership Transition and Business Continuity

1. Module Descriptor			
Module Code	M4	Indicative EQF Level	EQF Level 5
Indicative ECTS Workload	0.5 ECTS	Total Learner Workload	12–15 hours
Delivery Mode	Hybrid, Online, Face to Face/On Campus, Distance Learning, Blended Learning, Work-Based Learning, Self-Paced Learning		
Target Learners	VET educators, trainers, tourism SME owners, successors, family business members, business advisors, legal/tax support actors, SME mentors and learning facilitators working with business continuity and succession.		

Module 4



Key Objective

Prepare for a smooth leadership handover by assessing successor readiness, transferring roles and knowledge, and protecting business continuity.



Key Learning Outcome

By the end of this module, learners will be able to:



Assess successor readiness



Identify key roles, knowledge and relationships to transfer



Plan a gradual leadership handover



Protect staff, operations and service continuity

2. Module Rationale & Context

Purpose & Learning Aim

To help learners prepare for a smooth leadership handover in a tourism SME by assessing successor readiness, planning the transfer of roles and responsibilities, and protecting business stability during transition.

By the end of the module, learners should be able to assess whether a successor is ready to lead, identify key knowledge and responsibilities that must be transferred, plan a gradual leadership handover, and protect staff, customers, operations and business continuity during the transition.

Module Description

This module focuses on the **people and operational side of succession**. After learners have explored ownership transfer in Module 3, this module looks at how leadership is handed over in practice. Leadership transition is not only about naming the next owner or manager. It is about **preparing the successor, supporting the outgoing owner to step back, transferring knowledge, maintaining staff confidence and keeping the business stable during change**.

Tourism SMEs often depend strongly on the current owner’s relationships, local knowledge, customer trust, supplier contacts and daily decision-making. If these are not transferred carefully, the business may lose stability after transition. This module helps learners plan a gradual, realistic and trust-based leadership handover that protects business continuity.

3. Topics Covered (5)

- 1. **Successor Readiness**
Assessing the successor’s skills, confidence and development needs
- 2. **Planning the Leadership Handover**
Transferring leadership gradually through clear roles and milestones
- 3. **Knowledge Transfer and Operational Continuity**
Capturing essential knowledge, relationships and operating practices
- 4. **Staff Continuity and Communication**
Supporting employees and maintaining trust throughout leadership change
- 5. **Business Stability During and After Handover**
Protecting operations, service quality and continuity during transition

4. Learning Outcomes

By the end of this module, learners will be able to:

1. Explain why leadership transition is important for business continuity in tourism SMEs.
2. Assess successor readiness using practical indicators such as skills, confidence, motivation, credibility and support needs.
3. Identify key leadership responsibilities, decision-making authority, business knowledge and relationships that must be transferred.
4. Plan a gradual leadership handover with clear roles, milestones and support.
5. Recognise risks to staff, customer trust, operations and business stability during transition.
6. Prepare and review a Leadership Handover and Business Continuity Plan, adapting actions where business conditions or readiness needs change.

5. Competence Framework Alignment

Framework	Competences Addressed (Knowledge, Skills, Responsibility & Autonomy)
Assess successor readiness for leadership.	Knowledge: Understand the skills, confidence and experience needed to lead a tourism SME. Skills: Identify successor strengths, gaps and support needs.
Plan a gradual leadership handover.	Knowledge: Understand that leadership transition is a process, not one event. Skills: Create a timeline for transferring roles, responsibilities and authority.
Transfer key business knowledge.	Knowledge: Understand what knowledge is critical for business continuity. Skills: Map customer, supplier, staff, operational and destination knowledge that must be transferred.
Support staff and operational stability.	Knowledge: Understand how leadership change can affect employees, service quality and daily operations. Skills: Identify communication and continuity actions that reduce uncertainty.
Manage risks during the handover period.	Knowledge: Understand common risks such as founder dependency, role confusion, staff insecurity and successor overload. Skills: Recommend practical actions to protect business stability.

6. Module Structure & Topics

Topic 1: Successor Readiness

Keywords: Successor readiness, leadership skills, confidence, motivation, credibility, experience, support needs, development plan, leadership identity.

Overview: This Topic helps learners assess whether a successor is ready to take on leadership.

A successor may be a family member, employee, external manager, buyer or partner. Being ready does not mean knowing everything. It means having enough skills, motivation, confidence and support to lead the business while continuing to learn.

In tourism SMEs, successor readiness also depends on credibility. Staff, customers, suppliers, family members and the local destination community need to trust that the successor can lead the business. This trust is usually built over time through involvement, responsibility and visible learning.

The Succession Ready manual identifies leadership, communication, mentoring, adaptability and strategic thinking as important competencies for successors and transferors during business transfer.

What is Covered

1. What successor readiness means
2. Skills and experience needed to lead a tourism SME
3. Motivation, confidence and personal commitment
4. Credibility with staff, customers, suppliers and community
5. Readiness gaps and development needs
6. Mentoring and guided exposure
7. Successor overload and how to avoid it
8. Creating a successor development plan
9. Successor confidence and credibility during the first months of transition

Aim: Learners will assess the readiness of a successor and identify what support, experience or training is needed before full leadership transfer.

Topic 2: Planning the Leadership Handover

Keywords: Leadership handover, role transfer, responsibility transfer, founder role, successor role, authority, timeline, milestones, shadowing, mentoring.

Overview: This Topic focuses on how leadership is transferred from the current owner or manager to the successor.

Leadership handover should normally happen gradually. The successor may first observe, then co-manage, then take responsibility for specific areas, and later lead independently. This staged approach gives the successor time to build confidence and gives staff time to adjust.

The outgoing owner also needs a clear role. If the founder stays too involved, the successor may not be seen as the real leader. If the founder steps away too quickly, important knowledge and relationships may be lost. A good handover balances support and independence.

What is Covered

1. Difference between ownership transfer and leadership handover
2. Current owner role during transition
3. Successor role during transition
4. Transferring daily decisions and strategic decisions
5. Shadowing and mentoring
6. Handover milestones
7. When and how the founder steps back
8. Avoiding role confusion
9. Reviewing progress during handover
10. Clear decision-making authority during the handover period

Aim: Learners will design a gradual leadership handover plan with clear roles, timing, responsibilities, decision authority and milestones.

Topic 3: Knowledge Transfer and Operational Continuity

Keywords: Knowledge transfer, tacit knowledge, customer knowledge, supplier knowledge, staff knowledge, operating routines, procedures, systems, documentation, training.

Overview: This Topic helps learners identify what knowledge must be transferred so the business can continue to operate smoothly.

In many tourism SMEs, important knowledge is held in the head of the owner or long-term employees. This may include customer preferences, supplier arrangements, seasonal routines, informal problem-solving, staff strengths, destination relationships, pricing decisions and crisis responses.

If this knowledge is not documented and explained, the successor may struggle after taking over. Knowledge transfer should therefore be planned and practical. It can include checklists, written procedures, joint meetings, observation, training, handover documents and early-stage support.

The Succession Ready manual highlights that the handover should include financial information, customer information, supplier information, employee information, processes, procedures, knowledge and experience; it also recommends early planning, successor involvement, training and support in the initial phase.

What is Covered

1. What knowledge must be transferred
2. Tacit knowledge and why it is hard to capture
3. Customer and guest information
4. Supplier and partner relationships
5. Staff roles and employee knowledge
6. Operational procedures and daily routines
7. Booking systems, passwords and digital tools
8. Safety, quality and service standards
9. Handover documents and training sessions
10. Support during the first phase after handover
11. Key-person dependency and how to reduce it
12. Knowledge transfer before peak season or high-risk periods

Aim: Learners will identify the key knowledge and operational information needed to protect continuity during leadership transition.

Topic 4: Staff Continuity and Communication

Keywords: Staff continuity, team confidence, communication, roles, uncertainty, trust, internal communication, employee retention, culture.

Overview: This Topic focuses on employees and team stability during leadership change. Staff are often central to tourism SME success. They hold customer knowledge, local knowledge, service routines and business culture. During transition, employees may feel uncertain about their jobs, roles, working conditions or the future direction of the business. Clear communication helps reduce uncertainty. Staff need to know what is changing, what is staying the same, who they report to, and how the successor will lead. Communication should be honest, timely and repeated where needed.

This Topic also explores how the successor can build trust with staff. Trust is built through listening, consistency, respect for existing knowledge and clear decision-making.

This Topic focuses specifically on staff continuity during leadership handover; wider family, stakeholder and conflict issues are addressed in Module 5.

What is Covered

1. Why staff continuity matters in tourism SMEs
2. How leadership change can affect employees
3. What staff need to know during transition
4. Communicating roles and reporting lines
5. Retaining key employees
6. Building successor credibility with staff
7. Protecting service quality and workplace culture
8. Managing uncertainty and resistance
9. Supporting key staff during the first 100 days

Aim: Learners will prepare a simple staff communication and continuity plan for the leadership transition.

Topic 5: Business Stability During and After Handover

Keywords: Business continuity, operational stability, customer trust, service quality, risk management, crisis plan, first 100 days, monitoring, post-handover support.

Overview: This Topic helps learners protect the business during and after the leadership handover.

A leadership transition can affect daily operations, customer confidence, staff motivation, supplier relationships and financial performance. A good handover plan should therefore include continuity actions and risk checks.

Learners explore how to identify the most important parts of the business that must continue without disruption. These may include bookings, guest communication, staff scheduling, safety procedures, supplier orders, cash flow, digital systems and customer service quality.

The Succession Ready manual recommends preparing a crisis plan that includes risk management, business continuity and conflict resolution strategies, especially for unforeseen circumstances during transfer.

What is Covered

1. What business stability means during succession
2. Key continuity risks in tourism SMEs
3. Service quality and customer trust
4. Supplier and partner continuity
5. Digital and booking system continuity
6. Safety, compliance and operational routines
7. First 100 days of new leadership
8. Monitoring and reviewing handover progress
9. Crisis planning and backup roles
10. Backup roles and emergency decision-making during transition

Aim: Learners will identify the main risks to business stability and prepare continuity actions for the transition period, first 100 days and early post-handover phase.

Module 4

Development Framework

From Module Overview to Applied Delivery

This section outlines how **Module 4** can be delivered in practice. It introduces suggested learning activities, assessment approach, recommended time allocation and supporting resources that will help learners apply their knowledge in real tourism business contexts.

❖ In this section



1. Practical Learning Exercises

- Successor Readiness Check:** Learners assess a successor's strengths, gaps and support needs using a simple readiness checklist.
- Role Transfer Map:** Learners identify which tasks, decisions and responsibilities should be transferred now, later or only after a milestone.
- Knowledge Transfer Map:** Learners list the key customer, supplier, staff, operational and destination knowledge that must be transferred.
- Staff Communication Plan:** Learners prepare a short communication plan for employees during leadership transition.
- First 100 Days Plan:** Learners create a simple plan for the first three months after the successor takes the lead.

2. Work-Based Learning Task

Learners apply the module to a real or realistic tourism SME. They may use their own business, a local business, or a case study.

Learners answer:

- Who is the current leader, and who may become the next leader?
- How ready is the successor to lead?
- Which leadership tasks and decisions need to be transferred?
- What knowledge is currently held by the owner or key staff?
- Which staff, customer or supplier relationships need protection?
- What could disrupt operations during the handover?
- What three actions would improve leadership continuity?

3. Case Studies

Case studies should reflect realistic tourism SME situations and support practical discussion.

Case Study	Focus Area	Example Learning Themes
Family Guesthouse: Daughter Taking Over from Parents	Successor readiness and founder letting go	Confidence, trust, gradual leadership, family roles, staff expectations
Adventure Tourism Company with Founder Dependency	Knowledge transfer and operational risk	Safety procedures, supplier contacts, customer trust, tacit knowledge
Seasonal Tourism SME with Key Staff Leaving	Staff continuity and business stability	Employee retention, handover timing, service quality, recruitment risk
Tour Operator During Peak Season Transition	Business continuity during handover	Booking systems, customer communication, operational routines, first 100 days

4. Assessment

Assessment Method	Description & Evidence
Short written reflection	Learners explain why leadership transition affects business continuity in tourism SMEs. Evidence: Short reflection using a tourism SME example.
Successor readiness checklist	Learners assess the readiness of a successor. Evidence: Completed checklist showing strengths, gaps and development needs.
Knowledge transfer map	Learners identify critical knowledge that must be transferred. Evidence: Completed map covering customer, supplier, staff, operational and destination knowledge.
Staff continuity plan	Learners plan how to keep employees informed and stable during transition. Evidence: Short communication and continuity plan.
Work-based learning task	Learners apply the module to a real or simulated tourism SME. Evidence: Leadership Handover Snapshot or Leadership Handover and Business Continuity Plan.

5. Suggested Schedule

Total: 12–15 learning hours

Activity	Hours
Facilitated teaching/workshop	3
Group exercises and case studies	2
Independent reading/reflection	2
Work-based learning task	3–5
Assessment preparation/completion	2-3
Total Hours	12 - 15

6. Expected Module Learning Outcome

By the end of this module, learners will produce a Leadership Handover and Business Continuity Plan for a tourism SME. This will outline successor readiness, key leadership responsibilities, decision-making authority during and after the handover, critical knowledge to protect and transfer, staff communication needs, business stability risks, review points and actions to adapt the handover if conditions change.

7. Resources & Learning Materials

Leadership succession and successor readiness

- **Tourism HR Canada – Succession Planning:** <https://tourismhrc.com/wp-content/uploads/2024/04/Succession-Planning-Guidebook-Final-3.pdf>
- **Deloitte - Succession planning for family business:** <https://www.deloitte.com/us/en/services/deloitte-private/articles/family-business-succession-planning.html>
- **The Wall Street Journal - Most Family Businesses Expect Leadership Transition Soon. Few Have a Plan:** https://deloitte.wsj.com/riskandcompliance/most-family-businesses-expect-leadership-transition-soon-few-have-a-plan-d3ad1af7?eafs_enabled=false
- **Assenmacher et al. (2026) - What makes a successor?** <https://www.fact.tirol/en/article/what-makes-a-successor/>
- **Family Business Center - From Failure to Thrive: How does the ability to recover from failure affect the next generation of potential entrepreneurs?:** https://research.mci.edu/phocadownload/Familienunternehmen/Abschlussarbeiten/Englisch/Succession/Executive-Summary_MA_Singer_Failure.pdf
- **Family Business Org. - Family Business Succession Planning: A Complete Guide:** <https://familybusiness.org/succession-planning>

7. Resources & Learning Materials

Knowledge transfer and continuity

- **Elium – Knowledge Transfer Plan Template:** <https://elium.com/product/templates/>
- **NSW Small Business Commission – Business Continuity Plan Guide:** <https://www.smallbusiness.nsw.gov.au/resources/guides/BCP>
- **Angerer (2024) - Preserving Legacy: The Crucial Role of Successor Willingness in Family Business Succession:** <https://epub.jku.at/download/pdf/11372220.pdf>
- **KPMG – Transforming Family Businesses and Ensuring Business Continuity:** <https://kpmg.com/cz/en/services/consulting-services/transforming-family-businesses-and-ensuring-business-continuity.html>
- **PWC - Continuity and succession planning:** <https://www.pwc.com/us/en/services/audit-assurance/private-company-services/family-business/business-transition-and-succession-planning.html>
- **PWC - Continuity and succession planning in times of Crisis:** <https://www.pwc.com/m1/en/publications/covid-19/leadership-succession-continuity-planning.pdf>
- **Staff communication plan - Communication Matrix Template** <https://miro.com/templates/communication-matrix/>
- **First 100 days plan - Action Plan Template** - <https://miro.com/templates/action-plan/>

Videos or interviews with tourism business owners

- **HSG Uni St. Gallen - Knowledge Bank: Thomas Zellweger on "family business succession":** <https://www.youtube.com/watch?v=GTICu3PEqng>
- **Tedx Talks - How doing things differently in a family business can result in success:** https://www.ted.com/talks/peter_cho_how_doing_things_differently_in_a_family_business_can_result_in_success
- **Tedx Talks – Family Businesses are here to stay:** <https://www.youtube.com/watch?v=suL-HkP-2Ts>
- **EntreLeadership with Dave Ramsey - Transitioning Leadership in a Family Business the Right Way:** <https://www.youtube.com/watch?v=A3A5Pz56lr0>
- **F.act Talks: Succession in tourism:** <https://www.fact.tirol/en/article/fact-talks-succession-in-tourism/>
- **INSEAD Executive Education – Family Business: The Problem of Succession:** <https://www.youtube.com/watch?v=3-3rexYRdcQ>

Phase 3

People, Leadership
and Relationships

Module 5

Family, Teams and
Stakeholder
Relationships



People, Leadership
and Relationships

Module 5

Family, Teams and Stakeholder Relationships

1. Module Descriptor			
Module Code	M5	Indicative EQF Level	EQF Level 4
Indicative ECTS Workload	0.5 ECTS	Total Learner Workload	12–15 hours
Delivery Mode	Hybrid, Online, Face to Face/On Campus, Distance Learning, Blended Learning, Work-Based Learning, Self-Paced Learning		
Target Learners	VET educators, trainers, tourism SME owners, successors, family business members, business advisors, legal/tax support actors, SME mentors and learning facilitators working with business continuity and succession.		

Module 5



Key Objective

Improve communication, trust, conflict awareness and stakeholder involvement before, during and after transition.



Key Learning Outcome

By the end of this module, learners will be able to:



Identify key family, team and stakeholder relationships



Recognise communication risks and conflict triggers



Apply simple trust-building and conflict prevention tools



Prepare a Relationship and Communication Plan

2. Module Rationale & Context

Purpose & Learning Aim

To help learners manage the relationship side of succession by improving communication, trust, conflict awareness and stakeholder involvement before, during and after transition. By the end of the module, learners should be able to identify key family, team and stakeholder relationships, recognise communication and conflict risks, support trust-building, and prepare a simple relationship and communication plan for a tourism SME in transition.

Module Description

This module focuses on the relationships that influence whether succession succeeds or fails. In tourism SMEs, transition **affects family members, employees, customers, suppliers, advisors, local communities and destination partners**. These relationships can support the transition, but they can also create tension if expectations, roles and communication are unclear.

Learners explore how to **communicate early, manage difficult conversations, build trust between generations, involve employees and protect important stakeholder relationships**. The module is practical and SME-friendly. It helps learners move from silence, assumptions and informal promises towards clearer **conversations, shared understanding and agreed next steps**.

The module builds on Module 4 by moving from leadership handover to the **wider relationship system** around the business. It prepares learners to support smoother succession processes where people feel informed, respected and involved.

3. Topics Covered

- 1. Family and Intergenerational Dynamics**
Understanding the family roles, emotions and expectations shaping succession
- 2. Communication Before, During and After Transition**
Planning clear and timely communication for every stage of transition
- 3. Conflict Management and Difficult Conversations**
Recognising tension early and supporting safer, more constructive discussions
- 4. Teams, Staff and Internal Trust**
Maintaining employee confidence, involvement and workplace stability
- 5. Stakeholder Relationships and Relationship-Based Knowledge Transfer**
Transferring the relationships, trust and local networks supporting the business

4. Learning Outcomes

- By the end of this module, learners will be able to:
- 1. Explain the role of family, team and stakeholder relationships in tourism SME succession.
 - 2. Identify the key people and relationships that influence the transition process.
 - 3. Recognise common communication risks, assumptions and conflict triggers during succession.
 - 4. Apply simple communication and conflict-prevention tools to support trust, clarity and alignment.
 - 5. Plan how to involve family members, staff, customers, suppliers, advisors and destination stakeholders in a timely and appropriate way.
 - 6. Prepare a Relationship and Communication Plan for a tourism SME in transition.

5. Competence Framework Alignment

Framework	Competences Addressed (Knowledge, Skills, Responsibility & Autonomy)
Understand the relationship side of succession.	Knowledge: Understand how family, staff and stakeholder relationships affect transition. Skills: Identify key people who should be informed, involved or consulted.
Support clear communication during transition.	Knowledge: Understand why silence, assumptions and unclear messages create risk. Skills: Prepare simple communication steps for family, staff and stakeholders.
Recognise and manage conflict risks.	Knowledge: Understand common causes of conflict, including fairness, roles, control, money, identity and timing. Skills: Identify warning signs and suggest prevention actions.
Build trust between generations and teams.	Knowledge: Understand how trust is built through clarity, consistency, listening and shared responsibility. Skills: Recommend trust-building actions.
Protect relationship-based knowledge.	Knowledge: Understand that some business value sits in personal networks and informal knowledge. Skills: Map relationships and knowledge to transfer to the successor.

6. Module Structure & Topics

Topic 1: Family and Intergenerational Dynamics

Keywords: Family business, intergenerational transition, expectations, fairness, identity, values, founder role, successor role, emotional attachment, family legacy.

Overview: This Topic introduces the family and emotional dynamics that can shape succession.

Many tourism SMEs are family-run or strongly linked to the identity of the owner. The business may represent family history, personal sacrifice, local reputation and emotional value. This can make succession difficult, especially when different family members have different hopes, fears or expectations.

Learners explore how family roles and business roles can overlap. A person may be a parent, owner, manager and employer at the same time. A successor may be a child, employee, future owner and family member. These overlapping roles can create pressure and confusion if not discussed clearly.

The Topic helps learners understand that succession requires both business planning and relationship awareness.

What is Covered

1. Family roles and business roles
2. Emotional attachment to the business
3. Founder identity and difficulty stepping back
4. Successor expectations and pressure
5. Fairness between family members
6. Different values between generations
7. Legacy, tradition and change
8. The risk of assumptions and unspoken expectations

Aim: Learners will identify key family and intergenerational dynamics that may support or challenge succession in a tourism SME.

Topic 2: Communication Before, During and After Transition

Keywords: Communication, family meetings, staff updates, stakeholder messages, listening, expectations, transparency, timing, feedback, communication plan.

Overview: This Topic focuses on communication as a practical tool for reducing uncertainty. In many SMEs, succession conversations happen too late or not at all. Owners may avoid the topic because it feels sensitive. Successors may not want to ask difficult questions. Staff may hear rumours before they hear clear information. Customers and partners may be unsure whether the business will continue in the same way.

Good communication does not mean telling everyone everything at once. It means deciding who needs to know what, when they need to know it, and how the message should be shared.

Learners explore how to plan communication with family, employees, customers, suppliers, advisors and destination partners.

What is Covered

1. Why succession conversations are often delayed
2. Who needs to be informed, involved or consulted
3. Family communication and structured meetings
4. Staff communication and reducing uncertainty
5. Customer and supplier communication
6. Communication with advisors and destination actors
7. Matching the message to the audience
8. Communication before, during and after transition

Aim: Learners will prepare simple communication steps that support clarity, trust and stability during succession.

Topic 3: Conflict Management and Difficult Conversations

Keywords: Conflict, difficult conversations, disagreement, fairness, control, values, money, roles, mediation, negotiation, safe dialogue, conflict prevention.

Overview: This Topic helps learners recognise and manage conflict risks.

Conflict during succession is common because the process touches sensitive issues: ownership, money, control, identity, family expectations, workload, future direction and personal dreams. Conflict is not always negative. It can reveal issues that need attention. However, if conflict is ignored, it can damage the family, the team and the business.

Learners are not expected to become mediators. Instead, they learn to identify warning signs, create safer conversations, use basic conflict-prevention tools and know when external support may be needed.

The focus is on practical prevention: agreeing meeting rules, listening to different perspectives, separating facts from emotions, documenting decisions and involving neutral support where appropriate.

What is Covered

1. Common causes of succession conflict
2. Early warning signs of tension
3. How conflict affects staff and business stability
4. Difficult conversations between owner and successor
5. Fairness and expectations between family members
6. Listening and perspective-taking
7. Meeting rules and safe dialogue
8. When to use external facilitation, mediation or advisory support

Aim: Learners will recognise common conflict triggers and recommend simple actions to prevent or manage tension during succession.

Topic 4: Teams, Staff and Internal Trust

Keywords: Employees, staff continuity, trust, team communication, workplace culture, employee retention, roles, reporting lines, psychological safety, involvement.

Overview: This Topic focuses on the employees and team members who keep the tourism business running.

Staff often hold important knowledge about guests, routines, service quality, suppliers and daily operations. During succession, they may worry about job security, working conditions, leadership style or changes to the business. If staff are not informed or involved appropriately, uncertainty can lead to lower motivation or employee turnover.

Learners explore how to build trust with staff during transition. This includes clear communication, respect for existing knowledge, consistent decision-making and involving key employees at the right time.

The Needs Analysis notes that many SME owners do not engage stakeholders early enough, leaving successors with limited support networks and increasing stress and decision-making pressure.

What is Covered

1. Why staff relationships matter during succession
2. Staff uncertainty and transition anxiety
3. Involving key employees appropriately
4. Clarifying reporting lines and roles
5. Protecting workplace culture and service quality
6. Trust between successor and team
7. Employee knowledge as part of business value
8. Staff retention during and after transition

Aim: Learners will identify how staff and internal team relationships can be supported during succession.

Topic 5: Stakeholder Relationships and Relationship-Based Knowledge Transfer

Keywords: Stakeholders, customers, suppliers, advisors, community, destination partners, local networks, relationship transfer, trust transfer, customer continuity, reputation.

Overview: This Topic focuses on external relationships and informal knowledge. Tourism SMEs are often deeply connected to their local area. They depend on customers, suppliers, guides, local producers, destination organisations, booking partners, community actors and public bodies. Many of these relationships are personal and built over time by the current owner.

If these relationships are not introduced and transferred carefully, the successor may struggle to maintain trust and continuity. Relationship transfer is therefore an important part of succession readiness.

Learners explore how to map important stakeholders, understand what each relationship contributes, and plan how the successor can be introduced gradually. The focus is on protecting trust, reputation and continuity.

Focus group findings show that tourism-specific succession competences are strongly place-based and relationship-intensive; in Iceland, for example, they were described as shaped by destination and community relationships and requiring long exposure and situational learning.

What is Covered

- Mapping key customers, suppliers, advisors and partners
- Destination and community relationships
- Relationship-based knowledge and informal networks
- Introducing the successor to key stakeholders
- Protecting trust and reputation
- Customer and supplier continuity
- Maintaining local identity and business “personality”
- Using relationship maps as part of knowledge transfer

Aim: Learners will map key stakeholder relationships and prepare actions to support trust and continuity during succession.

Module 5

Development Framework

From Module Overview to Applied Delivery

This section outlines how **Module 5** can be delivered in practice. It introduces suggested learning activities, assessment approach, recommended time allocation and supporting resources that will help learners apply their knowledge in real tourism business contexts.

❖ In this section



Practical
Learning
Exercises



Assessment



Suggested
Schedule



Resources &
Learning
Materials



Understanding
Module 5



Developing &
Delivering

1. Practical Learning Exercises

- Relationship Map:** Learners map family, team and external stakeholders who influence the succession process.
- Communication Planning Exercise:** Learners identify who needs to know what, when and how during transition.
- Difficult Conversation Role Play:** Learners practise a structured conversation between owner, successor and staff or family member.
- Conflict Trigger Checklist:** Learners identify common risks such as unclear roles, fairness concerns, money, control, timing and family expectations.
- Trust Transfer Map:** Learners identify key customer, supplier, community and destination relationships that should be transferred to the successor.

2. Work-Based Learning Task

Learners apply the module to a real or realistic tourism SME. They may use their own business, a local business, or a case study.

Learners answer:

- Who are the key family, team and stakeholder actors in the succession process?
- Which relationships are most important for business continuity?
- Where could communication problems or assumptions create risk?
- What conflict triggers might appear during transition?
- Which staff, customer, supplier or community relationships need protection?
- How should the successor be introduced to important stakeholders?
- What three actions would improve trust and communication before transition?

3. Case Studies

Case studies should reflect realistic tourism SME situations and support practical discussion.

Case Study	Focus Area	Example Learning Themes
Family Guesthouse with Sibling Tension	Family dynamics and fairness	Expectations, roles, decision-making, conflict prevention
Rural Activity Provider with Long-Term Staff	Staff trust and internal communication	Employee uncertainty, role clarity, service continuity
Small Hotel with Strong Local Supplier Networks	Stakeholder relationship transfer	Supplier trust, owner dependency, successor introduction
Tour Operator Dependent on Destination Partnerships	Community and destination relationships	Reputation, local networks, partner continuity, trust transfer

4. Assessment

Assessment Method	Description & Evidence
Short written reflection	Learners explain why relationships, communication and trust matter in tourism SME succession. Evidence: Short reflection using a tourism SME example.
Relationship map	Learners identify family, team and stakeholder actors who influence the transition. Evidence: Completed relationship map showing importance, risks and communication needs.
Conflict trigger checklist	Learners identify likely sources of tension and propose prevention actions. Evidence: Completed checklist with practical recommendations.
Communication plan	Learners plan who should be informed, involved or consulted before, during and after transition. Evidence: Short communication plan for family, staff and external stakeholders.
Work-based learning task	Learners apply the module to a real or simulated tourism SME. Evidence: Relationship and Communication Snapshot or Relationship Continuity Plan.

5. Suggested Schedule

Total: 12–15 learning hours

Activity	Hours
Facilitated teaching/workshop	3
Group exercises and case studies	2
Independent reading/reflection	2
Work-based learning task	3–5
Assessment preparation/completion	2-3
Total Hours	12 - 15

6. Expected Module Learning Outcome

By the end of this module, learners will produce a **Relationship and Communication Plan** for a tourism SME. This will identify key family, team and stakeholder relationships, communication needs, possible conflict triggers, trust-building actions and practical steps to protect relationship continuity before, during and after transition.

7. Resources & Learning Materials

Communication and conflict management

- **KPMG – Conflict Resolution in Family Business:**
[assets.kpmg.com/content/dam/kpmgsites/sa/pdf/2023/conflict-resolution-in-family-business-\(english\).pdf.coredownload.inline.pdf](https://assets.kpmg.com/content/dam/kpmgsites/sa/pdf/2023/conflict-resolution-in-family-business-(english).pdf.coredownload.inline.pdf)
- **Acas Challenging Conversations Guide:** <https://www.acas.org.uk/acas-guide-to-challenging-conversations-and-how-to-manage-them>
- **Republic SME Toolkit – Roles and Conflict Resolution in Your Family Business:**
<https://republicsmetoolkit.com/roles-and-conflict-resolution-in-your-family-business>

Trust, governance and relationship structures

- **IFC – Family Business Governance Handbook:**
[Roles and Conflict Resolution in Your Family Business - SME Toolkit Caribbean](#)
- **F.act - Family Business in Tourism:** <https://www.fact.tirol/en/topics/family-businesses/>

7. Resources & Learning Materials

Stakeholder mapping and teaching tools

Communication Matrix Template: <https://miro.com/templates/communication-matrix/>

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